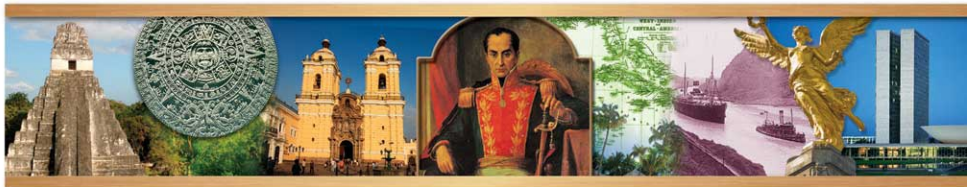




# ENCYCLOPEDIA OF LATIN AMERICA

Amerindians through  
The Age of Globalization

◆ Prehistory the Present ◆



J. Michael Francis, VOLUME EDITOR



Thomas M. Leonard, GENERAL EDITOR

ENCYCLOPEDIA OF  
LATIN AMERICA

Amerindians through The Age of Globalization  
(Prehistory to the Present)

J. MICHAEL FRANCIS  
VOLUME EDITOR

THOMAS M. LEONARD  
GENERAL EDITOR

 **Facts On File**  
*An imprint of Infobase Publishing*

**Encyclopedia of Latin America  
Amerindians through The Age of Globalization**

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For information contact:

Facts On File, Inc.  
An imprint of Infobase Publishing  
132 West 31st Street  
New York NY 10001

e-ISBN: 978-1-4381-2964-8

**Library of Congress Cataloging-in-Publication Data**

Encyclopedia of Latin America / Thomas M. Leonard, general editor.

p. cm.

Includes bibliographical references and index.

ISBN 978-0-8160-7359-7

1. Latin America—History—Encyclopedias. I. Leonard, Thomas M., 1937–  
II. Francis, J. Michael (John Michael) III. Burkholder, Mark A., 1943– IV. Rankin, Monica.

F1406.E5155 2010

980'.01303—dc22

2009014594

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Text design and composition by Lina Farinella  
Cover printed by Sheridan Books, Ann Arbor, MI  
Book printed and bound by Sheridan Books, Ann Arbor, MI  
Date printed: May 2010  
Illustrations by Patricia Meschino  
Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

This book is printed on acid-free paper.

ENCYCLOPEDIA OF  
LATIN AMERICA

❧ VOLUME I ❧

Amerindians through Foreign Colonization  
(Prehistory to 1560)



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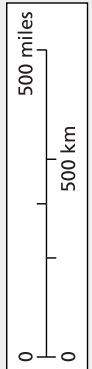
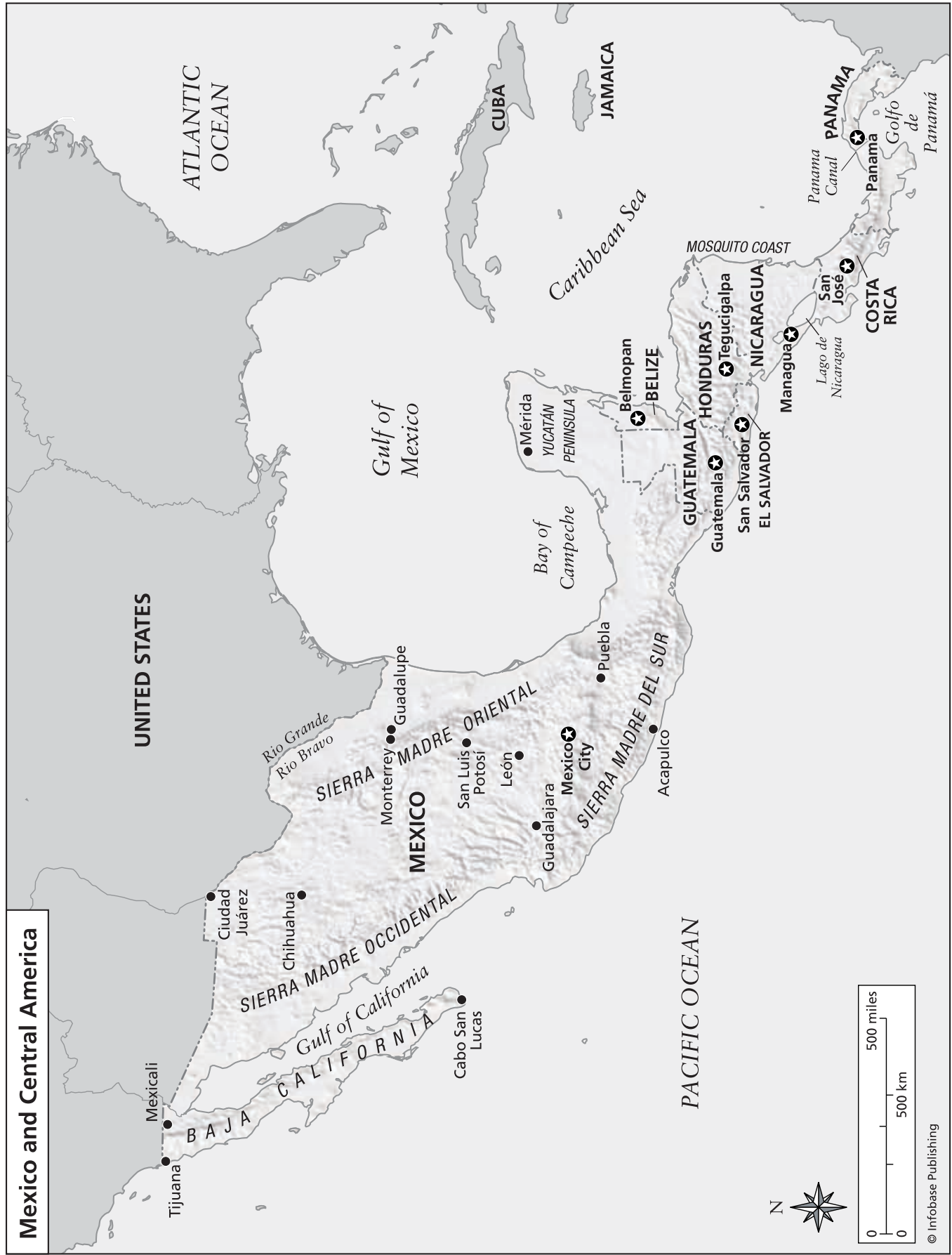
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Holguín

Camagüey

Cuba

Cayman Islands (UK)

Isla de la Juventud

Strait of Florida

Windward Passage

Haiti

Port-au-Prince

Santo Domingo

Dominican Republic

Jamaica

Kingston

San Juan

Puerto Rico (U.S.)

Basseterre

St. Kitts and Nevis

Guadeloupe (France)

Lesser Antilles

Roseau

Dominica

Martinique (France)

Antigua and Barbuda

St. John's

Barbados

St. Lucia

Castries

St. Vincent and the Grenadines

Kingstown

Bridgetown

Grenada

St. George's

Port-of-Spain

Spain

Trinidad and Tobago

Venezuela

Colombia

Panama

Nicaragua

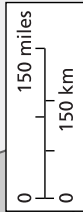
Aruba

(The Netherlands)

Netherlands Antilles

Bonaire

Curaçao



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# South America



## ❁ PREFACE TO THE SET ❁

How does one define Latin America? Geographically, Latin America stretches from the Rio Grande River on the U.S.-Mexican border and Cuba, bordering the Caribbean Sea and the Atlantic Ocean, to Tierra del Fuego at the southern tip of South America. The area is two and one-half times the size of the United States. Brazil alone is slightly larger than the continental United States. Within this vast geographic region there is enormous human and physical variety.

In historical terms, Latin America includes those parts of the Americas that at one time were linked to the Spanish, Portuguese, and French Empires and whose people speak a Romance language (a language derived from Latin, such as Spanish, Portuguese, French, and the derivative Creole). When Napoleon III popularized the term *Latin America* in the 1860s, he implied a cultural relationship between France and those countries of the Western Hemisphere where these language traditions existed: Mexico, most of Central and South America, Cuba, the Dominican Republic, Puerto Rico, Haiti, Martinique, Guadeloupe, and French Guiana. A literal interpretation of Napoleon III's definition would also include portions of the Southwest United States, Florida, and Louisiana; Quebec in Canada; and the islands of St. Pierre and Miquelon off of Newfoundland's coast. English is the first language of most Caribbean islands, and Papiamentu, a form of Creole, is predominant in the Netherlands Antilles and Aruba. Amerindian dialects remain the primary languages in parts of Mexico, Guatemala, Ecuador, Peru, and Bolivia.

The mixture of languages illustrates the diversity of race and culture across Latin America. The Amerindians, or Native Americans, dominated the pre-Columbian time period. In the 21st century, their descendants are still prevalent in Mexico, Guatemala, Ecuador, Peru, Bolivia, and the upper reaches of the Amazon River in the Andes Mountains. Latin America was colonized primarily by the Spanish and to a lesser degree by the Portuguese, first and foremost in Brazil. British, French, and Dutch interlopers followed, and in the 20th century,

the United States had a profound impact across the region. For economic reasons, slavery was practiced most notably in Brazil, along the Ecuadoran coast, and in the Caribbean Islands. Each of these ethnic groups—and the descendants of interracial relationships—produced its own culture with unique religious traditions, family life, dress styles, food, art, music, and architecture. With accelerated globalization throughout the 20th century, Western ideas and culture have had a significant impact upon Latin America.

Geography and climatic conditions also play a major role in the development of societies, their cultures, and economies. Latin America is no exception. For example, the Andes Mountains that traverse the west coast of South America served as the centerpiece of the Inca Empire in the pre-Columbian period, the source of gems and ores during the Spanish colonial period, and the ores and petroleum essential for modern-day industries. The Andes westward slopes and coastal plains provided agricultural products since the earliest of times. The rolling plains, or pampas, of north-central Argentina, southern Brazil, and Uruguay coupled with a Mediterranean-type climate turned those areas into highly productive cattle and grain centers. In contrast, the Amazon rain forest in Brazil, while still home to undiscovered Native American groups, offered little economic advantage until the 20th century, when the logging industry and land clearing for agricultural expansion cut deep into the rain forest's expanse. The tropical climate of the Caribbean and the coastal areas of Central America offered fertile ground for sugar, tobacco, and tropical fruits.

People, geography, language and culture, and economic pursuits transformed Latin America into one of the world's most diverse regions. Yet, the 41 countries and foreign dependencies that make up Latin America share four distinguishable historical time periods: the pre-Columbian period, followed by nearly three centuries of colonial rule; the struggle for national identity during the 19th century; and the quest for modernity since 1900.



The *Encyclopedia of Latin America* takes a chronological approach to the examination of the Latin American experience. Divided into four volumes, each devoted to one of the four time periods that define Latin American history, this unique reference work contrasts sharply with traditional encyclopedias. It provides students and general readers the opportunity to examine the complexity and vastness of the region's development and culture within a given time period and to compare the time periods.

Volume I, *Amerindians through Foreign Colonization*, focuses on the pre-Columbian period from the earliest Native American societies through the arrival of the Spanish conquistadores. Scholars continue to debate the number of Native Americans, or "Indians" as Christopher Columbus labeled them, who resided in the Americas when Columbus first reached the region in 1492. Estimates range from a low of 10 million to a high of slightly more than 100 million. While most scholars agree that the earliest waves of migrants came to the Americas across the Bering Straits land bridge as early as 40,000 years ago, there is continued debate over both the dates of settlement and descent of the earliest settlers. More recent scholarship in Chile and Brazil place the earliest New World migrants to 33,000 B.C.E. and suggest them to be of South Asian and Pacific Islander—rather than Eurasian—descent.

By the time of the European arrival on Latin America's mainland in the early 1500s, three highly organized Native American societies existed: Aztec, Maya, and Inca. Mexico's central valley was home to the rigidly stratified Aztec society, which by the time of the conquest reached southward and eastward to the Caribbean coast. The Aztecs had earned a reputation for their military prowess, for the brutal exploitation of the peoples brought into the empire, and for ceremonial city building, evidenced by its capital, Tenochtitlán, the site of contemporary Mexico City. From Peru's Cuzco Valley, the Inca Empire in South America stretched 3,000 miles (4,287 km) through the Andes mountain chain and inland to the east from Ecuador, in the north, to Chile, in the south. Through a tightly controlled bureaucracy, the Incas exercised control of the conquered communities. The Maya civilization began approximately in 1000 B.C.E. and, through a system of independent city-states, extended from Mexico's Yucatán Peninsula through Guatemala. For reasons not yet fully understood, Classic Maya civilization began its political collapse around 900 C.E., but Mayan society and culture remained intact. Aside from the three major groups, many other Native American societies existed throughout Latin America, such as the Arawaks and Tainos in the Caribbean and the Mapuche and the Guaraní in Argentina, Paraguay, and Chile.

Marked differences separated groups within the larger society and each group from the other. For example, even today, the Mexican government reports nearly 200 different linguistic groups; Guatemala, 26 different Mayan dialects; and an estimated 10 million Native Americans speak some form of the Quechua language in the high

Andes along South America's Pacific coast. Elaborate ceremonies that included human sacrifice characterized the Aztec, Inca, and Maya religions. Agriculture was the primary economic pursuit of all Native American groups, while hunting and fishing were pursued by some groups. Textiles and metalwork usually contained designs peculiar to each indigenous group.

Volume II, *From Colonies to Independent Nations*, focuses on the Spanish colonial period, from the early 16th century through the early 19th century. At the beginning of this time period, the Spanish explored the South and North American continents, laying out an empire in the name of the king and queen of Spain and the Roman Catholic Church. Despite the vastness of the empire, which stretched from Tierra del Fuego at the southern tip of South America to the far reaches of the northwest Pacific Coast, eastward to the Mississippi River and into the Floridas, the Spanish attention focused on the areas of modern-day Mexico and Peru. Both were home to significant Native American societies and rich in mineral wealth, particularly gold and silver. The colonies existed for the benefit of Spain, and the application of mercantilist economic policies led to the exploitation of natural resources, regulation of manufacturing and agriculture, and control of international trade, all of which contributed to a pattern of large land holdings and abuse of labor. In effect, the system drained the colonies of its specie and other wealth and negated economic development and the emergence of a significant entrepreneurial class in the colonies. The Spanish imposed their political and cultural systems on the colonies, including the Native Americans. A highly centralized governmental structure provided little opportunity for political participation by the Spanish colonial residents, except in matters at the local level. The colonial laws and rules were made in Spain and enforced in the New World by officials appointed by the Crown. During the colonial period, the Catholic Church became an entity unto itself. It administered education, hospitals, social services, and its own court system. It tithed its followers and charged fees for religious services. Because the church was exempt from taxes to the Spanish Crown, it emerged as a colonial banker and a benefactor of the Spanish colonial system. The church, therefore, was not anxious to see the system change.

In theory, the Brazilian colonial experience paralleled the Spanish model, but in application, the Brazilian model was much different. The states established on Brazil's Atlantic coast were administered like personal fiefdoms by the king of Portugal's appointed authorities. Because the colony lacked natural resources for mass exploitation and a Native American population to convert to Catholicism, Portugal gave little attention to its New World colony.

Latecomers to the New World, the British, French, and Dutch colonization schemes were confined to the Caribbean region. As with the Spanish and Portuguese,

each island fell victim to the political system of the mother country. Over time, the local governments of the British became more representative of the resident population. The economic focus on sugar production caused the importation of slave labor from Africa.

New World discontent in the mid-17th century led to reforms in the Spanish colonial system, but it took European events in the early 19th century to bring about Latin America's independence by 1826. Only Cuba and Puerto Rico remained under Spanish rule, and the British, French, and Dutch maintained control over their Caribbean island positions. Brazil received its independence on September 7, 1822, but continued to be governed by a member of the royal Portuguese family until November 15, 1889.

The legacies of colonial rule became evident immediately following independence. The establishment of governmental institutions and the place of each nation in the growing global economy that characterized 19th-century Latin America are the subject of volume III, *The Search for National Identity*. In addressing these issues, political and religious leaders, intellectuals, and foreigners who came to Latin America were confronted by the legacies of Spanish colonial rule.

The New World's Spanish descendants, the creoles, replaced the Spanish peninsulars at the apex of the rigid social structure and sought to keep political power confined to themselves. Only conflicting ideologies separated the elite. One group, the Conservatives, remained tied to the Spanish tradition of a highly centralized government, a privileged Catholic Church, and a hesitancy to reach out to the world. In contrast, the Liberals argued in favor of a greater decentralization of political power, the curtailment of church privileges, and greater participation in world affairs, particularly trade. Liberals and Conservatives, however, did not want to share political power or wealth with the laboring classes, made up of mestizos, Native Americans, or blacks. The dispute over the authority of central governments played out in different ways. In Argentina and Chile, for example, Conservatives Juan Manuel de Rosas and Diego Portales produced constitutions entrenching the Spanish traditions. In Central America, it signified the disintegration of the United Provinces by 1839 and the establishment of Conservative-led governments. The contestants for Mexican political power took to the battlefield, and the struggle produced 41 presidents from 1822 through 1848.

The Latin American world began to change in the 1860s with the emergence of Liberal leaders. It increasingly contributed raw materials to industrialized Europe. The heads of state welcomed foreign investment for the harvesting and processing of primary products and for constructing the supportive infrastructure. And, while the Liberals struck against church privileges, as in Chile during the 1880s, they still retained political power and continued to discriminate against the working classes.

Brazil and the colonized Caribbean Islands fell within the same purview as Spanish America. Although Brazil peacefully achieved independence in 1822, it continued its monarchical form of government until 1889. During that same time period, Brazil participated in the world economy through the exportation of sugar, followed by rubber and coffee. Meanwhile, the Caribbean Islands from Cuba southward to Trinidad and Tobago continued to be administered as part of European colonial empires. Administrators from Spain, Great Britain, France, and the Netherlands arrived to govern the island and to oversee the exportation of primary products, usually sugar, tobacco, and tropical fruits.

Latin America's participation in the global economy accelerated in the 20th century, but the new era also brought new players in the region's economic and political arena—the United States and Latin America's lower socioeconomic groups. These concepts form the basis for the entries in volume IV, *The Age of Globalization*.

The U.S. entry into Latin American affairs was prompted by the Cuban struggle for independence from 1895 to 1898 and the U.S. determination to construct a trans-isthmian canal. The U.S. three-month participation in the Cuban-Spanish War in 1898 and its role in securing Panama's independence in 1903 also confirmed long-standing assumptions regarding the backwardness of Latin American societies, owing to the legacies of the Spanish colonial system. More obvious was the need to secure the Panama Canal from foreign interlopers. U.S. policymakers combined the two issues—political and financial irresponsibility and canal security—to justify U.S. intervention throughout the circum-Caribbean region well into the 1920s. U.S. private investment followed the government's interventions and together led to the charge of “Yankee imperialism.”

The entrance or attempted entrance into the national political arena by the middle and lower socioeconomic groups remained an internal affair until after World War II, when they were considered to be part of an international communist movement and again brought the United States into Latin America's internal affairs. Argentina and Chile provide early 20th-century examples of the middle sector entering the political arena while the governments continued to suppress labor. The results of the Mexican Revolution (1911–17) provided the first example of a Latin American social revolution addressing the needs of the lower socioeconomic class at the expense of the elite. In the 1920s and 1930s, small Communist or communist-like political parties or groups emerged in several countries, including Costa Rica, Chile, Brazil, and Peru. While of concern at the time, the presence of communism took on greater importance with the emergence of the cold war in 1945, when the “generation of rising expectations” fused with the Communists in their call for a complete overhaul of the socioeconomic and political structures rooted in Spanish colonialism. In the ambience of the cold war, however, the 1954 presidential

election of Jacobo Arbenz in Guatemala, Fidel Castro's actions in Cuba in 1959 and 1960, the 1963–65 political crisis in the Dominican Republic, the administration of Chilean president Salvador Allende from 1970 to 1973, and the Central American wars during the 1980s were intertwined into the greater context: struggles of freedom against international communism based in Moscow. To "save" these countries from communism, the United States intervened but in so doing restored and propped the old order. The struggle against communism also resulted in a generation of military governments across South America.

Beginning in the 1980s, democratic governments replaced military regimes across Latin America, and each

of the countries experienced the growth of new political parties, mostly left of center. The new democratic governments also accepted and implemented the neoliberal, or free-market, economic model in vogue at the time. By the mid-1990s, many of the free-market reforms were in place, and Latin America's macroeconomic picture had vastly improved. Still, the promised benefits failed to reach the working classes: Half of all Latin Americans remained poverty stricken. In response to their personal crisis, beginning in 1998 with the election of Hugo Chávez as president of Venezuela, the Latin American people started placing so-called leftists in their presidential palaces. Latin America may be at the precipice of another change.

# ❖ HOW TO USE THIS ENCYCLOPEDIA ❖

The *Encyclopedia of Latin America* explores broad historical developments within the context of four time periods that together make up the complete Latin American historical experience. For example, the student or general reader can learn about a given country, when it was a “location” during the pre-Columbian period (volume I), a part of the Spanish colonial empire (volume II), a new nation struggling for its identity (volume III), or in its search for modernity (volume IV). The same can be done with political ideas and practices, economic pursuits, intellectual ideas, and culture patterns, to mention just a few of the themes that are explored across the four volumes. To locate topics in each of the four volumes, the reader should utilize the list of entries in the front matter of each volume. Words set in SMALL CAPITAL LETTERS in the body of a text indicate that an entry on this topic can be found in the same volume. At the conclusion of each entry are cross-references to related entries in other volumes in the set. For further help with locating information, the reader should turn to the comprehensive set index that appears at the end of volume IV.

Within each volume, the entries focus on the time period at hand. Each volume begins with an introduction providing a historical overview of the time period, followed by a chronology. A glossary of terms can be found in the back matter of the book. Each entry is followed by a list of the most salient works on the subject, providing the reader the opportunity to further examine the subject. The suggested readings at the end of each entry are augmented by the select bibliography appended to each volume, which offers a listing of the most important works for the time period. The further readings for each entry and selected readings for the volume together form a comprehensive list of Latin America’s most important historical literature.

Each volume also includes a collection of documents and excerpts to illustrate the major themes of the time period under consideration. Offering eyewitness accounts of significant historical events and personages, they perhaps will encourage the user to further explore historical documentation.

# ❖ ACKNOWLEDGMENTS ❖ FOR THIS VOLUME

Collaborative works of this nature are extremely rewarding endeavors, both personally and intellectually, and I am grateful for the opportunity to contribute to this ambitious and important collection. To that end, I would like to express my sincere gratitude to my friend and colleague Thomas M. Leonard, who invited me to edit volume I of this four-volume encyclopedia. As series editor, Tom assumed the unenviable task of coordinating and overseeing the entire project, which he did with great skill, enthusiasm, and, perhaps most important, good humor.

This project never would have come to fruition had it not been for the generous contributions and enthusiastic support of dozens of friends and colleagues. More than 60 scholars from a wide range of academic disciplines and backgrounds submitted entries for this volume. I wish to thank each one of them for graciously sharing his or her time and expertise; the volume is far richer for it. Danny Zborover, Kendall Brown, Patricia Netherly, R. A. Kashanipour, Sean H. Goforth, John F. Chuchiak IV, and Mark Christensen deserve special thanks for the outstanding contributions they made to this volume.

I would like to thank James Lockhart, Camilla Townsend, and Allen J. Christenson for kindly sharing their wonderful translations of a small corpus of remarkable colonial indigenous texts. Likewise, I am grateful to Janice Van Cleve, Donna Nash, Joel Palka, Danny Zborover, Kristin Dutcher Mann, Sarahh E. M. Scher, Jessica Christie, Dan Sandweiss, Frances F. Berdan, and the staff at the Michael C. Carlos Museum of Emory

University for sharing so many wonderful photographs and illustrations that fill this volume.

I am privileged to work closely with a large number of gifted, motivated, and engaging students at the University of North Florida. I am particularly pleased that four of them contributed entries to the volume. Justin Blanton, Kathleen M. Kole, Spencer Tyce, and Saber Gray are all exceptional students, and all four are going to develop into fine historians. Kathleen and Saber, in particular, merit special thanks. In the early stages of this project, Kathleen worked tirelessly, gathering bibliographical references, ordering rare books and articles, and helping to secure copyright permissions. As the volume approached completion, Saber provided invaluable assistance, without which the volume's production would have been delayed many months. Saber read the entire manuscript carefully, and she offered important editorial suggestions and identified numerous factual errors. Moreover, she helped to secure the final copyright permissions. I am most grateful for her professionalism and her friendship.

It has been an absolute delight to work with the entire staff at Facts On File. From its inception, Claudia Schaab has guided this project with professionalism and patience. Moreover, the editorial staff did an outstanding job with the original manuscript, and I am grateful for all of their recommendations. I hope to have an opportunity to work with them again.

Lastly, I would like to express my sincere gratitude and eternal admiration to my wife, Annie, and my dear friend Bill David.

—J. Michael Francis

# ❧ INTRODUCTION ❧ TO THIS VOLUME

The past few decades have witnessed a remarkable transformation in our understanding of the pre-Columbian world and the history of its inhabitants. Scholars from across academic disciplines have joined in an effort to shed light on a region long overlooked and poorly understood. These collaborative and multidisciplinary efforts have forced scholars to reevaluate much of what was previously “known” about the pre-Columbian period, from basic categories of periodization to interpretations of Native American political institutions, religious beliefs, economic organization, warfare, and demography.

Once considered a “people without a history,” Latin America’s pre-Columbian inhabitants are now beginning to recover their long-muted voices as well as the richness of that region’s past. In fact, contrary to popular belief, the “written” history of the peoples of the Americas did not begin with the arrival of Christopher Columbus. Rather, more than a thousand years before Columbus embarked on his famous voyage, Maya scribes in Mexico and Central America had created a system of writing that was capable of recording any aspect of Maya speech. Remarkably, only in the past five decades have scholars managed to “crack” the Mayan code, in what some have characterized as one of the greatest code-breaking feats in human history. As a result of this accomplishment, our understanding of the Maya world has been dramatically transformed.

The Maya were not alone in recording their history. Other Mesoamerican cultures recorded information on stone sculptures, ceramics, cave walls, and in screen-folded books called codices. In South America, current scholarship on pre-Incaic and Incan *quipus* (an Andean device consisting of a series of placed knotted cords) has begun to challenge the notion that *quipus* served only as mnemonic devices used to record such information as census data, troop numbers, and the contents of storehouses. A growing number of scholars now suggest that

*quipus* could be used to record sophisticated grammatical constructions; in other words, *quipus* could record language and therefore could be “read.”

Efforts to recover indigenous voices have not been limited to the scholarship on the pre-Columbian period. In recent years, historians of the conquest and early colonial period have devoted much more attention to the rich corpus of written and pictographic materials from the early colonial period recorded in native languages such as Nahuatl, Mixtec, and Maya, among others. A closer examination of these sources has challenged much of the previous scholarship on the conquest era, revealing that the encounter between the peoples of the New World and the Old was not simply a tale of victors and vanquished.

New discoveries are reported frequently, as scholars from across disciplines work to reconstruct the pre-Columbian and early colonial histories of the Americas. The purpose of this volume is to offer readers a broad synthesis of the new scholarship of the past few decades. It represents one of few general reference works that offer broad geographical and topical coverage of the pre-Columbian period as well as the early decades of conquest and colonization; here, individual entries cover topics ranging from art and architecture to music, politics, and warfare. Moreover, many topics are approached from a thematic perspective, allowing readers to follow similar themes across regions and chronological periods. Entries such as religion, economy, trade, family, women, food, literature, migration, and agriculture (among many others) trace these topics across different cultures, from Mesoamerica to the Caribbean and South America; furthermore, they move chronologically from the early pre-Columbian settlements through the dramatic decades of the conquest period.

Collectively, these entries reveal the remarkable diversity of the peoples and cultures of Latin America before 1492, as well as their varied responses to the early

Spanish and Portuguese colonial effort. Nevertheless, it is important to acknowledge the limitations inherent in a work of this nature. For one, not every ethnic group is represented in the pages that follow. Also, readers will note that much more attention is given to the period between ca. 250 c.e. and 1560 than to the long history of the earliest settlements in Latin America. The limited coverage of the period from the initial human migrations across the Bering land bridge more than 40,000 years ago to the earliest settlements in Latin America is the result of a relative paucity of information, especially compared to the tremendous volume of material for the period 250–1560.

Lastly, certain regions, such as Central Mexico, the Yucatán Peninsula, and the central and southern Andes receive more attention than other parts of Latin America. This is because those regions supported populations under the Aztec, the Maya, and the Inca that have attracted a great deal of scholarly interest. Moreover, because these regions also attracted larger numbers of European settlers (who wrote extensively about them), we simply have more information for these areas than for other parts of Latin America where there were few, if any, Europeans in the early colonial period.

## CHALLENGES IN EDITING THIS VOLUME

### *Orthography*

In preparing this volume for publication, J. Michael Francis was faced with a series of challenges, among the most significant of which related to the current debate regarding orthography. In recent years, scholars working throughout Latin America have introduced a new lexicon, with distinct spellings to reflect pre-Columbian indigenous languages and meanings, as opposed to the colonial terminology (and understandings) introduced by Europeans. To further complicate this matter, it should be noted that the colonial documents themselves are rarely uniform and do not always follow the same orthographic conventions. For example, consider the most commonly accepted spelling in English for the Aztec ruler Montezuma, which reflects the old Spanish pronunciation of the Nahuatl name; however, 16th-century Nahuatl-language sources offer different spellings, including *Motecçuma*, *Motecuçuma*, and even *Moteubççoma*. Further, in modern Mexico, his name is often rendered *Moctezuma* or *Motecubzoma*. Likewise, recent scholarship on the Incas reflects consideration of Quechua orthography: *Inca* becomes *Inka*, *quipu* changes to *khipu*, and *chasqui* becomes *chaski*, to cite just a few examples.

Today, a growing body of scholarship has adopted this new orthography, but its usage remains uneven and highly inconsistent. Therefore, in order to limit confusion and thus reach the broadest audience possible, we have decided to use traditional spellings for most of the entries in this volume. Nevertheless, in some cases (such as Tiwanaku, Wari, and *kuraka*), the new orthography has been so widely adopted that it made little sense to adopt

the old spellings (Tiahuanaco, Huari, and *curaca*). At any rate, where possible, we have included alternate spellings in parentheses to reflect the new orthography and, thus, help guide readers to additional sources.

### *Organization and Coverage*

A second challenge involved general organization and coverage. In order to maintain certain common threads through all four volumes in this series, the authors agreed that certain topics should be addressed in each volume. This standardization required that some terms be applied anachronistically in the early volumes. For example, in this volume (as well as the two that follow), readers will find that individual country entries are based on modern political boundaries, many of which were created following the independence movements of the early 19th century. This organization allows readers to follow the historical trajectory of one particular country from its pre-Columbian past through to the present. Of course, this decision is somewhat problematic for the earlier volumes because the political boundaries of Latin America's modern nation-states did not exist in the pre-Columbian period or in the early colonial era. The Inca Empire, for example, extended through much of modern Peru, as well as much of Ecuador, Bolivia, southern Colombia, northwestern Argentina, and northern Chile. Conversely, the Aztec Empire never encompassed the entirety of the modern state of Mexico, while Maya territory extended through the territory of modern Guatemala and Belize, as well as some parts of Mexico, Honduras, and El Salvador. Readers should therefore approach the individual country entries with some caution, recognizing that modern political boundaries were not a reality in the period covered in this volume.

### *Chronological Scope*

Finally, the chronological scope of this volume also merits explanation. Readers will note that this volume does not end abruptly with Christopher Columbus's arrival in the Caribbean in 1492. While this might seem a logical point to transition from one volume to the next, the year 1492 did not represent such a dramatic break in the history of Latin America, especially outside the Caribbean. It was another three decades before Hernando Cortés initiated the conquest of Mexico, and the conquest of the Inca Empire did not begin until 40 years after Columbus's maiden voyage. Coverage in this volume therefore continues roughly to 1560. By then, the "age of conquest" was drawing to an end; Europeans had toppled the great empires of the Aztecs and the Incas, and new settlements had been established across two continents, from the Spanish borderlands of Florida and what is now the U.S. Southwest to the southern cone of South America.

Undoubtedly, the arrival of Europeans initiated a series of sweeping and often devastating changes for Latin America's indigenous peoples. By 1560, European diseases such as smallpox, measles, and influenza had

caused unprecedented demographic loss among native populations throughout the Americas, though the effects were not uniform. Few regions were spared the ravages of disease, some did not return to preconquest population figures until the 19th century, and several never recovered. Yet, despite the changes that began with Columbus's arrival in the Caribbean, the pre-Columbian world did not simply disappear.

The aim of this volume, then, is to depart from the tendency to view 1492 as a single event that represented a complete rupture from the pre-Columbian past. The early conquest period did not bring about the total destruction or final conquest of Latin America's indigenous peoples. Rather, it should be viewed as the beginning of a complex and protracted process, with legacies that survive well into the present. As readers will see in this volume, the conquest of Latin America was an uneven process in which Europeans, Africans, and Native Americans all played important and lasting roles.

The entries that appear in this volume also explore the many changes that occurred during the transformative decades of the early conquest period. They highlight the diverse and uneven responses and adaptations of Latin America's indigenous to the arrival of the first waves of European conquistadores, revealing a story we are only just beginning to understand. It is our hope that this approach will help readers appreciate the richness, complexity, and diversity of Latin America's pre-Columbian past and how that past continues to shape the course of Latin American history.

#### LATIN AMERICA BEFORE 1492: A BRIEF OVERVIEW

The history of early human occupation in the Americas remains a hotly contested subject; future findings using DNA analysis to trace genetic links between pre-Columbian populations in the Americas and their Old World ancestors will reveal a great deal more about the earliest Americans. Archaeologists and linguists continue to add new information to our understanding of the first human settlers in North and South America, and future findings may well revise the chronology of the Americas' distant past. Nevertheless, at present, most scholars maintain that the earliest Americans journeyed across the ice-free Bering land bridge in a series of migrations that began as early as 40,000–50,000 B.C.E. These migrations likely continued until ca. 9000 B.C.E., when sea levels rose and the land bridge became impassable. By that time, bands of hunters and gatherers (and fishers) had spread across North America and into Central and South America. In fact, by 10,000 B.C.E., bands of hunter-gatherers occupied sites scattered throughout the Americas, from Alaska to Tierra del Fuego.

Between 8000 and 2000 B.C.E. (the Archaic period), a series of important changes led to a dramatic growth in the number of sedentary villages throughout Latin America. A general rise in temperatures, beginning ca.

8000 B.C.E., separated the Archaic period from the earlier Paleo-Indian era (12,000–8000 B.C.E.). It is precisely at this time, when temperatures began to increase, that plants were first domesticated in the Americas, including squash in Mesoamerica, manioc in Brazil, and the potato in Peru. By 5000 B.C.E., inhabitants in Mexico had domesticated maize, a crop that eventually spread throughout the Americas and became a staple in many pre-Columbian diets. When the Archaic period ended, ca. 2000 B.C.E., a variety of beans, chili peppers, and other crops had been added to a growing list of domesticated plants. Cotton, too, had been domesticated by at least 2500 B.C.E. Of course, the domestication of various plant species was not the only important innovation of the Archaic period. As early as 5500 B.C.E., settlers in Amazonia began to produce pottery, a tradition that spread first through northern South America and then into Central America and Mexico.

From the end of the Archaic to 250 C.E., dramatic changes began to unfold throughout Latin America. This long period saw the rise of complex public architecture, glyph writing, and the emergence of expansionist states. By 1500 B.C.E., the Andean peoples of South America were producing kiln-fired ceramics, working in copper and gold, and supporting large populations. At the same time, settlement in the Caribbean increased dramatically, with Arawak migrants moving up the Orinoco River and into the islands; several hundred years later, Ciboney Indians began to arrive in Cuba.

Significant changes occurred elsewhere as well. By 250 C.E., a series of large complex chiefdoms had emerged throughout the Amazon region. In Mesoamerica, this period witnessed the early rise of the Zapotec and Mixtec peoples in Mexico, the rise and fall of Olmec civilization along Mexico's gulf coast, and early Maya settlements in southern Mexico, Guatemala, Belize, and Honduras. This period also witnessed several innovations that would become the cornerstones of Mesoamerican civilizations. For example, evidence for writing in glyphs and the use of the 260-day sacred calendar date back at least to 600 B.C.E.

Throughout the pre-Columbian period, Mesoamerica was home to a variety of different groups, such as the Olmecs, the Maya, the Zapotecs, Mixtecs, and, much later, the Aztecs (Nahuas). Yet, despite their differences, these disparate groups shared a number of traits unique to Mesoamerican peoples, such as the use of glyphic writing, the production of bark paper or deerskin books called codices, and a complex calendrical system (with a 260-day sacred calendar and 365-day solar calendar); they also played a ball game (the precise rules of which are still poorly understood). Many of these characteristics continued well into the colonial period.

By 100 C.E., Mesoamerica boasted a number of large urban centers. The Maya site of El Mirador dominated much of northern Guatemala, and Central Mexico's Teotihuacán already supported dense urban populations; over the next several centuries, Teotihuacán came to exert



its influence over much of Mesoamerica. At the same time, dozens of Maya cities emerged out of the jungles of Mexico, Guatemala, and Belize, and by 250 c.e., the Maya had created a complex glyphic writing system.

During the Classic period (250–900), Mesoamerican populations created urban centers as large as any found elsewhere in the world. A thousand years before Columbus set sail for the New World, Teotihuacán's urban core had as many as 200,000 inhabitants. At the same time in the Maya lowlands, Tikal boasted a population that likely reached 60,000–80,000. Nevertheless, most of these cities were destroyed or abandoned centuries before the first Europeans arrived in Mesoamerica. Internecine warfare, drought, environmental degradation, overpopulation, loss of faith in rulers, and disease all contributed to the end of the Classic period.

Large urban centers dominated northern Yucatán for much of the Postclassic period (900–1519), with Maya cities such as Uxmal, Chichén Itzá, Cobá, and Mayapán exerting influence at various times. By the early 16th century, however, these cities, too, had been largely abandoned, and thus the first Europeans encountered a Maya population that was highly decentralized. Central Mexico, on the other hand, presented a different story. Beginning in the early 13th century, waves of Nahuatl-speaking migrants began to arrive in the Valley of Mexico, filling a power vacuum left after the fall of the Toltecs and their capital city of Tula. Among these early migrants was a small band known as the Mexica. Eventually, in the year 1325, the Mexica settled on an island in the valley and began constructing the city of Tenochtitlán. A century later, the Mexica would establish a military and political alliance with two other city-states; this Triple Alliance became the Aztec Empire. From 1428 until 1519, the Aztec Empire expanded over much of central and southern Mexico, forging what was perhaps the largest empire in pre-Columbian Mesoamerica. When Hernando Cortés reached the Aztec capital in 1519, he encountered a city of more than 100,000 residents, far larger than its European contemporaries of Paris, London, or Seville. Within two years, the Aztec Empire had crumbled, and Tenochtitlán's ruins became the site of the Spanish capital, Mexico City.

In contrast to Mesoamerica, South America was inhabited by a veritable kaleidoscope of ethnic groups, with diverse cultures, languages, traditions, and histories. South America's Andean region saw the flourish of a series of advanced civilizations, such as the Nazca, Moche, Tiwanaku, and Wari; less-known civilizations such as San Agustín and the Muisca dominated much of Colombia; and around 1000 c.e., the first Incas began to settle the Valley of Cuzco. However, it was not until the 15th century that the Incas began to expand their empire, a process that began in earnest after 1438. Thus, like the Aztec Empire in Mexico, the Inca Empire was relatively new when the first Europeans arrived. In November 1532, when Francisco Pizarro and his band of 168 Spanish conquistadores first

encountered the Inca ruler Atahualpa, the empire, known as Tawantinsuyu (Four Parts Together), extended over 380,000 square miles (984,200 km<sup>2</sup>).

Thus, by the period of European contact and conquest, Latin America was a highly diverse region, made up of disparate groups with distinct cultures, political organizations and institutions, languages, and traditions. Some of these groups lived in small sedentary villages, while others were organized into complex chiefdoms. Still others, such as the Aztecs and the Incas, had forged large empires with millions of subjects.

#### THE ATLANTIC WORLD IN THE AGE OF CONQUEST, 1492–1560: A BRIEF OVERVIEW

Columbus's 1492 voyage initiated a period of unprecedented European expansion into the continents surrounding the Atlantic Ocean; this "age of conquest" was led by Spain and Portugal. Even before Columbus's historic Atlantic crossing, the Portuguese had made landfall on the Atlantic islands of Madeira (1419), the Azores (1427), and the Cape Verdes (1456), and the Spaniards had begun the conquest of the Canary Islands (between 1478 and 1493). All of these Atlantic voyages by the two Iberian powers served as a base and proving ground for the invasion and conquest of what became Spanish America, known then as the Indies, and Portuguese Brazil.

After 1492, Spain's possessions expanded from a few isolated Caribbean outposts to include Aztec territories in Mexico, Maya domains in southern Mexico and Central America, and, within a decade, the extensive human and mineral resources of the Inca Empire in South America. The original conquistadores, followed by Crown bureaucrats and Catholic clergymen, firmly consolidated Spanish sovereignty over the central regions of Mexico and Peru. Collectively, the new possessions served as the foundation of the Spanish Atlantic empire, which encompassed a vast region, extending from the current south of the United States to the southern tip of South America.

Well before the Spanish conquests, Portuguese explorers had made their way along the coast of Africa, founding an outpost in Ceuta (1415); and between 1450 and 1505, they had established at least 14 trading posts in Guiné, where they exchanged European goods with local African polities for slaves. These slaves were shipped from Guiné to the Cape Verde Islands and then sent to Portugal, which served as the center for the growing European slave trade. At the same time, Portuguese settlers had transformed the Madeira Islands into a prosperous producer of sugarcane, which was sold throughout the Mediterranean and northern Europe. Portuguese merchants also explored the coast of Africa, and in 1488, Bartholomeu Dias rounded the Cape of Good Hope, demonstrating that seagoing vessels could gain entry into the rich markets of the Indian Ocean. This route was then exploited in 1497 when Vasco da

Gama left Lisbon and entered the Indian Ocean via the Cape of Good Hope, reaching the Indian city of Calicut on May 20, 1498. Two years later, the discovery of Brazil by Pedro Álvares Cabral seemed insignificant compared to the immensely profitable African and Eastern trading outposts established by the Portuguese. After Portuguese control over the Far Eastern spice trade weakened a century later, Brazil would become the “crown jewel” of Portugal’s overseas possessions.

### THE SPANISH ATLANTIC IN THE AGE OF CONQUEST

The Spanish invasion of the New World consisted first of the Caribbean islands and next moved to Mexico and Central America and then to Peru, as expeditions incorporated new lands into the Crown’s domain. The major expeditions of Hernando Cortés in Mexico and Francisco Pizarro in Peru both benefited from having large numbers of Amerindian allies, and their victories resulted from small, highly mobile, and technologically superior Spanish forces leading indigenous uprisings against the unpopular, divided Aztec and Inca states. Restive ethnic groups, such as the Tlaxcalans in Mexico and the Cañari in the Andes, were valuable allies to the Spanish conquistadores in overthrowing the Aztec and Inca states. Nonetheless, the position of the conquistadores was hardly secure after the overthrow of the major indigenous polities. The Spanish consolidated their newly acquired wealth, status, and power by making strategic alliances with powerful Amerindian ethnic groups, often marrying or taking as concubines the daughters of local indigenous elites. In Peru, the Spaniards even put a seemingly docile member of the Inca royal family, Manco Inca, on the throne to legitimize their rule in the Andes. Manco eventually rebelled in 1536 and almost succeeded in driving the Europeans out of the Andes; ultimately, he established a rival Inca kingdom in the remote jungle region of Vilcabamba, where his successors remained until the Spaniards captured the fortress in 1571.

To divide the spoils of conquest, the conquistadores gave out *encomiendas*, grants that allowed them to collect taxes and labor services from a designated group of indigenous towns in return for military protection and religious instruction. These grants gave the Spanish holder, the *encomendero*, social status and a source of capital and labor to buy property, engage in mining, or pursue commercial opportunities. The *encomienda* allowed the conquistadores to drain resources from the already existing Amerindian economies and invest them in emerging colonial enterprises.

By the middle of the 16th century, the Crown had slowly phased out the *encomienda* in wealthy, densely populated central areas of the Indies, although it persisted along the fringes of the empire. Squabbles among the conquistadores led to disorder, particularly in Peru, and the onset of European epidemic diseases dramatically reduced the Amerindian population in the central zones

of the Spanish Indies. Moreover, Crown authorities feared creating a New World nobility of *encomenderos*, while churchmen wanted direct control over evangelizing the indigenous peoples. Furthermore, the rise of new colonial cities and the discovery of fabulously rich gold and silver mines attracted a new influx of migrants from Spain, who resented the political, social, and economic dominance of the *encomiendas* system.

To replace the *encomenderos*, the Crown sent bureaucrats, clergy, and other settlers to rule, convert, and populate the newly acquired lands. In Spain, the Crown established the Board of Trade, or Casa de Contratación (1503), to control colonial commerce and the Council of the Indies (1524) to serve as a court of appeals in civil cases, a legislative body, and an executive authority to enforce laws for the Indies. In the Americas, the Crown set up an extensive bureaucracy to rule the newly conquered lands, headed by a viceroy in each of the two major political units, the Viceroyalties of New Spain and Peru. Within these two viceroyalties, the metropolitan government founded a series of high courts, called *audiencias* (six in Peru and four in New Spain), to hear civil and criminal cases. These justices worked with the viceroys to enforce legislation sent from Spain and to issue laws dealing with local matters. To limit the regional power of the *encomenderos*, authorities in Spain created a network of rural magistrates to regulate contact between Spaniards and Amerindians, to collect the head tax or tribute, and to assign forced (*corvée*) labor service for state projects.

Roman Catholic clergymen took firm control of converting the Amerindians to Catholicism in the two viceroyalties. At first, the religious orders—primarily the Franciscans, Dominicans, Augustinians, Mercedarians, and, later, the Jesuits—played a leading role in evangelizing the indigenous peoples. Over time, members of the secular clergy established parishes under the overall supervision of a series of bishops appointed by the Crown (seven in New Spain and eight in Peru) and shared evangelization duties with the regular orders.

### THE PORTUGUESE SEABORNE EMPIRE

During the 60 years after Cabral’s landing in Brazil in 1500, the Portuguese continued expanding their trading activities throughout the Atlantic Basin and beyond, to the Far East. Portuguese traders controlled the slave trade in the Atlantic world, and in the Far East, they seized most of the spice trade to Europe. The Portuguese established only small overseas fortresses and warehouses and enforced their commercial prominence with their navy rather than by establishing settler colonies like their rival, Spain. The center of Portugal’s empire in this early period was its outpost at Goa, in India, and the only Crown agency supervising the empire was the India House, established in Lisbon in 1503. Through this agency, the Crown exercised a monopoly over this seaborne commerce, licensing Portuguese nobles and merchants to engage in foreign trade for a share of the profits.

The Portuguese exploration and settlement of Brazil proceeded more slowly, as the local indigenous peoples had no densely populated, organized states capable of funneling trade goods to Portuguese coastal outposts. After Cabral's initial explorations, the Crown licensed a few small coastal dyewood trading posts or factories to open a barter trade with the indigenous Tupí-Guaraní peoples for brazilwood. Within a few decades, this barter system began to break down as many Amerindian groups balked at cutting dyewoods for the Portuguese and the inroads of French traders placed increased demands on the semisedentary Tupí-Guaraní peoples, which emboldened them to demand more valuable goods (including firearms) in payment for cutting and hauling dyewoods. As a result, the Portuguese began systematically enslaving the native Brazilian peoples, which led to periodic wars.

The Portuguese monarchy later promoted full-scale colonization in Brazil by granting charters to wealthy notables, called *donatários* (proprietors), who would bankroll and govern the first settlements. The Crown gave these proprietors the authority to control the distribution of land, dispense justice, grant town charters, oversee commerce with the Amerindians, and force indigenous people to work for the colony. The Crown also granted the proprietors large personal tracts of land. Although the king authorized the trade in dyewoods, he made the business a royal monopoly, ensuring the monarchy a large share of the profits. Nonetheless, only the colonies at Pernambuco, Bahia, Rio de Janeiro, and São Vicente managed to survive and prosper. Hostile relations with the indigenous peoples, chronic shortages of capital, and hostility between settlers and the proprietors led other colonies to wither.

In 1549, the Crown dispatched the first governor-general of Brazil, Tomé de Sousa, to fight the French and hostile Amerindian groups, and Sousa later founded the city of Salvador as the capital of Brazil. The economic success of Portuguese Brazil was not ensured, however, until profitable sugar plantations emerged in the northeast, around Olinda and Salvador da Bahia. The Portuguese colonists continued exploiting and enslaving the Tupí-Guaraní peoples, until their near extinction from disease and overwork (in some coastal regions) encouraged the introduction of African slaves to work on the plantations. The colonial enterprise in Brazil required permanent settlements, ongoing relations with indigenous peoples, and commercial agriculture, which required outlays much greater than the Portuguese had expended to build their trading outposts in Africa and Asia.

The institutional influence of the Roman Catholic Church in Brazil was minimal in the first half of the 16th century, and the first bishopric in Salvador da Bahia was not established until 1551. Most of the evangelization of the indigenous peoples fell to the Society of Jesus (Jesuits), whose first representatives arrived in 1549. They soon set up religious houses to convert and care for the indigenous communities of the interior. Although the Jesuits remained influential in the educational, spiritual, and economic life of Brazil, they often engaged in conflicts with settlers over the welfare of indigenous peoples. The colonists viewed the missions as an impediment to the enslavement of Amerindians to work on the sugar plantations. The Jesuits maintained that many Portuguese settlers acted immorally and abusively toward the Amerindians. The Jesuits even ran afoul of the first bishop of Bahia, Pedro Fernandes Sardinha, who argued that the society's first responsibility lay in ministering to Portuguese settlers, not converting Amerindians. With such divisions within the church and between the order and civil society, the Catholic Church in Brazil had less influence in the evolution of colonial society than it did in the Spanish Indies.

By 1560, the Spanish and Portuguese Atlantic empires were an immensely varied agglomeration of landscapes, climates, disease environments, cultures, languages, and customs. Despite its diversity, this Atlantic world also had unifying networks of political, economic, and social cohesion. The encounters between the Spanish and Portuguese and the native peoples of America and Africa altered preexisting modes of production, technology, commerce, politics, social hierarchies, patterns of diet and disease, and religion. At the same time, African and Amerindian peoples managed to incorporate these changes into their political, social, and religious practices, producing a constantly evolving mixture that was not entirely European, indigenous, or African, particularly in the Americas. Spanish and Portuguese notions of wealth, for example, led to intensive mining of precious metals and commercial agriculture, and the introduction of new foodstuffs and animals set in motion changes that transformed Africa, Brazil, and the Indies in significant ways. At the same time, indigenous food products (such as chocolate, maize, potatoes, and tobacco) and cultural practices reshaped European lifeways. In this sense, the Spanish Indies and Brazil represented a new world, indeed, tied to Europe and the wider Atlantic Basin.

—Kenneth J. Andrien  
J. Michael Francis

# ❧ TIME LINE ❧

## (PREHISTORY TO 1560)

### 50,000 B.C.E.— 40,000 B.C.E.

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- Earliest waves of human migrants cross the Bering land bridge, initiating settlement in the Americas.

### 12,500

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- Evidence of human settlement at Monte Verde, Chile, and Taima Taima, Venezuela

### 12,000–8000

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- Paleo-Indian period in Mesoamerica

### ca. 10,000

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- Earliest evidence of human settlement in the Amazonian regions of Brazil, Peru, Ecuador, and Colombia
- Early human occupation sites in Bolivia, Venezuela, Argentina, and other regions of South America
- Earliest evidence of textile production in South America

### 9500

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- Earliest evidence of human occupation in Panama, at La Yeguada and Lake Alajuela

### 9000

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- Rising sea levels make the Bering land bridge impassable.

### 8000–2000

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- Archaic period in Mesoamerica, characterized by a rise in temperatures and the domestication of various plants

### ca. 8000

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- Earliest evidence for the domestication of squash in Mesoamerica, potato in Peru, manioc in Brazil
- Evidence of early textile production in Mesoamerica

### 5500

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- Earliest examples of pottery in Amazonia, representing the earliest ceramic tradition in the Americas

### ca. 5200

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- Earliest evidence for the domestication of maize in Tabasco, Mexico

### ca. 5000

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- Evidence for maize domestication in South America

### 4600

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- Earliest evidence for the domestication of manioc in Mesoamerica

### 4500

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- Early hunter-gatherers settle near future site of Lima, Peru.

### 4000

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- Earliest human occupation of the island of Hispaniola

### 3500–1800

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- Valdivia culture flourishes in Ecuador.

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## 3000

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- Local development of pottery in Panama, at sites such as Monagrillo
- Significant monumental architecture appears in Peru, at sites such as Caral.

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## 2700

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- Earliest evidence for the domestication of chilies in Mesoamerica

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## 2500

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- Cotton is domesticated in the Mexican lowlands.

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## 2000–1000

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- Early Preclassic period (or Early Formative period) in Mesoamerica
- Complex public architecture emerges in Mesoamerica.

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## 2000

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- Settled farming villages appear throughout Mesoamerica.
- Formative period in the South American Andes sees formation of sedentary villages in Peru and Bolivia.
- Construction begins at Peruvian site of El Paraíso.

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## 1800–1400

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- Ocós culture on the coast of Guatemala and in Chiapas

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## 1800

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- Evidence of kiln-fired ceramics in South America

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## 1500

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- Arawak populations move up the Orinoco River and eventually into the Caribbean.
- Evidence of sheet-metalworking in copper and gold in the southern Andes of South America
- Zapotec peoples first settle in the Valley of Oaxaca.
- Mixtec peoples first settle in region that corresponds to the modern Mexican states of Oaxaca, Puebla, and Guerrero.

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## 1400–200

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- Chavín culture in Peru

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## 1200–1000

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- Early settlement at the Maya site of Kaminaljuyú, near the modern capital of Guatemala

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## 1200–500

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- Olmec civilization flourishes in Mexico's Gulf Coast region.

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## 1000–400

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- Middle Preclassic period (or Middle Formative period) in Mesoamerica

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## 1000

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- Ciboney Indians arrive on the island of Cuba.

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## 600

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- Earliest evidence of glyphic writing and the sacred calendar anywhere in Mesoamerica, found at the Zapotec village of San José Mogote in the Valley of Oaxaca

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## 500

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- Zapotec chiefdoms establish the city of Monte Albán.

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## 400 B.C.E.–1 C.E.

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- Early Horizon period in Peru

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## 400 B.C.E.–250 C.E.

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- Late Preclassic period (or Late Formative period) in Mesoamerica
- City of El Mirador dominates the Maya lowlands region.
- City of Teotihuacán begins its rapid growth and domination over much of Central Mexico.
- Large, complex villages emerge throughout the Amazon region.

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## 200 B.C.E.

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- Early construction begins at Maya site of Tikal.

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## 200 B.C.E.–700 C.E.

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- Nazca culture flourishes in southern Peru.

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## 1–600 C.E.

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- Early Intermediate period in Peru

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## 50–800

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- Moche culture dominates Peru's north coast.

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## 100

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- Evidence of widespread farming and agriculture in the Caribbean

- Taíno migrants arrive in the Leeward Islands.
- Evidence of kiln-fired ceramics in Mesoamerica

## 100–1200

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- San Agustín culture in Colombia

## ca. 150

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- City of Cuicuilco, located at the southern edge of the Valley of Mexico, is partially destroyed by a volcanic eruption.

## 250–900

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- Classic period in Mesoamerica
- Teotihuacán exerts influence over much of Mesoamerica, until its dramatic fall in the seventh century.
- Zapotecs dominate much of the Oaxaca region of Mexico.
- Mixtec peoples occupy parts of Oaxaca, Puebla, and Guerrero.
- Period of flourish in much of the Maya lowlands, with the dramatic growth of Maya centers such as Tikal, Calakmul, Yaxchilán, Caracol, Palenque, and Copán
- Maya have a fully developed glyphic writing system.

## 300–1100

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- Much of Bolivia is dominated by Tiwanaku culture.

## 378

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- Siyaj K'ak, perhaps on orders from the ruler of Teotihuacán, leads a military conquest of several Maya lowland sites, including Tikal. A new dynastic order begins at Tikal, with close ties to Teotihuacán.

## 426

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- K'inich Yax K'uk' Mo' establishes Copán dynasty, which lasts almost 400 years.

## 500

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- Evidence of tobacco cultivation at the site of Cerén in modern El Salvador

## 500–900

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- City of Monte Albán dominates Mexico's Oaxaca region.

## 562–594

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- El Niño triggers drought conditions in Peru.

## 600–1000

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- Middle Horizon period in Peru
- Wari culture flourishes in Peru.

## 650

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- Construction of Maya city of Chichén Itzá begins.

## 738

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- Copán's king, Waxaklajun Ub'aah K'awil, is captured and executed at Quiriguá.

## 800

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- Major construction ends at Monte Albán.

## 800–1200

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- Las Ánimas period in Chile

## 800–1537

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- Muisca peoples flourish in Colombia's eastern highlands.

## 822

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- Copán dynasty ends.

## 900–ca. 1200

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- Central Mexico dominated by the Toltecs, from their capital city Tula.

## 900–1519

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- Postclassic period in Mesoamerica
- Rise and fall of numerous northern Yucatán Maya cities such as Uxmal, Sayil, Chichén Itzá, Cobá, and Mayapán

## 909

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- The last recorded long-count calendar date appears on a Maya monument at Toniná.

## 1000

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- Colombia's Muisca Indians mine emeralds at Muzo.
- Incas begin to settle around the Valley of Cuzco.
- Maya city of Chichén Itzá falls into decline.
- Evidence of earliest human occupation on the island of Tenochtitlán, future capital of the Aztecs

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## 1000–1450

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- Late Intermediate period in Peru

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## 1050

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- Arawaks and their descendants, the Taino, have settled on Cuba.

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## 1200

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- Acolhua, Tepaneca, Culhua, Chalca, and Xochimilca migrants arrive in the Valley of Mexico.

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## ca. 1250

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- Mexica (Aztecs) arrive in the Valley of Mexico.

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## 1325

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- Mexica (Aztecs) establish their capital city, Tenochtitlán.

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## 1372

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- Acamapichtli, son of a Mexica noble and a Culhua princess, becomes the first Mexica king, or *tlatoani*. He rules until 1391.

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## 1391

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- Huitzilíhuitl becomes Mexica king, ruling until 1417.

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## 1400

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- Incas dominate the Cuzco valley region.

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## 1417

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- Chimalpopoca becomes Mexica king, ruling until 1427.

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## 1427

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- Itzcóatl becomes Mexica king, ruling until 1440.

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## 1428

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- The Triple Alliance between the Mexica, Texcoco, and Tlacopán is established, forming the Aztec Empire, which will quickly expand.

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## 1438

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- The Chancas launch an assault on the Inca capital of Cuzco. Following a successful defense, the Incas begin process of rapid imperial expansion.
- Pachacuti Inca Yupanqui becomes Inca ruler, governing the empire until 1471.

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## 1440

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- Montezuma Ilhuicamina (Montezuma I) rules Aztec Empire until 1468.

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## 1441

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- Violent collapse of Maya city of Mayapán in Yucatán Peninsula.

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## 1450–1455

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- Severe drought and famine in Central Mexico

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## 1450–1533

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- Late Horizon period in Peru

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## 1451

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- Christopher Columbus is born in Genoa, Italy.

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## 1450s

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- Inca emperor Pachacuti Inca Yupanqui establishes Machu Picchu as a royal estate.

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## ca. 1460

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- Incas conquer the Chimú of northern Peru.

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## 1468

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- Axayácatl rules Aztec Empire until 1481.

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## 1470–1480

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- The Kaqchikel Maya establish their highland capital at Iximché.

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## 1471

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- Topa Inca Yupanqui becomes Inca ruler and governs for 22 years.

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## 1478

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- Aztec army suffers devastating defeat in campaign against the Tarascans. As many as 20,000 Aztecs are killed during the battle.

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## 1479

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- On September 4, the monarchs of Spain and Portugal sign the Treaty of Alcaçovas.

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**ca. 1480**

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- Incas initiate conquest campaigns in northwest Argentina.

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**1481**

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- Tizoc rules Aztec Empire until 1486.

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**1484**

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- Hernando Cortés is born in Medellín, Spain.

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**1486**

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- Ahuizotl rules Aztec Empire until 1502.

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**1487**

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- Thousands of captives are sacrificed at the dedication ceremony of the Templo Mayor in the Mexica (Aztec) capital city of Tenochtitlán.

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**1492**

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- On January 2, the Catholic monarchs, Isabella and Ferdinand, defeat the last Muslim kingdom in Spain and triumphantly enter the city of Granada.
- Edict of Expulsion forces Spain's Jewish population to either convert to Christianity or leave Spain; many Spanish Jews flee to neighboring Portugal.
- On April 17, Isabella and Ferdinand draft an agreement with Christopher Columbus. The Capitulations of Santa Fe include certain promises to Columbus if his venture proves successful.
- On August 4, three vessels—the *Niña*, *Pinta*, and *Santa María*—depart from the Spanish city of Palos, under the command of Columbus. On September 9, the three ships leave the Canary Islands, and one month later, on October 12, Columbus and his men sight land.
- On December 25, the *Santa María* strikes a reef and sinks. With the assistance of a local chieftain (cacique) named Guacanagari, the crew salvages most of the ship's cargo.
- Europeans first learn about the use of tobacco when the Taíno Indians show them the leaves.

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**1493**

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- Papal bulls issued by Pope Alexander VI grant Castile title to the lands Christopher Columbus has discovered and charge the monarchy with Christianizing the inhabitants of those lands.
- Columbus embarks on his second of four voyages to the Americas. Outfitted to establish a European colony, Columbus's ships carry a wide variety of Old World grains, grasses, vegetables, and livestock. Sugar is introduced to Hispaniola.

- Columbus returns to Hispaniola to find that the fortress he established at La Navidad has been destroyed, and the Spanish garrison killed.
- Huayna Cápac becomes Inca king, governing the expansive empire until his death in 1527.

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**1494**

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- On June 7, following negotiations between Portugal and Castile, the Treaty of Tordesillas is signed; the treaty establishes a designated line 370 leagues west of Cape Verde. Spain is permitted to claim territories to the west of that line, and Portugal receives authority to claim territories to the east of the boundary.
- During his second voyage, Christopher Columbus discovers the island of Jamaica.

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**1496**

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- Portugal's king, Dom Manuel, issues an expulsion order for all Jews who do not convert to Christianity.
- Christopher Columbus builds the first American caravel on the island of Hispaniola.

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**1498**

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- Christopher Columbus departs on his third voyage to the New World, charged with carrying colonists and supplies to Hispaniola as well as conducting further exploration. Among the colonists are 30 women.

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**1499**

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- Spanish explorer Alonso de Ojeda sets out from Spain to conquer and explore the northeastern coast of South America.

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**1500**

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- Pedro Álvares Cabral claims Brazil for the Portuguese Crown.

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**1501**

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- Gaspar Corte Real explores the northeast coast of Newfoundland and the coast of Labrador. Reports of rich fish stocks in the Great Banks encourage Iberian fishermen, mainly Basques, to establish small processing plants in villages that still bear Portuguese and Spanish names.
- Muslims, Jews, and other heretics, as well as their children, are henceforth forbidden to travel to the New World.

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**1502**

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- Montezuma Xocoyotzin (Montezuma II) rules Aztec Empire until 1520.



- Nicolás de Ovando arrives as governor of Hispaniola.
- Explorer Amerigo Vespucci maps the northeastern coastline of the Southern Cone.
- Christopher Columbus embarks on his fourth and final voyage to the New World.

### 1503

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- House of Trade (Casa de Contratación) is established in Seville; it is charged with supervising and regulating the traffic of goods and peoples between Spain and Spanish America.

### 1504

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- Queen Isabella dies, leaving Ferdinand king of Aragon and regent of Castile.

### 1506

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- On May 20, Christopher Columbus dies at the age of 55.

### 1508

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- Pope Julius II grants the privilege of *patronato real* (royal patronage) to the Spanish monarchy, giving the Crown the right to appoint bishops and parish priests in the New World.

### 1511

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- The first American *audiencia* (high court) is established at Santo Domingo.
- The Spanish conquest of Cuba begins.

### 1512

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- Laws of Burgos are issued by King Ferdinand of Spain to regulate relations between Spaniards and the indigenous inhabitants of Hispaniola.
- Hatuey, the Indian cacique who led the first indigenous revolt against colonial rule in Cuba, is captured and burned at the stake.

### 1513

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- Juan Ponce de León becomes the first Spaniard to explore La Florida; he will return to colonize the region in 1521 but will die during the campaign.
- Blasco Núñez de Balboa informs the Spanish Crown of the existence of the Pacific Ocean, which he claims for Castile.
- King Ferdinand names Pedro Arias de Ávila as governor of the new colony of Darién.
- Pope Leo X authorizes the creation of the New World's first ecclesiastical see at Santo Domingo.

### 1514

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- Alessandro Geraldini, the first bishop in the Americas, oversees the construction of the cathedral of Santo Domingo.

### 1515

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- The city of Havana is founded.

### 1516

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- Juan Díaz de Solís lands briefly in what is now Argentina.
- The archbishop of Toledo, Francisco Jiménez de Cisneros, awards the Dominican friar Bartolomé de Las Casas the title of “universal defender and protector of the Indians.”

### 1517

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- Diego Velásquez de Cuéllar, the governor of Cuba, authorizes Francisco Hernández de Córdoba to lead a voyage of exploration of the Yucatán Peninsula.
- Charles I becomes king of Aragon and Castile.
- Alfonso Manso, the bishop of Puerto Rico, becomes the first inquisitor in the New World.

### 1518

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- A smallpox epidemic devastates the Indian population on Hispaniola.
- First *asientos* are issued to transport slaves to the Americas.

### 1519

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- Cuba's governor, Diego Velásquez de Cuéllar, commissions Hernando Cortés to lead an expedition west, building on the previous expeditions of Francisco Hernández de Córdoba (1517) and Juan de Grijalva (1518).
- Governor Velásquez's efforts to remove Cortés from command come too late, and on February 18, Cortés sets sail from Cuba, with more than 500 men, 11 ships, 16 horses, and some artillery.
- Scuttling all but one of his ships (which he dispatches to Spain), Cortés and his forces march inland, initiating the conquest of the Aztec Empire.
- Pedro Arias de Ávila is appointed governor of Panama; he immediately relocates the capital to the Pacific side, near present-day Panama City.
- Vasco Núñez de Balboa is arrested, tried, and beheaded.
- Ferdinand Magellan anchors in the bay of what is now Montevideo, Uruguay; he then sails past the entire region and through the straits that today bear his name.
- King Charles I is elected Holy Roman Emperor Charles V.

## 1520

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- On June 30, Hernando Cortés and 450 of his men escape from Tenochtitlán during the Noche Triste. More than 900 Spaniards are captured and killed, as are 1,000 of Cortés's Tlaxcalan allies.
- On the same day, the Aztec ruler, Montezuma, dies after being struck by a stone.
- Cuauhtémoc becomes the last Aztec king, ruling until 1525.
- A major smallpox epidemic ravages Central Mexico.

## 1521

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- Hernando Cortés launches a direct assault on the Aztec capital of Tenochtitlán, with the assistance of 20,000–30,000 Indian allies. Tenochtitlán falls to Cortés's forces, ending 93 years of Aztec imperial domination. Mexico City is founded on the ruins of the Aztec capital.
- On the island of Hispaniola, Wolof slaves lead the first recorded slave revolt in the Americas.

## 1522

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- A Spanish law restricts immigration to the New World to Castilian Old Christians.
- Gil González Dávila leads the Spanish conquest of Nicaraguan territory.
- French pirate Jean Fluery attacks and seizes three Spanish treasure ships.

## 1523

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- Pedro de Alvarado, a lieutenant of Hernando Cortés, arrives in Central America with a force of 400 Spaniards and hundreds of Tlaxcalan allies to conquer the Maya of highland Guatemala.

## 1524

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- The Council of the Indies is established to administer Spain's imperial affairs.
- Twelve Franciscan friars arrive in Mexico City to begin the "spiritual conquest" of Mexico's indigenous population.
- Alvarado founds the colonial capital of Santiago de los Caballeros de Guatemala (Tecpán), located near Iximché, the Kaqchikel Maya capital.

## 1525

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- During a conquest campaign in Guatemala, Hernando Cortés orders the execution of Cuauhtémoc, the last Aztec ruler.

## 1526

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- In order to protect ships and regulate trade, Spanish vessels are required to travel in fleets; over the next few decades, a system will develop that dispatches an annual convoy to Mexico (*la flota*) and another to Panama for Peru (*los galeones*).
- Disgruntled Spanish conquistadores burn much of the Kaqchikel Maya city of Iximché.

## 1527

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- Pánfilo de Narváez leads an expedition of 400 men and 40 horses into northwestern Florida. Only four men will survive, including Álvar Núñez Cabeza de Vaca, who will later record his eight-year ordeal as a captive among the Indians and his remarkable overland journey from east Texas (near modern-day Galveston) to New Spain (Mexico).
- The Inca Huayna Cápac, ruler of the vast Inca empire, and his chosen heir both die unexpectedly, sparking a violent civil war between two half brothers, Huáscar and Atahualpa.

## 1528

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- Second *audiencia* (high court) in the Americas is established in Mexico City.

## 1529

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- A special ceremonial bullfight is celebrated in Mexico City to mark the anniversary of Hernando Cortés's conquest of Tenochtitlán eight years earlier.
- The Caribbean city of Santa Marta (Colombia) is founded.
- Francisco Pizarro obtains royal authorization to launch an expedition of exploration and conquest in Peru.

## 1531

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- Francisco Pizarro founds the city of San Miguel de Piura on the northern coast of Peru, commencing the invasion of Inca territory.
- The Indian Juan Diego sees a vision, the Virgin of Guadalupe.

## 1532

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- On November 16, Francisco Pizarro captures the Inca ruler Atahualpa and holds him hostage in the city of Cajamarca.

## 1533

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- Caribbean city of Cartagena de Indias (Colombia) is founded.

- On August 29, after collecting a rich ransom for the Inca's release, Pizarro orders Atahualpa's execution.

## 1534

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- Jauja, the first capital of Spanish Peru, is formally founded; the capital is later moved to Lima, the "City of Kings."
- Sebastián de Benalcázar founds the city of San Francisco de Quito amid the smoldering ruins of the conquered Inca city.

## 1535

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- The legendary Inca general Rumiñahui is captured and executed.
- Sebastián de Benalcázar establishes the port city of Guayaquil.
- The first viceroyalty in the Americas is established in New Spain (Mexico).
- Diego de Almagro, a veteran of the conquest of Peru and a former partner of Francisco Pizarro, organizes his own expedition to move south to conquer Chile. Not finding any gold, a disgruntled Almagro and his men will return to Cuzco in 1537.
- Vasco de Quiroga, the Franciscan bishop of Michoacán, argues that because the Indians failed to establish a civil society (as defined by Europeans), the lands of the New World were unoccupied and therefore available to peoples capable of creating such a society.
- Gonzalo Fernández de Oviedo y Valdés, King Charles I's official chronicler of the Indies, publishes his *Historia general y natural de las Indias*.

## 1536

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- Manco Inca assembles an army of 100,000 and lays siege to the city of Cuzco. In early 1537, with his forces dwindling, Manco withdraws northward to Vilcabamba.
- Spanish conquistador Gonzalo Jiménez de Quesada leads an expedition into Colombia's eastern highlands, resulting in the conquest of the Muisca Indians and the establishment of the New Kingdom of Granada.
- In Mexico City, the Franciscans open a college for Indian students called Santa Cruz de Tlatelolco; there, young Indian nobles study Spanish, Latin, rhetoric, logic, theology, music, and medicine.
- With the papal bull *Cum ad nil magis*, the Portuguese Inquisition is formally established to police the behavior and the beliefs of subjects of the Portuguese Crown.

## 1537

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- Pope Paul III, in *Sublimis Deus*, confirms the basic humanity of the Indians, meaning that they are capable of

becoming Christians; he forbids their enslavement and the seizure of their lands or property.

- The port of Guayaquil (modern Ecuador) is formally founded.

## 1538

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- Christopher Columbus's son Fernando publishes his *Historia del almirante*, a biography of his father.
- The *audiencia* (high court) of Panama is established.
- The Battle of Las Salinas is fought near Cuzco, Peru.
- King Charles I issues a royal decree allowing the establishment of the first brothel in Mexico City.

## 1539

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- Hernando de Soto undertakes the first extensive land exploration of La Florida. Three years later, de Soto will fall ill and die on the west bank of the Mississippi River.
- The first printing press in the Americas begins operation in Mexico City.

## 1540

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- Pedro de Valdivia is granted permission to conquer Chile. He sets out with 1,000 Peruvian Indians and roughly 150 Spaniards. In February of the following year, he will found the city of Santiago del Nuevo Extremo.
- The Society of Jesus (Jesuit order) is founded.
- The Mixtón War begins.
- Francisco Vázquez de Coronado leads an expedition into New Mexico and Arizona.

## 1541

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- Francisco Pizarro is murdered.

## 1542

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- The New Laws of 1542 prohibit further *encomiendas* and order the reversion to the Spanish Crown of all *encomiendas* upon the death of the current *encomendero*. The New Laws also ban the enslavement of Indians. Widespread resistance to the laws will lead to some revisions, restoring the right to pass *encomiendas* to an heir; nevertheless, the ban on personal service will be preserved.
- Bartolomé de Las Casas's influential and highly controversial text, the *Brevísima relación de la destrucción de las Indias* (*Very Brief Account of the Destruction of the Indies*), is published.
- Spanish explorer Juan Rodríguez Cabrillo becomes the first Spaniard to explore the territory that will later become California.

- Francisco de Orellana completes navigation of the Amazon River.
- Viceroy Antonio de Mendoza leads a force of 500 Spaniards and 50,000 Indian allies to defeat the Mixtón Indians, ending the Mixtón War.
- Hernán Pérez de Quesada leads an ill-fated expedition in search of El Dorado.
- Francisco de Montejo leads the conquest of the Yucatán Peninsula.

## 1543

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- The Consulado (Merchant Guild) of Seville is established to help organize fleets to the New World and supervise the loading and unloading of vessels.

## 1544

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- The Viceroyalty of Peru is established; the first viceroy, Blasco Núñez Vela, arrives with orders to enforce the New Laws of 1542. Two years later, when Núñez Vela attempts to impose his authority by force, Gonzalo Pizarro will have the viceroy captured and executed.

## 1545

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- Pope Paul III convokes a general council of the Catholic Church to respond to the challenges of the Protestant Reformation and initiate reforms within the church. The council meets in the northern Italian city of Trent, and in 1563, the Council of Trent will promulgate its decrees, which will profoundly influence Catholicism in Iberia and the Americas.
- The rich silver mines of Potosí are discovered, sparking a boom in silver mining in the Viceroyalty of Peru.

## 1547

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- Santo Domingo becomes the metropolitan see of the Indies.

## 1548

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- Silver is discovered in Zacatecas, Mexico.
- Gonzalo Pizarro is captured and executed.

## 1549

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- The Portuguese Crown appoints Tomé de Sousa as Brazil's first governor general.
- The first Jesuit missionaries arrive in Brazil, as do Brazil's first paid troops, known as the *tropas de primeira linha*.
- The city of La Paz is founded in present-day Bolivia.

## 1550

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- The *audiencia* (high court) of Santa Fe is established, with jurisdiction over most of present-day Colombia and Venezuela.
- Silver mining begins in Guanajuato, Mexico.

## 1551

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- Brazil's first diocese, centered in Salvador, is established.
- The University of San Marcos is founded in Lima, Peru.

## 1552

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- Francisco López de Gómara's *Historia general de las Indias* (General history of the Indies) is published in Zaragoza, Spain.
- Aztec healer Martín de la Cruz produces his Codex Badianus, an illustrated manuscript that describes indigenous botanical medicine; the work is translated into Latin by his collaborator, Juan Badiano.
- The University of La Plata is founded in Sucre, in modern Bolivia.

## 1553

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- Mexico's Royal and Pontifical University opens, with a curriculum based on that of the University of Salamanca in Spain.
- The Hospital Real de Naturales (Royal Indian Hospital) is founded in Mexico City.

## 1554

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- Pedro de Cieza de León's *Descubrimiento y conquista del Perú* (*Discovery and Conquest of Peru*) is published.
- Peruvian rebel Francisco Hernández Girón is captured and executed by viceregal forces.

## 1555

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- Bartolomé de Medina invents a method of refining silver ores through amalgamation, a process that makes it possible to refine lower-grade ores. The new technology quickly spreads throughout Spanish America.

## 1556

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- King Charles I (Holy Roman Emperor Charles V) abdicates the Spanish throne in favor of his son, Philip II.
- The Augustinians found the University of San Fulgencio in Quito.

## 1558

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- The Jesuit order founds its first university in the Americas, the Universidad de Santiago de la Paz in Santo Domingo.

## 1559

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- A royal decree of June 12 creates the *audiencia* (high court) of Charcas (Upper Peru), with jurisdiction over much of the territory of modern Bolivia.

## 1560

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- Lope de Aguirre joins Pedor de Ursúa's ill-fated expedition in search of El Dorado.

✿ ENTRIES A TO Z ✿





***aclla* (*aqlla*)** *Aclla* is a QUECHUA word that means “chosen woman.” The *acllas*, or *aqllakuna*, were the only WOMEN under Inca rule who received a formal education, and they played a critical role in the expansion of the Inca Empire (see INCAS). The *acllas* were rumored to have been among the Inca state’s most beautiful women and were supposed to remain virgins throughout their lives, or at least until they were awarded in marriage. Removed from their families from about the age of 10, the girls were taken to various parts of the realm, where they were sequestered in one of the many state *acllawasi*, or “houses of the chosen women.” According to one Spanish observer, the largest *acllawasi* housed as many as 200 women of different ages.

Long overlooked by scholars of Inca imperial expansion, the *acllas* played important roles in the social, political, religious, and economic organization of the Inca state (see ECONOMY). They wove rich TEXTILES used in religious and political ceremonies; these textiles were also distributed by the state as compensation for services rendered and as payment to the Inca’s burgeoning army. The *acllas* also brewed great quantities of maize beer, or *CHICHA*, which was central to political and religious life in the Inca realm (see RELIGION).

The fate of the *acllas* varied. After four years of specialized training, they were qualified to serve as *mamakuna*, or priestesses; however, not all became priestesses. Some *acllas* were removed from the *acllawasi* and were given in marriage to men whom the Inca ruler wished to reward for their services to the state.

See also WOMEN (Vols. II, III, IV).

—J. Michael Francis

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**agriculture** Native Americans developed a variety of agricultural methods to suit local conditions. In the temperate highland areas of Mesoamerica and the Andes, people practiced permanent agriculture. Intensive cultivation provided sufficient harvests to support both the Aztec and Inca Empires. In low-lying and tropical areas and in arid regions, Native Americans relied on hunting and gathering to supplement shifting agriculture. Whichever type of agriculture was practiced, Native Americans had long-standing traditions of horticulture, irrigation, and shaping the landscape to serve their needs. This is seen in the *CHINAMPA*, or aquatic garden, of the Valley of Mexico and other places.

#### **CARIBBEAN BEFORE 1492**

The first evidence of widespread farming and agriculture in the Caribbean dates from around 100 C.E. and corresponds with the arrival of the Igneri or Saladoid, Arawak-speaking migrants from northern South America. The TAINO, descendants of the Saladoid, introduced new farming techniques that led to increased yields capable of supporting large populations.

Although the Taino hunted, fished, and collected wild plants for FOOD and other uses, their society depended mainly on the cultivation of root crops typical of Amazonian cultures: These included MANIOC, or cassava (*Manihot esculenta*), sweet POTATO (*Ipomea batatas*), yautia (*Xanthosoma sagittifolium*), and arrowroot or *lirén* (*Calathea allouia*). Of these, manioc was by far the most important.



Manioc plants have yields per acre comparable to those of rice or plantains; additionally, they provide all the calories and carbohydrates needed by a typical adult. Nevertheless, the root requires careful preparation because its sap, when exposed to air, turns into prussic or hydrocyanic acid, a powerful poison. The Taino and other indigenous cultures developed a process to extract this sap and render the root into flour suitable for baking and for use in stews.

MAIZE (from the Taino *mais*) was also cultivated but was less important than manioc as a food staple. The Taino cultivated several varieties of maize, generally with softer shells than those cultivated in Mesoamerica. The Taino did not make corn flour but rather roasted the grains or used them in soups and stews. The CARIB, another group with South American origins that settled the islands of the eastern Caribbean, used maize (*anasi* in their language), as well as fermented manioc and sweet potatoes, to make a potent alcoholic drink that was consumed during religious festivities (see ALCOHOL).

To supplement their diets, the Taino and Carib also grew several varieties of beans, which provided additional proteins and complemented their otherwise starchy diets. Peanuts or groundnuts (*mani* in Taino) were also cultivated and formed an important part of the indigenous diet.

Several species of gourds, squashes, and pumpkins were cultivated; these were used both as food and as containers. Pineapples (*ananas*) were also grown across the regions. Used as flavoring and as an irritant or poison for their arrows, chili peppers (known as *aji* by the Taino) were also widely grown.

Nonfood crops constituted another important aspect of indigenous Caribbean agricultural production. COTTON, the fibers of which were used to make TEXTILES and cords, was both cultivated and collected from wild varieties. Farmed cotton plants, however, produced higher yields and stronger threads. Fibers from cultivated and naturally occurring species of agave and maguey plants were used to make cordage for fishing lines and bowstrings and to weave hammocks. The crushed seeds from the *bija* shrub (*Bixa orellana*), which was grown around village huts, provided a vivid red dye that was used in textiles and as body paint (see DYES AND DYEWOOD).

TOBACCO (from the Taino *tabaco*) was cultivated to use as medicine and during religious ceremonies (see RELIGION). The Taino smoked dried tobacco leaves in pipes and cigars; the leaves were also finely ground and inhaled through a hollow tube.

The tools used by the indigenous peoples of the Caribbean to plant and tend their crops were simple but effective. The main farming implement was a planting stick (known as a *coa* among the Taino) about five feet long with a sharp, fire-hardened point. Petal-shaped axes made from polished hard stones were also common.

The indigenous peoples developed sophisticated farming practices that improved on the technologies imported from their Amazonian ancestral lands. The Taino and Carib, limited to the narrow bands of fertile

land on their generally mountainous islands, practiced intensive agriculture, while their relatives in mainland South America, with exponentially more cultivable land available, relied on extensive agriculture. The last involved using fires to clear and fertilize plots of land (slash-and-burn farming) that could yield crops for three to five years before the soil was exhausted and the farmers were forced to repeat the process elsewhere, thus allowing the previously farmed plot to lay fallow. By contrast, the Caribbean indigenous peoples limited the use of slash-and-burn farming to certain types of soils and perhaps also crops, such as maize. In the Caribbean, mound farming was the most common way of growing the staple manioc root plant. Farmers built low mounds of earth, typically about three feet high and nine feet across, in rows several feet apart. About 10 pieces of manioc root were planted on each mound. By planting on a mound, the roots received more water and air. This technique also facilitated harvest when the root matured.

Irrigation was practiced among the Taino on the island of HISPANIOLA. Spanish chroniclers described large-scale irrigation canals on the relatively flat lands of the Xaraguá valley, a somewhat arid part of the island, watering fields of cotton.

## MESOAMERICA BEFORE 1492

Agriculture emerged independently in a small number of regions around the world in the millennia following the last ice age. Mesoamerica was one of the most significant of those key regions. The civilizations of Mesoamerica developed a complex agricultural economy, which produced the economic surplus necessary for the growth of large populations and societies. By the time of the Spanish conquest, Mesoamerica's native inhabitants had developed elaborate and intensive systems of cultivation that fed millions of people and provided commodities for both local and long-distance trade. After the conquest, Mesoamerican foods spread rapidly around the world and today are a vital part the global diet and ECONOMY.

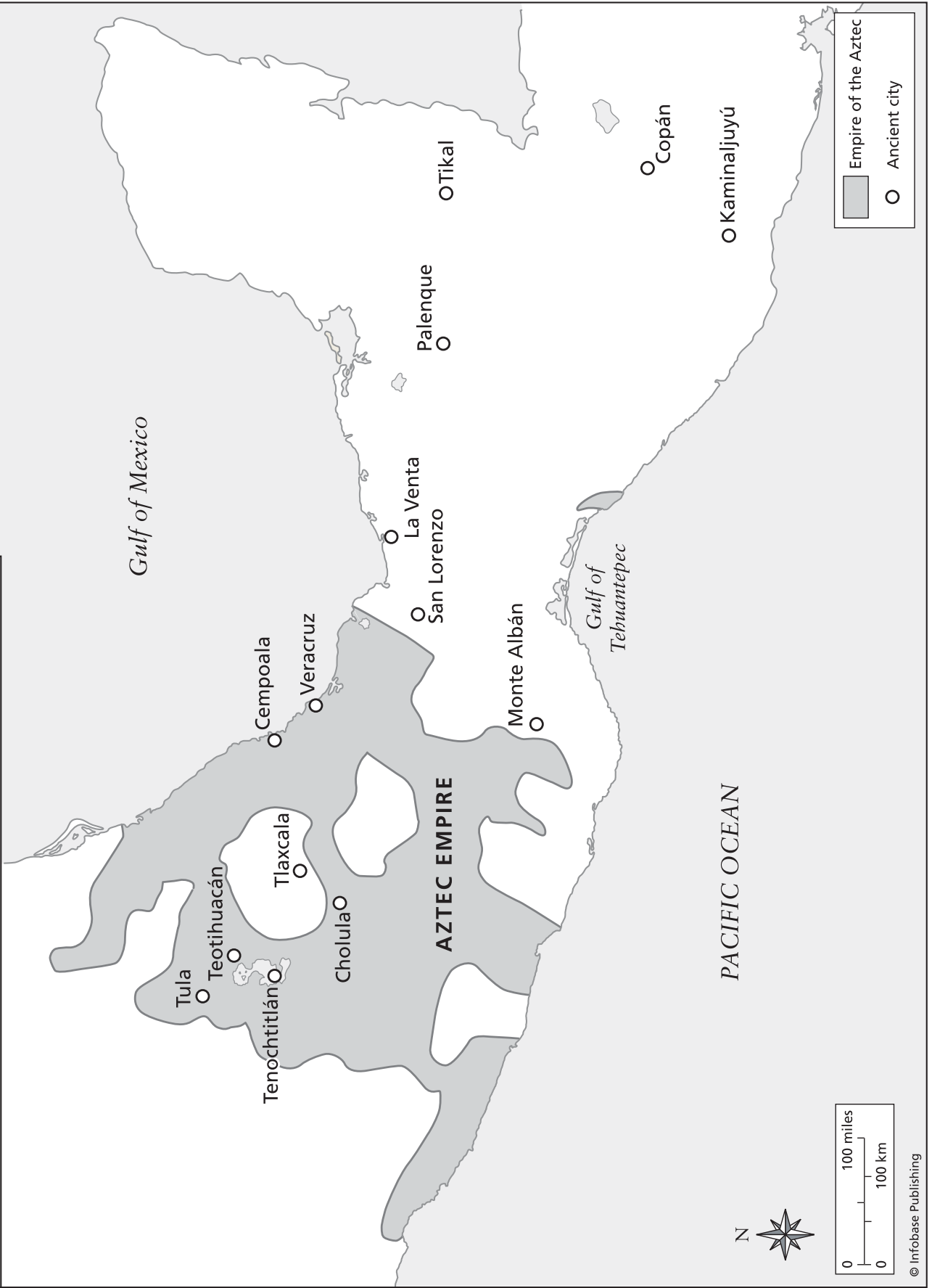
### Domestication of Plants

The domestication of plants represents one of the most significant technological and economic innovations in human history. True domestication implies the modification of a plant through manipulation of its reproduction, thus replacing natural selection, at least partially, with artificial selection. Domestication is usually visible archaeologically through an increase in the size of the edible portion of the plant, typically the seed or fruit. In addition, humans often modify a plant's natural seed dispersal mechanisms, facilitating the harvesting of seeds to eat. Archaeologists who excavate plant remains are able to trace such changes and map plants' domestication.

### Plant Domestication in Mesoamerica

Mesoamerican farmers grew many different crops. The most productive and economically important was maize

**Mesoamerica and the Boundaries of the Aztec Empire in 1519**



(“Indian corn,” or *Zea mays*). Historically, Mesoamerica has boasted many varieties of maize, grown in different regions, at different altitudes, and for diverse purposes. Today, maize, or corn, is one of the world’s staple crops. The origins of maize remain poorly understood. For many years, the wild ancestor of maize was unknown, and some researchers thought it was long extinct. Modern genetic research has demonstrated through DNA analysis that an annual variety of a Central Mexico grass called teosinte is the wild progenitor of maize. Nevertheless, the history of the domestication process remains murky. Recent research suggests that maize was domesticated in the central Balsas River area of the highlands of southwestern MEXICO, but the earliest physical evidence of domesticated maize comes from the lowland archaeological site of San Andrés in Tabasco, Mexico, and dates from about 7,300 years ago. This is far from the native range of teosinte and must represent the cultivation of an already domesticated plant. Molecular and paleoecological data imply an initial date for domestication at least 9,000 years ago.

The next most important plants to be domesticated were squash (*Cucurbita pepo*) and beans. Evidence of the domestication of squash dates from some 10,000 years ago. It is also likely to have been domesticated in the dry southern and western Mexican highlands. Less is known about the domestication of beans, which may have occurred somewhat later, perhaps about 2000 B.C.E. In combination with corn and squash, beans formed the foundation of Mesoamerican agriculture. Grown together in the same plots, these plants revitalize the soil and offer a nutritionally balanced diet.

Many other plants were also cultivated. Manioc, a lowland root crop, appeared by 4600 B.C.E., although its domestication probably took place in South America. Sunflower (*Helianthus annuus*) appears in the archaeological record by about 2700 B.C.E. Chilies (*Capsicum*) have a long history in Mesoamerican agriculture and cuisine. Although several species of peppers were probably domesticated in South America, one (*C. annuum*) may have been domesticated in Mesoamerica. Chia (*Salvia hispanica* L.) was a staple food, possibly rivaling maize in importance among AZTECS. Today, it is used mainly for medicinal purposes and to make a refreshing drink; however, in pre-Hispanic times, the seeds were ground into flour. Tomatoes (*Lycopersicon esculentum*) were grown in Mexico before the conquest, but how they got there—the wild species are South American—is unknown. Cotton (*Gossypium*), although not a food, was as economically significant in Mesoamerica as it is today worldwide. It appeared in the lowlands around 2500 B.C.E.

A wide variety of tree crops were farmed and managed in Mesoamerica. CACAO (*Theobroma cacao* L.) was a major crop. Cacao beans were used as currency and to make a savory drink. Cacao cultivation was concentrated in ecologically propitious environments, most notably in Tabasco, Chiapas, and NICARAGUA. Other important tree

crops included avocado, anona (custard apple), papaya, and *guayaba* (guava).

### Agricultural Systems

The varied systems of cultivation developed in Mesoamerica represent significant social and technological accomplishments, while the intensification of agriculture is usually essential to the growth of complex societies. Traditional agriculture in Mesoamerica employed a slash-and-burn system, whereby a plot, or *MILPA*, was prepared by cutting the natural vegetation, letting it dry, and burning it. The ash and carbon from the burning added nutrients to the soil. Corn and squash were planted in the fields at the beginning of the rainy season, with beans perhaps planted later.

Ancient Mesoamericans developed several methods of agricultural intensification, some highly original. Irrigation was developed by the earliest complex society: A dam at the Olmec site of Teopantecuanitlán dates from about 1200 B.C.E. (see OLMECS). Other dams existed in Puebla and Oaxaca. Most known archaeological irrigation systems are found in the arid highlands of central and southern Mexico.

Raised aquatic fields, or *chinampas*, were constructed by excavating a network of canals in swamps or wetlands and then piling up the dredge spoil to build islands between the canals. The islands were supremely productive: Not only was the swamp mud fertile, but the water percolated through the sides of the canals where it was drawn up by the plant roots. Farmers dredged the canals periodically and dumped the spoil on the fields, which were thus re-fertilized. In addition, the canals supported aquatic species, such as fish, for consumption. *Chinampas* are still used for cultivation in the southern part of the Valley of Mexico (Xochimilco), where they are sometimes incorrectly called “floating gardens.” The remains of ancient *chinampas* are found throughout Mesoamerica, with the largest concentrations in Central Mexico, especially the Valley of Mexico; the southern MAYA lowlands, especially northern BELIZE and adjacent areas; and along the coast of Veracruz. *Chinampa* agriculture clearly made a major contribution to the Aztecs diet at their capital of TENOCHTITLÁN in the Valley of Mexico, and possibly to the economy of the earlier, nearby city of TEOTIHUACÁN. The archaeological *chinampas* of the Maya lowlands are also extensive. Modern agronomists have been experimenting with *chinampas* to increase agricultural production in the developing world.

### SOUTH AMERICA BEFORE 1492

Agricultural development in South America naturally stems from the earliest human settlements in the region. The MONTE VERDE archaeological site in CHILE as well as the El Abra site in COLOMBIA are widely believed to be the oldest human settlements in the Americas, each occupied some 14,500 years ago. Some evidence also exists of food cultivation practices in the AMAZON Basin at about the same time. Archaeologists have uncovered berries, more

than three dozen edible plants, and nuts at these early sites. From these origins, agriculture in South America was developed and adapted to the continent's varied geography. The rudimentary practices of the earliest settlements gave way to complex terraced fielding and irrigation techniques in successive civilizations of pre-Columbian South America. Using these techniques, several civilizations were able to create vast and reliable harvests of numerous crops, which was oftentimes a momentous feat given the unaccommodating South American terrain.

The earliest civilizations in South America included the Valdivia community in ECUADOR, from ca. 3500 to 1800 B.C.E., and the Norte Chico culture, which occupied several hubs in PERU from roughly 3000 to 1800 B.C.E. Over the course of their existence, these communities cultivated beans, manioc, hot peppers, maize, and squash, as well as cotton for clothing. While domesticated maize was grown in Mexico from around 3500 B.C.E., it was not until a millennium later that the staple first appeared in South America. In South America, and particularly the Andes, the most important domesticate was the potato. By 2000 B.C.E., a handful of communities in South

America were cultivating a variety of vegetables and harvesting nuts, which led to permanent settlements.

Building on the knowledge of their predecessors, the INCAS adapted technology and created an agricultural system that spanned some of the world's most diverse environments. Because of a lack of flat land in many parts of the Andean highlands, the Incas created terraced fields to facilitate the production of crops. By cutting rivets and tiers into the steep terrain, they were able to create a series of shelflike plateaus that permitted the cultivation of staple crops, the most widely grown being potatoes. The Incas relied heavily on *andenes* and *camellones*, both artificial terraces but distinct in terms of application, to create soil suitable for agriculture. To aid harvests, the Incas created *cochas*, which were essentially artificial lagoons, along the coasts. The Incas' terracing techniques, advanced irrigation techniques, sophisticated aqueducts, and extensive road systems enabled them to eat a wide variety of vegetables and fruits.

An assortment of beans and squash were cultivated from the time of the earliest human settlement in the Americas. Cotton was also one of the first products to be cultivated. Eventually, maize made its way from Mexico to become a staple of many South American diets. These staple crops continued to be cultivated throughout South America and remain the chief sources of nutrition to this day in many parts of the Andes and the Amazon Basin. Agricultural refinements over the millennia enabled the Inca to feed more than 12 million inhabitants in the 15th century. Indeed, the Incas' agricultural system was so efficacious that many experts assert that if it were readopted today, it would solve the food shortages experienced in many Andean nations. Even so, the Incas' agricultural sophistication is perhaps best appreciated in the light of discoveries made by a series of societies that existed prior to the rise of the Inca.

#### EARLY COLONIAL LATIN AMERICA

While the arrival of Spaniards and Portuguese brought considerable changes to agriculture and the environment, many aspects of Native American agriculture endured long into the colonial period. Before the conquest, agriculture in the Americas differed from that in Europe in terms of technology, cultivation practices, and types of crops. Because of the resilience and adaptability of maize, Native Americans harvested it throughout many regions. Maize was the most widespread staple and was supplemented with foods such as avocados, tomatoes, beans, and chilies. In the Andes, potatoes and the grain called quinoa were also cultivated, as was coca. In lowland areas, the Tupí, Maya, and others grew maize or manioc as a staple, as well as sweet potatoes and other vegetables such as squash.

People in tropical, forested regions cultivated the land on a shifting or rotational basis throughout the colonial era. They cleared land for cultivation by felling trees and burning the undergrowth, although certain plants were left to maintain fertility and retain water in



Felipe Guamán Poma de Ayala's illustration of the eighth month, or August; this was the Chakra Yapuy Killa, the month to turn the soil. (The Royal Library, Copenhagen, Denmark)

the soil. This farming technique of slash and burn, or swidden agriculture, proved well suited to wet and warm conditions. Fields typically yielded significant crops for two or three years. The land would then be left fallow for a decade or so, with the farmers moving to new locations where the cycle would begin again. In areas of permanent agriculture, such as the Andes, Native Americans prepared soils by using fertilizers and weeding plots of land. They also relied on irrigation systems such as terracing to capture and retain rainwater. In wetland areas such as the lakes of the Valley of Mexico, irrigation involved the use of dams, dikes, and canals. In the case of *chinampa* agriculture, plots of land were constructed above the water level by using soil dredged from lakes. These fertile *chinampas* generated bountiful harvests and survived through the colonial period until today.

Native Americans often appropriated Spanish and Portuguese farming techniques. Native Americans had typically tilled land using a *coa*, or digging stick, whereas Europeans used plows that were pulled by draft animals. While many Native American groups readily adopted European implements such as axes, hoes, and, at times, plows, they did not necessarily replace their established agricultural practices. For example, Native Americans continued to plant seeds in an individual fashion, in contrast to the European method of broadcast sowing. The endurance of traditional cultivation practices was related to the preservation of existing systems of land tenure. While colonialism threatened the integrity of Native American landholdings, *milpas* (household plots of land) remained vital to village subsistence. Most lands were owned by individual families, although communal lands were allocated to nobles and some land was held in common by communities. In many areas, the greatest threat to Native American landholdings came from the interrelated processes of population decline and the rise of large landed estates, or haciendas.

In the early colonial period, Latin American agriculture underwent its most widespread change through the introduction of Old World DISEASES and flora and fauna as part of what is known as the COLUMBIAN EXCHANGE. Early generations of Spanish and Portuguese settlers preferred foods to which they were accustomed. Accordingly, they brought numerous new food species to the Americas. WHEAT, olives, grapes, citrus fruits, and other plants from the Mediterranean became common foodstuffs in some parts of the Americas, depending on the suitability of the crop to local conditions. Wheat and grapes, for instance, fared poorly in parts of Mexico because of the climate (see WINE). Similarly, African imports such as bananas, millet, okra, rice, and sorghum, followed the forced migration of slaves across the Atlantic (see SLAVERY).

The Columbian Exchange also involved the importation of new pathogens, pests, and animals that significantly altered agriculture. With catastrophic population collapse, lands were left fallow, facilitating the rise of Spanish estates, particularly ranches. Lacking natural predators, populations of cattle, goats, pigs, and sheep

grew rapidly. Sheep proved a particular menace to Native American agriculture by roaming freely across lands and trampling crops. In some areas, sheep brought widespread environmental change, denuding the land of plants and, in the case of the Mezquital Valley in Mexico, transforming land that had been used for intensive irrigation agriculture into desert.

The arrival of the Portuguese and Spanish led to the rise of new forms of commercial agriculture. Some imported crops, such as SUGAR, were cultivated for European markets. Spaniards also sought to harness Native American LABOR to obtain brazilwood, cacao, cochineal, cotton, and indigo for commercial markets. Not all of these ventures were successful, as with the case with silk. Of greater success were haciendas. These commercial enterprises, which were run either by elite Europeans or monastic orders such as the Jesuits, supplied urban and Spanish markets and became crucial in the production of wheat, barley, and maize. While the extent of haciendas' development varied considerably from one region to the next, in some areas they became extensive enterprises that alienated Native American lands, altered labor relations, and disrupted local agriculture.

See also AGRICULTURE (Vols. II, III, IV); CACAO (Vols. II, III); COCA (Vols. II, III).

—Clifford T. Brown  
Richard Conway  
J. Michael Francis  
Sean H. Goforth  
Francisco J. González

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**Aguilar, Gerónimo de** (b. ca. 1489–d. 1531) *Spaniard shipwrecked along Yucatán's coast; he lived for eight years among the Yucatec Maya before being rescued in 1519 by Hernando Cortés* Gerónimo de Aguilar has gained much fame for his role as translator in the Spanish CONQUEST of the Aztec empire (see AZTECS). Born in Écija, Spain, Aguilar was trained as a priest and took minor orders before departing for the New World, perhaps in 1510. In the spring of 1511, while en route from PANAMA to Santo Domingo (see HISPANIOLA), Aguilar's ship struck shoals near Jamaica; Aguilar and roughly 20 other Spaniards set off in a small lifeboat, which was blown west toward the Yucatán Peninsula. By the time they reached Yucatán, more than half of the men had died from hunger and exposure; the survivors, including Aguilar, were immediately taken captive by the local MAYA. Five Spaniards were sacrificed; however, Aguilar and several others managed to escape and were received by another Maya ruler, who kept them as slaves. For the next eight years, Aguilar lived among the Yucatec Maya and learned to speak their language. When HERNANDO CORTÉS reached Yucatán in 1519, Aguilar was one of two Spaniards from the 1511 shipwreck still alive (Gonzalo Guerrero was the other). When Cortés learned of Aguilar's presence, he went to great lengths to rescue him; Cortés needed a translator as he prepared to move his forces against the Aztec Empire. Aguilar played a significant role as interpreter between the Maya and Cortés; nevertheless, his long-term value proved to be limited because he did not know how to speak NAHUATL, the Aztec language. Increasingly, Cortés began to rely on a young native woman, one of 20 women whom the Maya had given Cortés as a peace offering. Her name was LA MALINCHE, and she spoke both Maya and Nahuatl. Over time, as Malinche learned more Spanish, Aguilar's role as interpreter became less important.

—J. Michael Francis

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**Aguirre, Lope de** (b. ca. 1514–d. 1561) *Spanish conquistador who led a failed rebellion against the Spanish Crown* Born in the Basque town of Oñate ca. 1514, Lope de Aguirre was one of thousands of early 16th-century Spaniards who journeyed to the Americas in search of fame and fortune. Aguirre's story, however, is one of frustration, bitterness, and anger. He has been portrayed both as a tragic hero and as a cruel tyrant. Immortalized in Werner Herzog's 1972 classic film, *Aguirre, the Wrath of God*, Lope de Aguirre has acquired international fame,

but Herzog's imaginative representation of the conquistador bears little resemblance to the historical Aguirre.

The paucity of documentary evidence makes it very difficult to reconstruct a detailed picture of Aguirre's early life in the New World. It appears that he left Spain in 1534. For the next two decades, spent mainly in PERU, Aguirre seems to have been a loyal servant to the Crown. He earned his living by breaking horses and as a soldier. In 1555, he fought with Crown loyalists in the Battle of Chuquinga against the rebel forces under Francisco Hernández Girón. Aguirre was left with a permanent limp and few lasting rewards for his services.

Then, in 1560, an aging Aguirre joined Pedro de Ursúa's ill-fated expedition to search for the land of EL DORADO, a kingdom east of Peru, rumored to be filled with unimaginable riches. Aguirre joined a force of more than 300 Spaniards and scores of African slaves and Indian carriers (see SLAVERY). After months of suffering in the AMAZON's blistering heat, the party found no evidence of El Dorado. Then, on New Year's Day of 1561, as frustrations mounted, Aguirre joined with a dozen other armed men and murdered the leader of the expedition. Aguirre's revolt against the Crown had begun, and over the next six months, another 60 members of the expedition were killed. The survivors sailed down the Amazon River, eventually reaching the island of Margarita on July 20, 1561. There, Aguirre and his close followers plotted to return to Peru and conquer it for themselves.

Aguirre never reached Peru. With his rebellion collapsing from within and Spanish forces closing in, Aguirre drafted a remarkable letter to King Phillip II, in which he denounced the Spanish ruler for failing to recognize and reward those who had suffered so greatly in service to the Crown and never received their due compensation. Shortly before his death, Aguirre murdered his mestiza daughter, Elvira, an act he justified as merciful to spare her from the abuse she would endure as the daughter of a rebel. On October 27, 1561, Aguirre was shot; his corpse was beheaded, quartered, and put on public display as a warning to others.

—J. Michael Francis

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**alcabala** The *alcabala* was a sales tax collected in Spain and eventually extended to the American colonies. As with many Spanish commercial and fiscal terms, *alcabala* is of Hispano-Muslim origin (*al-qabāla*), from

the period when the Moors ruled much of the Iberian Peninsula. As the Christian monarchies reconquered Iberia, they imposed the *alcabala*. In 1342, the Castilian Cortes (national legislative body) granted King Alfonso XI permission to make the *alcabala* a royal tax.

When establishing the Board of Trade (*CASA DE CONTRATACIÓN*) in 1503 to regulate commerce with the new American colonies, Queen Isabella apparently discussed imposing the *alcabala* in the New World; however, the tax had yet to be implemented when she died the following year. Her successors generally granted new colonies a temporary exemption from the *alcabala*. Consequently, several decades passed before the colonies began to pay it: Philip II imposed the *alcabala* in MEXICO in 1574, GUATEMALA in 1575, and PERU in 1591. Whereas the *alcabala* rate in Spain was 10 percent (on merchandise going both to and coming from the Americas), it was a much lighter 2 percent in the Americas during the 16th century. Basic foodstuffs and indigenous goods were generally exempt, along with a number of other items, such as books, medicines, paintings, and weapons. The seller was required to pay the tax on the first and each succeeding sale of a good.

During the 16th century, the royal treasury lacked the manpower and other resources to collect the *alcabala* itself and so tended to farm out its collection to private individuals or groups, such as merchant guilds (*consulados*) in CITIES.

See also *ALCABALA* (Vol. II); *ALMOJARIFAZGO* (Vol. II); *QUINTO* (Vol. II).

—Kendall Brown

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**Alcaçovas, Treaty of** (1479) On September 4, 1479, the Catholic monarchs of Castile and Aragon signed this accord with the Catholic king of Portugal (see *MONARCHS OF PORTUGAL*; *MONARCHS OF SPAIN*). Sometimes referred to as the Peace of Alcaçovas, this treaty effectively ended the war of succession for the Castilian Crown, which had erupted five years earlier. In addition to confirming Queen Isabella as the legitimate ruler of the kingdom of Castile, the agreement established some important foundations for future Atlantic explorations of discovery and conquest. In return for ceding to Portugal all rights to establish outposts along the African coast, the Treaty of Alcaçovas confirmed the Canary Islands as a Castilian possession. It granted to Portugal the islands of the Azores, Madeira, and Cape Verde and made it illegal for any Spaniard to sail to these Portuguese possessions without license from the Portuguese Crown. In January 1492, when Ferdinand and Isabella captured Granada, the last Moorish stronghold on the Iberian Peninsula, the stage was set for the

Spanish monarchs to turn their attention toward the west. It was then that they agreed to help fund a Genoese sailor named CHRISTOPHER COLUMBUS, who claimed he could find a route to Asia by sailing west and thus avoid having to compete against the Portuguese. In this endeavor, Castilian sovereignty over the Canary Islands proved central to Columbus's successful first voyage, and the islands remained important to Spain's Atlantic empire throughout the colonial period.

—J. Michael Francis

**alcohol** Latin America's pre-Columbian inhabitants made fermented beverages from various plant and animal products. With an ethylene alcohol content of between 1 and 5 percent, these drinks were both nutritious and inebriating. For millennia, they played significant roles in the religious lives and curing practices of those who used them, whether by drinking, taking as an enema, or pouring off in sacrifice to deities or in communion with the departed (see *RELIGION*). The Spaniards who colonized much of Latin America shortly after 1492 introduced grape WINE and hard liquor, the latter made through the distillation of fermented products. These European beverages had a significantly greater alcohol content and less nutritional value than their American counterparts. Europeans also brought with them a different set of attitudes concerning the consumption and regulation of alcohol.

Alcohol acts on the central nervous system, reducing attention, inducing relaxation, and slowing reaction time, with varying effects on the personality, including a general lessening of social inhibitions. With a significant blood alcohol level, one becomes drunk, causing slurred speech, clumsiness, and a form of euphoria. Indigenous groups generally experienced these effects communally and sporadically, expressing them primarily in the shared context of group religious ceremonies, abandoning themselves fully to the limits of inebriation allowed by the generally low alcohol content of their beverages, and viewing their temporary inebriation as a state of contact with the sacred. WOMEN participated less in drinking activities, if at all. Curers and diviners also employed alcohol as a necessary component of their calling.

The Spaniards imbibed too, but generally more individually and in private. They also drank more frequently and with greater attention to self-control. They thus viewed the communal abandon of indigenous drinking occasions with disapproval and disparagement.

Depending on the region, fermented beverages in Latin America were generally based on fruits, roots, or grains, though some indigenous groups used honey, tree sap, or the fluid from a century plant (agave cactus). In Central MEXICO, the AZTECS brewed *octli* from the latter. Later called PULQUE in Spanish, *octli* is still made by fermenting juice collected after cutting off the flowering

stem of an agave. Evidence from Classic Mayan (250–900 C.E.) writing and images indicates that this drink was also consumed much earlier by MAYA peoples; however, by the time that Spaniards arrived in Maya territory in the early 16th century, the lowland Maya were more noted for a honey-based fermented drink they called *balché*, which contained strips of bark from the *Lonchocarpus* tree. Maya in highland Chiapas drink a fermented beverage made from freshly squeezed sugarcane juice and called *CHICHA* in Spanish, a name originally given by highland GUATEMALA Maya to a fermented MAIZE drink.

The Spanish term *chicha* is applied from Mexico to ARGENTINA to any kind of fermented beverage. It may have been borrowed from an Aztec term for “bitter water” or possibly from a Kuna word for maize. In PERU, *chicha* is usually made from maize, either sprouted or ground before germination and then moistened in the manufacturer’s mouth to break down the starches into maltose; regional variants use quinoa, amaranth, barley, garbanzos, and/or seeds from the pepper berry tree (*Schinus molle*) instead of maize. In the eastern Andean lowlands, *chicha* is more frequently made from cassava root (MANIOC) that is chewed by specially selected women and then spat into a fermentation container. In the Peruvian highlands, during the Inca Empire, women were schooled in chewing and brewing ground maize for *chicha*, and recent excavations have uncovered the ruins of a brewery staffed and run by women with gracefully sloping foreheads, belonging to the Peruvian WARI Empire a millennium before the INCAS, who made maize beer with pepper berry seeds. This *chicha* is thought to have been central to Wari religious activities.

Even more recent excavations in HONDURAS suggest that the local elite were making a fermented CACAO pulp drink more than a thousand years prior to the current era and that this practice may have led to the discovery that fermenting, roasting, and grinding cacao seeds could produce an even tastier, if bitter and nonalcoholic, drink that was beaten to a froth and sometimes spiced with chilies. Eventually, processing fermented cacao beans gave rise to the chocolate industry.

Numerous fermented drinks have been produced in Latin America using regionally specific fruits. For example, in northwest Mexico, saguaro and *pitahaya* cactus fruits supplied the sugar base for the drinks. In the north-central region, the fruit of the nopal, or prickly pear cactus, was used. On the western coast, it was the fruit of the hog plum, or *jocote*. *Tepache* is a common fermented drink in Mexico. Weakly alcoholic, it is of colonial origin and made mainly from various fruits. Pineapple-based *tepache* is a popular beverage in many parts of Mexico.

In northwest Mexico, sprouted maize was, and continues to be, ground and fermented in water to make a beer of great cultural importance, called *tesgüino*. In the central region, in addition to the consumption of *pulque*, green cornstalks were squeezed for their sugary liquid as a fermented drink base. Mesquite (*Prosopis*) seedpods

were chewed along with the seeds in northern Mexico, put in hot water, and left to ferment to produce a mildly alcoholic beverage. In South America, *algarrobo* (*Prosopis*) pods were processed the same way.

In Central America, sap from the *coyol* palm was drained from a felled tree and fermented to make a mildly alcoholic drink with enzymes that interact with sunlight to produce a unique kind of inebriation. The Shuar of Ecuador used the fruit of the *chonta* palm to produce their traditional alcoholic beverage.

Alcohol use in indigenous Latin America prior to European contact was mostly communal, public, and religious. Beverages were based on fermentation. Spaniards brought distillation techniques and different attitudes toward drinking. By 1560, colonists and indigenous groups were beginning to influence each other, and this exchange continued throughout the colonial period. The broad dissemination of cane liquors did not occur until later in the colonial period, when Caribbean rum emerged as one of the most widely consumed alcoholic beverages in the Atlantic world.

See also AGUARDIENTE DE CAÑA (Vol. II); PULQUE (Vol. II).

—Brian Stross

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**Almagro, Diego de** (b. ca. 1475–d. 1538) *Spanish conquistador in Peru and first conqueror of Chile* Born ca. 1475 in the Extremaduran town of Almagro, Diego de Almagro was the illegitimate son of Juan de Montenegro and Elvira Gutiérrez, who were both from lower-class families. In 1514, he traveled to the fledgling Spanish colony in PANAMA with the new governor, PEDRO ARIAS DE ÁVILA. Active in the establishment of the colony, Almagro befriended fellow Extremaduran FRANCISCO PIZARRO during an expedition they led in 1515. Entering a three-way partnership with Pizarro and the clergyman Hernando de Luque, Almagro took part in the first two scouting expeditions along the southern coast of South America from 1524 to 1528. On one of these expeditions, Almagro lost his left eye and several fingers during a battle with the Indians. While Pizarro continued to lead expeditions to the south, Almagro remained in Panama to recruit men and outfit ships for a third major expedition.

Setting out before Almagro, Pizarro and his men arrived first at Tumbez along the coast of ECUADOR and in 1532 apprehended and held the Inca emperor ATAHUALPA for ransom (see INCAS). Extorting from the Inca a large amount of GOLD and SILVER, Pizarro began the CONQUEST OF PERU. Almagro and his men did not arrive on the Peruvian coast until April 1533, several months after Pizarro had acquired the Atahualpa ransom.



Almagro demanded his share of the treasure, but Pizarro refused to part with any of it, instead sending Almagro and his men south to conquer Cuzco, the Inca capital, and its surrounding region. In early December 1534, Almagro was named governor of Cuzco and southern Peru. A few months later, the Spanish Crown named him governor of the new territory of CHILE to the south, which he was instructed to conquer and colonize. Facing many hardships in crossing the Andes Mountains and the Atacama Desert, Almagro's expedition eventually made it to Chile and during two brutal years conquered much of the northern part of the region. However, in 1537, on learning that civil war had broken out between Pizarro and other conquistadores in Peru (see CIVIL WARS-PERU), Almagro quickly returned with an army to defend his claim to Cuzco. Reaching Cuzco in early 1537, Almagro's army defeated the local Inca leader and took possession of the city. Almagro proclaimed himself governor, but his claim was immediately disputed by Pizarro. The two men declared war on each other, and on April 26, 1538, their armies met at the BATTLE OF LAS SALINAS outside Cuzco. Almagro, ill from disease, was captured by HERNANDO PIZARRO during the battle. Diego de Almagro was tried and executed on July 8, 1538.

—John F. Chuchiak IV

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**altepetl** The *altepetl* was the largest Nahuatl sociopolitical unit in Mesoamerica to survive Spanish conquest and colonization. (The Nahuatl were and are an ethnic indigenous group in Mesoamerica that included the Mexica, or AZTECS.) It was also the fundamental building block of what some scholars refer to as preconquest empires. The term itself is a quasi-compound in NAHUATL of the words *atl* (water) and *tepetl* (hill, mountain), alluding to two fundamentals of community life. When used in more formal contexts, such as Nahuatl petitions to the viceroy of Mexico or the monarch of Spain, native scribes would separate its components and write it as *in atl in tepetl* (the water, the mountain).

During the colonial period, the term *altepetl* was often translated into Spanish as *ciudad* (city) and *pueblo* (people, settlement). The latter meaning is more accurate than Spanish or English terms that emphasize European-style urban entities, so scholars have turned increasingly to using the Nahuatl term to describe these ethnic city-states of greatly varying size. Nahuatl writers themselves would apply the term to describe small communities in Mexico and Spain as well as to areas as large as Peru, Japan, and Africa. The *altepetl* was composed of named subunits called *CALPULLI*, or *tlaxilacalli*.

The defining characteristics of the *altepetl* include a *TLATOANI* (ruler), a central marketplace (*tianquiztli*, borrowed into Mexican Spanish as *tianguis*), and the main temple of its patron deity (almost always a foundational figure), often literally replaced by a large single-nave church that is named after the community's current Christian patron saint.

By far the most famous *altepetl* today is MEXICO CITY-TENOCHTITLÁN, once the home of the ill-fated Aztec "emperor" MONTEZUMA, then the site of Mexico City. *Mexico* literally means "place of the Mexica," the ethnic grouping or subgrouping to which Montezuma belonged. The name would also be applied to the colonial region and the later independent nation.

—Barry D. Sell

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**Alvarado, Pedro de** (b. ca. 1495–d. 1541) "conqueror" of Guatemala Born in Badajoz, Spain, Pedro de Alvarado first reached the New World in about 1510. He joined his uncle on HISPANIOLA, moved to CUBA, and participated in JUAN DE GRIJALVA DE CUÉLLAR's expedition to the Yucatán coast in 1518. The following year, he returned to the mainland as a leading captain in HERNANDO CORTÉS's conquest of the Mexica (Aztec) capital, TENOCHTITLÁN. During that campaign (1519–21), Alvarado gained a reputation for ambition and brutality; for example, he was blamed for the 1520 massacre of unarmed AZTECS in the city.

In 1523, encouraged by Kaqchikel MAYA envoys, Alvarado convinced Cortés to back a campaign into highland GUATEMALA. The invading force of 250 Spaniards, several dozen Africans, some 3,000 Central Mexico Nahuatl, and thousands of allies from Oaxaca encountered a fractured political landscape. Exploiting the rivalry between the K'iche' (Quiché) and the Kaqchikel, Alvarado aligned with the latter, establishing a foothold in the Kaqchikel capital of IXIMCHÉ (renamed Santiago) in 1524. However, Spanish control in Guatemala was tenuous, and exorbitant tribute and labor demands backed by excessive violence led to the Kaqchikel Rebellion (1524–30). Alvarado left the highlands in 1526, returning to Spain. While Pedro de Alvarado has long been viewed as the conqueror of Guatemala, in fact, it was thousands of Mesoamerican indigenous allies—aided by indigenous disunity and the spread of epidemic DISEASE—and the 1527–29 military campaign by Pedro's brother, Jorge de Alvarado, that made a permanent Spanish presence possible.

Pedro de Alvarado was said to be handsome, a fine horseman, garrulous, sometimes cruel, vain about his clothing and appearance, and in love with his common-law

Nahua wife, Luisa (a daughter of the ruler of TLAXCALA), with whom he had two children. He later married, one after the other, two of the sisters of the duke of Albuquerque.

Alvarado spent the first half of the 1530s traveling between GUATEMALA, HONDURAS, and PERU, attempting to capitalize on conquest opportunities. In 1537, he traveled back to Spain to secure the governorships of Honduras and Guatemala. Charles I initially granted him both posts for the next seven years. After returning to MEXICO, Alvarado was helping to suppress the MIXTÓN WAR in New Galicia (western Mexico) when he was trampled by his own horse. He died several days later, on July 4, 1541.

—Spencer Delbridge  
Matthew Restall

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**amauta** According to one 16th-century chronicler, the sixth ruler of the INCAS, Inca Roca, founded a number of schools in the capital city of CUZCO. There, young noblemen were trained in a variety of disciplines, such as poetry, music, philosophy, history, and astrology. They were also taught how to “read” and record information using a sophisticated system of woven, colored knots known as QUIPUS. The men who taught at these advanced schools were *amautas* (philosophers, wise men). In Cuzco, *amautas* were celebrated orators and storytellers. This specialized and highly venerated group of poet-historians crafted a wide range of works, which they recited both publically and in private ceremonies for the Inca elite. Because these works were transmitted orally (perhaps with the assistance of the *quipus* as mnemonic devices), most of these works were lost after the Spanish conquest. Nevertheless, in their efforts to record the history of the Inca Empire, some Spanish chroniclers turned to the *amautas* for their accounts of the preconquest past. For example, the 16th-century work of the Jesuit priest Blas Valera offers a unique view of Inca history based largely on the testimonies of the *amautas* who served under the Inca ruler ATAHUALPA.

—J. Michael Francis

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**Amazon** The geographic and cultural area known as Greater Amazonia (Amazon Basin) includes the watershed of the Amazon River, the watershed of the Orinoco

River, the Guiana Highlands, and most of the Brazilian Highlands and northeastern BRAZIL, and extends westward to the foot of the Andes. It encompasses tropical rain forest, dry forest, thorn scrublands, and savanna. In contrast to the Andes or the Pacific coast, the prehistory of Greater Amazonia is not well known. It is clear, however, that the inhabitants of the area mastered a difficult environment and developed a sustainable agriculture. Indeed, food surpluses supported population growth.

When Europeans arrived in the 16th century, as many as 5 million people may have inhabited Greater Amazonia, with some societies organized as stratified chiefdoms. The Omagua, whose settlements were located along the Amazon River and the lower Napo River, may have reached this level of complexity but did not leave monumental remains. Other groups, in the Venezuelan Llanos of the central Orinoco and to the south of the Amazon River, built towns linked by causeways and roads in both the forests and on the savannas. In the south, towns were surrounded by baulks and ditches, areas of raised fields, and artificial fish ponds (see VENEZUELA). Settlements in the north had large and small mound complexes, as well as causeways and raised field complexes, but were designed somewhat differently.

While the generally accepted archaeological record begins about 12,000 years ago, with evidence of human occupation in southern and eastern Brazil and the western Amazon region in modern COLOMBIA and ECUADOR, human entry into Greater Amazonia may have been considerably earlier. During the Pleistocene period, which lasted until the onset of the warm Holocene about 10,000 years ago, the climate was as much as 41° Fahrenheit (5°C) cooler, and there was less rainfall. The forest that covered the heart of the Amazon watershed included trees adapted to cooler weather; these species today are found in the cloud forests of the eastern slopes of the Andes in the west and on the high peaks of the Guiana and Brazilian Highlands in the east. Until the end of the Pleistocene, the northern shore of South America and some distance inland was semiarid savanna with dry forest. Gallery forests fringed the rivers. This more humid environment supported trees and other plants found in the humid rain forest and offered access to important resources not found on the savanna. Thus, this semiarid environment offered many more food resources, both plants and animals, than was originally believed. To the east of the Guiana and Brazilian Highlands, a corridor of dry forest terrain extended south and west along the southern edge of the rain forest. This may have offered familiar resources to migrating populations, and archaeologists believe that one major route of entry into the Amazon region was along this arc of dry forest and savanna.

The Pleistocene period ended abruptly. Within decades, the average temperature increased and rainfall patterns changed, with the northern savannas and north coast of South America now receiving more rain. Increased rainfall and water from melting glaciers in turn



A man and a young boy paddle across the Amazon River near Iquitos, Peru. (Courtesy of J. Michael Francis)

increased the discharge from the headwater rivers into the main stream of the Amazon River. The sea level rose, and flooding now occurred in the lower valleys of the eastern Amazon and its tributaries. The rivers of central and western Amazonia were also affected, flooded by the backed-up water; they are still reexcavating the sediment deposited in their beds today. Around the central rain forest of Greater Amazonia, with a new assortment of species, lay the dry forest and savanna zones of the Llanos of Colombia and Venezuela, the *cerrado* of eastern and southern Brazil, and the Llanos de Mojos in BOLIVIA. Despite the rapid environmental changes, however, archaeologists have discovered numerous sites dating back 10,000 years that indicate human adaptation to the changing weather patterns. The appearance of sites at about 10,000 years ago also reflects an increase in the population, which may have first entered Greater Amazonia several thousand years earlier.

The dry forest region of eastern and southern Brazil included many wild rhizomes and tubers that stored starch over the dry season. Many of these plants may have been gathered by foraging peoples. At the beginning of the Holocene period, crops such as *Ilerén*, taro, sweet POTATO, and MANIOC (cassava) began to be cultivated. In time, manioc was being processed into a dry meal that

could be both stored and easily transported. Peanuts, which probably grew wild on riverbanks, were also cultivated over time, as were hot peppers. In the rain forest, root crops were supplemented by tree fruits and palm nuts and shoots. Some 7,000 years ago, MAIZE, which had been domesticated in MEXICO, was being grown in the forested lowlands of eastern Ecuador. Amazonian foragers also gathered plants with medicinal or hallucinogenic properties (see MEDICINE) and constructed their dwellings from trees using palm fronds and grasses for thatch.

The inhabitants of Greater Amazonia prospered, with increased food production leading to larger populations and greater social and political complexity. These peoples both modified and extended their environment. On the savannas of the Llanos of the central Orinoco and the Llanos de Mojos of Bolivia, where sheet flooding left the ground under water for months at a time, indigenous peoples constructed settlements on low artificial mounds and sometimes the remains of earlier villages. These were connected by raised causeways. They also constructed fields on platforms that raised their crops above the waters of the seasonal floods. Artificial fish ponds and weirs also stabilized food production. Forest resources were brought closer by creating artificial islands above floodwater levels and planting them with forest trees and plants. The

forest-dwelling societies that lived near the upper Xingú River in southern Brazil surrounded their settlements with moats and berms. These villages were also linked by raised causeways. Settlements were not isolated; rather, they appear to have been grouped into regional polities of varying size without a central authority.

The Omagua and related societies along the Amazon River westward to the Napo and Ucayali Rivers had access to a greater range of resources along the main rivers and fertile *várzea* land on which annual floods deposited silt, as well as higher land for longer-term cultivation. Omagua societies were highly militaristic; their chiefs had hundreds of warriors at their disposal, as well as huge war canoes. Although not centrally organized, the Omagua were expansionistic, moving westward and conquering new territory until the arrival of Europeans.

The Spanish initiated the settlement of the Amazonian lowlands at the foot of the Andes immediately after the CONQUEST of the INCAS. CITIES such as Sevilla de Oro and Ávila were founded in order to mine GOLD. In 1534, Fray Gaspar de Carvajal took part in FRANCISCO DE ORELLANA'S expedition down the Napo and Amazon Rivers, observing that in some places, indigenous settlements lined the banks of the Amazon for leagues. These were ruled by chiefs, and there were priests and temples. The inhabitants produced and stored enormous quantities of FOOD.

On the Atlantic coast, Sir Walter Raleigh, who sought EL DORADO as the Spanish had, extolled the wealth and fertility of the lower Orinoco, where he hoped to establish settlements. Nineteenth-century European naturalists were keenly interested in the many forms of life found in the Amazonian rain forest, while others saw it as a source of riches including gold, hardwoods, and rubber. By the early 20th century, however, the rain forest was viewed more negatively by many Europeans because it did not easily lend itself to Western-style exploitation.

See also *SERTÃO* (Vol. II).

—Patricia J. Netherly

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**Amazon women** Legends and myths of Amazon WOMEN are nearly universal, appearing from Asia Minor to India to the post-CONQUEST Americas. Although their origin is debatable, most scholars trace these female warriors back to the ancient Greeks, where they surface as antagonists in epic poems and are memorialized on tombs and shrines and represented in ART and iconography. The etymology of the word *Amazon* is disputed, but popularly

the word is understood to mean “breastless,” derived from the combination of the negating prefix *a-* and *maza* (breast), and related to the myths that the warrior women cut out their right breasts to facilitate javelin throwing in battle. An inversion of hegemonic Greek gender roles, the Amazons appear in many legendary accounts as living independently from men at the edges of civilization, controlling important resources, and occasionally battling men, but also using them for procreation.

Many of these characteristics of the Amazons are recorded in Caribbean and South American chronicles, letters, and histories from the first 50 years after conquest. While the geography and details related to the women are varied, all of the early reports have one thing in common: They seem to be products of European imagination, results of misinterpretation of indigenous testimonies, and, in some cases, purposeful deployment of the legendary figures by authors eager to inspire further exploration, conquest, and pillage. Their first appearance in a European text written in the Americas can be attributed to CHRISTOPHER COLUMBUS, who reports in his diary and in his letter to Luis de Santángel (1493) of armed and solitary women who inhabit Martinique, an island in the Caribbean.

Some of the more literate CHRONICLERS would have known of the Amazons' celebrated attributes and deeds from classic literature and early modern sources, such as the popular sequel to the novel *Amadis of Gaul*, the *Deeds of Esplandian* (1510), in which the Amazons are said to inhabit the “islands of California” led by a queen, Calafia, whence came the name of the state of California. Other early accounts appear in Peter Martyr's *Decades* (1516), in a Spanish translation of Sir John Mandeville's *Travels* (1521), and soon after in Antonio Pigafetta's account of FERDINAND MAGELLAN'S voyage around the globe (1522).

In his Fourth Letter (October 15, 1524), HERNANDO CORTÉS mentions that one of his captains reported testimonies from “the lords of the province of Ciguatán, who affirm that there is an island inhabited only by women, without a single man, and that at certain times men go over from the mainland and have intercourse with them; the females born to those who conceive are kept, but the males are sent away.” DIEGO VELÁZQUEZ DE CUÉLLAR had charged Cortés with looking for the Amazons, and as Cortés's captain details, this Amazon-inhabited island “was very rich in pearls and gold.” These kinds of accounts, in which wealthy Amazons are rumored to exist, proliferate as the conquistadores turn their attention to South America. The mythic women are found in letters written to King Charles I during the conquest of New Granada (COLOMBIA), led by GONZALO JIMÉNEZ DE QUESADA, and further south reports came in from modern-day PARAGUAY, ARGENTINA, CHILE, PERU, and ECUADOR.

The most elaborate account of the Amazons in the Indies is featured in Fray Gaspar de Carvajal's narrative of FRANCISCO DE ORELLANA'S expedition down the river

that now bears the infamous warrior women's name: *Relación del nuevo descubrimiento del famoso río grande de las Amazonas*. In 1541, Orellana, under the command of GONZALO PIZARRO, set out to find the renowned "Land of the Cinnamon." After encountering many hardships that forced them to break off from Pizarro's group to find provisions, Orellana and Carvajal, along with 50 men, navigated farther down the Napo River and what is now known as the Amazon River; eventually, they reached the Atlantic Ocean. On Saint John the Baptist day, June 14, 1542, Carvajal reported encountering hostile Indians who "intended to take us to the Amazons," of whom they had heard rumors since the beginning of the journey. Indeed, the expedition was attacked by the Amazons; these "tall," "white," "long-haired," "muscular" women fought naked, with the "strength of ten Indians," wielding bows and arrows and rallying their male subjects to nearly defeat the Spanish. Later, Orellana questions an Indian captive, who answers all of his leading questions about the female warriors affirmatively. Most of the well-known characteristics of the mythic Amazons are confirmed: They lived apart from men; they procreated through captive men, raising the female offspring and banishing or killing the males; and they controlled fabulous wealth. The witness even named their leader, Coñori, an Amazon queen who resided in a splendid palace whose walls were lined with silver and whose ceiling was decorated with parrot feathers. Of course, Orellana was unable to capture an Amazon, and the women remained elusively inscribed in oral accounts and written chronicles well into the 18th century, forming part of the "invented" America that still inspires historians, novelists, and artists.

—Michael J. Horswell

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## architecture

### MESOAMERICA BEFORE 1492

The iconic image of Mesoamerican antiquity is a temple atop a step pyramid. Temple pyramids, along with ball

courts and certain other architectural elements, are among the defining characteristics of Mesoamerican culture. Although style and engineering varied across Mesoamerica, the architecture shared essential attributes that unified it as an expression of culture. The stylistic canon included buildings such as temples, palaces, step pyramids, and ball courts. Common architectural elements included supporting substructures and platforms, moldings of various kinds, roof combs, and mosaic sculpture, as well as certain decorative motifs that were found over a wide geographical area. Thus, Mesoamerican architecture is a stylistically coherent marker of cultural patterns.

The earliest substantial architecture in Mesoamerica coincides with the first appearance of social complexity. At the site of Paso de la Amada, in coastal Chiapas, the inhabitants built a number of substantial buildings in the Early Formative period (ca. 1900–1000 B.C.E.). Mound 6 was a large dwelling, much bigger than other houses at the site. Apparently, it was the principal residence. Nearby, archaeologists have excavated a ball court that dates to about 1600 B.C.E. It is about 260 feet (79 m) long and 100 feet (30 m) wide, making it the largest construction known for Mesoamerica in this early period; it also highlights the centrality of the ball game in Mesoamerican culture. Only a few centuries later, Mesoamerica's first kings, living across the Isthmus of Tehuantepec at Olmec sites (see **OLMECS**), are shown in their colossal head portraits wearing ball game helmets. We also know from the **POPOL VUH** that **MAYA** religion and mythology ascribed a central role to the ball game in the development of social relations. Other Early Formative period ball courts have been discovered at both Maya and central Mexican sites.

Other early public buildings are known from Formative Mesoamerica at sites such as San Lorenzo Tenochtitlán, Veracruz, and Chalcatzingo, Morelos. The earliest buildings, from San Lorenzo Tenochtitlán and Paso de la Amada, are made of clay, earth, or adobe, with perishable superstructures built of wood and covered in wattle and daub. Massive earthen construction took place at San Lorenzo Tenochtitlán, an Olmec site, during the Early and Middle Formative periods. Early platforms at Chalcatzingo, also an Olmec site, are faced with rough field stones and date from the Early Formative Amate phase (ca. 1500–1100 B.C.E.).

From the Middle Formative period onward, regional traditions of architecture developed in Mesoamerica. The two most important regional traditions were that of the Maya culture of eastern and southern Mesoamerica and that of the central Mexican highlands. Other traditions existed, such as those in Oaxaca, Veracruz, and west Mexico.

### Maya Architecture

In the Maya lowlands, the earliest well-dated architecture is found at the site of Cuello in northern **BELIZE**. The structures, which date from approximately 1000 B.C.E.,



Final phase of Copán's ball court as commissioned by the city's ruler, Waxaklajuun Ub'aah K'awiil, in 738 C.E., looking south. The tarpaulin in the background protects the famous hieroglyphic stairway, the longest stone carved inscription in the entire Maya realm. (Courtesy of Janice Van Cleve)

consist of low (10-inch [25.4 cm]) platforms of earth and stone, covered with plaster floors and supporting perishable wooden structures apparently apsidal in form. Apsidal houses, still built by the Yucatec Maya, have a plan consisting of two long parallel walls enclosed at the ends by semicircular walls. Similar buildings from the Formative and Classic periods are found at other locations in the Maya area.

The earliest large and complex sites in the Maya lowlands are found in the Mirador Basin of what is today the north-central department of Petén, GUATEMALA. These sites evolved into giant monumental ceremonial centers during the Middle and Late Formative periods (1000 B.C.E.–250 C.E.). The sites include EL MIRADOR, the largest, as well as Nakbé, Tintal, and Wakna. Residential architecture is known from both El Mirador and Nakbé. At Nakbé, early Middle Formative (ca. 800–600 B.C.E.) residential architecture includes stone-faced platforms up to six and a half feet high, with vertical walls constructed of roughly shaped slabs of limestone and topped with floors made of limestone marl or plaster. By the end of the Middle Formative period at Nakbé (600–400 B.C.E.), massive platforms, measuring 10 to 26 feet (3 to 7.9 m) in height and covering 430,000 square feet (39,947 m<sup>2</sup>),

were being constructed. In one case, a structure 60 feet (18.2 m) tall was built.

Some early Maya ceremonial structures are massive constructions. The largest structures of El Mirador, the Danta and El Tigre complexes, were among the largest buildings ever built by the ancient Maya. Other substantial Formative architecture existed at sites throughout the Maya lowlands, including Lamanai, Belize; Yaxuná, Yucatán; and TIKAL, Guatemala. This architecture clearly foreshadows the styles and forms of later Classic period Maya architecture but also possesses interesting peculiarities of its own.

Architectural complexes called "E-groups" appear in the late part of the Middle Formative period at Nakbé and were also constructed early in the architectural history of other sites in the Petén, such as Uaxactún and Tikal. An E-group is composed of a pyramidal structure—usually a radial pyramid with four stairways—facing a long building to its east. The buildings are juxtaposed so that a person standing on the platform will see the Sun rise over the middle of the long building on the equinoxes and over the north and south corners of the building on the solstices. In some cases, rather than one long building, three smaller ones were built and similarly aligned. These complexes clearly constitute a particular type of architectural arrangement with ritual meaning.

Radial pyramids, mentioned above, also appear at this time. They are a widespread and persistent architectural form. These are square step pyramids with approximate quadrilateral symmetry, usually having four stairways, one ascending each side. They may or may not have inset corners and a stone temple on top. They occur in the “twin-pyramid complexes” of Tikal and Yaxhá. Some of the latest Maya pyramids are radial in form, such as the Temples of Kulkulkán at CHICHÉN ITZÁ and MAYAPÁN, dating to the Terminal Classic and Postclassic periods, respectively. Round structures, although rare in Classic Maya architecture, also appear in the late Middle Formative in the Maya lowlands. They, too, continue into the Postclassic period. Maya roads, called *sacbé*s (Yucatec Maya for “white road”), also seem to date from the late Middle Formative period. They formed an integral element of Maya architecture and cityscapes for many centuries, until the arrival of the Spanish. These causeways represent a significant engineering achievement. They were often wide, tall, and graded and ran straight for great distances, connecting either different parts of a city or sometimes linking distant CITIES with each other.

Toward the end of the Middle Formative period and during the succeeding Late Formative, carefully cut and squared stones began to be used in lowland Maya architecture. Advances in quarrying and masonry apparently led to the development of more elaborate architectural motifs, such as apron moldings and rounded corners on pyramids and platforms, both of which became enduring elements of the Classic architectural repertoire.

One distinctive attribute of Formative period Maya architecture is the construction of massive triadic temple pyramids. These consist of a huge stepped substructure, usually with inset corners, crowned by three smaller temple pyramids facing a small plaza atop the base. The largest of the three temple pyramids is set back on the substructure, while the two smaller constructions sit in front, facing each other and flanking the court. Stucco began to be used to adorn Maya building facades during the Late Formative period. Thick layers of stucco were modeled into elaborate and complex designs including monumental faces of deities. The tradition of architectural stuccos continued throughout the pre-Columbian period.

The Classic period (250–900 c.e.) represents the apogee and flourish of Maya high ART, including architecture. During the Classic period, corbelled vaulting was widely used to roof buildings. Inscriptions, low-relief sculpture, and modeled stucco adorned buildings. Many buildings were elaborately painted as well.

Regional styles of architecture developed in the Early Classic period. For example, in the northern lowlands of Yucatán, megalithic masonry is found at sites such as Izamal, Aké, Ikil, and Tepich. Some TEOTIHUACÁN influence is seen in the architecture of several important sites, including Tikal, COPÁN, and Dzibilchaltún. This influence often takes the form of *talud-tablero* terrace faces (see below under “Central Mexican Architecture”).

Distinctive regional styles flourished during the later Classic period. Scholars draw different geographic boundaries between the various regional styles, but most agree that the following stylistic areas can be recognized.

The Southern style includes at least Copán, in HONDURAS, and Quiriguá, in Guatemala. The style is distinguished by the particularly elegant and well-executed facade sculptures, as well as a tendency toward sculpture in the round, which is unusual in the Classic Maya canon.

The Central, or Petén, style is found at the major sites in the heart of the Maya lowlands, in the department of Petén in Guatemala, adjacent areas of western Belize, and southern Quintana Roo and southern Campeche in Mexico. Sites exhibiting this style include Tikal, Uaxactún, CALAKMUL, Xunantunich, and many others. The buildings are constructed of carefully coursed, well-squared limestone blocks. One outstanding characteristic of the style is the construction of towering temple pyramids. These have a square or rectangular plan, ascend steeply, and culminate in a small temple set back on the tall substructure. The temple roofs often bear large roof combs that increase their overall height. Typically, a single, steeply inclined staircase ascends the pyramid on the principal side. Some are funerary pyramids and



A fine example of a corbelled arch on the east flank of the Copán ball court. The Classic Maya never learned the art of the true arch, and thus interior rooms of stone structures were often small and narrow. (Courtesy of Janice Van Cleave)



Built ca. 750 C.E., Tikal's Temple 5 measures 190 feet (57.7 m) in height, making it the site's second tallest temple. To date, no tomb has been found inside this temple. The picture, taken in 2008, shows the newly completed restorations to Temple 5. (Courtesy of J. Michael Francis)

contain tombs, while others may have been dedicated to particular gods.

The Western style includes Mexican sites such as Palenque in Chiapas and Comalcalco in Tabasco and, arguably, the major sites of the Usumacinta river valley, such as Piedras Negras and Yaxchilán. The Western style is most easily recognized by the use of mansard roofs that convey a lightness and grace not often achieved elsewhere in the Maya area. Comalcalco is the westernmost major Maya site. Located on the alluvial plains of Tabasco where stone was not available, the buildings were constructed of fired brick.

The Río Bec style extends from the northern border of the Petén (at Naachtún) to the northwest and includes the site Río Bec, as well as Xpuhil and Becan, among others. The Río Bec style is defined by the presence of false towers that seem to imitate the giant funerary pyramids of the Petén. To the north of the Río Bec style, but overlapping it, is the Chenes style. The Chenes style is related to the Río Bec style but lacks the false towers. Chenes architecture is typified by complex geometric mosaic sculptures on the facades of buildings, including “monster-mouth doorways” in which the iconography

of the facade sculpture turns the principal doorway of a building into the symbolic mouth of a deity.

The culmination of northern Maya architecture is the Puuc style, centered in the region of the Puuc hills in southern Yucatán. It overlaps with Chenes architecture, both geographically and stylistically. The Puuc style also carries complex mosaic sculpture on the facade, but usually only above the medial molding. The masonry is quite remarkable: Walls were built with a rubble core strongly cemented with lime mortar. The core was then covered with a veneer of thin and beautifully squared stones with shallow tenons. The veneer was not load bearing but created a finely finished exterior. The engineering of these buildings is superb, and many remain well preserved. The most famous Puuc sites are located in the Puuc Hills, including Uxmal, Labná, Sayil, Nohpat, Oxkintok, Chacmultún, Xkichmook, Kiuik, and many others; however, the style extends over the entire northern plains and east to the border of Quintana Roo.

In the Late and Terminal Classic periods (ca. 800–1100 C.E.) in Yucatán, a unique manifestation of Maya architecture emerged at the famous site of Chichén Itzá. The style combines Puuc stylistic elements with central



Mexican motifs, such as serpent columns, warrior columns, *tzompantli* (sacrificial “skull racks”), I-shaped ball courts, and extensive colonnades. The central Mexico elements were once seen as evidence of a Toltec invasion from that region, but current thought emphasizes the eclectic sources of these influences (see **TOLTECS**).

The last flowering of Maya architecture took place during the Postclassic at Mayapán in central Yucatán and at many smaller sites along the Caribbean coast of the peninsula. This type of architecture was not well engineered; stones were frequently not well squared, and coursing and bonding were casual at best. Aesthetically, the style recapitulates earlier Maya elements, including radial pyramids, corbelled vaults, and stelae, but also features “Mexican” elements such as serpent temples, round temples, and colonnades. A related style emerged in the Guatemala Highlands, where double temples, an Aztec building type, occur with some frequency and ball courts proliferated.

### **Cityscapes and Settlement Patterns**

Maya buildings, both public and residential, were arranged in complex patterns. Major public and ritual structures were often arranged in relation to astronomical phenomena and physiographic features of apparent religious significance, such as caves and hills. In combination with the historical idiosyncrasies of the builders, these factors led to intricate and attractive juxtapositions of different building types.

Domestic buildings, including residences, kitchens, storage structures, and other ancillary constructions, were arranged into patio groups, or *plazuelas*, of varying sizes in which multiple buildings faced on to one or more shared courtyards. The patio groups in turn usually formed clusters that may have constituted wards or neighborhoods. The complicated patterning of residential settlement is widely believed to reflect the structure of the kinship system. The density of Maya settlement, although not high, clearly qualifies as a type of urbanism. Intensive studies of Maya settlement indicate that populations of sites were often in the tens of thousands.

### **Central Mexican Architecture**

Central Mexican architecture employed distinctive motifs throughout its history. For example, round temples and the use of columns tend to distinguish Mexican from Maya architecture. Also, central Mexican peoples constructed raised lines of masonry bordering both sides of stairways. Called *alfardas*, these vaguely resemble balustrades and are rare in the Maya area.

One of the most notable early architectural monuments of Central Mexico is the pyramid at Cuicuilco in the Valley of Mexico. In the Late Formative period, Cuicuilco grew to be a large community with a population perhaps as large as 20,000. The pyramid is round and faced with cobbles. The site was abandoned at the

end of the Formative period, possibly because of the eruption of the nearby volcano, Xitle.

At the beginning of the Classic period (ca. 1 c.e.), the site of Teotihuacán began to grow rapidly and soon became the largest city in Mesoamerica, as well as one of the largest cities in the world at the time. Its sphere of influence eventually encompassed most of Mesoamerica. The city was a carefully planned metropolis, with streets laid out in a grid pattern, creating uniform square blocks. The principal avenues ran north-south and east-west and met in the ceremonial heart of the city, at the Ciudadela, which encloses the Pyramid of QUETZALCÓATL (the Plumed, or Feathered, Serpent).

The architectural style includes several distinctive motifs. The pyramids were rectangular in plan, with several terraces and, usually, a single staircase on the principal side. The biggest structures are the Pyramids of the Sun and the Moon, which are among the largest pyramids of the ancient world. The iconic motif of Teotihuacán architecture is the “*talud-tablero*,” in which each terrace of a step pyramid was formed of a lower sloping *talud* (sloped) surmounted by a vertical *tablero* (board, panel) with a rectangular inset. The *tablero* typically projected out beyond the top of the *talud*. The combination of slopes, angles, and insets created a complex juxtaposition of planes and volumes that was visually appealing.

Residential architecture was distinctive too. The city blocks were filled with large multiroom apartment complexes built around courtyards that must have housed sizable extended families. More elaborate apartments boasted relief carvings and wall paintings, while more modest dwellings contained warrens of small rooms.

The Toltec culture of the Early Postclassic period developed in the northern reaches of Mesoamerica, but its influence and contact spread as far as the U.S. Southwest to the north and the Maya region to the south. The architecture featured extensive colonnades sometimes with anthropomorphic columns or columns with relief carving. I-shaped ball courts are associated with the Toltecs, although not uniquely so.

The **AZTECS** were the last significant pre-Columbian culture of Central Mexico. Their architecture continued the Central Mexico tradition but with new variations on the basic themes. For example, the Aztecs built double temples in which a single step pyramid supported two temples dedicated to different gods. The best-known example of a double temple is the Templo Mayor (Great Temple) of their capital, TENOCHTITLÁN, today MEXICO CITY. The Aztecs also built round temples dedicated to the wind god, Ehécatl, a version of Quetzalcóatl.

With the arrival of the Spaniards in the 16th century, many aspects of the formal architecture of pre-Columbian Mesoamerica were suppressed. Some elements survived, however, particularly in the vernacular architecture of more remote areas.

## SOUTH AMERICA BEFORE 1492

Architecture is important in the study of pre-Columbian South America, not only because it may be beautiful or monumental, but also because it imparts information about the societies that created it. Architecture covers structures of all kinds, singly, in groups, or on a regional scale. Besides buildings, it can include free-standing walls, fortresses, aqueducts, flights of terraces, roads, and the like. Particularly for societies without written records, architecture provides information about its function, as well as social and political organization, ideology, and RELIGION. The relationship between social organization and architecture may be evident in design or layout, or it may be hidden in the fabric of the structure.

The reasons why people are motivated to build public monuments cannot always be determined from the monument alone. For example, while religion and ideology are powerful motivators, they do not necessarily muster a large number of workers at a time. Nevertheless, many scholars have assumed that large architectural complexes of antiquity were built by state-level societies. This is certainly correct in the case of the INCAS and the WARI of the Andean highlands, as well as the CHIMÚ of the Pacific coast. The architecture of these societies had a recognizable state style, both in the major centers and in the hinterlands. The structures and monuments that remain today were built of materials that have withstood the passage of time. They are found for the most part on the Pacific coast and in the Andean highlands. Some societies of northern South America and parts of the AMAZON Basin built elaborate, multistoried structures of perishable materials, which have been lost except for their footprint, which can be recovered through archaeological excavation.

Architecture is often associated with groups of related or complementary structures or cities. Indeed, the Western mind associates civilization with cities and architectural style. The pre-European societies of South America produced civilizations, not all of which were fully urban but which, nonetheless, built spectacular architectural monuments.

The earliest domestic structures were found in the upper Jequetepeque and Nanchoe Valleys and are 10,000 years old. These buildings were so small they were probably used only for sleeping. A couple of thousand years later in the same area, the houses were somewhat larger and were grouped with several within eyesight. By 6,700 years ago, in the nearby Nanchoe Valley, foragers and incipient farmers had built a pair of low mounds on three levels, which functioned as the only public structures in the valley. This ceremonial center was in use for some 2,400 years, after which the mounds were covered with fresh soil and abandoned.

By this time, populations were farming full time, and ceremonial complexes in different architectural styles began to appear up and down the Pacific coast and in the adjacent highlands. At Huaricoto in the Callejón

de Huaylas, a highland valley with links to the coast, 13 superimposed ritual structures with architectural features associated with the Kotosh tradition in the form of circular, sunken hearths with ventilation shafts were found. The earliest is 4,200 years old. In the Supe Valley on the north-central coast of PERU, there may have been a long agricultural tradition perhaps similar in its early stages to the Nanchoe and Jequetepeque Valleys. By 4,200 years ago, farming populations had begun to build large platform mounds around open plazas at a site now called Caral, which was occupied for six centuries. The design reflected not only the monumentality of the mounds but also the sunken circular plazas between them. The mounds appear to have been built in two major construction phases by all the inhabitants of this part of the valley. Cut masonry retaining walls were filled with stones from the river packed in reed carrying bags. The walls were then faced with stone and plastered. There were residential areas with small houses and domestic trash near the mounds and in a large area to the southwest. The architecture of Caral indicates a number of things: First, the valley's population had made an early transition to irrigated AGRICULTURE, which supported a larger population; and second, their ideology led people to expend time and energy in erecting large mounds. Caral is not unique; there are numerous sites with large mounds in both the Supe and Pativilca Valleys. Nonetheless, Caral predates the better-known styles of ceremonial architecture by some 2,000 years.

The tradition of building large, impressive platform mounds as temples and tombs for royal individuals continued on the Pacific coast. As at Caral, autonomous groups controlling a portion of a valley but sharing a larger religious tradition built ceremonial centers in particular architectural styles. On the central coast, ceremonial centers consisted of platform mounds in a U-shaped configuration, as seen in the valleys from Huaura to Lurín—a style also evident at CHAVÍN de Huántar in the highlands and the Caballo Muerto complex in the Moche Valley. Farther north, in Supe, Casma, and Nepeña, mounds were rectangular with circular forecourts. At this time on the north coast, from the Virú Valley to Lambayeque, ceremonial platform mounds were low, with inset central stairways and rectangular forecourts. Colonnades topped each mound, and painted, molded adobe sculpture decorated the walls. The central mound was flanked by low lateral mounds, giving a U shape that antedates the U-shaped mounds at Chavín by several centuries. The orientation of the U-shaped mounds is toward the mountains, the source of water. The lateral wings may be related to the dual social organization of the society, as is the case with Mapuche U-shaped mounds and ceremonial fields today.

The culmination of the tradition of constructing large mounds of adobe occurred during the Early Intermediate period, when the religious tradition and art style known as MOCHE dominated the northern valleys. It was thought

that the area in which the Moche style in CERAMICS and architecture was prominent indicated an expansionist state, or possibly two such states, one centered in the Moche Valley at the Huaca de la Luna and Huaca del Sol (see *HUACA*). However, the Moche style is now understood to have been adopted by the elites and priests of regional polities that controlled a valley or part of a valley. Nonetheless, it is probable that the largest constructions, such as the Huaca del Sol or Huaca Fortaleza, drew on larger populations for their construction. The Huaca del Sol originally was a platform mound 380 yards (347 m) long, 175 yards (160 m) wide, and 45 yards (41 m) high. It was the largest structure built in the Americas at that time. Two-thirds of the structure was washed away by Spanish treasure hunters, who diverted the Moche River to “mine” the mound for GOLD. It appears that the function of the Huaca del Sol was primarily administrative. The religious center was at the Huaca de la Luna, which lay about half a mile to the south. It was a platform mound that measured 318 yards (290 m) from north to south and 230 yards (210 m) from east to west, and was about 100 feet (30.4 m) high. The walls of the terraces were plastered and decorated with polychrome friezes, representing the faces of divinities and other religious symbols. Between the two *huacas* was a large settlement.

In the next valley to the north of the Moche, the Chicama Valley, there were two large platform mounds at opposite ends of a relict terrace above the sea at the valley’s western edge. Known today as Huaca Cao and Huaca El Brujo, both were built during the Moche period. Huaca Cao has been excavated and friezes covering the walls of the forecourt and the faces of the terraces have been uncovered. These structures would have been awe-inspiring at the time of their use. It is not known whether Huaca El Brujo had a religious or administrative function. Cao was a ceremonial site. Nevertheless, it is probable that in many cases administrative and ceremonial functions were carried out in different areas of the complex. At Huaca del Sol and at Huaca Cao, archaeologists have found that many of the adobes carry marks that are believed to represent markings on the quota of bricks contributed by different groups in the valley.

After about 750 C.E., there were major changes in Andean society. Ceremonial centers were always important, but individual mounds were relatively smaller; however, as polities became larger, particularly on the coast and in the highlands, new architectural forms emerged. Compounds, palaces, and larger urban concentrations replaced the great ceremonial platforms and relatively modest settlements of the Moche.

On the North Coast a new society, the CHIMU, emerged some 300 years after the heyday of the Moche. Over the course of some 300 to 400 years, the Chimu, centered in the Moche Valley, conquered the coastal valleys from Tumbes in the north to Casma in the south. Their influence extended farther south almost to LIMA. Instead of building large, lavishly decorated platform

mounds, this society constructed large walled palaces, which served as administrative centers as well as the residence of the rulers. This pattern was first seen at the site of Galindo in the upper Moche Valley. This architectural form was developed most elaborately at the Chimu capital of CHAN CHAN. Here, over a period of three or four centuries at least 10 large compounds were built, each one associated with a particular ruler and his cohort.

These compounds varied in size and plan, but all were immense, roughly rectangular areas enclosed by massive walls of rammed earth (*tapia*). The tallest of these walls measured 29 feet (9 m) in height. The architectural plan of these compounds, called *ciudadelas* by archaeologists, was tripartite. Entry into the compounds was restricted, with the principal entrance on the north side leading into an immense enclosed courtyard. There were raised benches along the sides. The southern end was closed off by the walls of rooms that filled the width of the compound. There were one or more entrances into the rooms behind and likely a roof over the platform area. Apparently, this served as a proscenium, or stage, for the presentation of ritual enactments or for the ruler himself. The northern courtyard could have held an audience of hundreds of people who could then witness these rituals at a distance.

The central section of the *ciudadela* was a honeycomb of rooms and room complexes with restricted access. Some were surely the private apartments of the ruler and his family. Others had administrative functions, which are not fully understood. There were three-sided open rooms with niched walls that may have been points of administrative or ritual control. Archaeologists refer to these as *audiencias*. Despite all the investigation of the past 40 years, archaeologists are still not sure of their function. The *audiencia* complexes appear not only at Chan Chan but also in other Chimu administrative centers in the outlying valleys of the Chimu Empire. The southern third of the *ciudadela* compounds held a platform mound within which lay the tomb of the resident ruler. There was also a deep open well dug down to the water table to supply water to the palace. The remains of wattle-and-daub structures indicate that low-status people, probably retainers serving the palace, lived here. The walls of the northern and central sections of the *ciudadela* and the burial platform were decorated with modeled friezes with marine and abstract motifs in the characteristic Chimu style. There were at least four free-standing platform mounds, which were probably temples, which were located outside the area of the *ciudadelas*. These platform mounds were undoubtedly ritual centers. However, they are so heavily looted that it is difficult to say much about their architectural style. They were dwarfed by the sheer size and extent of the palace compounds and were rivaled in size by several of the burial platforms. Among the Chimu, architecture was associated with political power and the ability to command human energy.

The architecture of the INCA Empire, centered at Cuzco in the southern highlands of Peru, is the best-known of the pre-Columbian period in the Andean region. While much of Inca Cuzco has been lost to almost five centuries of European influence, there are many intact sites, such as Pisac and Ollantaytombo, in its hinterland. MACHU PICCHU has become both a cultural icon and a tourist destination. There are a number of features that characterize all Inca architecture: Building complexes were generally laid out around enclosed courtyards called *cancha*; doorways and wall niches were trapezoidal; and roofs were steeply pitched and elaborately thatched. There was usually a wall with one or two entries around the complex. Around the courtyard were four or more buildings, one to a side, with entries facing the *cancha*. The highest status buildings, those intended for the Inca ruler, his representatives, and high members of his administration, were built of the famed Inca pillow masonry. In this stoneworking technique, each stone was individually fitted without mortar, and the outer surface of the stone was finished with the center of the stone slightly raised and the edges slightly recessed, giving a pillowed effect. This stonework was sometimes used to frame trapezoidal doorways in buildings where the rest of the walling was of roughly shaped double-faced masonry with a rubble fill. The most utilitarian buildings, such as storehouses, were built of single-course stone walls. Other buildings were of adobe resting on a stone foundation. Low thatched roofs protected these buildings from the effect of rain.

Inca architects planned high-status buildings so that there would be long sight lines through multiple trapezoidal doorways or through trapezoidal windows. Sometimes the sight line ended in a trapezoidal niche in an inner wall. The stone used was carefully chosen and frequently brought from distant quarries. At the great administrative site of Huanuco Pampa, the length of an immense plaza was lined with enormous rectangular buildings with multiple trapezoidal doors opening on the plaza. It has been suggested that such buildings were used to house large groups of transient persons, such as soldiers. Within the plaza was a small, stepped platform, the *ushnu*, which was faced with fancy stonework. This was apparently intended as a kind of artificial mountain. From its summit, the Inca himself, or his representative, would officiate at ceremonies in the sight of the populace who filled the plaza.

Inca architects also worked on landscape. They designed great flights of terraces, used to grow prized crops such as maize, and walls, in conjunction with smaller structures. In some cases even the Inca roads were incorporated symbolically into settlement design. The sources of important rivers or canals were often marked by elaborately carved stone *pacchas* through which water was made to flow, replicating the landscape. At Huanuco Pampa, the two main roads entered and exited at opposite corners, creating an X-like pattern and

dividing the plaza into halves and fourths, both symbolically important to the Inca. The architecture of the Inca was deliberately intended to impress the observer and reflect the extent and power of their vast empire.

### EARLY COLONIAL ARCHITECTURE

Architecture played an important role in the creation of Spain's empire in the Americas. The destruction of indigenous temples and the construction of churches and administrative buildings symbolized the change in political, religious, and social order. The reinvention of native communities as the cities and towns of the Spanish Empire became a vivid visual reminder of the radical transformation of Latin America during the early colonial era.

The effect of the CONQUEST on Latin American architecture differed across indigenous communities. Many saw little immediate effect, and buildings continued to be constructed as before. Soon, however, mission complexes populated by Franciscan, Dominican, and Augustinian friars and civic buildings for colonial bureaucrats appeared in native villages (see RELIGIOUS ORDERS). Other native communities were forcibly relocated from widely dispersed locations into single, centralized towns known as *reducciones*, or *congregaciones*, to facilitate conversion and administration (see CONGREGACIÓN). Some of these *reducciones* were located on existing settlement sites; others were newly built. Many came to assume a similar appearance, with an open plaza surrounded by civic buildings and a nearby mission complex.

Cities such as the Aztec capital of Tenochtitlán and the Inca capital city of Cuzco were heavily damaged during the conquest. HERNANDO CORTÉS admired the beauty of Tenochtitlán but explained in a letter to the Spanish king that he had to destroy it in order to defeat and humiliate his enemy. In Cuzco, the long siege held the Spaniards in the city as the Inca army pelted them with boulders from above damaged buildings, while others were intentionally demolished by the conquerors. Nevertheless, the colonizers soon rebuilt the imperial cities, now suitable for viceregal courts (see VICEROY/VICEROYALTY). Their practices were codified in King Philip II's 1573 ordinances for town planning. The king's rules reflected the ideal of urban planning, inherited from ancient Roman cities and their Renaissance humanist champions.

In Mexico, Cortés moved into MONTEZUMA's palace, while Alonso García Bravo redrew the city plan, incorporating existing roads, canals, and secular buildings on a reticulated grid. García's plan, however, used only a quarter of Tenochtitlán's massive sacred precinct for the new central plaza, or *plaza mayor*. The rebuilding of Cuzco was similarly dependent on existing structures. The walls of Cuzco's Coricancha (Golden Temple) became the foundations of the new church and convent of the Dominican order. The round wall beneath the church apse supported a balcony for religious services.



The Church of Santo Domingo in Cuzco, Peru, built on top of the Inca temple Coricancha (Courtesy of Kelly Donahue-Wallace)

Palaces for Cuzco's Spanish inhabitants were built using the masonry from the homes of the Inca nobility. Early colonial city architecture consequently combined European Renaissance characteristics, indigenous foundations and construction techniques, and even Moorish decoration, as many churches and palaces included gilded and polychromed wood ceilings and repeated geometric or vegetal motifs.

Churches in the early colonial era were first built in the urban centers, as each of the missionary religious orders constructed a church and monastery for itself. Like the Dominican monastery in Cuzco, the Franciscan monastery in Mexico City took into account its responsibility for converting the local native population in its construction plans. An early structure at the site was an open-air chapel known as San José de los Naturales. In Peru, a similar phenomenon occurred, and urban churches included a *capilla de indios* (chapel for Indians) to segregate the churches' two populations. The Jesuit church in Cuzco, built on the ruins of the palace of the Inca HUAYNA CÁPAC, retains its Indian chapel.

Soon after the conquest, urban centers also saw the construction of cathedrals ministered by local bishops and archbishops. Cuzco's cathedral was built on the site of Inca Viracocha's palace using materials from the Inca city's buildings and massive main square. Mexico City's

first cathedral employed stones from the ruined Templo Mayor. These earliest cathedrals in the Viceroyalties of New Spain and Peru—including the one in Lima—were roundly criticized by colonists as soon as they were completed. To many colonists, the humble early colonial cathedrals were too small and plain to pay proper homage to their faith. By 1562, architect Claudio de Arciniega had completed a new plan for the Mexico City cathedral, with three aisles, side chapels, and a projecting polygonal apse; construction on the massive stone building began in 1572 and ended more than two centuries later. Lima and Cuzco also undertook the construction of newer and larger cathedrals after mid-century; Cuzco's cathedral was under way by 1560 and Lima's soon after. The Peruvian structures employed the same floor plan, with slight modifications, as the cathedral in Mexico City.

The hybrid quality of many early colonial cities was repeated in the missions erected to convert indigenous peoples to Christianity. Although generally based on the European monastery plan, with a church located within a walled atrium and a convent surrounding a cloister, missions in Latin America were adapted to the needs of the new context. It was common in both viceroyalties, for example, for mission complexes to rest on the foundations of indigenous temples, a solution that was not only practical but also a potent symbol of religious imposition.

Open chapels may have been another adaptation to the evangelical context. These structures provided a covered balcony or chamber to protect a consecrated altar but otherwise opened on to the mission atrium. The specific form of an open chapel varied from site to site; the most elaborate structures had rib vaulting and multiple chambers, resembling the hypostyle mosques of southern Spain. Although open-air masses were not unknown in Europe, the popularity of these structures in early colonial Latin America suggests that they were concessions to the outdoor rituals characteristic of indigenous religions. Similarly, the ornamentation on many churches in New Spain employed Renaissance architectural features alongside the glyphlike relief carvings of the so-called *tequitqui*, or Indo-Christian style. Other sites appear to reflect the tastes of the Moorish-influenced, or Mudejar, art of southern Spain. The architecture of missions constructed at the end of the 16th century in Peru, on the other hand, displays a consistently classicizing architectural vocabulary, with round arched entrances located on the sides of the church nave.

The architecture of the early colonial period was constructed principally by indigenous craftsmen, who employed familiar building techniques including coursed masonry, rubble-core walls with stone revetment, and wood-beamed ceilings. The building plans reflected native traditions and European sources and models. Between 1520 and 1570, however, European craftsmen began arriving in the Americas in ever greater numbers, and architecture in urban centers came to be dominated by guilds. These organizations of carpenters, bricklayers, stone masons, and others controlled the professions through their ordinances. The rules addressed everything from the ethnicity of members—some guilds excluded native practitioners—to training and contracts.

See also ARCHITECTURE (Vols. II, III, IV); ART (Vols. II, III, IV).

—Clifford T. Brown  
Kelly Donahue-Wallace  
Patricia J. Netherly

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**Argentina** The name *Argentina* is derived from the Latin word for SILVER, *argentum*, and was popularized by Spanish poets during the Renaissance. Myths about Argentina's great silver wealth began almost immediately after the arrival of the Spanish and also are responsible for the name of Argentina's principal river, the Río de la Plata, or "river of silver." For most of its early history however, *Argentina* was not the term used to describe the colony; instead, it was referred to as a collection of provinces, with the Río de la Plata Province as its default head. Argentina covers most of South America's Southern Cone. It is bordered by the Atlantic Ocean on the east and the Andes Mountains (and CHILE) on the west. The Paraná-Pilcomayo river system marks much of its northern border with PARAGUAY and BOLIVIA, while it extends to South America's southeasternmost tip. It is separated from URUGUAY by the River Plate Estuary, where its modern capital and largest city, BUENOS AIRES, is located.

Argentina's northwest was home to nearly two-thirds of Argentina's pre-Columbian population. Most groups were agriculturalists who irrigated high-yield crops, allowing towns and villages to develop (see AGRICULTURE). The most advanced and largest of the groups were the Diaguitas. The Diaguitas' villages were not large but were organized enough to provide LABOR to build dams and wind walls. The INCAS conquered some Diaguita villages, while others kept Inca expansion at bay; nonetheless, most Diaguita settlements showed some traces of Inca influence in their ART, language, and RELIGION. The Diaguita were often polygamous. Most wore wool CLOTHING from guanacos and llamas, and many developed tools and ornaments made of copper, GOLD, and silver. Less advanced neighbors of the Diaguita included the Comechingone, who resided near modern Córdoba, and the Juríes (Tonocontés), who practiced flood farming in the flatter saline plains farther away from the Andes.

Many of Argentina's pre-Columbian inhabitants were nomadic hunters, as the open grasslands of the Pampas, Patagonia, and Tierra del Fuego fed an abundance of wandering rhea and guanaco. The most prominent of these groups were the Querandí, who inhabited the Pampas southwest of the River Plate, and their southern neighbors, the Tehuelche Guenakén. Even though the Pampas are vast and Tehuelche villages consisted of transportable tents, each Tehuelche village had well-established hunting grounds. Entering a neighbor's grounds without permission was a serious offense, which at times led to violent clashes. Tehuelche leadership was usually hereditary, but ineffective leaders were abandoned by villagers.

Their proximity to the sea meant that the Chanik Tehuelche and the Ona of Tierra del Fuego often hunted smaller game and fished. Each nuclear FAMILY usually owned a canoe, and each member had a task while aboard it. Killing a seal meant that several families could eat for weeks at a time. Smaller prey included penguins, cormorants, herring, and mussels. These societies were egalitarian

and patrilineal. The supreme being Watavineva was life maker, life taker, and creator.

The Alcaluf, Yahgan (Yagán), and Chonos inhabited Argentina's extreme south. Like the Tehuelche Guenakén, these groups were nomadic but had territorial divisions and even their own waters. During part of the year, the Yahgan lived in conical dwellings made from sticks and covered with animal skins, which they also used for clothing. The Chonos more frequently wore cloth that they crafted from dog fur and tree bark fiber.

The Huarpes resided on Argentina's eastern Andean slope. These agriculturalists possessed llamas and used irrigation techniques to grow quinoa, maize, and beans. In the 15th century, the Huarpes were incorporated into the Inca Empire. The Puelche-Guanakén and the Pehuenche were nomadic hunter-gatherers whose territory straddled the Andes. Both groups were multilingual and traded animal skins in Chile and Argentina. The Pehuenche reliance on the nut from the Araucaria pine was the primary feature that distinguished them from their Puelche neighbors.

The CONQUEST of Argentina began largely as an extension of Spain's conquest of the Inca Empire in PERU. By pushing south from Peru, and from the Atlantic into the Río de la Plata, the Spanish hoped to find more precious metals and ways to more efficiently ship the silver and gold they continued to seize from the Inca (see MINING).

Juan Díaz de Solís discovered the mouth of the River Plate in 1516, but soon after stepping ashore, he and his men were killed by local Querandí Indians. FERDINAND MAGELLAN explored the estuary as well, in 1520, but avoided the Querandí and continued along his southerly route to the Pacific. Sebastian Cabot explored the Atlantic coast in 1527 before founding the soon-to-be-abandoned town of Sancti Spiritus along the Paraná River. Cabot returned safely to Spain, and Charles I decided to fund an impressive force of 1,600 to accompany PEDRO DE MENDOZA in his attempt to settle Argentina's east coast. Mendoza founded Buenos Aires in 1536, but such a large contingent proved difficult to feed. Spanish desperation at a lack of food and supplies provoked new hostilities with the Querandí, and Mendoza soon abandoned his men. He later died on his return voyage to Spain. In the meantime, Mendoza's subordinates had followed the Paraná upriver; they founded Asunción in 1537.

The development of Argentina's northwest was also deeply affected by the rise and fall of the Inca Empire. DIEGO DE ALMAGRO, fresh from his conquest of the Inca in partnership with the Pizarro brothers, passed through the northwest on his way to Chile's central valley in 1535. Diego de Rojas led a longer incursion from Peru in 1547, eventually reaching the Paraná but not making contact with Asunción.

New expeditions from Chile focused on settling the Tucumán region, which was thought to be both a good source of indigenous labor and a more direct route to Upper Peru. In 1553, Francisco de Aguirre founded the first permanent Spanish settlement in the region,

Santiago del Estero. During the same decade, other towns developed in the region but were soon abandoned after local indigenous groups attacked them. By 1560, Chile's colonists had quickly depleted Santiago's local indigenous workforce, and its *encomenderos* sought new sources of labor (see ENCOMIENDA). This led to the founding of Mendoza in Huarpe territory in 1561. Although the mountain pass from Santiago to Mendoza was closed by snow for much of the year, the trek took only eight days.

See also ARGENTINA (Vols. II, III, IV); BUENOS AIRES (Vols. II, III, IV).

—Eugene C. Berger

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### Arias de Ávila, Pedro (Pedrarias Dávila, Pedrarias)

(b. ca. 1440–d. 1531) *Spanish conquistador, governor of Panama, and conqueror and governor of Nicaragua* Born in Segovia ca. 1440 into the lesser nobility, Pedro Arias de Ávila, or Pedrarias, as he was later known, served as a soldier in many of the European wars of the early 16th century. He married Isabel de Bobadilla y Peñalosa, from a wealthy and prominent FAMILY whose influence helped him gain entry to the court of King Ferdinand. In 1513, Ferdinand named Arias de Ávila to the position of governor of the new colony of Darién, which had been founded in 1511 by VASCO NÚÑEZ DE BALBOA.

Along with his wife and family, Pedrarias sailed to the isthmus of PANAMA in early 1514 as captain general and governor of the region of Castilla de Oro, making him the first royal-appointed permanent Spanish governor on the mainland Americas. Authorized to conduct the formal investigation, or *residencia* trial, of Balboa, whom he believed to be a dangerous obstacle to his governorship, Pedrarias suspended the investigation and made a pact with Balboa to ensure his support and that of other colonists, even arranging for the marriage of Balboa to one of his older daughters who had remained in Spain. Nevertheless, the men remained rivals, and Balboa planned to launch a new expedition of discovery to explore the Pacific Ocean, which he had discovered the year before (1513). Known for his ruthlessness and violent temper, Pedrarias tricked Balboa and seized his

ships and supplies. He then had Balboa arrested and resumed his *residencia*. Fearing reprisals from Balboa's many supporters, Pedrarias accused Balboa and several of his leading captains of treason. They were executed by beheading in early January 1519.

Pedrarias then began to send out conquest expeditions both northward and southward from Panama City, which he founded in 1519. However, a new governor arrived in 1520 to relieve Pedrarias of his governorship and conduct his own *residencia* trial. The new governor's quick death from natural causes and his replacement's weakness allowed Pedrarias to emerge exonerated from the charges against him of cruelty and abuse of power in office.

From the end of 1520 until 1527, Pedrarias moved northward and began the CONQUEST and occupation of modern-day NICARAGUA, founding the town of León and ruling the region with an iron hand. Executing many of his rivals, including several of his own lieutenants, such as GIL GONZÁLEZ DÁVILA, Pedro Arias de Ávila died on May 30, 1531, in León.

—John F. Chuchiak IV

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**arms** See WARFARE.

## art

### MESOAMERICA BEFORE 1492

Mesoamerican material culture is divided into four major periods: the hunter-gatherer societies of the Archaic period (8000–1600 B.C.E.); the socially stratified farming communities with early ceremonial centers of the Formative period (1600 B.C.E.–C.E. 200); the Classic period (200–850 C.E.), characterized by the construction of major ceremonial centers associated with urban centers; and the Postclassic period (850–1519), which began with the collapse of major ceremonial centers and ended with the creation of relatively militarized states and the emergence of the Aztec Empire (see AZTECS).

A division between public spaces used for ceremonial practices and as open-air markets and private spaces, which often correspond to the archaeologically identifiable living spaces of local elites, emerged in the ceremonial sites built in the Early (1600–900 B.C.E.) and Middle (900–400 B.C.E.) Formative periods. For example, the Paso de la Amada site in Chiapas (ca. 1600 B.C.E.) and La Venta in Veracruz (ca. 800 B.C.E.) both feature a central axis of orientation and are composed in part by platforms that surround a large, open plaza. Moreover, La Venta includes two major architectural features that

recur in Mesoamerican ceremonial centers throughout the Classic and Postclassic periods: a ball court (usually I shaped) and a pyramid (see ARCHITECTURE).

The first pan-Mesoamerican artistic style, usually called the "Olmec style," also emerged during the Formative period (see OLMECS). The Olmec style may have originated in or been adopted relatively early in the Gulf Coast centers of San Lorenzo, La Venta, and Tres Zapotes, or in the Central Mexico site of Chalcatzingo, from where it spread to other regions. Some of its central motifs are human figures with flaring upper lips (which may represent jaguar-human hybrids), the use of flame-shaped eyebrows, and clefts atop human heads. Other motifs include "baby-faced" figurines with cranial deformation, and carved monumental heads with helmet-shaped headdresses, which may depict actual rulers and might have served as thrones.

The emergence of a calendrical system native to Mesoamerica—composed of a 260-day divinatory count, a 365-day count, and among the MAYA, the Long Count with a mythohistorical starting point—provided a key cultural context for the development of regional artistic styles on many media: stone, frescoes, portable ceramic objects, and CODICES. The Maya and the ZAPOTECAS are two Classic period societies notable for their development of a complex iconographic tradition that merges naturalistic and abstract depictions of humans, animals, and natural forces with the calendrical system described above and a writing system. Each Classic Maya ceremonial site had its own accretive building program, which was controlled by local rulers. One of the main purposes of this program was to celebrate the life and warfare exploits of the *k'ubul ajaw* (divine ruler), who ruled over a specific polity designated with an emblematic glyph. Maya artists erected stelae and carved lintels depicting these rulers as they assumed office, performed public rituals, communicated with their ancestors, conducted warfare, and commemorated the ending of a *k'atun* (20-year period). Although Maya artists did not depict an individual's facial features, they replicated elite dress with great care, including details such as embroidered motifs on the robes of elite WOMEN. Rulers were often depicted in stereotypical poses wearing elaborate feather headdresses and holding a wide bar decorated with celestial motifs. Each successive ruler attempted to expand on his predecessor's architectural and iconographic plan. Elites also commissioned and exchanged polychrome pottery, figurines, and engravings carved in costly materials, such as jade and OBSIDIAN.

The epitome of Classic Zapotec material culture is found at MONTE ALBÁN, which featured monumental architecture, elite tombs and living quarters, and a large assembly of stone carvings, some of which were recycled from other sites in the Valley of Oaxaca. Perhaps the most striking set of depictions of the human figure from this site are the so-called Danzantes, a large group of slabs, each showing an individual often accompanied by



a name glyph. Although these individuals were originally thought to be sacrificial victims, a recent reconstruction of the building to which the engravings were attached suggests they are individuals ordered by age and social rank. Other large engravings on stone slabs include groups of ball players at other sites in the Valley of Oaxaca, such as at Dainzú.

Zapotec tombs located throughout Oaxaca often contained large ceramic effigy vessels depicting specialists dressed as supernatural beings and/or deity complexes, including the rain deity Cocijo, the MAIZE deity, and other entities that may have been deified ancestors. The iconographic system exemplified by these vessels is closely related to Zapotec epigraphic writing and the day signs in the divinatory calendar. While Zapotec glyphic writing is not yet fully understood, it has been proposed that a number of public monuments contain information similar to that depicted on Maya stelae, such as names of rulers, actions performed, and dates of public ceremonies.

In contrast, although the Central Mexico site of TEOTIHUACÁN generated a number of influential forms of symbolic and material expression, it possessed no systematic writing system, and its architectural program does not appear to emphasize the actions of individual rulers. At its height, around 500 C.E., Teotihuacán was the most densely populated urban center in Mesoamerica (with about 200,000 inhabitants), and artisans and workers from the Gulf Coast, Oaxaca, and Maya regions coexisted there. Teotihuacán's characteristic *talud-tablero* building style, which features a slope-flat step progression, influenced building styles as far away as the Maya sites of COPÁN and CHICHÉN ITZÁ. The city's iconography for a rain deity (featuring fangs and circular eye ornaments) and a plumed serpent deity, on display in the Temple of QUETZALCÓATL, was diffused widely throughout Mesoamerica, along with tripod ceramic vessels and stylized flat masks in jade and other precious materials. Various locations in the city featured fresco paintings of water-giving deities, aquatic motifs, jaguars, and dancing warriors bearing hearts attached to spears; some of these images are also depicted on small pottery vessels. The standing of the city as a locus for craft production, trade, and iconography is attested by the depiction of a Teotihuacán envoy meeting a Zapotec noble on the Lápida de Bazán; moreover, various texts and stelae attest to the links between Teotihuacán and K'inich Yax K'uk' Mo, a ruler of Copán.

Throughout Mesoamerica, a major transition in architectural and material culture began in the Early Postclassic period. Some sites, such as the Classic Maya-influenced murals of Cacaxtla, Puebla, and the Mexican-style regalia of Maya nobles depicted in Terminal Classic stelae at Seibal, attest to cross-regional influences. Northern Yucatán witnessed the emergence of the Puuc style, characterized by tall ornamental combs placed atop structures, and the building of shallow, fake temple facades atop pyramid structures. The site of Chichén Itzá,

which began as a Classic-period center, was expanded in the Postclassic with the construction of a new district featuring a pyramid, a columned hall, and monumental stone sculptures depicting eagle warriors, jaguar warriors, and skull racks (*tzompantli*) that appear to be strongly influenced by similar structures in the Postclassic Central Mexico site of TULA. Although earlier scholars interpreted these similarities as evidence of a military conquest of Maya sites by Central Mexico armies, more recent work suggests a more complex set of trade, diplomatic, and/or political interaction among elites.

Postclassic and early colonial Mesoamerican codices—texts painted on tree bark paper featuring the pictographic writing system of Central Mexico and the syllabic glyph writing in the Maya region—contain a wealth of information about Mesoamerican cosmology, calendars, sociopolitical history, and elite genealogies. While very few extant codices date from before the Spanish CONQUEST, those produced shortly after 1521 share many stylistic and structural elements with their pre-Columbian counterparts. There exist four pre-Columbian Mayan texts that contain, among other elements, calendrical calculations and cosmological events associated with specific dates, as well as data on lunar phases and eclipses.

Central Mexico codices can be divided into three broad pictographic traditions. The Mixtec tradition is represented by four pre-Columbian texts—Bodley, Colombino-Becker, Zouche-Nuttall, and Vienna—and four early colonial works—Becker II, Egerton/Sánchez Solís, Muro, and Selden. These works provide a narrative about the emergence of the MIXTECS from a mythical tree at Apoala and the creation of the world; they also contain detailed accounts about the life and deeds of specific Postclassic Mixtec rulers, such as Lady Six Monkey and Lord Eight Deer. The Mexica (Aztec) tradition is represented by the bark-paper texts now known as Borbonicus, Tonalamatl Aubin, Telleriano-Remensis-Vaticanus A-Ríos, and Tudela. Finally, the Borgia Group, all made of hide, consists of texts known as Aubin 20, Borgia, Cospi, Fejérváry-Mayer, Laud, Porfirio Díaz Reverse, and Vaticanus B. It is unlikely that the Borgia and the Mexica texts were painted before 1521 but rather were produced shortly after the Spanish conquest; together, they contain about 102 pictorial almanacs focusing on the cosmological order and the 260-day divinatory count. Many of the elements employed in the Mixtec, Mexica, and Borgia traditions resemble one another, and authors trained in this “international style” were probably able to decode them, regardless of which Mesoamerican language(s) they spoke.

Finally, in their capital of TENOCHTITLÁN, the Mexica people built characteristic structures such as the Templo Mayor, which was constructed in seven stages (each associated with specific Mexica rulers) and has two temples on its summit. The Templo Mayor contains multiple iconographic references to the emergence of the tutelary deity Huitzilopochtli. One of the major original Mexica

contributions to Mesoamerican art was the production of public stone sculptures on various scales. Some of these, such as the Teocalli of the Holy War, refer to both former Mexica rulers and to Mexica deities. Others, such as Tizoc's Stone, depict military victories over other Mesoamerican communities. The Mexica stone calendar, discovered in the 18th century, refers to the four previous ages of the world and depicts the 20 day signs in the divinatory count. Other statues depict a variety of Mexica deities, such as Xipe Totec, Xochipilli, and Coatlicue, or the specialists who represented them in public ceremonies. In spite of major changes and discontinuities, there exist many common iconographic and calendrical traditions that would have rendered some of the Late Postclassic material culture familiar to Mesoamerican artisans from the Late Formative period.

### SOUTH AMERICA BEFORE 1492

In the ancient Americas, art was a part of life. The finest art objects were made for the elite of society, but beautifully made CERAMICS or colorful beaded necklaces are often found in otherwise simple graves. South America can be broadly divided into two main cultural areas: the Andes and the AMAZON. While the arts of the Andes are fairly well known, those of the Amazon are not. Other than some ceramic figurines, not much has survived the wet, warm climate of the jungle. It can be speculated, however, that early Amazonian arts were similar to those of today, which are characterized by elaborate featherwork, wood carvings, and ceramics.

Artwork in the Andes consisted primarily of TEXTILES, metalwork, ceramics, and stone sculpture supplemented with feathers, animal skins, and exotic hardwoods from the Amazon. While most exotic items came from the Amazon region, spiny oyster shells were brought in from the warm coastal waters of ECUADOR. While all of these materials were used to make items of beauty and importance, textiles were the supreme and most valuable art form. They were used not just for CLOTHING but as ritual gifts to the spirit forces and expressions of cultural belonging and prestige. Both men and women wove, and young and old were put to work preparing and spinning the thread to be used in weaving. On the coast, COTTON was commonly used to make textiles, while in the mountains alpaca wool was most often used. Coastal and mountain communities traded fibers, thus alpaca wool is found in textiles on the coast and cotton in those made in the mountains. High-status garments often showed off alpaca fibers dyed with rare or difficult-to-use colors, such as red and blue. Sometimes entire tunics were covered in bright feathers from tropical birds, which were cut and tied to the fabric to form a design. The massive quantity of feathers required for such costumes, and the need to import them from the far-off jungles, made feather tunics both rare and high-status garments.

The artistry of most Andean textiles is in the fineness of the thread and weaving techniques. Some textiles are

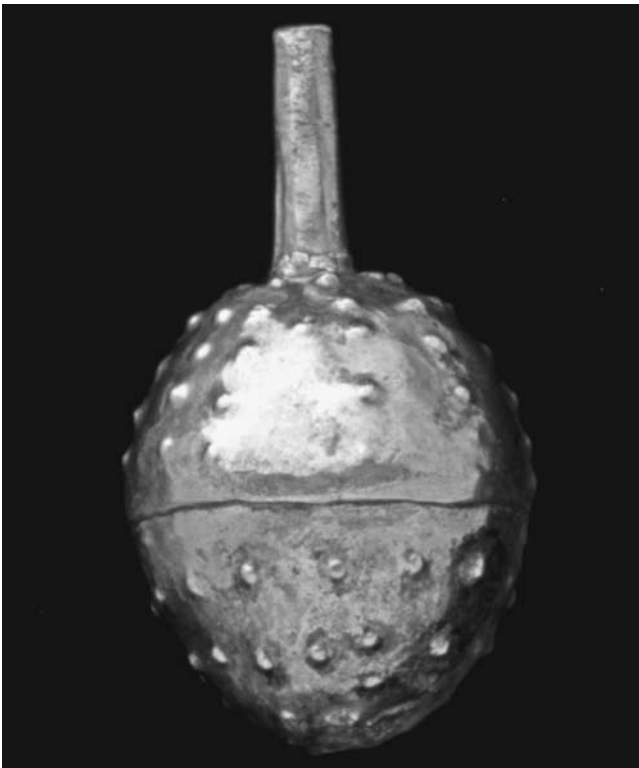
as closely woven as modern machine-made fabrics, and the Spanish favorably compared Inca cloth to European velvet (see INCAS). Andean weavers developed a remarkable number of techniques, some of which were found nowhere else. These allowed the artists to produce textiles that not only looked attractive but embodied spiritual ideas of essence and wholeness. Most garments were formed as an entire piece on the loom, not cut and sewn from pieces of cloth. It was felt that the creation of a textile on the loom gave it a spiritual existence of its own, and cutting the cloth would kill this spirit. Elite textiles frequently featured spiritually important motifs, sometimes highly abstracted. Gauzelike fabrics were created with designs that could be seen only while the fabric was on the loom. It was not particularly important for people to be able to perceive these images; rather, the fact that they were there imparted their spiritual essence to the cloth and helped give it a life and spiritual power of its own. Cloth was a common gift to the ancestors and other spirits, and other important offerings such as ears of MAIZE were made more sacred by wrapping them in cloth. Rich textiles were sometimes further decorated with embroidery, appliqués, and three-dimensional borders.

Metalwork traditions in the Andes tended to center on casting GOLD alloy in the north (modern-day Ecuador and COLOMBIA) and forming sheets of gold, SILVER, or copper in the central and southern areas. The northern casting tradition strongly influenced the artistic culture of Central America, where it reached its greatest elaboration as an art form. Cast forms in Colombia include those of the MUISCAS (1000–1550), which feature flattened, angular human figures, and the Tolima (900–1500), which are dominated by abstract images of supernatural beings. Intricate nose, ear, and mouth ornaments were also created by casting metal. Some of this jewelry included hollow forms with small pieces of metal inside so that they would make a noise as the wearer moved. Most of these items were made from a gold-copper alloy called *tumbaga*.

Artists to the south preferred to work with sheets of metal that were cut, shaped, and pieced together. Moving elements were sometimes attached with wires, which allowed the ornaments to reflect light as the wearer moved. Hollow objects that could make a noise were also a part of the southern tradition, and bells and rattles were made to adorn elite personages. The most startling innovation of southern Andean metalworkers was creating a surface of pure silver or gold on an alloy body. This allowed the artists to use only a small amount of precious metal to create a piece that looked as though it were made of pure silver or gold, taking advantage of copper's superior strength while maintaining the important surface color. Silver was associated with the Moon and gold with the Sun in many Andean cultures, thus the appearance of metal ornaments was spiritually important for religious and political leaders. In most Andean cultures, men wore more jewelry and ornamentation than women



These large gold alloy ear ornaments would have been worn by a member of the Chimú nobility. They depict divers collecting brightly colored *Spondylus* shells in lands hundreds of miles to the north, symbolizing the elite's access to luxury goods. (Courtesy of the Michael C. Carlos Museum of Emory University/Photo by Michael McKelvey)



This miniature fruit formed part of an elite Inca burial offering, which also included a bed and a set of panpipes. It is made from thin sheets of silver, carefully shaped and crimped together. (Courtesy of the Michael C. Carlos Museum of Emory University/Photo by Michael McKelvey)

wore. Many men wore ornaments in their ears and noses as well as on their heads, necks, and wrists.

The technique of firing ceramics in South America was first developed in the northern Andes, in modern-day Ecuador. Ceramic production ran the gamut from simple undecorated vessels used to cook and serve daily food to elaborate, finely crafted and decorated pieces used for ceremonial purposes or as grave goods. Figurines, whistles, and even drums were made from fired clay. There is archaeological evidence that fine ceramic wares were imported or traded among cultures. Ceramics could be decorated in any number of ways. Designs could be pressed or cut into the surface of the clay before firing, making a textural decoration, or the surface could be painted. Some cultures, such as the Paracas of southern PERU, used mineral pigments mixed with plant resin to decorate important ceremonial wares. They were not heat-resistant and so could not be used as cooking and serving vessels. Slip, a fine suspension of clay particles, was more often used to decorate ceramics. The thin layers would be painted on using a brush of hair or plant fibers, then rubbed with a smooth stone to make the surface shiny after firing.

The Valdivia culture of present-day Ecuador (3500–1800 B.C.E.) produced thousands of small ceramic figurines depicting women and men. These figures changed over time from simple, flattened forms decorated with incised lines to rounded bodies with elaborate hairdos. The later Jama-Coaque culture (350 B.C.E.–600 C.E.) is well known for its ceramic sculptures of men and women,

which are often large, with elaborate hairstyles and ornaments. These sculptures were often made using molds, which allowed artists to create multiples of the same figure. The use of mold-made ceramics spread rapidly, and the technique found some of its greatest expression among the *MOCHE*, who produced dozens of ceramic objects from a single mold. The use of molds was almost always combined with some hand building, and pieces from the same mold usually have different surface decoration. The *Nazca* (200 B.C.E.–700 C.E.) of the southern coast of Peru reached the pinnacle of color decoration in their slip-painted ceramics, using more colors than any other culture, including cream, black, red, yellow, several shades of brown, and a rich purple. Inca artists created many types of vessels decorated with geometric designs, including *urpus*, which were large storage vessels with pointed bottoms that could be more than two feet tall.

Large blocks of stone suitable for carving are not found on the coast, and so it is in the mountains that stone carving developed as an art form. The San Agustín culture of present-day Colombia (100–1200 C.E.) is known for monumental statues carved from stone. These depict fanged heads and human figures, some holding weapons. The styles range from somewhat representational to flattened and abstracted. Fangs are an important feature of Andean iconography, denoting supernatural status and perhaps referring to the powerful jaguar of the Amazonian lowlands. The same fanged motif was important to the people of Chavín de Huántar in the Peruvian highlands (900–200 B.C.E.). They carved flat stone panels with elaborate linear figures, combining aspects of different animals to depict supernatural beings and religious leaders transforming into spirit animals. These carvings were made with finely chiseled lines on a flat surface, creating a shadow line that confused the eye and created a sense of wonder that communicated the spiritual message of the *CHAVÍN* cult. Near Lake Titicaca in the central Andes, the *Tiwanaku* culture (which reached its apex 500–800 C.E.) created monumental stone sculptures that showed elites wearing intricately decorated tunics and holding ceremonial objects. These imposing monoliths represent the power of the *Tiwanaku* elite and their possession of other fine art forms, such as textiles and ceramics.

### EARLY COLONIAL

Art in early colonial South America and Mesoamerica displayed a plurality of forms, techniques, processes, influences, and contexts. While Spanish soldiers and missionaries famously destroyed many examples of indigenous art, including Andean *HUACAS* and Mesoamerican *CODICES*, the arrival of Europeans in the 1520s and 1530s had little immediate impact on the art of other native communities. Ceremonial and utilitarian textiles, ceramics, metal figurines, manuscripts, and other objects continued to be made according to traditional techniques and bore familiar symbols and decoration. Over time, art

changed as indigenous artists responded to new demands from native and European patrons and traditional avenues for professional training were replaced by monastic schools and guild apprenticeships based on European models. Artists from Spain further altered artistic expression in the Americas.

In the early colonial period several traditional arts flourished in the Andean region of South America, the most robust artistic center in the new Viceroyalty of Peru (see *VICEROY/VICEROYALTY*). Andean silversmiths continued to produce utilitarian accessories for wardrobes and figurines of precious metals, selling them to both native and European customers. They likewise expanded their repertoire of products to include liturgical instruments, altar frontals, and tablewares. Andean textile artists continued to create *uncu* tunics, with geometric *tocapu* patterns denoting authority. These garments were purchased by elite indigenous patrons and appeared in portraits painted from the 17th to the late 18th century. With the introduction of European decorative motifs, the *uncu* and other textiles incorporated new forms, including European-inspired lacelike designs, scrolls, grotesques, and figures. The artists also made new types of goods, such as wall hangings, and adopted imported manufacturing techniques and materials, including cochineal dye from Mesoamerica and sheep's wool. Ceremonial cup production was also transformed in the early colonial era. Given in pairs to commemorate political and social relationships, these vessels bear geometric motifs incised into their walls. Sometime around the 1530s, wooden *queros* began to be painted, and by the 1570s artists depicted figures and more descriptive motifs using an inlaid polychrome technique.

In addition to traditional arts, South American indigenous artists were trained in urban settings to use European materials, techniques, and models. In 1536, Fray Jodoco Ricke established the Colegio de San Andrés in Quito to train students in carpentry, painting, sculpture, and other arts and crafts. The school's students received high praise from colonial authorities for their use of Renaissance naturalism. This new, European-influenced approach to art was particularly visible in the paintings created for the South American missions in the late 16th and early 17th centuries.

In Mesoamerica, soon to be called the Viceroyalty of New Spain, many traditional arts flourished in the early colonial period, particularly manuscript painting, mural painting, feather mosaics, sculpture, and metalwork. These arts flourished largely because they were embraced by the missionaries and colonial authorities for the evangelization and administration of indigenous peoples (see *RELIGION; RELIGIOUS ORDERS*). They similarly served native patrons negotiating the new colonial context.

Soon after *MEXICO CITY* (on the ruins of Tenochtitlán) was established as the capital of Spain's colony in Mesoamerica, missionaries established schools where native peoples received religious instruction as

well as education in artistic practices. The first and most important school was San José de los Naturales at the Franciscan convent. Founded by Fray Pedro de Gante, it assumed responsibility for transforming the work of Aztec *tlacuilos* (painters), *amantecas* (feather mosaicists), and other indigenous artists into objects that would serve the evangelical effort. Gante embraced these arts for their beauty as well as for their ability to teach the stories of the Catholic faith. Like the artists at Ricke's school in Quito, the Mexican artists learned from European prints and paintings and soon adopted a more European style in their work, frequently merging the imported forms and iconography with local tastes and symbols. Some of the art of the early colonial era in New Spain consequently has a hybrid appearance, which has been labeled Indo-Christian, or *tequitqui*.

Sculpture and murals created by native artists trained at the monastic schools and in less formal contexts are located throughout the earliest surviving mission complexes in New Spain. The paintings and sculpted images illustrate the life and death of Christ, the Virgin Mary, and the saints. A famous example appears in the Church of San Francisco in Tecamachalco, where 28 narrative scenes on bark paper are glued between the ribs of the choir loft. Executed in 1562 by the indigenous painter Juan Gerson, the paintings tell stories from the Old and New Testaments to address the theme of sin and judgment.

Sculpture on outdoor chapels, known as *posas*, and on stone crosses erected in the churchyard, on the other hand, use a short-hand, almost glyphic, array of symbols to embody the tenets of the Christian faith. Seen during outdoor services, these images were intended to help convert the indigenous people to Christianity by using a symbolic and ornamental vocabulary that recalled pre-Columbian pictographs.

Manuscript painting also thrived in New Spain during the early colonial era, serving missionaries, colonial authorities, and indigenous communities. In a few very early examples, only experts can distinguish the materials and appearance of the early colonial paintings from pre-Columbian Late Postclassic objects. In most extant examples, however, European paper and the bound book format replaced skin or bark paper screenfolds, helping to date the work to the early colonial era. Artists also developed a new collection of pictographic signs to account for the Spaniards' arrival and the new historical context and incorporated elements of European-style naturalism into their images. The painted manuscripts, however, continued to offer much the same content as before the conquest, recording history and genealogy, measuring time and the complex ritual calendar of indigenous faiths, and mapping territories (see MAPS). In some cases, the manuscripts were made for native patrons; indigenous maps and other bureaucratic manuscripts were even accepted in Spanish courts as legal documents. Other paintings copied earlier codices for curious Europeans. The 1541 Codex Mendoza, for example, included pages

reproducing the tribute that subject peoples sent to Aztec rulers. Religious codices that survived the flames of evangelization were copied for missionaries who hoped to banish pagan practices; annotations in Spanish identify the deities and rituals of the past.

Feather mosaics were perhaps the most beautiful examples of indigenous art to persist into the early colonial era. Employing the traditional technique of gluing single barbs from the feathers of brightly colored birds onto plant fiber paper, colonial *amantecas* created shimmering visions of Christian themes. The iridescent barbs shift as the light moves, creating an almost electrical effect. Church officials admired these luxury goods for their beauty and commissioned artists to create miters, copes, and other vestments. The artists also created small wall hangings, including the famous 1539 image of the Mystic Mass of St. Gregory, commissioned by a native patron and sent to Pope Paul III, perhaps in recognition of his decree on the humanity of Indians.

In addition to traditional media, new types of objects were introduced during the early colonial era. Painting on cloth was widely practiced in the new vicerealties soon after the conquest. The most famous example of this type of art is the image of the VIRGIN OF GUADALUPE. According to the legend, the Virgin's image appeared miraculously on the cape of Juan Diego, an Indian, in 1531. The painting has been attributed to an indigenous painter, Marcos Cipac. Other European artistic media to gain popularity during the early colonial era include wood sculpture painted in lifelike colors, carved and gilded altar screens, and printed woodcuts.

See also ART (Vols. II, III, IV); MURALISTS, MEXICAN (Vol. IV).

—Kelly Donahue-Wallace  
Sarah E. M. Scher  
David Tavárez

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**asiento** An *asiento* was a contract or license to import African slaves to the Spanish-American colonies (see SLAVERY). For a price, the Spanish Crown awarded an *asiento* to individuals or companies to bring a specific number of captives over a number of years to designated ports in the Americas. The royal trading house, or CASA DE

CONTRATACIÓN, oversaw the contracts and collected the fees related to the transatlantic slave trade, ensuring that the Crown profited from it. The first *asientos* were issued in 1518 to don Jorge de Portugal to import 400 slaves and to Lorenzo de Gouvenot o Gavorrod to import 4,000 slaves.

The Spaniards were the first European colonizers in the Americas who could afford the high costs associated with enslaved African labor. In the late 15th and early 16th centuries, both enslaved and free African men took part in the first military ventures into the Caribbean, and later into MEXICO and PERU (see CONQUEST). Serving in Spanish armies as well as newly established households, enslaved men were in high demand among the wealthy conquistadores. The early Spanish settlers on HISPANIOLA perceived the native TAINO as too weak to labor in the GOLD mines. Moreover, the Taino resisted this work. In response to the colonists' demands, King Ferdinand and Queen Isabella allowed Spanish merchants to import captives in 1501 but prohibited the enslavement of Muslims, Jews, and those newly converted to Catholicism (see MORISCO). In 1502, the governor of HISPANIOLA, Nicolás Obando, privately introduced 16 slaves to the Spanish Caribbean. Other merchants and migrants followed suit, bringing their own and other slaves from Spain to the Americas.

After 1510, the Crown taxed each slave brought to the Americas, which quickly led to the establishment of the *asiento*. By institutionalizing the commercial slave trade to its colonies, the Spanish Crown profited from the slave trade, if not its actual transactions. By 1518, colonists in the Caribbean specifically requested blacks who did not speak Spanish because they were considered easier to control. Portuguese merchants acquired captives from local contacts and established agents along the Upper Senegambian coast and other parts of "Guinea," or Atlantic Africa (especially West Central Africa). Indeed, the *asiento* allowed contracted merchants to transport slaves directly from the Atlantic African coast to the Americas. Before 1518, the Spanish Crown required that Africans bound for the colonies first be brought to Europe to be baptized and indoctrinated as Catholics.

The *asiento* trade (and its illegal counterparts) supplied the growing colonies of Mexico and Peru, in particular. By the mid-1550s there were approximately 3,000 slaves in the Viceroyalty of Peru (see VICEROY/VICEROYALTY). The distance from the Caribbean port of Cartagena increased the prices for captives destined for urban areas, especially the coastal city of LIMA and gold-mining towns such as Carabaya in the southern Andes.

See also *ASIENTO* (Vol. II).

—Rachel Sarah O'Toole

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**Atahualpa (Atawallpa, Atahualpa)** (b. ca. 1502–d. 1533) *last independent Inca emperor* Born ca. 1502 to one of the Inca emperor HUAYNA CÁPAC's concubines from the region of ECUADOR, Atahualpa soon came to be one of his father's favorite sons and his trusted general in his northern wars. His legitimate half brother HUÁSCAR ruled over the southern part of the empire from the capital of CUZCO as regent for his father, who was campaigning in the north.

On the death of their father in 1527 from a DISEASE that may have been smallpox, Huáscar proclaimed himself Inca ruler, or Sapa Inca (see INCAS). The Inca elite in Cuzco considered him the rightful heir to the throne since he was the legitimate son of Huayna Cápac and his sister queen. They demanded that Atahualpa swear allegiance to him.

Atahualpa did not immediately rebel against his brother. For five years after Huayna Cápac's death, Atahualpa ruled almost undisturbed by his brother in the north. Then, in the year 1532, assured of his army's loyalty and the support of some of the nobility, Atahualpa rose up in rebellion against Huáscar. Atahualpa became known for his ruthlessness. In early 1532, he slaughtered all of the inhabitants of several towns that supported his brother as both a lesson and a warning. The two brothers waged a brutal civil war that cost the lives of thousands and depleted much of the empire's wealth and food supplies.

Also in early 1532, Spanish conquistadores, under the leadership of FRANCISCO PIZARRO, landed at Tumbes on the northern coast of PERU. Becoming aware of the civil war, Pizarro sent word to both opposing camps and asked Atahualpa's faction for a meeting with Atahualpa. The Inca emperor agreed to a meeting, and on November 16, 1532, Pizarro and his band of conquistadores kidnapped Atahualpa in the northern Andean town of Cajamarca. There, they held him captive, promising to release him in exchange for a ransom in GOLD and SILVER. Although the ransom was paid, Pizarro betrayed his promise, and Atahualpa remained imprisoned.

Before his own capture by the Spaniards, Atahualpa had received word that his brother had been defeated and that Atahualpa's armies had managed to take Cuzco and capture Huáscar. While imprisoned, Atahualpa sent the order to have Huáscar murdered. Even after his death in 1532, however, Huáscar's allies continued to fight Atahualpa's army.

Using the murder of Huáscar as an excuse, Pizarro ordered Atahualpa's execution by strangulation on August 29, 1533. Pizarro soon realized that this was a mistake, however. He quickly named Topa Huallpa, whom he believed would appeal to both sides in the civil war, as the new Inca emperor. Nevertheless, the war continued. Topa Huallpa allied himself with Huáscar's faction, and he and the Spaniards were soon under attack from Atahualpa's followers. Topa Huallpa died within a few months, whereupon the Spaniards reaffirmed their alliance with Huáscar's faction by placing Huáscar's brother MANCO INCA on the throne. Manco Inca helped the Spaniards

destroy the remnants of Atahualpa's army—and thus helped to bring about the final CONQUEST of Peru in 1536—before he, too, rebelled against the Spanish.

See also ATAHUALPA, JUAN SANTOS (Vol. II).

—John F. Chuchiak IV

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**audiencia** The *audiencia* (high court) was the most important and powerful colonial institution in Spanish America. It was created to address both criminal and legal matters, yet it also enjoyed extensive legislative and administrative functions. In 1511, less than two decades after CHRISTOPHER COLUMBUS's 1492 voyage, the Spanish Crown authorized the establishment of the New World's first *audiencia*, located on Santo Domingo (see HISPANIOLA). The Audiencia of Santo Domingo was in part created to counter the power of the island's viceroy, Diego Columbus.

As Spain's colonial possessions in the New World increased, additional *audiencias* were created to facilitate their governance. The first mainland *audiencia* was established in MEXICO (New Spain) in 1527, just six years after the conquest of the Aztec Empire (see AZTECS). Later, *audiencias* appeared in PANAMA (1538, abolished in 1543 but reinstated in 1564), PERU (1543), GUATEMALA (1543), New Galicia (1547), BOGOTÁ (Santa Fé de Bogotá, 1549), La Plata (modern BOLIVIA, 1559), and Quito (modern ECUADOR, 1563). By the end of the 16th century, a total of 11 *audiencias* had been established in Spanish America. Most of Spanish America's 16th-century *audiencias* consisted of a president, four judges (*oidores*), and a crown attorney (*fiscal*). Only the *oidores* voted on judicial matters.

See also AUDIENCIA (Vol. II); OIDOR (Vol. II); REGIDOR (Vol. II); RESIDENCIA (Vol. II); VISITA (Vol. II).

—J. Michael Francis

**ayllu** In the central Andean region, the QUECHUA term *ayllu* refers to the basic kinship unit that regulated social, religious, and economic relations. Governed by a hereditary ruler, or *KURAKA*, each *ayllu* consisted of extended FAMILY lineages whose members traced their descent to a common ancestor, often mythical. *Ayllu* members also shared a sacred place of origin, such as a mountain peak, cave, stream, or lake. The precise historical origins of the *ayllu* are unclear; however, archaeological and ethnohistorical evidence suggests that Andean communities organized into *ayllus* hundreds of years before the 15th-century expansion of the Inca Empire.

The emergence of the *ayllu* likely represented a long-term adaptation strategy to the region's diverse natural envi-

ronment. Under this system, *ayllu* members did not reside in the same nuclear settlement; instead, members were disbursed to various ecological zones at different altitudes, where they were able to exploit vastly different resources. For example, mid-elevation settlements cultivated MAIZE, quinoa, and various tubers; meanwhile, members of the same *ayllu* who settled at lower elevations harvested various fruits, peppers, and COCA leaves. The highest elevations were ideal for herding llamas and alpacas. All of these goods were then circulated among members of the same *ayllu*, thus making it virtually self-sufficient and guaranteeing each member access to a full complement of goods and resources. Lands were held in common and were allocated to different families based on their numbers and status. *Ayllus* were governed by the principles of reciprocity and redistribution and were typically divided into two opposing parts, known as *hanan* (upper) and *hurin* (lower).

In a land characterized by dramatic local variations in temperatures, rainfall, soils, and elevations, this “vertical economy” helped Andeans mitigate the risks posed by drought, flood, or frost. A crop failure in one ecological zone could be balanced by a surplus in another, thus this “archipelago” settlement pattern protected *ayllu* members from potentially devastating local conditions. Not surprisingly, the system required a high level of political organization and communal cooperation. Major work projects, such as the maintenance of irrigation canals, the construction of roads and bridges, and the organization and celebration of religious festivals, all required the participation of the entire *ayllu*. Men and WOMEN shared most tasks, and both contributed to the political, economic, and spiritual welfare of the community. In theory, the *ayllu* was endogamous, with members taking spouses from within the extended family networks of the same *ayllu*.

Both Inca imperial expansion (see INCAS) and the Spanish CONQUEST threatened local *ayllu* autonomy. While the *ayllu* did experience some important changes as a result of these external pressures, many Andean *ayllus* survived, and the *ayllu* continues to govern a large number of rural highland communities in modern Peru.

—J. Michael Francis

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**Aztecs** The term *Aztec* generally refers to the Mexica people, who dominated large portions of Mesoamerica from their great capital in the Valley of MEXICO and who flourished for nearly two centuries before their violent clash with the Spaniards in 1521. Of all pre-Columbian cultures of Mesoamerica, the Aztecs are probably the best known to modern scholars since their history and achievements were recorded in great detail by the early colonial Spanish and indigenous CHRONICLERS. Though the encounter with

Europeans produced much valuable information regarding their rapid demise, very little is known about their early beginnings. No pre-Columbian Aztec CODICES have survived, thus most historical reconstructions come from later retrospective accounts. Furthermore, archaeology at their capital, TENOCHTITLÁN, is hindered because the majority of the remains are buried under the contemporary urban sprawl of MEXICO CITY.

Although the designation *Aztec* has been used in the literature in multiple ways, none of the NAHUATL-speaking people (Nahuas, who included the Mexicas) in fact referred to themselves as “Aztecs”; rather, their identities were based on the kingdom or ethnic group to which they belonged. The modern appellation *Aztec* derives from the toponym *Aztlán* (Place of the Herons, in Nahuatl), perhaps an island in a lake somewhere in the northern lands of the Chichimec tribes. According to the Mexicas’ own histories, *Aztlán* was their place of origin. Oppressed by other groups or forced to relocate due to environmental stress, these particular inhabitants of *Aztlán* (there were in fact several groups who claimed descent from there) started on their long migration probably as early as the 11th century C.E.

Other origin myths tell of Chicomoztoc, or “Place of the Seven Caves,” where each of the caverns housed a different ethnic group who left for Central Mexico, the Mexica ancestors being the last to depart. They left under the command of their patron deity, Huitzilopochtli (Hummingbird to the South), traveling in eight groups called the *calpultin*, each of which numbered between seven and 20 people. These *calpultin* were headed by three men and a woman, who carried their patron gods and sacred bundles on their backs. After a long journey, which overall might have lasted for almost two centuries and encompassed some 20 stops along the way, they were among the last Nahuas to arrive in the Valley of Mexico. On arrival, some of the *calpultin* members insisted on settling in a place called Coatepec (Serpent Hill); however, according to the myth, Huitzilopochtli objected and sacrificed the dissidents. It was only after these events that Huitzilopochtli bestowed on them the tribal name by which they would become known throughout Mesoamerica, the *Mexica*. Among their stops might have been the Toltec capital of Tollan (TULA), where they could have gained important skills as builders, artisans, and warriors and acquired a taste for a more sophisticated urban lifestyle (see TOLTECS).

With the new knowledge and dress they adopted along the way, the Mexicas continued to push toward the center of the valley, which they found already densely populated. They settled first in Chapultepec, from which they moved to an isolated hill at Tizapán and became subjects of the king of Culhuacán. Although he had successfully employed the seemingly barbaric Mexica warriors to defeat his Xochimilca enemies, he soon expelled the Mexicas from his land after they sacrificed his daughter and flayed her. Following their expulsion

from Tizapán, the Mexicas continued their migration. Finally, in 1325, their long voyage came to an end when they established a settlement on a small island in Lake Texcoco, which was under the domain of the Tepanec king Tezozómoc from Azcapotzalco. According to their own myths, it was here that the Mexicas witnessed the vision that Huitzilopochtli had prophesied—an eagle perched on top of a cactus near a spring—as a sign of their promised homeland. This would be the place where the Mexicas would establish their mighty capital city, Tenochtitlán (literally “Among the Stone-Cactus Fruit,” while the name has also been associated with an early Mexica leader named *Tenoch*).

The choice of settling this desolate island might have been in part due to its defensible location; additionally, these were originally “water people” (*atlaca Chichimeca*) who drew their subsistence from lacustrine environments (such as in *Aztlán*). Alternatively, the site might have been chosen simply because it was one of the few unoccupied places in Mexico’s central valley. Regardless, the Mexicas made the most of their newly founded home. Their early ECONOMY was based on the exploitation of local resources, namely intensive fishing, hunting, and gathering. Lacking most natural resources, they traded duck and fish for stone and wood from the mainland and started to construct their houses and temples. Soon, they expanded the available agricultural land by building up *CHINAMPA*, or fertile plots of cultivated raised fields in the shallow lake bed, which provided high yields of MAIZE, beans, squash, and chilies (see AGRICULTURE). Over the years, they continued to reshape their immediate surroundings. Among other public works, the Mexicas built a long dike to control the lake’s water level and prevent the severe flooding that periodically damaged the city. They constructed several long causeways that connected the island to the mainland and an aqueduct to transport water from the springs at Chapultepec on the mainland back to the city. Thirteen years after initial settlement, a territorial conflict had forced one group to leave and establish the twin city of Tlatelolco on a smaller island to the north, thus creating two distinct groups: the Mexica-Tenochca and the Mexica-Tlatelolca. Soon, however, Tenochtitlán and Tlatelolco formed a single urban island, connected by various avenues and canals. Before long, their city was as strong and impressive as any other in the Valley of Mexico.

### AZTEC RULERS AND IMPERIAL EXPANSION

In return for this granted land, the Mexicas became the mercenaries and subjects of the Tepanec king of Azcapotzalco, the most powerful ruler in the valley at the time. Under Tepanec rule, the Mexicas participated in various wars against Azcapotzalco’s enemies. Despite their subordinate position in valley politics, the Mexicas continued to seek connections to local royal dynasties in order to achieve the coveted *tlatocayotl* status that would entitle them to establish and rule over their own dynastic kingdom. The Tenochcas soon crowned their first ruler,



Acamapichtli (r. 1372–91), son of a Mexica noble and a princess from Culhuacán, Tula's ancient ally. Similarly, in an effort to tie their emerging lineage to a powerful royal house, the Tlatelolcas chose Cuacuauhpitzahuac, son of Tezozómoc, king of Azcapotzalco, as their ruler. In 1383, the Mexicas assisted the Tepanecs in conquering the cities of Xochimilco, Mixquic, and Cuitláhuac at the southern part of Lake Texcoco; and in 1395, they took over the Otomí city of Xaltocán. Acamapichtli's son and successor, Huitzilíhuítl (r. 1391–1415), also married a Tepanec princess of Azcapotzalco, thus reducing the Mexicas' tribute load.

Huitzilíhuítl and Cuacuauhpitzahuac were succeeded by Chimalpopoca (r. 1415–26) of Tenochtitlán and Tlacateotl of Tlatelolco, to whom the Tepanecs granted the city of Texcoco as their first tribute; shortly thereafter, however, both rulers were killed during a revolt in the Tepanec kingdom. It was then left for Itzcóatl (r. 1427–40), the new Tenochca king, to centralize Aztec authority and rewrite Aztec history. Itzcóatl burned the early *CODICES* available to other religious leaders of competing groups and established the important office of the *cibuacóatl* adviser. In 1428, Itzcóatl took on Texcoco and defeated Maxtla, Tezozómoc's son and the current Tepanec king. Following this critical overthrow, known as the Tepanec War, Itzcóatl seized Azcapotzalco's kingdom and established the *TRIPLE ALLIANCE* between his ally rebel rulers Tótoquihuaztli of Tlacopan and Nezahualcóyotl of Texcoco (the town of Huexotzinco also took part in the rebellion but withdrew soon after). The alliance entailed a mutual peace agreement and the unequal distribution of tribute among the three conquering towns; however, due to its prominent military role in these events, Tenochtitlán soon became the strongest entity in the Triple Alliance. At the same time, the Tlatelolcas were denied a place in this new political order, and the rift between them and the Tenochcas grew even further.

Itzcóatl was succeeded by his nephew Montezuma (Moctezuma) Ilhuicamina (Montezuma I; r. 1440–68), who is often credited as being the true founder of the Aztec Empire. Under Montezuma's rule, the Aztecs subjugated the southern lake towns of Xochimilco, Culhuacán, and Coyoacán and embarked on an imperial expansion beyond the valley into the modern states of Morelos and Guerrero. Montezuma's reign also survived a severe drought that struck the Valley of Mexico between 1450 and 1455, and the capital's economy nearly collapsed.

Axayácatl (r. 1468–81), Montezuma's grandson and successor, followed his predecessor's example and continued to strengthen Aztec hegemony through more conquests; however, he was not always successful. For example, in 1478, Aztec forces suffered a disastrous defeat at the hands of the Tarascans, who killed more than 20,000 Aztec soldiers in a single battle. Still, as the empire grew larger and stronger, tribute began to flow to the capital's treasure houses, and exotic goods filled its markets; although each Aztec city had its own market,

the most renowned was that of Tlatelolco. By the time the Spaniards saw it in 1519, Tlatelolco was visited by 60,000 people a day and was supervised meticulously by the *POCHTECA* long-distance merchants. Even in 1473, this in itself was a strong motive for Axayácatl to conquer and annex Tlatelolco to Tenochtitlán's already existing quarters and replace its rulers with Tenochca governors.

Tizoc (r. 1481–86), Axayácatl's brother and heir to the throne, failed to follow his predecessors' success on the battlefield; as a consequence, his reign was short-lived. In fact, it has been suggested that Tizoc was poisoned by members of his own council. He was replaced by yet another of Axayácatl's brothers, Ahuítzotl (r. 1486–1502), who embarked on an aggressive expansion campaign, reaching all the way to the Valley of Oaxaca and the Soconusco, a coastal region that was known for its *CACAO* and quetzal feathers. Montezuma (Moctezuma) Xocoyotzin (Montezuma II; r. 1502–20) son of Axayácatl, was next in line (see *MONTEZUMA*). He conquered additional parts of Oaxaca; however, for the most part, he was occupied with consolidating a vast empire that had already reached a critical size for indirect control.

According to Aztec historical sources, written several decades after the Spanish *CONQUEST*, a series of menacing omens appeared early in Montezuma's reign. These omens, eight in total, prophesied the empire's doom and destruction. Indeed, it fell to this ill-fated emperor to meet *HERNANDO CORTÉS* and his soldiers in Tenochtitlán on November 8, 1519, after which he curiously submitted to their outrageous demands to hold him as captive in his own city. Although it is unlikely that Montezuma thought of Cortés as a reincarnation of the Toltec king-god *QUETZALCÓATL*, returning now to the valley to claim his throne, it does appear that Cortés himself gained his trust and manipulated him into a submissive attitude. Considered a traitor by his own council and subjects, Montezuma died on June 30, 1520, from a stone hurled at him when the Aztecs attacked the palace. After his untimely death, his brother Cuitláhuac (r. 1520) took the throne and expelled the Spaniards from the city. His rule was also cut short, however, when he died in a smallpox epidemic that had spread among the defenseless indigenous peoples (see *DISEASE*). The last Aztec king was *CUAUHTÉMOC* (r. 1520–25), Cuitláhuac's cousin, who attempted to defend Tenochtitlán from the invading Spaniards and their allies, but he was eventually captured in 1521. Four years later, in February 1525, Cuauhtémoc was executed in *GUATEMALA* under Cortés's orders. Thus ended the proud lineage of Aztec kings.

## AZTEC EMPIRE

On the eve of the Spanish conquest, the Aztec Empire extended over much of the territory of today's Mexico, stretching from the Pacific coast to the Gulf coast and from the north of the Valley of Mexico to the Soconusco region on the Guatemalan border. This was never a homogenous territorial sovereignty; rather, the Aztec



Stone statues rest against one of the stairways from several construction phases of the Templo Mayor in the Aztec capital. The final stage of the construction was completed in 1487, just three decades before Europeans first entered Tenochtitlán in 1519. (Courtesy of J. Michael Francis)

Empire embraced pockets of independent kingdoms populated by diverse ethnic groups. Still, by 1519, the joint forces of the Triple Alliance controlled an empire with 5 to 6 million people living in more than 300 indigenous communities, in a territory meticulously divided into 38 provinces. Since these provinces encompassed numerous ethnic groups and diverse languages, the Aztecs imposed their own language, Nahuatl, as the lingua franca among the conquered elite and even renamed their communities. This was the largest indigenous political entity ever to arise on Mesoamerican soil and the second largest in the New World, after the INCAS of PERU.

The driving force behind this imperial expansion was the Aztec army. From their humble beginnings as mercenaries of Azcapotzalco, the Aztecs emphasized militarism and warfare in their iconography and sacred ART, much of which echoed that of the earlier Toltecs of Tula. Every young man in Aztec society had to join the army and further prove himself as an adult by capturing an enemy on the battlefield. This achievement was publicly demonstrated by a particular haircut, and the number of captives was indicated by the length of one's cloak and the right to wear a lip plug. The army included special units maintained by the state and made up of nobles and oth-

ers who proved themselves worthy in battle; among the most prestigious were the orders of the Jaguar and the Eagle Knights. However, since the majority of the army was in fact composed of commoners who also farmed the empire's land, warfare had to be limited to the winter-time, when agricultural activity was at a hiatus.

Nevertheless, the enterprise of territorial conquest mostly began diplomatically, with Aztec emissaries sent to negotiate with local rulers. If these rulers did not join the empire voluntarily, the marching armies soon followed. With their tens of thousands of swords and spears edged with sharp OBSIDIAN blades, colorful yet fearsome costumes, and tall feathered banners, they were likely a terrifying sight for any nonconforming town. For the most part, the Aztecs left the existing social, political, and religious order intact if the conquered province provided no further resistance. In cases where military confrontation was inevitable, the armies often laid waste to the place and people and replaced the local government with an Aztec governor or a tribute collector. On rare occasions, the Aztecs even mobilized large groups of migrants from the Valley of Mexico into distant provinces, where enclaves were established among the local people. In some unstable areas, it was necessary to set

up a permanent military garrison, such as the one in the Valley of Oaxaca.

Once political relations were cemented between subject towns and the Triple Alliance, the region was reorganized as a tributary province. Although tribute depended largely on the wealth of the local rulers and the natural resources available to them, those who rebelled were required to pay higher amounts than those who joined the empire peacefully. These taxes were carefully recorded in the Aztec codices as in the early colonial manuscripts *Matrícula de tributos* and the *Codex Mendoza*. The tribute that flowed to Tenochtitlán, Texcoco, and Tlacopán included food supplies, raw materials, COTTON cloths, and CACAO beans, with the last two also serving as monetary units. At the same time, Aztec imperial expansion stimulated specialization in the provinces, since a great deal of the tribute that flowed to the capital was in the form of finished luxury goods such as jewelry and costumes for the Aztec nobility. Subject towns were further committed to participate in the long-distance trading economy of the *pochteca*; moreover, they were to allow free passage to Triple Alliance armies and provide resources and supplies to Aztec soldiers. At times, they were forced to offer victims for sacrifices in Aztec ceremonies.

In addition to the tributary provinces, the Aztecs established several strategic provinces that bordered unstable areas and important trade routes. Instead of tribute, their rulers provided “gifts” to the Aztec Empire, although once the empire expanded past a strategic province, this agreement would transform into a tributary arrangement. Other important towns, such as Cholula in Puebla, were able to remain independent from the Aztecs without developing a hostile relationship, while keeping an open economic network with the empire. Even where no direct conquest could be achieved, the Aztecs encouraged secondary liaisons through marital alliances among the royal lineages. Still, due largely to its ethnic and political diversity, the Aztec Empire was never a stable entity; rebellions were quite common throughout its short history. Even among the Tenochca political leaders there were strong disagreements, which came forcefully into play in the matter of the Spaniards’ march inland from Veracruz and their subsequent presence in Tenochtitlán. Furthermore, the Aztecs were never able to conquer resilient groups such as the Tlaxcalans or the Tarascans, and the battles with these enemies were occasionally disastrous for Triple Alliance troops. Indeed, the eventual downfall of the Aztec Empire would largely be due to these resentful conquered and unconquered groups who willingly joining the Spanish conquistadores as allies.

### AZTEC SOCIETY

Aztec society was divided along strictly defined class lines, with the *buetlatoani* (he who speaks) as supreme ruler at the top of the social structure. The ruler was elected from among the males of the previous ruler’s FAMILY and controlled his vast empire from his palace in

Tenochtitlán. His closest adviser was the *cibuacóatl* (snake woman), an office occupied by a male. The *cibuacóatl* was similarly chosen from the members of a special lineage. The position was formally established in the 1420s and outlasted even the Aztec royal lineage when a *cibuacóatl* served as the last Aztec *tlatoani* from 1525 to 1526. While the *buetlatoani* was considered a divine incarnation of the celestial authority, the *cibuacóatl* represented the terrestrial aspects of the rule. Together, they embodied the Aztec concept of cosmic duality in both the social and political realms. Under them were the jurisdictional, administrative, military, and religious councils, whose members were chosen from among the *tetecutin*, nobles and the king’s relatives. Below these were the rest of the nobles by birth (*PIPILTIN*), who functioned as administrators, priests, and war chiefs. Under the Aztecs, all members of the nobility were exempted from tribute payment. Another highly regarded position was that of the *calpixqui*, an Aztec administrator who ruled over a town where the local dynasty had been replaced by the *buetlatoani*. Despite the fact that most of these positions were occupied by men, noblewomen also had strong influence on decision making in the political sphere, and several were chosen as lesser rulers in the city-states around the lake. The nobility could practice polygamy, and the *buetlatoani* himself had numerous wives and concubines.

The relatively small nobility ruled over the majority of the population, known as the *macehualtin*, or commoners (see *MACEHUAL*). They included general workers, artisans, soldiers, farmers, and fisherman, all of whom had to pay tribute in goods and LABOR, such as helping to construct public works. At the same time, Aztec (Mexico) commoners seemed to have fared better than others in the realm, as household excavations have revealed that they had access to imported goods such as polychrome CERAMICS and obsidian. In early Aztec history, commoners could occasionally be granted the noble rank of a *quauhpilli* (eagle lord) on account of their military achievements; however, this practice was eliminated under Montezuma Xocoyotzin’s reign, when the number of nobles was becoming too large to support. Still, upward social mobility remained possible through the “intermediate” level between the elite and the commoners, which was mostly composed of rich *pochteca* merchants and luxury goods artisans.

Below the *macehualtin* were the *mayeque*, rural farmers who did not live in a *CALPULLI* but worked the lands of the nobility. At the bottom of the social hierarchy were the slaves (*tlacotin*), who were bought at the market to provide hard labor at nobles’ households (see *SLAVERY*). For the most part, the *tlacotin* consisted of people who had unpaid debts or criminal records and thus had the opportunity to buy their freedom (see *CRIME AND PUNISHMENT*). At the same time, slaves might have been easily used as sacrificial victims or purchased to serve that purpose.

The Aztecs maintained their primordial tribal organization even in their great city. The bulk of the

population lived in *calpultin* (great houses), loose corporate kin groups unified by a common ancestor (*calpulteotl*) and a specialized profession. Each *calpulli* occupied a neighborhood, where land was divided among the respective families. Although most land was considered communal, there is evidence to suggest that in the early 16th century, there was a trend toward privatization and capitalization of territorial properties. The *calpultin* were ruled by a traditional government of elders and a government of nobles, the latter mediating between the *calpulli* and the central government of the king and managing the tribute obligations of each group. Noble boys attended the *calmecac* schools, where they learned religious, political, military, artistic, and administrative skills, while the commoners went to the *telpochcalli*, where they were trained as warriors. Girls helped with household chores such as grinding maize and weaving cloth, although noble girls could have been trained as priestesses. Both boys and girls participated in the *cuicacalli* (house of song), where they learned ceremonial songs and dances.

## AZTEC RELIGION

According to Aztec mythology, the Earth was formed from a crocodilian monster that floated on a great disc of water in the center of the universe. The Aztec universe was divided into quadrants oriented to the cardinal directions, with the center serving as the fifth direction. Space was further divided vertically into nine layers below the Earth's surface and 13 above it. At the uppermost level resided the two primordial creator deities, Ometecuhtli and Omecihuatl, the Lord and Lady of Duality. They had four sons, who ranked among the most important deities in the Aztec pantheon: Quetzalcóatl, Huitzilopochtli, Xipe Totec, and Tezcatlipoca. Each was associated with a cardinal direction, color, animal, tree, and other aspects and possessed a divine-human personality; Tezcatlipoca, for example, was as omnipotent as he was capricious, characteristics that often associated him with the Aztec sorcerers.

Before the current world was created, it had passed through four destructive phases, each dominated by a different "sun." Within each sun, different types of people were created but then destroyed in a major catastrophe



This photograph shows the so-called Aztec calendar stone, on display at Mexico City's National Museum of Anthropology and History. The figure in the center of the calendar represents Tonatiuh, the sun deity who presided over the Fifth Age in which the Aztecs lived. Tonatiuh is surrounded by the four previous ages of creation and destruction. (Courtesy of J. Michael Francis)

(as depicted in the so-called Aztec calendar stone). In the fifth and current sun, Quetzalcóatl created humanity from the previous era's bones and ashes, which he had acquired from the god of the underworld, Mictlantecuhtli; Quetzalcóatl gave life to these bones and ashes by mixing them with his own blood. This benevolent deity also provided humans with the first maize and invented the calendar and fine arts. In order to prevent this world from being destroyed before the cycle's natural end by an earthquake, the sun was to be constantly fed with human blood in honor of the sacred covenant between the gods and humans. For this reason, HUMAN SACRIFICE was a paramount component in Aztec religious rituals, and bloodletting was an important ceremonial activity among most nobles, who used sharp objects to draw blood from their earlobes, tongues, limbs, and genitals.

The Aztecs are perhaps best known for their ostentatious sacrifices on top of the Templo Mayor, where hundreds of thousands of victims' hearts were cut and torn from their chest with obsidian knives, then offered as divine sustenance to the gods by priests. Since the majority of these victims were caught during the so-called FLOWER WARS, the death toll might not have been higher than in most European wars at the time, which aimed to slay the enemies in the battlefield rather than capture

them alive. Undoubtedly, however, these gory and public spectacles had the additional propagandistic purpose of frightening any potential opponents of Aztec dominion.

Other important deities in the Aztec pantheon were Tlaloc and Chalchiuhtlicue, who were the principal water and storm deities. Aztec kings would conduct annual pilgrimages during the dry season to honor the water deities and ensure the renewal of the rains. Xipe Totec was the god of fertility, and festivities in his honor involved flaying a sacrificial victim, which was then worn by a priest. The Sun God, Tonatiuh, was equally important to this agriculture-based society and was further associated with warriors who died in battle. Even so, the one and true war god was Huitzilopochtli, the Mexica patron god who led the people out of Aztlán; human sacrifices were offered to him regularly. According to Aztec mythology, Coyolxauhqui, the Moon Goddess and older sister of Huitzilopochtli, attempted to kill their mother, Coatlicue, but was hindered and defeated by the heroic Huitzilopochtli. A gigantic carved image of the dismembered Coyolxauhqui was found at the foot of Templo Mayor, indicating that these myths were commemorated and reenacted in the sacred geography of Tenochtitlán. There were numerous other gods, goddesses, and lesser deities, and the Aztecs even incorporated the sacred idols



A serpent head at the base of one of the staircases of the Templo Mayor, located in the ceremonial precinct of the Aztec capital city of Tenochtitlán, modern-day Mexico City (Courtesy of J. Michael Francis)

of conquered peoples into the pantheon; these were housed in a special temple in Tenochtitlán. To accommodate and maintain all these supernatural beings, full-time priests and priestesses occupied the different shrines; according to one chronicler, the Templo Mayor was served by 5,000 people. Not surprisingly, religious ceremonies were common throughout the year, and besides human sacrifice, these included activities such as song, music, dance, and ball games.

### AZTEC CALENDARS, SCIENCE, AND ARTS

For the Aztecs, time was cyclical and repetitive, and their complex calendric system reflected this notion. The solar calendar consisted of 365 days, divided into 18 groups of 20 days each, with the addition of five “unlucky” days. This particular calendar was associated with the agricultural cycle of planting and harvesting, as well as the rotating market system. Each of the 18 “months” featured a particular ceremony, mostly related to themes of agricultural fertility and dedicated to a different deity. Like most Mesoamerican cultures, the Aztecs also observed a ritual calendar (*tonalpobualli*) of 260 days, which combined 20 days names with a rotating cycle of 13 numbers; this sacred calendar might have been derived from the length of the human gestation period. Perhaps for this reason, the *tonalpobualli* was also the basis of the Mesoamerican personal identification system, by which individuals would be named after the day on which they were born (for example, 1 Alligator or 7 Flower), with an additional personalized name often derived from the natural world. Each of these different 260 name-number combinations were further associated with a patron deity and carried a specific set of fortunes, which could be favorable, ominous, or indifferent. These prognostications were recorded in a sacred book called the *tonalamatl* and were used by specialists to divine the fates of every newborn, to determine an auspicious day for a temple inauguration or a king’s coronation, and even to foretell the final fate of an empire.

The two calendars of 365 and 260 days meshed together to form a longer cycle of 52 years, known as the “calendar round.” The calendar round served the purpose of measuring longer periods of time and distinguished the solar years by their specific position in the calendar. However, unlike the MAYA, who used what is known as the Long Count, the Aztecs did not tie their calendar rounds to a fixed starting date, so determining the exact position of any recorded event can often be confusing. To commemorate the end of a calendar round and the beginning of a new one, every 52 years the Aztec celebrated the New Fire Ceremony on top of Mount Citlaltépec, which

was dedicated to Xiuhtecuhtli, the “Old God.” The entire city of Tenochtitlán was cast in darkness and silence, and old idols and cooking pots were discarded. Then, a fire was lit in the chest of a sacrificial victim on top of the mountain, and this flame was brought down back to the city to light the hearths in the temples and households. The Aztecs believed that if the priests failed to light the new fire, the end of the world would arrive in the horrific form of *tzizimime*, or “devouring monsters.”

The Aztecs practiced naked-eye astronomical observations for the purpose of adjusting their calendars and agricultural activities, mostly by looking at cyclical celestial phenomena such as solar, lunar, and planetary movements. Rather than applying this knowledge for scientific ends, they used it as the basis for their intricate mythology and cosmogony, while unique celestial events such as eclipses and comets were considered as divine omens that could foretell destruction (such as those observed before the arrival of the Spaniards). In addition, the Aztecs possessed vast medical and anatomical knowledge (see MEDICINE), as well as a detailed geographical record of their empire whereby MAPS and kingdoms’ territorial extent were recorded on large cloth sheets.

Aztec craftsmen and artisans were renowned for their magnificent work in feathers, semiprecious stones, and GOLD; the last might have been taught by Mixtec artisans who were brought from Oaxaca to reside in the valley (see MIXTECS). Above all, the Aztecs excelled in sculpting large stone monuments with intricate designs, which for the most part depicted religious motifs such as deities and gods. Other monuments were dedicated to Aztec emperors, and these usually contained historical details such as coronation dates and the names of conquered city-states. In addition, the Aztecs carefully recorded their historical and mythical narratives, as well as poetry and other LITERATURE. One of the greatest Aztec poets was Nezahualcōyotl, the influential king of Texcoco. All of these literary genres were most likely kept in screenfold codices and other documents written with the Aztec glyphic writing system, which employed pictographs, ideographs, and phonetic elements. Although the early colonial chronicles tell of extensive archives of recorded knowledge that had existed in Tenochtitlán before the Spaniards’ arrival, none of these has survived, and all the Aztec codices we know of today postdate the Spanish conquest.

—Danny Zborover

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# B

**Balboa, Vasco Núñez de** (b. ca. 1475–d. 1519) *Spanish conquistador, founder of first permanent Spanish settlement in Central America and first European to sight Pacific Ocean* Vasco Núñez de Balboa was born ca. 1475 in the town of Jerez de los Caballeros, in Extremadura, Spain. In 1499, he joined the expedition of RODRIGO DE BASTIDAS to the northern coast of South America. After a failed attempt at colonization, Bastidas’s expedition returned to the island of HISPANIOLA. Balboa decided to stay behind in Santo Domingo to become a farmer, borrowing money to purchase a small parcel of land.

Unsuccessful at farming, Balboa accumulated many debts. In an effort to escape his creditors, he sealed himself in a barrel and stowed away on a ship under the command of Martín Fernández de Enciso headed for a struggling Spanish colony in northern COLOMBIA. On arrival, Balboa used the knowledge of the area he had gained on the Bastidas expedition and persuaded the remaining colonists to transplant their township across the Gulf of Uraba to the site of Darién, on the coast of present-day PANAMA.

Following Balboa’s lead, the colonists founded the new town of Santa María de la Antigua, which was the first permanent Spanish settlement in Central America. Elected as a town magistrate, Balboa quickly rose to be the leader of the new colony. By December 1511, Balboa had received royal recognition to serve as the interim governor and captain general of the area.

Balboa then led various expeditions into the interior and ultimately subjugated most of the local indigenous population; indeed, many native people were enslaved and granted in *ENCOMIENDA* to the colonists. During his expeditions, Balboa learned of the apparent existence of a culture rich in GOLD to the south. During an expedition

to find this golden kingdom, on September 25, 1513, Balboa became the first European to sight the Pacific Ocean, which he named the “Great South Sea.” Although he claimed the region and the sea for the king of Spain, he later received only the title of governor of the South Sea with a small coastal territory to be placed under the jurisdiction of the new governor, PEDRO ARIAS DE ÁVILA, who had been sent from Spain in 1514.

Resenting his loss of prestige, Balboa and the new governor soon became rivals. Balboa retreated to the Pacific side of Panama and began to build a small fleet of ships to explore the South Sea. Arias de Ávila, however, thwarted this attempt, having learned of Balboa’s efforts to discredit him at the Spanish court. Under the pretense of wishing to consult with Balboa, Arias de Ávila had him arrested on arrival and put on trial for treason. In early January 1519, after a rapid trial, Vasco Núñez de Balboa and four of his captains who had been named as accomplices were beheaded.

—John F. Chuchiak IV

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**Bastidas, Rodrigo de** (b. ca. 1468–d. 1527) *founder and governor of the coastal city of Santa Marta, Colombia* A native of Seville, Spain, Rodrigo de Bastidas was among the first Europeans to sail to the New World, joining CHRISTOPHER COLUMBUS on his second voyage in 1494. In

1500, the Spanish Crown authorized Bastidas to organize his own expedition in search of new territories to conquer. That same year, Bastidas first explored the coast of Santa Marta, where he and the Spaniards with him bartered with local native people for GOLD and pearls. However, fierce resistance from the region's indigenous population and limited evidence of mineral wealth delayed the establishment of permanent Spanish settlements along COLOMBIA's northern coastline. In fact, another 25 years passed before Bastidas returned to the region and founded Spain's first town in Colombia, which was called Santa Marta. Bastidas served as Santa Marta's first governor. During the first decades of the 16th century, Santa Marta attracted few Spaniards; those who did venture along Colombia's Caribbean coast did so in search of slaves, gold, and, on occasion, pearls. Despite the fact that the region fell loosely under governor PEDRO ARIAS DE ÁVILA's jurisdiction in PANAMA, there was no permanent Spanish presence in Santa Marta until the mid-1520s.

In November 1524, the Crown reached an agreement (*capitulación*) with Bastidas, entrusting the new governor with the conquest and settlement of the province and port of Santa Marta. Bastidas was to take at least 50 Spaniards to settle the new town, 15 of whom were supposed to be accompanied by their wives. Bastidas's tenure as governor did not last long; upset that the governor refused to distribute all the gold they had acquired, Bastidas's lieutenant, Pedro de Villafuerte, and several of his supporters stormed the governor's house late one night and attacked him. Bastidas survived but was critically wounded. Fearing that he would be murdered if he remained in Santa Marta, he was taken to Santo Domingo to seek medical attention but never reached HISPANIOLA. Rodrigo de Bastidas died from his wounds in CUBA in January 1527.

—J. Michael Francis

### Further reading:

J. Michael Francis. *Invading Colombia: Spanish Accounts of the Gonzalo Jiménez de Quesada Expedition of Conquest* (University Park: Pennsylvania State University Press, 2007).

**batab** The term *batab* (plural, *batabo'ob*) referred to the headman of a Yucatec MAYA village. The origins and usage of the term are both pre-Columbian. *Baat* means "hatchet," while *-ab* adds the concept of instrumentality, thus producing "by means of the hatchet," or more idiomatically, "he who wields the hatchet." In all probability, this referred to the use of a ceremonial hatchet designed to denote authority.

Prior to the Spanish CONQUEST in the region (1526–44), the Yucatec Maya were divided into a complex political patchwork. *Batabs* governed individual villages, while above them were the *jalach wíimik*, or "true men," who ruled regions. While at first the Spanish failed to recognize

the former, during their campaign to concentrate Indian populations in settled villages, they reinforced the authority of the *batab*, who became the point of access for virtually all matters of village governance, including tribute, LABOR, and the teaching of Spanish Catholicism (see RELIGION). The *batab*, in association with a council of elders known as the *REPÚBLICA DE INDÍGENAS*, administered petty justice and guarded the village land title. *Batabs* and *repúblicas* survived into the early national period, and despite legal decrees limiting their power, the *batabs* continued to perform similar functions to those of earlier times.

—Terry Rugeley

**Belize** The area that is today Belize was one of the cradles of MAYA civilization. The site of Cuello, located in the north of the country, almost two miles (3 km) west of the town of Orange Walk, is possibly the oldest Maya ceremonial center, dating to at least as early as 400 B.C.E. Early structures consisted of little more than raised earthen mounds that sustained huts made from perishable materials. As Maya society became more complex and diversified, ceremonial structures such as pyramids, plazas, and causeways emerged. Several factors encouraged the growth of civilization here: The hot climate with regular rain aided AGRICULTURE, while Belize's multiple river systems facilitated trade both within the region and without. By the end of the late pre-Classic period (300 B.C.E.–250 C.E.), the city of Lamanai (submerged crocodile) was already in full bloom along the New River. Lamanai (along with a few other CITIES in western Belize and northern GUATEMALA) survived into the early 17th century, considerably reduced in size but still a vital community.

While the Classic period (250–900) is most commonly associated with the Petén and southern Campeche sites, numerous Belizean Maya sites shared in the overall dynamism of the region. CARACOL was the largest of these centers and managed to hold its own against its aggressive neighbor TIKAL. Farther to the north, but also on the Mopan River, Xunantunich (stone woman) prospered until its eventual collapse around 900. Altún Ha (heavy stones beside water) also stood out in the same time. In 1968, archaeologists working in this northeastern Belizean zone discovered the largest jade carving of the Maya world, a 9.75-pound (4.43-kg) representation of the sun god K'inich Ahau. Meanwhile, numerous other centers emerged in southern Belize. These include Lubaantún, famous for its carefully cut, mortarless stones, and Nim Li Punit, site of the country's largest stela.

The first Spanish attempts to conquer the Belize region produced little result. Alonso Dávila entered the region as part of FRANCISCO DE MONTEJO's initial attempt to subdue the Yucatán Peninsula but was forced to withdraw owing to stiff Maya resistance. In 1543–44 Gaspar Pacheco, his son Melchor, and his nephew Alonso succeeded in establishing the first semipermanent Spanish



presence near present-day Bacalar. They gathered tribute from the northern Belize region for a time, but key Maya cities maintained their independence and eventually forced out the Spanish in the early 1600s.

See also BELIZE (Vols. II. III. IV).

—Terry Rugeley

**Benavente, Toribio de (Motolinía)** (b. ca. 1482/1491–d. 1569) *Franciscan friar famous for his ministry among Central Mexico's indigenous peoples* While there is a great deal of uncertainty regarding the early history of Toribio de Benavente's life in Spain (born ca. 1482–91), there is much less when it comes to his last 45 years, which he spent in MEXICO (1524–69). That is because like his fellow Franciscan BERNARDINO DE SAHAGÚN, Benavente was a foundational member of the Mexican church and an important figure in the fledgling colony of New Spain.

He reached the Gulf coast of Mexico in May 1524 in the company of 11 other Franciscans (see RELIGIOUS ORDERS). Although preceded by other clerics, this was the first official delegation of priests to reach the newly conquered territory. They became known later as “the Twelve.” The number was no accident, for these friars viewed themselves as following in the footsteps of the Apostles. While they slowly made their way from the coast to MEXICO CITY, Benavente discovered that the Indians began to refer to the friars as *motolinía*, a NAHUATL term that translates as “poor, afflicted one[s].” Benavente considered this a divine sign and made it part of his name. It stuck so firmly that it has been his primary designation ever since.

During his long tenure in the New World, Motolinía served in many capacities. He was a parish priest, administrator, Franciscan representative before the civil and royal authorities, and writer. At a time when travel was slow going by foot, horse, or ship, he was posted all over colonial Mexico; he also traveled as far as GUATEMALA and NICARAGUA, where he visited the famous Masaya Volcano. In the 1550s, he engaged in public disputations with the famed Dominican friar BARTOLOMÉ DE LAS CASAS, the “Defender of the Indians.” While few of Motolinía's writings survive, those that do bear witness to many of the church's early successes in converting, baptizing, and indoctrinating the indigenous peoples of Mexico. Motolinía outlived all the other members of “the Twelve,” dying in Mexico City in 1569.

See also FRANCISCANS (Vol. II).

—Barry D. Sell

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**Bobadilla, Francisco de** (d. 1502) *Christopher Columbus's successor as governor of West Indies* By 1500, rumors were circulating throughout Spain of CHRISTOPHER COLUMBUS and his brothers' incompetence in ruling the island of HISPANIOLA. As a result, the Spanish monarchs, King Ferdinand and Queen Isabella, sent Francisco de Bobadilla to replace Columbus as governor of the colony. The powers bestowed on Bobadilla far outweighed those given to his predecessor. In all likelihood, Bobadilla was given such leverage because he was both a nobleman and a knight.

Bobadilla was a religious knight of the Order of Calatrava. He chronicled the brutal nature of Columbus's regime in the Americas (see CHRONICLERS). According to his 48-page document, Columbus was harshest on his own followers. Bobadilla reported that a man who stole corn out of hunger had his nose and ears cut off before being auctioned off as a slave and that a woman who slandered Columbus's nobility was stripped naked and forced to ride through town on a mule.

In 1500, with his orders from the king and queen, and a crew of 500 men and a handful of slaves, Bobadilla took his place as the new governor of the Indies. He sent Columbus and his brothers back to Spain in shackles. However, Bobadilla's tenure as governor was even more disastrous than that of his predecessor. Under his rule, the conditions of indigenous slaves grew to be subhuman. Bobadilla also demonstrated clear favoritism toward his followers, to whom he gave gifts of land and franchises.

Bobadilla governed until 1502, when he was replaced by Nicolás de Ovando. During the return voyage to Spain, Francisco de Bobadilla's ship was struck by a hurricane and Bobadilla drowned.

—Christina Hawkins

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**Bogotá** The city of Bogotá is located in the fertile plains of COLOMBIA's eastern highlands. Its name derives from a powerful MUISCA ruler (sometimes called Bacatá) who governed this densely populated region when the first expedition of Spanish conquistadores arrived in 1537 (see CONQUEST). Led by GONZALO JIMÉNEZ DE QUESADA, this small expeditionary force of 179 Spaniards spent almost two years exploring Muisca territory before they founded the city. Eventually, Jiménez de Quesada's decision to establish a formal settlement was based on the unexpected arrival of two other expeditions. In February 1539, NIKOLAUS FEDERMANN's (Nicolás Federmán) expeditionary force arrived from VENEZUELA, and less than two months later, another Spanish force, this one led by Sebastián de Belalcázar, arrived from Quito (ECUADOR). Both Belalcázar

and Federmann attempted to lay claim to the region. While the region had no GOLD or SILVER mines, its fertile soils, dense indigenous population, and EMERALD and salt mines were highly attractive to the Spanish conquistadores. Thus, in an effort to help legitimize his own claim to the conquest, Jiménez ordered the foundation of the region's first three Spanish towns, Santafé de Bogotá, Tunja, and Vélez. Bogotá's foundation date is April 27, 1539.

During the initial years of Spanish settlement, Bogotá maintained much of its pre-Columbian character. The city's early European inhabitants lived in Indian houses, or *bohíos*, which were constructed from dried mud and thatch. It was not until after 1542 that Bogotá's municipal authorities issued orders to build residences with brick or stone. In 1549, just a decade after its humble foundation, the Spanish Crown officially recognized the region's growing importance and authorized the establishment of an *AUDIENCIA* at the site of Colombia's modern capital city. Still, by 1560, the region remained dominated by the surrounding population of Muisca Indians, which likely exceeded 200,000. By contrast, Bogotá's Spanish population at the time numbered less than a few thousand.

See also BOGOTÁ (Vols. II, III, IV).

—J. Michael Francis

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Frank Safford and Marco Palacios. *Colombia: Fragmented Land, Divided Society* (New York: Oxford University Press, 2002).

**Bolivia** Bolivia has three major environmental zones: the altiplano, the mid-elevation valleys, and the Amazonian jungle (see AMAZON). Accordingly, the patterns of the early inhabitants of Bolivia followed different trajectories. The altiplano is a high-altitude (12,000–15,000 feet [3,658–4,572 m]), essentially treeless grassland in a plateaulike basin bounded on the east and west by two parallel ranges of the Andes. The environment is semiarid, with annual rainfall decreasing from the north to south from 24 inches (609 mm) to four inches (101 mm), respectively. The eastern slopes of the Andes broaden into two major valleys in the Cochabamba and Chuquisaca areas, which have wetter, milder climates. The Amazonian jungle area includes major drainages of the Amazon River and has an annual rainfall of about 118 inches (2,997 mm).

The earliest evidence of human habitation in the altiplano and central valley areas dates back to about 11,000–12,000 years ago. At sites such as Mina Avaroca in the altiplano, hunter-gatherer populations exploited wild guanaco and vicuña herds and apparently colonized the area from the Pacific coast. In the mid-valley to the east in present-day Cochabamba, at sites such as Jaihuayco, Mayra Pampa, and Ñuapua, there is evidence of the

killing of late Pleistocene megafauna such as *Equus* and *Mylodon* dating from approximately 11,000 years ago. The Bolivian Amazonian area has not yet yielded sites of comparable age; however, in the Brazilian Amazonia across the border, sites associated with extinct fauna dating to 11,500–13,000 years ago indicate that the Bolivian Amazon region was also inhabited this early.

While the earliest altiplano inhabitants may have moved between the Pacific coast and Bolivian zones on a seasonal basis, by 10,000 years ago, there is clear evidence of year-round altiplano occupation. These ancestors of the TIWANAKU and INCAS began an agropastoral lifestyle, herding camelids and cultivating plants, around 8,000 years ago (see AGRICULTURE). While initially it was supposed that llama and alpaca were domesticated prior to plants and were first domesticated in the central highlands of PERU, there is new evidence of a possible second center of camelid domestication in the central Bolivian altiplano. In the wetter areas near Lake Titicaca, several varieties of POTATO and other root crops and various types of native grains (Chenopod family) were being cultivated by the Late Archaic period, 4,000–5,000 years ago. In the drier southern areas, due to a lack of adequate precipitation to grow crops, a more complete animal-based type of pastoral nomadism evolved.

In the mid-elevation eastern valleys, with their milder climates, a much more robust collecting and gathering ECONOMY evolved during the Archaic period. Preliminary evidence indicates this also occurred in the Amazonian lowlands.

The Formative period began around 4,000 years ago in Bolivia. In the altiplano, this period saw the development of settled villages, as well as a local religious tradition, Pajano, which originated in the Lake Titicaca area (and a variant of which spread to southern Peru, where it was called Yaya-Mama). The Pajano tradition was first characterized by fish, amphibian, and reptilian motifs but later included a dyadic component of wet-dry, male-female, and so on. Typically, subterranean rectangular temples were constructed; these were adorned with stone stelae and panels and, later, were also usually associated with mounds and U-shaped complexes. Copper, SILVER, and GOLD artifacts were considered items of wealth, and in the later part of the period, the first metal alloys were produced. The production of pottery is one of the hallmarks of the Formative period. Among the items that began to appear in the altiplano, some were part of a “hallucinogenic complex” that included such material artifacts as incense burners, snuff tablets, and inhaling tubes, which are believed to have been introduced from the valleys or lowlands, as the hallucinogenic substances that were used derive from those areas.

Agricultural villages began appearing in the mid-valley at the same time as they appeared on the altiplano. Initially assumed to be the result of diffusion from the altiplano, CERAMICS inventories for the mid-valley show clear relationships with Amazonian groups as well as

altiplano influences. Therefore, one can parse a kind of two-pronged spread of sociocultural complexity into Bolivia: one emanating from the Pacific coast and Peru and a second coming from Amazonia into the Bolivian lowlands and spreading up the Amazon tributaries.

The second great Andean empire, the Tiwanaku, emerged during the first millennium C.E., from ca. 300 to 1100. During this time, the polygonal architectural style that became the hallmark of the Incas was developed, as were the tin-copper and tin-nickel-copper binary and ternary alloy bronzes, elaborately decorated ceramic ritual corn beer (*CHICHA*) drinking cups (called *keros*), and the string-knot counting system (see *QUIPU*). The vibrant, independent, but closely allied Cochabamba federation emerged in the mid-valley as an important trade partner for Tiwanaku, while further east the large Mojoboya chiefdom evolved. In northern Bolivian Amazonia, in the Llanos de Mojos region of the lowlands, this period also appears to have seen the initial development of the immense complex of canals, causeways, and mounds.

After the demise of the Tiwanaku Empire, the Bolivian altiplano was marked by an era of political balkanization. The highland altiplano was re-formed into a dozen or more autonomous polities. Conflict seems to have characterized the political sphere (evidenced by the remains of elaborate fortresses, or *pucarás*), as different groups vied for dominance or simply for survival. Ultimately, all were to be conquered by a group evolving in similar circumstances farther north, the Incas.

Although less studied, a similar pattern of fractionation appears to have characterized the mid-valley polities and the Amazonian area. Although the Incas conquered and incorporated the mid-valley and altiplano into their empire in the 1400s, the Spanish CONQUEST followed so closely that during the postconquest colonial period, the disparate *señoríos* (or chiefdoms) that characterized Bolivia up until the 19th-century establishment of the republic generally reverted back to the kingdoms that had emerged following the decline of the Tiwanaku.

See also BOLIVIA (Vols. II, III, IV).

—David L. Browman

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**Brazil** The early history of Brazil is part of the larger story of Portuguese expansion. Portugal, located on the edge of western Europe, was in many ways a bridge between the Mediterranean and the Atlantic during the early modern era. The origins of Portugal's expansionism can be traced to the invasion of Ceuta in North Africa in

1415. In the decades that followed, Portuguese mariners explored the coasts of western Africa and moved into the Atlantic, colonizing Madeira, the Azores, the Cape Verde Islands, and São Tomé. In 1488, Bartholomeu Dias rounded the Cape of Good Hope and sailed up the coast of eastern Africa, laying the groundwork for Vasco da Gama's epic voyage to Calicut (in modern-day India) a decade later. In 1510, Afonso de Albuquerque defeated the Muslim rulers of Bijapur, effectively gaining control of Goa. In the years that followed, his compatriots would extend Portugal's reach all the way to Macau (near modern-day Hong Kong). First discovered in 1500 in the midst of Portugal's drive to reach Asia, Brazil would eventually become the largest and most important component of Portugal's overseas empire. In this regard, the social, political, and economic foundations of Brazilian history are firmly rooted in the larger context of Portuguese expansion and in the encounters between Europeans and other peoples during the 15th and 16th centuries.

The early colonization of Brazil built on Portugal's experiences during the preceding decades. In Africa, Portuguese mariners had confronted a number of large, complex societies whose inhabitants had developed immunity to European DISEASES over centuries of intermittent contact. Unlike the Spanish in MEXICO or PERU, the Portuguese in Africa had neither the manpower nor the unexpected epidemiological advantages to create an inland empire. Instead, they created coastal factories or fortified trading posts in order to barter with local allies for GOLD and slaves (see SLAVERY; TRADE). Portugal's Atlantic islands, on the other hand, were largely uninhabited upon the Europeans' arrival, enabling more permanent settlements to be established. On Madeira and São Tomé, the Portuguese established plantation-based economies that produced large quantities of SUGAR for European markets (see ECONOMY). Significantly, both of these patterns of development would be used in Brazil over the course of the 16th century.

During the first three decades after the discovery of Brazil in 1500, Portuguese attempts to colonize the new land were limited. Brazil was used primarily as a convenient stopover for the far more lucrative voyages to India. The only commodity found to be of value in the new land during these years was brazilwood, a form of dyewood that would eventually give the new land its name (see DYES AND DYEWOOD). As fortified trading posts were established along the coast of Brazil in order to barter with indigenous groups for dyewood and fresh supplies, other Europeans, especially the French, began to compete for control of the new land. In response, the Portuguese Crown implemented a series of reforms, including the establishment of DONATARY CAPTAINCIES and the subsequent creation of a colonial bureaucracy, and the use of large-scale military expeditions. By the end of the 1560s, Portugal had successfully expelled the French from Brazil and had consolidated its control over indigenous groups along the coast.

Although the demographic data is imprecise, scholars estimate that Brazil's pre-Columbian population ranged between 2 and 5 million people. The Portuguese divided Brazilian indigenous peoples into two distinct groups based on language. The Tupí (sometimes referred to as Tupí-GUARANÍ) inhabited the coast from Ceará in the northeast to São Paulo in the south and then inland into the Paraná and Paraguay river basins (see TUPINAMBÁ). The Tapuya (a generic Tupí term that referred to non-Tupí speakers) were found north of Ceará and interspersed at different points along the coast. The Portuguese were most familiar with Tupí society, and much of what we know about pre-Columbian Brazil is based on this diverse group. As the Portuguese CHRONICLER Pêro de Magalhães Gândavo wrote in 1570, "It is impossible to either enumerate or comprehend the multitude of barbarous heathen that Nature has planted throughout this land of Brazil." Modern scholars believe that there were in fact between 40 and 100 distinct language families spoken in 16th-century Brazil. Many, but not all, are now classified under three general headings: the Tupí and the Gê (corresponding, in part, to the Tapuya), as well as Arawak/Carib speakers in the north.

Native civilizations in Brazil were very different from what the Spanish encountered in Mexico and Peru. Unlike their counterparts in Mesoamerica and the Andes, the Brazilian indigenous consisted largely of seminomadic peoples who practiced slash-and-burn forms of AGRICULTURE, with subsistence-based economies. In addition to hunting, fishing, and gathering fruit, for example, Tupí society cultivated beans, MAIZE, squash, and MANIOC and migrated to new areas when the soil gave out. Contact and trade between different groups was limited, even among those who spoke similar tongues. WARFARE WAS COMMON, and many groups practiced ritualistic CANNIBALISM. Aside from LABOR, Brazil's indigenous people offered little in the way of wealth for early colonists, and initial interactions centered mainly on the dyewood trade as well as formal and informal sexual liaisons. In this regard, by the middle of the 16th century, the *mameluco* offspring of Luso-indigenous unions formed a significant segment of Brazilian society, particularly in São Paulo and Pernambuco.

As was the case throughout the Americas, the discovery of indigenous peoples in Brazil raised important questions about how New World populations should be understood and treated. In both Spain and Portugal, the debate pitted church and state against local settlers, who sought to make use of indigenous peoples for tribute and labor. In the case of Brazil, the Portuguese Crown generally maintained that Brazil's indigenous groups should not be enslaved but rather converted to Christianity. Significantly, Jesuit missionaries first arrived in Brazil in 1549 with the country's first governor general (see RELIGIOUS ORDERS). In time, the Society of Jesus would become the most important institutional force in the new colony with the possible exception of the Portuguese state itself. The Jesuits and other missionaries established a system

of *aldeias*, or mission villages, in which they housed and tutored native people who agreed to give up the practices of cannibalism and polygamy or who otherwise sought protection from local settlers. *Aldeias* would subsequently become a standard mode of European-indigenous interaction in Brazil through the mid-18th century, when the Jesuits were expelled from the Portuguese Empire.

Like the Jesuit missionaries, local colonists had designs on the New World native population. During the three decades after the discovery of Brazil, indigenous labor was limited mainly to the dyewood trade. By the mid-16th century, however, native slaves were sought for a variety of other work, including to labor on sugar plantations, which were becoming increasingly important in the northeast. In this regard, in spite of royal and religious efforts to prevent indigenous slavery, the enslavement of natives by local settlers would play an important role in the colony's economic development through the mid-17th century. For Brazil's indigenous, the shift from barter to a plantation-based slave economy came at a critical demographic moment. Although Brazil's indigenous population steadily decreased over the course of the 16th century, this was especially the case in the 1560s, when a series of severe epidemics devastated native populations. Thereafter, Portuguese-indigenous relations would be fundamentally changed, as indigenous labor was less available and increasingly expensive. Additionally, Portuguese planters came to believe that the land's seminomadic native population had little aptitude for the intense and highly skilled labor required on the sugar plantations.

In order to solve the labor shortage, mill owners drew on Portugal's history in Madeira and São Tomé, importing large numbers of African slaves to work on the sugar plantations. Although the transition from indigenous to mainly African labor would not be complete until the 1630s, by the end of the 16th century, the Portuguese had clearly staked the future of the colony on the African slave trade. As the first nation in the Western Hemisphere in which African slavery was instituted on a large scale, Brazil would also be the last to give it up. Whether laboring on rural plantations along the coast, in mining districts in the interior, or in urban centers, African slaves were a fundamental reason for Brazil's future economic success. Although Asia would remain an imperial priority for Portugal for the next century, by the late 1560s, all of the major factors were in place for Brazil to become the most dynamic and dominant component of Portugal's overseas empire.

See also BRAZIL (Vols. II, III, IV); COLÔNIA DO SACRAMENTO (Vol. II); MARANHÃO (Vol. II); MINAS GERAIS (Vol. II); PERNAMBUCO (Vol. II); RIO DE JANEIRO (Vols. III, IV); SÃO PAULO (Vols. II, III, IV).

—Erik Myrup

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**brazilwood** See DYES AND DYEWOOD.

**Buenos Aires** Unlike other colonial urban centers such as MEXICO CITY, BOGOTÁ, or CUZCO, the city of Buenos Aires, in modern-day ARGENTINA, was not constructed on the site of a pre-Columbian native settlement. In fact, Buenos Aires began as a temporary Spanish encampment on the banks of a remote estuary in southeastern South America.

In 1534, in response to growing competition between the crowns of Spain and Portugal over jurisdiction in eastern South America, Castile's monarch, King Charles I, reached an accord with a Spanish nobleman named PEDRO DE MENDOZA. The agreement, or *capitulación*, authorized Mendoza to prepare a large expedition to settle the region around the Río de la Plata (River Plate, or literally, "Silver River"). In exchange, Mendoza was appointed governor of the new lands, from which he was entitled to receive a handsome share of their riches. Mendoza prepared an armada of 16 ships carrying 1,600 men, as well as cattle, horses, and other accoutrements necessary for the establishment of a permanent settlement. In February 1536, Mendoza's armada arrived at the River Plate, where they founded an encampment

that they named Puerto Nuestra Señora Santa María del Buen Aire.

The new settlement did not last long. Persistent attacks from nearby indigenous groups, combined with starvation and DISEASE, devastated the European settlers. Within 18 months of their arrival, Mendoza's force had fallen by two-thirds. The settlement was finally abandoned in 1541, its survivors transferring to Asunción (PARAGUAY). It was not until 1580 that a permanent Spanish settlement was established on the site of modern Buenos Aires; the Spaniards christened the new town Ciudad de Santa María de la Santísima y Puerto de Santa María de los Buenos Ayres. More than a century would pass before Buenos Aires began to emerge as one of South America's most important urban centers.

See also ARGENTINA (Vols. II, III, IV); BUENOS AIRES (Vols. II, III, IV).

—J. Michael Francis

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**Burgos, Laws of** See LAWS OF BURGOS.



**Cabeza de Vaca, Álvar Núñez** (b. ca. 1485/1492–d. 1559) *survivor of the failed expedition to Florida, later wrote famous account of his eight-year journey across North America* After successful service in the military (1511–21), Álvar Núñez Cabeza de Vaca received a royal appointment to serve as treasurer on PÁNFILO DE NARVÁEZ’S 1527 expedition to FLORIDA. The Spanish Crown had authorized Narváez to lead an expedition to conquer and settle the lands from the Río de las Palmas (northeast MEXICO) to Florida; however, the expedition ended in disaster, and most of its participants, including Narváez, were killed. In 1528, a hurricane redirected the expedition from its intended destination off the western coast of the Gulf of Mexico to the eastern gulf coast. By raft and foot, the surviving conquistadores traveled westward along the shore. On the east Texas coast, Cabeza de Vaca was separated from the others and taken captive by Native Americans he encountered there. Five years later, in 1533, Cabeza de Vaca was reunited with the only three survivors of the Narváez expedition, out of more than 500. The four continued down the coast, crossing through south Texas and eventually reaching northwest Mexico. As they headed south in 1536, down Mexico’s western coast, they encountered Spanish soldiers and thus began their journey home.

Though Cabeza de Vaca returned to Europe in 1537, it took five years for his account, *La relación* (later known as *Naufragios*), to be published. It was written as a *PROBANZA DE MÉRITO*, or “proof-of-merit petition,” to request royal compensation for his services and sufferings. In the account, Cabeza de Vaca expressed his interest in returning to the Americas under royal commission. In 1540, he was given the title of *adelantado* and appointed governor of the Río

de la Plata province of South America. However, Cabeza de Vaca’s governorship was cut short when, in 1544, he was arrested and escorted back to Spain. Tried seven years later, he was at first stripped of his titles and charged with crimes such as misconduct in office and abuse of native populations; however, the penalties were drastically reduced, and his reputation was eventually restored.

Cabeza de Vaca’s 1542 *Relación* offers one of the first geographic and ethnographic accounts of the landscapes and peoples of North America. He recounts the harsh treatment he received by some Indians he encountered, as well as the trust and respect he found among others. Essentially living the life of a native—even posing as a powerful shaman—Cabeza de Vaca urged his fellow Spaniards to treat the indigenous people well and proposed peaceful pacification over violent conquest. Later expeditions, such as those under HERNANDO DE SOTO and FRANCISCO VÁSQUEZ DE CORONADO, would consult Cabeza de Vaca’s *Relación* in the hopes of locating and conquering rich new kingdoms in North America.

—Saber Gray

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**cabildo** The *cabildo* was the city council in colonial Latin America. Spanish political theory of the Middle Ages and early modern period held that in the absence of other governmental units, the city council was the most elemental governmental institution. As a result, in order

to both claim and incorporate new territory into the Spanish Crown, conquistadores would frequently first establish a city and a city council for its governance.

The *cabildo* consisted of as many as 24 *regidores* (see *REGIDOR*). Initially in the New World, these city councilmen were elected by the citizens of the city. Eventually, however, they fell under the royal patrimony, and the Crown began to appoint important personages of the colony to these seats. By the late 16th century, the Crown had begun the practice of selling seats on the city councils at public auction. The winning bidder received not only the right to enjoy the office throughout his life but, on payment of a bonus, could name a successor.

The *regidores* governed CITIES in accordance with Spanish law and tradition. They generally received no salary for their service, although occasionally they would allocate small sums to themselves for certain activities. They regulated local government, including allocating land for houses and garden plots, monitoring the city's supply of FOOD and water, seeing to public safety, and managing the municipal courts. The authority of the colonial Spanish city extended into the hinterland until it came under the authority of another city or other governmental unit. Consequently, city councils also controlled farming and ranching in the hinterland.

The *cabildo* also included two municipal court judges (*alcaldes*). They were elected annually by the *regidores*. Normally, one judge supervised the municipal courts, while the other served the farmers' and ranchers' court.

See also *CABILDO ABIERTO* (Vol. II).

—John F. Schwaller

#### Further reading:

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**Cabral, Pedro Álvares** (b. ca. 1467–d. ca. 1520) *Portuguese discoverer of Brazil* A native of Belmonte, Portugal, Pedro Álvares Cabral was born into a well-connected aristocratic FAMILY. His father, Fernão Cabral, was a councilor to King John II, and his mother, Isabel de Gouveia, was descended from a prominent family in the Beira region. As a young nobleman, Cabral benefited from royal patronage, studying literature, cosmography, and the arts with other young peers at court.

Following Vasco da Gama's epic voyage to India (1497–99), the now adult Cabral was awarded command of a follow-up expedition. He set sail in early March 1500, with 13 ships and more than 1,200 men. In the weeks that followed, the expedition passed the Canary Islands and the Cape Verde Islands before veering southwest in order to avoid the doldrums and catch the trade winds that would carry the ships around the Cape of Good Hope. In the process, the Portuguese fleet swung wide, stumbling upon the coast of northeastern BRAZIL.

On April 22, Cabral's scouts spotted a distant mountain-top near modern-day Porto Seguro. The following day, Cabral sent a small party ashore. Altogether, the fleet remained in this vicinity for nine days, replenishing supplies and attempting to TRADE with the region's indigenous in order to facilitate future voyages.

Cabral eventually weighed anchor in early May, sending one ship back to Portugal with news of the discovery, while the remainder continued the voyage to India. Cabral finally reached Calicut in September 1500. There, he engaged in heavy fighting with Muslim traders before being forced to retreat to Cochin, where he was better received. During the months that followed, the expedition suffered a number of setbacks. By the time Cabral sailed up the Tagus in late July 1501, only five of his ships remained.

Although the discoverer of Brazil was initially well received by the Crown, Cabral would subsequently fall from royal favor; in fact, his journey to India would be his first and last voyage. Two years later, he married Isabel de Castro. Together they raised six children on a small estate near Santarém. Although the exact date of Cabral's death is not known, probate records indicate that he died sometime before late 1520, when his remaining possessions were divided among his heirs.

—Erik Myrup

#### Further reading:

William Brooks Greenlee, ed. *The Voyage of Pedro Álvares Cabral to Brazil and India* (London: Hakluyt Society, 1938).

**cacao** Described as the “food of the gods” by the 18th-century botanist Carl Linnaeus, cacao has a long and complex history in the Americas. From the Classic period (250–900 C.E.) and through the early colonial period, the TRADE and consumption of cacao beans served as a symbol of wealth and power in Mesoamerica. Under Spanish rule, political and religious leaders attempted to control both its production and consumption by the indigenous population.

Growing only in the tropics, cacao (*Theobroma cacao*) was domesticated in the Central American rain forests during the 15th century B.C.E. (see AGRICULTURE). Archaeological records from the Classic period indicate that cacao was a high-value commodity that symbolized noble status and prestige. Epigraphers deciphered the term *kakawa* (the origin of the modern term) on drinking vessels associated with royal MAYA burials. Large-scale glyphic texts from the period describe the consumption of cacao-based drinks during rituals associated with marriage and succession. Although production was limited to a few subtropical regions, during the Postclassic, cacao was used throughout MEXICO, Central America, and the AMAZON. For the Mexica (AZTECS) of Central Mexico, cacao served as both a commodity and a form of currency.

In TENOCHTITLÁN, imbibing cacao, which was mixed with MAIZE and chilies, was a luxury open only to Mexica nobles. In Chiapas, tribute payments were largely made in cacao, a practice that continued through the early colonial period.

Sixteenth-century Europeans viewed cacao with trepidation. While CHRONICLERS and explorers struggled to define its physical properties, religious officials challenged its use in rituals (see RELIGION). Religious officials in GUATEMALA, for example, equated the production of cacao beverages by indigenous women with WITCHCRAFT and sorcery. Chocolate arrived in Europe in 1544 with a group of Maya elites who displayed it before the future king of Spain, Philip II. It was not, however, until the 17th century that the importation and use of cacao by Europeans became acceptable.

See also AGRICULTURE (Vols. II, III, IV); CACAO (Vols. II, III).

—R. A. Kashanipour

**Further reading:**

Sophie D. Coe and Michael D. Coe. *The True History of Chocolate* (London: Thames & Hudson, 1996).

**cacique** The term *cacique* was a TAINO or Arawak word used to indicate a ruler or chief. A *cacicazgo*, or chiefdom, from which the term *cacique* derives, refers to a type of society that is territorially based, possesses an incipient bureaucracy, and is ruled by a chief who retains arbitrary but limited power. Certain goods and services are concentrated in a permanent centralized authority, which performs a redistribution function. Tribute, gifts, or surplus production are used as a way of manipulating the distribution of goods and services throughout the entire society. Most *cacicazgos* were found in the Greater Antilles, northern coastal South America, the northern Andes, eastern Bolivia, lower Central America, and parts of Mesoamerica.

The Spaniards adopted the concept, and it came to replace the local indigenous terms of leadership throughout the entire colonial system. After the CONQUEST, caciques served as cultural brokers, or buffers, in dealings with Spaniards and, in doing so, often prevented exploitation and cultural disorganization. In return for their services, caciques received tribute from properties worked by dependent laborers and, in regions with a market system, taxes from the local marketplace. They engaged in such commercial enterprises as sheep and cattle ranching and the raising of silkworms.

Caciques also acquired privileges such as the right to carry swords or firearms and to ride horses or mules. They adopted prestigious Spanish surnames and honorific titles, such as *don*. When the Spaniards first introduced municipal councils, the cacique in the first postconquest generation usually filled the highest office of governor and typically served for life, a reflection of

the hereditary nature of indigenous rulership (see ALTEPETL; CAH). Caciques actively sought the confirmation and protection of rights associated with rulership from Spanish authorities and increasingly claimed their landholdings as private property.

By the 16th century, the term cacique referred to the heir of a preconquest ruler and the single possessor of a *cacicazgo*. The affluence and influence of the cacique, however, deteriorated rapidly during later colonial times. Epidemics led to the loss of population and thus tribute (see DISEASE). Spanish authorities further limited income by progressively eliminating exempt tribute categories. The decay of the missionary system, the ineffectual efforts of the government to control exploitation of the Indians, the inability of Indian towns to preserve their lands and status, and the subordination of Indians to systems of hacienda and peonage contributed further to the decline of the cacique.

See also CACIQUE (Vol. II).

—John M. Weeks

**Further reading:**

Robert Kern, ed. *The Caciques: Oligarchical Politics and the System of Caciquismo in the Luso-Hispanic World* (Albuquerque: University of New Mexico Press, 1973).

**cab** The term *cab* (plural, *cabob*) is a MAYA word used to describe the organizational unit of the pre-Columbian and colonial Maya. Although *cab* can be loosely translated as “town,” it meant much more to the Maya. The *cab* was the central unit of Maya culture and society and served a conceptual, geographical, and sociopolitical role. Each individual was considered a *cabnal*, or “*cab* member,” and lived on a *cab* house plot among a *chibal*, or “patronym group,” made up of relatives and close associates. A Maya’s relationship to his or her *cab* was so strong that it served as the context for self-identity. Indeed, the Maya lacked a term of ethnic designation, such as “Indian,” a generic term used by Spaniards for all the indigenous inhabitants of the Americas. Instead, their self-identity centered around the *cab*, creating an “us-and-them” distinction, with the members of the *cab* being “us,” and all others, including other Maya from different *cabob*, being “them.”

As a geographical entity, each *cab* had specific boundaries that included both the house plots of the community and land located outside the *cab* that was used or owned by its members. All *cabob* had a plaza surrounded by administrative and religious buildings and the homes of the *cab*’s important families. Politically, the *cab* was organized with a *BATAB*, or “governor,” and other administrative positions filled by nobles. Also, the *chibal* largely determined the economic and sociopolitical organization of the *cab*, creating units and subunits of varying class and status.



After the arrival of the Spaniards, the *cab* continued to serve its central role in the lives of the Maya, largely functioning in the same way as it had before. Indeed, although the *cab* began to exhibit elements of Spanish culture—such as cathedrals, *CABILDOS* (town councils), and Spanish goods—it absorbed such elements within existing frameworks. In nearly all of the extant colonial Maya documentation—especially that of the 16th century—individual Mayas continued to identify themselves not as Indians but rather as members of a particular *cab*.

—Mark Christensen

### Further reading:

Matthew Restall. *The Maya World: Yucatec Culture and Society, 1550–1850* (Stanford, Calif.: Stanford University Press, 1997).

**Calakmul** The pre-Columbian MAYA center of Calakmul (Kaan) flourished in what is today southern Campeche state, MEXICO. It lay midway between the Gulf of Mexico and the Caribbean coast and probably mediated much of the transcoastal TRADE, working through a network of smaller, nearby centers such as Dzibanché and Kohunlich.

Around 500 C.E., Calakmul began a long rivalry with its southern neighbor, TIKAL. Initially, the upstart city got the better of the contest: Calakmul defeated Tikal in a major battle in 562, although the city of Tikal itself survived. In 679, Calakmul's leaders compelled Bajal Chan Kawiil, lord of the vassal city of Dos Pilas, to launch a ferocious attack on Tikal. The latter was subdued, but two decades later a new ruler revitalized Tikal and launched a new offensive. This time the northern rival was defeated, bringing an end to Calakmul's expansion. Much like the Peloponnesian War in Greece, the protracted struggle ultimately sapped the entire region and led to its generalized collapse from about 600 onward. Both Tikal and Calakmul shared in this decline, and by 900, the two supercenters were largely abandoned.

—Terry Rugeley

### Further reading:

Simon Martin and Nicolai Grube. *Chronicle of the Maya Kings and Queens: Deciphering the Dynasties of the Ancient Maya* (London: Thames & Hudson, 2000).

**calpulli (calpollí)** *Calpulli* in NAHUATL means literally “big house” and is the preferred word in sources such as the FLORENTINE CODEX for the named subunits of the ALTEPETL. Nevertheless, indigenous scribes more frequently referred to these subunits as *tlaxilacalli* (the etymology is uncertain; however, the last element is apparently *calli*, meaning “house” or “structure”). Their closely shared meaning when glossed in Spanish was

*barrio* (neighborhood, district); nonetheless, the *calpulli* were not identical to the subdivisions of European socio-political units.

Rather than a hierarchically organized center with dependencies, each *altepetl* had its own *tlaxilacalli/calpulli*, organized in a cellular or modular structure. Ideally in pairs, fours, or eights (although the numbers greatly varied), each *altepetl* subunit was the equal of the others, at least in theory. A microcosm of the whole, each was also potentially the basis of a new *altepetl*. Community tasks and responsibilities rotated in a fixed order (usually based on perceived seniority and importance) between the subunits. This sort of less linear framework can also be found in other areas of Nahua life, such as the household compound, monumental art, song/poetry, and traditional rhetoric.

Counterparts of the *tlaxilacalli/calpulli* can be found in some Mesoamerican areas and not in others. The *siqui*, *siña*, and *dzini*, as they were called in various Mixtec dialects, are comparable to the central Mexican subunits (see MIXTECS); on the other hand, the MAYA equivalent of the *altepetl*, the *CAH*, apparently did not contain similar subunits.

As central as the *tlaxilacalli/calpulli* were to community life, the *altepetl* remained the foremost expression of unit identity. *Altepetl* names were often unique or uncommon, while those of *tlaxilacalli/calpulli* were repeated over and over. When native record-keepers ascribed an affiliation to individuals or families, their membership in an *altepetl* (with or without mention of the specific subunit) was the most common way to indicate group affiliation.

—Barry D. Sell

### Further reading:

Rebecca Horn. *Postconquest Coyoacan: Nahuatl-Spanish Relations in Central Mexico, 1519–1650* (Stanford, Calif.: Stanford University Press, 1997).

Kevin Terraciano. *The Mixtecs of Colonial Oaxaca: Ñudzahui History, Sixteenth through Eighteenth Centuries* (Stanford, Calif.: Stanford University Press, 2001).

**cannibalism** In 1493, soon after landing in the New World on his second voyage, CHRISTOPHER COLUMBUS sent a report to the Spanish monarchs, Isabella and Ferdinand, offering his initial impressions of the Caribbean islands. In the letter, Columbus claimed that one of the islands was inhabited by bald people, another by Amazons, one by people with tails, and still another by cannibals (see AMAZON WOMEN). The letter contains the first reference to New World cannibals. Indeed, the word *cannibal* originated from Columbus's men, who heard the Caribbean natives refer to a nearby indigenous culture of feared, cannibalistic warriors (the CARIB) as the “Caniba.” Tales of monstrous, semihuman, or subhuman beings existed in Europe prior to Columbus's arrival and thus facilitated the perception of barbarous, morally perverse New World peoples that required and deserved conquering. In

the 16th-century words of Francisco López de Gómara, “Long live, then, the name and memory of [HERNANDO CORTÉS], who conquered so vast a land . . . and put an end to so much sacrifice and the eating of human flesh!”

Similar to López de Gómara, many 16th-century narrators used, and often exaggerated, the existence of cannibalism in the New World to define a type of “Other” who could only stand to benefit from the social and religious reforms of the conquerors. Ecclesiastics were especially disturbed by cannibalism. To them, it represented the devil’s attempt to copy and mock the Eucharist (see *DIABOLISM IN THE NEW WORLD*). Indeed, the cannibalistic scenes the friars witnessed helped them to justify their need to administer the gospel to the indigenous people. Fray TORIBIO DE BENAVENTE (Motolinía) described a Nahua sacrificial ceremony in which the victims’ hearts were removed, and then the Indians “dragged [the victims] away, slashed their throats, cut off their heads, and gave the heads to the minister of the idols, while the bodies they carried, like mutton, to the lords and chiefs for food.” The Dominican friar Diego Durán provides perhaps the most extravagant 16th-century account of New World cannibalism. Describing the precontact Nahuas, he states, “In those days, the bellies of the lords were gorged with that human flesh. It is said of that king that not a day passed . . . that he did not eat human flesh. For this he had many slaves and each day had one killed so he could eat that flesh, or so his guests could, or those who usually shared his meals.”

However, not all the ecclesiastics’ reports of cannibalism had such an exaggerative or condemning tone. As a Protestant missionary sent to BRAZIL in 1556, the Frenchman Jean de Léry lived among the TUPINAMBÁ and witnessed firsthand many aspects of their culture, including cannibalism. Although he disapproved of cannibalism, he noted that whereas the Tupinambá eat their enemies out of vengeance, at times Europeans are guilty of worse. He asks the reader of his narrative, “have we not found people in these regions over here, even among those who bear the name of Christian . . . who, not content with having cruelly put to death their enemies, have been unable to slake their bloodthirst except by eating their livers and their hearts?” He then goes on to cite various examples, including the St. Bartholomew’s Day massacre. Thus, for Léry, the Tupinambá practiced cannibalism as a part of a meaningful cultural ritual, while Europeans senselessly engaged in similar brutalities.

With few exceptions, however, most of the conquistadores’ and friars’ accounts of cannibalism were exaggerations of small-scale rituals that they themselves never witnessed. Nevertheless, cannibalism did exist among the precontact cultures of the New World. Some scholars have suggested that indigenous groups practiced it on a massive scale as a means to add protein to their diets. Such theories, however, lack convincing data. More recently, anthropological findings and ethnohistorical records have led scholars to discover that in most pre-

contact settled societies, human flesh was eaten only occasionally and only during strictly monitored rituals.

Out of all the New World cultures that practiced cannibalism, scholars know the most about the Nahuas (see *AZTECS*). The Nahua worldview was based on a cosmic balance and order that required constant maintenance through rituals, including human sacrifice. Although human sacrifice regularly occurred, not all victims were eaten. On the contrary, only during select rituals, such as the Feast of the Flaying of Men, were victims consumed, and then, only the most important captives were selected. In such cases, the captors and their kin were allowed to participate in the rituals surrounding the sacrifice, including the reverent, postmortem consumption of the victim’s flesh, which was prepared in a MAIZE stew. Interestingly, because a warrior knew that one day he, too, might be captured, sacrificed, and consumed, he did not participate in the eating of his captive saying, “Shall I perchance eat my very self?”

In the semisettled cultures of Brazil’s Tupí-speaking nations, cannibalism was less restricted. The various Tupí nations engaged in constant warfare, not for territory, but for captives and vengeance. Captives were killed with a single blow to the head, cooked, and eaten by the community as reparations for those they had lost in battle to other Tupí nations. Although cannibalism arguably occurred more frequently among the Tupí than other groups, human flesh was not a staple of the Tupí diet and was consumed sparingly. Overall, although cannibalism was practiced in the New World prior to the arrival of Europeans, it was selective and not on a large scale and was imbued with cultural and supernatural meaning.

—Mark Christensen

#### Further reading:

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- Jean de Léry. *History of a Voyage to the Land of Brazil, Otherwise Called America*, translated and introduction by Janet Whatley (Berkeley: University of California Press, 1990).

**Capitulations of Santa Fe** (April 17, 1492) The Capitulations de Santa Fe initiated the commercial relationship between CHRISTOPHER COLUMBUS and the MONARCHS OF SPAIN, Ferdinand and Isabella. Competing with the Portuguese for Asian markets, the monarchs sought a route to the East Indies that did not conflict with the papal bull *Romanus Pontifex*, issued in 1455, which granted the Portuguese exclusive rights to the southern trade routes along the African coast. Columbus’s proposal to sail west to reach Asia intrigued Ferdinand and Isabella, whose support of his venture is enshrined in the Capitulations. On the condition that Columbus was successful, the monarchs were to grant him the hereditary title of admiral and the commissions of viceroy and

governor general. These titles invested Columbus with royal authority to establish and administer trading posts on behalf of the Spanish Crown. The Capitulations also specified that he receive one-tenth of the profits from the merchandise gained during his voyages, jurisdiction over lawsuits resulting from his enterprise, and the right to invest one-eighth of the costs of outfitting his ships and one-eighth of the resulting profits.

Because the Capitulations offered benefits that were contingent on the voyage's success, they created legal disputes between the royal court, Columbus, and his heirs. Columbus had to prove to the Crown that his voyages were indeed successful, and he wrote a number of letters to this effect. His descriptions of the indigenous peoples and natural world of the Caribbean islands reflected this need for self-promotion. However, his inability to administer soon became evident, and the Crown attempted to strip away the privileges they had bestowed in the Capitulations. For years, Columbus and his heirs lobbied the royal court to fulfill the original terms of the agreement.

—Karoline P. Cook

#### Further reading:

Helen Nader, ed. *The Book of Privileges Issued to Christopher Columbus by King Fernando and Queen Isabel, 1492–1502* (Los Angeles: UCLA Center for Medieval and Renaissance Studies, 1996).

**Caracol** Caracol is an enormous archaeological site located on BELIZE's western border. The name means "snail" or "conch" and refers to the enormous number of conch shells discovered there. The center's pre-Columbian name is unknown. Caracol was a Classic-era MAYA center, and it lay in the heartland of that era's civilization in the web of rivers that branch inland from the Belizean and Tabascan coasts. Long growing seasons, abundant water, and easy river travel allowed the inhabitants of the city to grow wealthy through extensive regional TRADE, while they fed themselves through a combination of slash-and-burn MILPA farming and other systems of AGRICULTURE. Construction at Caracol dates from 70 c.e., but the city did not reach its apogee until at least half a millennium later. Its strategic advantage was its location near tributaries of the Macal River, which in turn connected it with the Belize River. At its height, Caracol's population may have been as high as 150,000. It was an archenemy of the powerful city of TIKAL, located west-northwest in what is today GUATEMALA's Petén district. Caracol glyphs record that its people defeated Tikal in a battle in 562 and that they dealt a similar defeat to the nearby city of Naranjo in 631. However, Caracol succumbed to the same stresses that scourged other Classic-era CITIES: overpopulation, maldistribution of resources, soil erosion, and collapse of older trade systems. The last recorded date here is 859; the center appears to have been abandoned within 200 years.

Today the site of Caracol lies some three hours from the main roads in Belize's Cayo District. While it includes a series of impressive temples and ball courts, as well as several *aguadas*, or "artificial water reservoirs," its most astonishing structure is the *Caana*, or "sky building," a 136-foot temple that is the tallest in Belize and one of the largest in the Maya world.

—Terry Rugeley

#### Further reading:

Arlen F. Chase and Diane Z. Chase. *Investigations at the Classic Maya City of Caracol, Belize: 1985–1987*. Monograph 3 (San Francisco: Pre-Columbian Art Institute, 1987).

**Carib** The Carib, or Kalinago, inhabited the Lesser Antilles or the Leeward Islands of the eastern Caribbean, arriving from South America around 1000 c.e. The Carib homeland, to the west and south of the Orinoco river delta, is located next to that of the Arawak-speaking ancestors of the Saladoid, who had settled the islands of the Caribbean centuries earlier. The Carib, skilled sailors and aggressive warriors, slowly but steadily moved from island to island, conquering the local Saladoid. By 1500, the Carib had reached the Virgin Islands and perhaps even PUERTO RICO.

Carib society was loosely egalitarian, although only for men. There were no established chieftains or elite classes, and all Carib males were expected to be warriors, with those excelling in combat and taking many captives obtaining wealth and prestige. Particularly successful men might be recognized as *ubutu*, or leaders, although their authority was more symbolic than real. WOMEN, both Carib and enslaved TAINO-Saladoid, were responsible for tending the crops (mainly MANIOC and MAIZE), cooking, manufacturing household articles such as CERAMICS and baskets, and raising children (see FAMILY). Since only men could participate in most religious and social activities, Carib society developed distinct male and female subcultures, with women even speaking a separate language based on the Arawak spoken by Taino female captives.

The Carib had a fearsome reputation not only because of their constant raids on their neighbors but also because they practiced CANNIBALISM. Usually, male captives were selected to be eaten as part of victory celebrations. Nevertheless, the Carib also peacefully traded and intermarried with their neighbors and developed a vast TRADE network that connected the Caribbean islands with northern South America.

Carib spirituality was based on the belief of the duality of the spirit beings that ruled nature. Bakamo, the great Sky Serpent (star constellation), guided and protected seafaring canoes but could also cause harm if offerings were not made. Likewise, the spirits of deceased ancestors could turn *maboya*, or evil, if neglected. The *boyez*, or shaman, could summon these spirits to heal the sick or interpret dreams.

The Carib fiercely resisted European encroachment on their islands for several centuries. They also intermarried with runaway African slaves and Taino refugees (see **SLAVERY**).

—Francisco J. González

### Further reading:

David Harris. *Plants, Animals and Plants in the Outer Leeward Islands, West Indies* (Berkeley: University of California Press, 1965).

**Casa de Contratación** (1503–1790) A centralized board of **TRADE**, the Casa de Contratación was originally the only authorized trading house and provisioning agency for Spain's mercantile trade with its colonies in the Indies. Eventually, the Casa de Contratación came to control all trade as well as navigational training and served as the chief commercial court of the Spanish Empire.

With **CHRISTOPHER COLUMBUS**'s discovery of the New World in 1492, Spain needed to create a system of trade with its new colonies. While developing the first trading fleets, the Crown realized that controlling and regulating interoceanic trade with the New World would become necessary. Between 1494 and 1502, Queen Isabella's confessor and council, Bishop Juan Rodríguez de Fonseca, controlled virtually all aspects of Spain's trade with the Indies. By late 1502, however, it had become apparent that the Crown needed to create new institutions in order to control both the governmental and the fiscal/mercantile aspects of their New World colonies. Accordingly, in 1503, the Catholic monarchs determined to relieve Bishop Fonseca of his economic and trading obligations by creating the Casa de Contratación.

On January 20, 1503, the Crown formally established the Casa de Contratación. The new institution was located in the Royal Alcázares in Seville until 1598, when it moved into what is now known as the Casa Lonja (which also houses the Archivo General de las Indias).

Initially, the Casa de Contratación was made up of a treasurer (*tesorero*), a chief accountant (*contador*), and a business and trading manager (*factor*). Other posts were added as it took more control over maritime trade and transoceanic **TRANSPORTATION** and then also regulated the immigration of Castilians to the New World. In 1508, the Italian **AMERIGO VESPUCCI** was appointed as the first chief pilot, serving from 1508 to 1514. By 1514 a postmaster general had been appointed and eventually a large number of lawyers, notaries, and other officials were added to the bureaucracy.

By the end of the 16th century, the Casa de Contratación operated as a board of trade, a supreme commercial court, and a clearinghouse for all merchant traffic and oversaw certain immigration issues. In essence, its operations were divided into three distinct divisions. The treasury functions came under the authority of the

treasurer. The chief duties of the treasurer and his officials were to receive and safeguard the **GOLD** and **SILVER** bullion and precious stones that were owed to the royal treasury as payment of the *quinto real*, or royal fifth tax.

The *factor*, as business manager of the Casa de Contratación, focused on outfitting and provisioning ships and purchasing supplies, armaments, and all kinds of merchandise from Europe for shipping to the Indies. His office also had the responsibility of administering all of the nonprecious metal merchandise that arrived from the Indies. The *factor* and his subordinates also oversaw all trade regulations, as well as the annual merchant fleets that sailed between Spain and the Indies.

The *contador*, or chief accountant, had the difficult task of registering all persons and merchandise carried by outgoing or incoming vessels. His office also controlled the fiscal review and accounting of other overseas Crown officials.

The Casa de Contratación in Seville functioned and ensured a royal monopoly on trade with the New World colonies from 1503 until it was moved to Cádiz in 1717. As the Spanish Bourbon monarchs reformed the colonial trading system in the late 1700s, it gradually lost its importance until it was finally abolished by decree in 1790.

See also **CASA DE CONTRATACIÓN** (Vol. II).

—John F. Chuchiak IV

### Further reading:

Clarence Henry Haring. *Trade and Navigation between Spain and the Indies in the Time of the Hapsburgs* (Cambridge, Mass.: Harvard University Press, 1918).

**cassava** See **MANIOC**.

## Catholic Church

### BRAZIL

The early history of the Catholic Church in **BRAZIL** was dominated by one religious order, the Jesuits. In 1549, a group of six Jesuits, under the leadership of Manuel de Nóbrega, arrived in Salvador do Bahia, along with the region's first governor general, Tomé de Souza. By 1550, a second group of four Jesuits arrived; in the subsequent years, others followed. The Jesuits enjoyed a close relationship with the representatives of the royal government. While they focused their efforts largely on the conversion of indigenous peoples, they also played an important role in the general life of the colony. Although eventually many **RELIGIOUS ORDERS** participated in evangelization, in Brazil, the Jesuits took the lead, their influence expanding steadily throughout the early colonial period. Starting in Bahía, they spread Christianity along the Brazilian coast. The indigenous people, who relied on some **AGRICULTURE** and hunting and gathering, lived in small settlements that were widely dispersed in the interior. They frequently

moved their villages to take advantage of new land and shifts in wild animals and plants. The Jesuits attempted to move the natives into larger villages and settlements to ease the process of conversion, thus beginning a practice (*CONGREGACIÓN*) that would continue throughout the colonial period. This also meant that the Jesuits had more control over the native peoples, who were also sought after by colonists as a source of LABOR. The Crown and local governors had established mixed decrees regarding Indian SLAVERY. Some royal laws and local traditions allowed for the enslavement of indigenous people, while in general the Crown discouraged it. The Jesuits fought to keep the natives free and under their immediate supervision.

While focusing their efforts mainly on the coastal indigenous population, the Jesuits also set out for the interior, to what would become the city of São Paulo. There, the order not only founded a settlement but also a school for local native children (see EDUCATION). They also learned local languages in order to better evangelize. José de Anchieta developed the first grammar of the local language, Tupí, and translated Christian teachings into that language. The Jesuits used a modified form of the language that was somewhat intelligible to a broad number of tribes; it became the native lingua franca of the region. Although the Jesuits forcefully opposed the enslavement of both Africans and indigenous people, they were successful only in the latter case. Colonists increasingly imported African slaves to work on SUGAR plantations and at other ventures, and, indeed, as the demand for labor increased, the Jesuits themselves came to be some of the largest owners of African slaves in the colony.

The secular, or diocesan, clergy was slow to emerge in Brazil (see CLERGY, SECULAR). The first diocese was created in 1552 in Salvador do Bahia. The secular clergy tended to concentrate their efforts among the Portuguese residents of the colony and generally served coastal villages. The Portuguese Crown claimed control over the church in Brazil as part of the *Padroado Real* (royal patronage). Under this, in return for early support of missionary activity, the Portuguese Crown retained the right to nominate persons to high ecclesiastical office, such as bishop, or to clerical benefices. The Crown also retained the right to control papal communications with Brazil by requiring royal permission for papal decrees and letters to be promulgated there.

### SPANISH AMERICA

The Catholic Church played a central role in the pacification and settlement of the Spanish New World. Following CHRISTOPHER COLUMBUS's initial voyage to the West Indies, nearly every voyage and expedition counted a member of the Catholic clergy among its members. Because it based its possession of the New World in part on grants from the pope in recognition of its evangelization efforts, Spain needed to actively support missionaries and the spread of Christianity in order to defend its rights to the region. This was the basis for the royal

patronage (*patronato real*), a set of rights and privileges granted by the pope to the Spanish monarchs in recognition of their support for the conversion to Catholicism of non-Christian peoples.

The priests of the Catholic Church fell into two large categories. Priests and other clergy who belonged to organized religious orders were called “regular” clerics. The term *regular* comes from the Latin *regula* meaning “rule,” signifying that these clerics had to follow a special set of rules in their daily lives, such as the Rule of St. Francis or the Rule of St. Benedict. They might be members of orders such as the Franciscans, Dominicans, or Jesuits. The normal parish priest, who reported directly to a bishop or archbishop, was referred to as a “secular” cleric, from the Latin word *saeculum*, meaning the “spirit of the world,” signifying that they lived out in the world rather than within a cloister.

The earliest missionaries to the Americas were members of religious orders, specifically the Jeronimites, Mercedarians, and the Franciscans. The basic pattern of evangelization was to have at least one priest accompany each major expedition. In the case of HERNANDO CORTÉS's expedition to MEXICO, the designated missionary was a Mercedarian; in the CONQUEST OF PERU, FRANCISCO PIZARRO brought a Dominican. Frequently, other priests also joined the early expeditions but as regular members of the company. In the case of the Cortés expedition to Mexico, there were probably as many as three other priests, the most famous of whom was the secular priest Juan Díaz.

In the aftermath of Spain's military conquest of the Americas, small groups of missionaries began to arrive to engage in the ongoing process of evangelization. For example, in Mexico shortly after the formal defeat of the AZTECS, three Franciscan friars arrived, and within a matter of months another larger group of 12 joined them. The Dominicans were the first order to send missionaries to Peru after the nominal defeat of the INCAS. Two small expeditions, one consisting of six and another of eight friars, embarked for Peru. Because of the distance and the dangers of the journey, only about 10 arrived.

The first missionaries had great difficulty communicating with the indigenous peoples. Only a very few Spaniards could speak native languages. The missionaries had to confront the problem of either teaching the indigenous Spanish, or Latin, or learning the indigenous languages themselves. They opted to do the latter. Because of the multiplicity of native languages, the missionaries first learned the languages of the dominant cultures, namely, NAHUATL for the areas conquered from the Aztecs, QUECHUA for the regions of the Incas, and MAYA for the Yucatán and Central America. The Spanish then used these three languages as the common native languages for each area, regardless of what language an individual might speak. These languages thus became lingua franca in each of their territories. The missionaries then set about making grammars of the native languages,

translating catechisms into them, and learning about local customs in order to begin to teach Christianity.

The missionaries wrestled with how best to communicate the essentials of the Christian faith to the Indians. The two options were either to find words in the native languages that approximated Christian ideas or to simply incorporate the Christian concept and Spanish word into the native language. For example, among the Aztecs, the missionaries referred to God either with the Spanish word *dios* or the Nahuatl word *téotl*. In general, for central concepts, they opted to continue to use the Spanish word. Other notions, such as sin, were somewhat alien to the Indians. The missionaries decided to use a native word, *tlatlacolli*, meaning “something damaged.” This resulted in what one scholar has characterized as the “double mistaken identity.” The Spaniards thought that the native word meant roughly the same as the Spanish word and did not grasp that it might have various meanings and refer to a broad spectrum of cultural understandings (see **SYNCRETISM**). Similarly, indigenous people thought that the Spanish word must mean roughly the same as their word and thus did not understand its Spanish cultural context.

In general, secular clerics arrived later than the religious orders, although, as noted, some seculars participated in the conquest expeditions, such as Juan Díaz in Mexico. Secular priests functioned under the authority of their bishop. It was not until the early decades of the 1500s that the first bishops were appointed to govern the church in the New World. The first diocese was that of Santo Domingo, created in 1511 under the supervision of the archbishop of Seville. In 1546, it became an independent archdiocese. In Mexico, the first diocese, Puebla de los Ángeles, was created shortly after the conquest of that country in 1525. Nevertheless, the diocese of Mexico, with its capital in MEXICO CITY, later became the see of the archdiocese of Mexico, erected first as a diocese in 1530 and elevated to an archdiocese in 1546. In South America, LIMA was the first diocese, erected in 1541 and also elevated to an archdiocese in 1546.

As a result of the royal patronage, the bishops of the New World were appointed by the Spanish king. The main church of a diocese was called a cathedral because it housed the bishop’s throne, or cathedra. The cathedral was governed by a body of clerics, called the cathedral chapter (*cabildo eclesiástico*). Appointed by the king, it served the cathedral of the diocese and also as an administrative council for the bishop. Each chapter had 27 members. Local parish priests generally were appointed by the local bishop, although the king retained the right to appoint them if he so desired. They were called curates (*curas*). By the 1570s, the Crown had begun to guarantee the wage of the curates, thus converting the curacies into beneficed curacies. A beneficed curate enjoyed certain privileges, including what constituted a lifetime appointment. Some local curates also served as judges in the ecclesiastical court

system. These priests were called *vicarios* (vicars) since they enjoyed the powers of judge vicariously through the local bishop.

The religious orders were largely self-governing and organized around their convents. The great majority of religious orders were mendicant, meaning they supported themselves through alms. Their members were generically known as friars. The Society of Jesus, or the Jesuits, supported itself through both alms and farms, ranches, sugar mills, and other money-making endeavors. Each convent elected its abbot or leader, along with a council of friars, to assist the abbot. In turn, orders were divided into provinces. The leadership of the various convents elected one friar, known as the provincial, to govern the province. Similarly, councils of friars assisted the provincial. The provincial and his aides assigned individual priests to the various parishes served by the order. These parishes were called *doctrinas*, and the priests who served in them were known as *doctrineros*.

The daily routine in a parish did not differ greatly between curacies and *doctrinas*. Part of each day was spent teaching Christian doctrine to children and then to groups of adults, who were normally separated by gender. The priests taught in the native languages they had learned and sometimes used comic book-like pictures to aid their teaching. The latter are called Testerman catechisms, after Jacobo de Tastera, an early Franciscan missionary. The parish priest also had to prepare couples for marriage, listen to confessions, visit the sick, and perform burial rituals. Because the indigenous population completely overwhelmed the available priests, there was far greater demand for services than the priests could accommodate. They trained Indian assistants to take over some duties, such as teaching doctrine, caring for the church itself, and organizing the service MUSIC.

See also **AUGUSTINIANS** (Vol. II); **AUTO DE FE** (Vol. II); **CATHEDRAL CHAPTER** (Vol. II); **CATHOLIC CHURCH** (Vols. II, III, IV); **COFRADÍAS** (Vol. II); **DOMINICANS** (Vol. II); **FRANCISCANS** (Vol. II); **INQUISITION** (Vol. II); **JESUITS** (Vol. II); **MISSIONS** (Vol. II); **MERCEDARIANS** (Vol. II); **RELIGION** (Vols. II, III, IV).

—John F. Schwaller

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**ceque** See **ZEQUE SYSTEM**.

**ceramics** In general, pre-Columbian pottery consisted of earthenware vessels and other objects manufactured from various clays. Pottery is an ancient tradition in the Americas, with multiple centers of development and elaboration. In many regions, pottery became a prominent component of the material cultural tradition. The production of pottery was strongly associated with the emergence and continuity of settled cultures based on horticultural and agricultural economic systems (see *AGRICULTURE*; *ECONOMY*). Potting became a feature of life throughout Mesoamerica, the Intermediate Area (between Mesoamerica and northern South America), Amazonia (see *AMAZON*), and the Andean region, where its manufacture was associated with the processing, cooking, and storage of various tubers, *MAIZE*, and grains and with the feasting, political, ritual, burial, and symbolic needs of society (see *FOOD*). Largely earthenware, pre-Hispanic pottery was highly diverse and included storage and cooking jars in a wide range of shapes and sizes; service plates and bowls; fermentation jars; drinking cups; zoomorphic, phytomorphic, and anthropomorphic vessels; and burial vessels (large vessels in which the dead were placed and then buried). Other objects made of pottery in various regions included incense burners, stools, snuff spoons and drug containers, jewelry, pubic covers for women, spinning tools, paint palettes, net sinks, *MANIOC* graters, musical instruments, printing devices, beads, and figurines (see *ART*; *MUSIC*; *RELIGION*). Pottery use and manufacture was associated with both the household and larger regional and imperial political economies.

### TECHNOLOGY

Throughout the Americas, low to moderate temperature-fired ceramics were produced at the household level. However, in both Mesoamerica and the Andes, kiln-fired production was widespread by 100 c.e. In the southern Gulf lowlands of Mesoamerica, fine paste orange wares were produced in updraft kilns. The glossy, black-smudged ceramic wares of the *CHIMÚ* kingdom in coastal *PERU* were also produced in kilns. Except in a very limited sense, high-temperature firing suitable for the application of vitrified glazes was not a feature of pre-Columbian ceramic traditions. Glazelike surface treatment did develop in a small border region along the Pacific coast frontiers of *GUATEMALA* and *MEXICO*, where pottery of the Plumbate tradition was manufactured and subsequently traded throughout large areas of Early Postclassic Mesoamerica (see *TRADE*). Except in the *MAYA* area and Andes, where precursors of the pottery wheel developed, pots were assembled from coils, slabs, and mold-made parts without the benefit of a rotating base. Mass manufacturing developed in Mesoamerica, the Andes, Amazonia, and, likely, the Intermediate Area, where different techniques were employed to maintain manufacturing efficiencies and standardization. In Mesoamerica, molds were often employed, for instance, in the manufacture of *incensarios* (incense burners) at the large Classic-period city of *TEOTIHUACÁN*. There, too, figurines were system-

atically manufactured using molds. Later, large workshops in Central Mexico serviced the needs of a massive rural, town-, and city-dwelling population. Within the Andes, low-value objects, such as the mass-manufactured Inca *kero* and *paccha*, vessel forms related to the consumption and offering of *CHICHA* beer, and serving and storage vessels, were mass manufactured along with more specialized components, such as spouts (see *INCAS*). By 400 B.C.E., slip casting was employed along the southern coast of Peru to make bottle spouts to systematic standards.

Medium- to large-scale production of pottery in pre-Hispanic contexts is often indicated by the presence of quantities of production-damaged fragments, waster sherds, and highly standardized forms. Major production facilities were located at Aztec sites in the Basin of Mexico (see *AZTECS*), Inca cities such as Huánuco Pampa, and earlier Andean cities such as *TIWANAKU*. Elsewhere in Amazonia and the Intermediate Area, pottery production was limited to the household level, with part-time and full-time specialization characteristic of some regions, for instance the Chibcha culture of lower Central America and northern *COLOMBIA* (see *MUISCA*). Ornate polychromes of the Nicoya Peninsula of *COSTA RICA*, produced between 600 and 1100 C.E., are among the most elaborate examples of this tradition and are likely to have been manufactured by full-time specialists.

Pottery was decorated in a wide range of styles, from simple incision and punctuation to more complex excision, carving, stamping, and modeling. Color schemes were created through choice of clay, manipulation of the firing environment, and application of clay slips, sometimes in conjunction with the application of resin employed in resist ceramics such as the Usulután wares of the Maya region. Postfiring painting was also employed. At *Teotihuacán*, the true fresco technique was used on elaborate tripod vessels to create scenes representing priests dressed as deities similar to those depicted on murals found on apartment walls. During the Mesoamerican Preclassic, differential firing techniques, such as smudging or refiring, were employed to produce service vessels such as plates and bowls with precisely differentiated, and later mottled, areas of cream and dark grays.

### POLITICAL ECONOMY

Pottery served numerous functions in the Americas, from the quotidian to the hegemonic; in fact, pottery became an important tool for the communication and negotiation of prestige and power. Cooking and service containers are more often than not associated with the daily needs of the household, but they also served the needs of the elite. Large cooking and service vessels signal the emergence of feasting within corporate groups or communities, which were often tied to factional politics. Workshops and industrial-scale manufacture of pottery are associated with emergent complex polities and empires, where redistribution, gifting, and the provisioning of large populations were necessary.

In the Inca Empire, for example, pottery production was partially controlled by the state. Specialists were recruited and relocated to new settlements throughout the empire to produce pottery storage and service vessels, both in local styles and in the geometrically decorated imperial style; this imperial style included the double-handled, flared-mouth storage vessel, or *aryballos*. Workshops within such new cities as Huánuco Pampa in Peru produced large quantities of quotidian ceramics to service the needs of both the rotating population of *MITA* LABOR tax workers and permanent residents.

### SYMBOLIC ASPECTS

Pottery is a semiotically loaded technology that communicates status, esteem, and meaning via symbols applied through a variety of techniques, ranging from modeling to plastic decoration to painting and fresco techniques. Value and, hence, status and esteem related to the complexity and sophistication of the ceramic product. In the Classic Maya world, ornate pottery vases with polychrome scenes containing text and signed by the artists formed part of the elite gifting system. Mythological representations depicted significant aspects of the Maya creation epic, the *POPOL VUH*. The images painted on the vases mirrored murals and, presumably, illustrations painted on the now lost Classic period *CODICES*.

In Peru, elaborate polychrome pottery manufactured during the Early Intermediate period and later in such regions as the Nazca river valley served to communicate religious precepts and encode representations of daily life (see *NAZCA LINES*). There, pottery phytomorphs, zoomorphs, and anthromorphs reproduce fruits, MAIZE, fish, and humans, from WOMEN to warriors (see *WARFARE*). The iconography on these ceramics reduplicates the iconography on similarly important *COTTON TEXTILES* and that associated with the geoglyphs of the adjacent pampa. This representational tradition is widespread in the coastal region where houses, ritual scenes, and aspects of daily life, such as the manufacture of *chichi*, were encoded in three-dimensional representations. The depiction of ritual and daily life in modeled pottery vases was also seen in western Mesoamerica during the Preclassic period.

In Peru, too, pottery was used to encode social and sexual concepts of gender, submission, eroticism, and male homoeroticism. Various stirrup spout, bridge and spout, and wide-mouthed vases depict sexual scenes ranging from intercourse to oral and anal sex. These sexualized images co-occur with a tradition of the modeled and painted representation of prisoners, sacrificial heads, and ritual scenes (see *HUMAN SACRIFICE*). Farther to the north, along the coastal lowlands of ECUADOR and Colombia, a similar interest in the ceramic representation of the phallus is present in the Andean-influenced ceramic traditions of the region.

Pottery miniatures were produced in a number of areas. Among the *OLMECS* of Mesoamerica, small cooking *ollas* and service bowls and platters were produced to scale with the most common figurine type. These

1–2 inch (2.5–5 cm) miniatures were presumably used to create ritual or didactic scenes in conjunction with fired clay figurines. Alternatively, they may be among the few examples of pottery toys.

Pottery figurines were among the most important elements of material culture that could be used to infer aspects of gender construction in the pre-Hispanic world, where ethnohistoric records are nonexistent or too far removed in time. Quotidian aspects such as dress and hairstyles may be inferred (see *CLOTHING*). Often small, less well made figurines depict pregnancy, suggesting that the symbolic concerns of common households in regions such as Mesoamerica were different than those of the elites, who sought and displayed finely made pottery.

### EARLY DEVELOPMENT

The earliest well-documented pottery in the Americas comes from Amazonia and the Santa Elena Peninsula of southwest Ecuador. Early pottery use in the Santarém region of the lower Amazon precedes that of Ecuador by at least 2,000 years. There, simple, decorated red-brown pottery bowls appeared as early as 5500 B.C.E. in shell midden sites. In Ecuador, Early Valdivia culture ceramics have been dated between 3300 and 1850 B.C.E. There, pottery is associated with the precocious development of circular or U-shaped villages, similar to those of the Tropical Forest culture of the Amazon Basin; for the Amazon Basin, there is evidence of increasingly dispersed settlements, as maize and legume farming populations expanded to make use of river margin alluvial soils. However, it remains unclear whether the early development of pottery technology in Amazonia and coastal Ecuador played a part in the subsequent emergence of potting traditions in Mesoamerica and the Andes, or whether they were isolated developments.

### REGIONAL TRADITIONS

The earliest pottery tradition of Mesoamerica emerged during the second millennium B.C.E. along the Pacific coastal margin of the Mexican state of Chiapas and appears not to have local antecedents. This early tradition was characterized by the production of large service *tecomates*, or gourdlike, narrow-mouthed jars without necks; these jars are considered elements of a beverage service associated with feasting and the development of incipient political systems. They may have been used to ferment and serve maize or other alcoholic beverages. Local pottery traditions were well entrenched in Mesoamerica by the last centuries of the second millennium B.C.E., concurrent with the emergence of large-scale maize-based farming communities. Cylindrical seals, early printing devices, were part of this early Mesoamerican tradition.

Ceramics emerged as a feature of settled Andean communities by 1800 B.C.E. Ceramic musical instruments were particularly important in the Andean world, where mold- and slip-casting techniques were used to manufacture tuned panpipes, trumpets, and drums. Special whistle



containers were also manufactured; these produced a sound when liquid was poured out.

The precocious use of pottery in the lowlands of the lower Amazonia laid the foundation for a technological tradition that continued until the arrival of Europeans. Pottery is strongly associated with lowland sites along the Amazon and its affluents, as well as the rolling savanna plains, the Llanos de Mojos, in BOLIVIA, where extensive populations built complex earthworks. The highly modified, nutrient-rich soils of Amazonian sites, known as *terra preta*, which were essentially massive middens that were widespread by 1 C.E. in Amazonia, were especially well suited for pottery making. Amazonian potters provided containers for daily use and ritual and burial needs, as well as furniture and clothing in the form of women's pubic covers. Most elaborate in the Marajoara phase of Marajó Island at the mouth of the Amazon (ca. 400–1300 C.E.), pottery was used to signal social identity and rank through the use of elaborate polychrome modeled anthropomorphic funerary urns. This tradition of polychrome funerary and ceremonial ware has been found across the lowlands in Amazonia, Colombia, Ecuador, and Peru by 1000 C.E.

Throughout the Americas, ceramics served a variety of pragmatic material and cultural needs while simultaneously communicating social position. Ceramics were a focal point of pre-Hispanic technological innovation through the development of kilns, specialized paints, and other manufacturing techniques. Most important, they served as a canvas that gave shape to a variety of artistic traditions, from the depiction of royal and mythological scenes to the modeling of daily life.

—Christopher Von Nagy

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**Chanca wars** The Incan idea of past events was very different from the European concept of history. Events may or may not have taken place; a narrative may have been edited. Nevertheless, whether called history or myth, the accounts of Inca political consolidation, like those of the origin of the Inca rulers, were important political statements intended to validate Inca rule and expansion (see INCAS). The account of the Chanca wars is found in many of the early chronicles. It was clearly an important statement, aimed at justifying a major shift in political strategy from that of a small, regional polity to that of an expansive, imperial state.

The narrative states that during the reign of Viracocha Inca, a peace-loving ruler, an ethnic group from the west, the Chancas, conquered Andahuaylas. The Chanca ruler then decided to conquer the Inca capital city of Cuzco. He divided his army into three parts, each under a pair of generals, and sent messengers to Viracocha Inca demanding submission. After consultation with his lords in council, Viracocha Inca decided to submit; he fled the city with his FAMILY and followers, including his first-born son and heir apparent, Inca Urqon. A younger son, Inca Yupanqui, decided to defend Cuzco to the death. He was joined by three young nobles, among others, but they were still far outnumbered by the Chanca forces. Each night Inca Yupanqui prayed to the god Viracocha, who told him in a dream that he would send help. When the Chanca army attacked Cuzco, unknown warriors rose up as if from the ground and defeated the Chanca. These warriors were called *purum auca*, or “warriors from the wilderness”; some believed that they had been transformed from stones. The other two Chanca armies were easily vanquished. Inca Yupanqui's power and prestige were greatly enhanced; he later became the Inca ruler, assuming the name PACHACUTI INCA YUPANQUI (He Who Overturns the World).

—Patricia J. Netherly

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**Chan Chan** Chan Chan was the capital city of the CHIMÚ Empire, founded in the early 14th century on the north coast of PERU. At its height, the city spanned nearly eight square miles (20.7 km<sup>3</sup>) and housed some 30,000 people. Chan Chan was built of adobe and made up of monumental elite residences, called *ciudadelas*, as well as scattered intermediate and commoner dwellings. Because of the north coast's desert climate, the city resorted to the use of forced LABOR programs for canal construction and agriculture. Using this system, Chimú elites were able to prosper and accumulate large amounts of luxury items, particularly metalwork. Each *ciudadela* compound was dedicated to an individual ruler. The structures were made up of high, thick walls laid out in a rectangular formation with a single entrance. After his death, the ruler was buried within the compound, and his FAMILY, charged with its upkeep. Within the *ciudadela*, leading families set up residences, stored luxury goods, and administered the estate. The interiors of these *ciudadelas* had a repetitive mazelike organization, which may have served as a deterrent to thieves. Interior walls were ornamented with adobe reliefs, which contained no reference to rulers, history, or daily life. Instead, they combined geometric shapes (diamonds and lines are the most common), as well as natural creatures (particularly fish and birds). These repetitive design elements align with the Chimú practice of accumulation, a unique penchant for collecting goods

in large, guarded storage rooms. U-shaped rooms called *audencias* line the labyrinthine passages and were probably used as administrative offices that also restricted access to elite residences and storerooms. Sometime between 1462 and 1470, the INCAS conquered Chan Chan, at which point the Chimú leader and his court were captured and exiled to the Inca capital of CUZCO. It is believed that the Incas may have organized their empire of tribute labor and storage according to Chimú models.

—Elena FitzPatrick

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**chasqui (chaski)** The QUECHUA word *chasqui* refers to the highly trained Inca runners, or couriers, who delivered messages (either orally or written on *QUIPUS*), royal decrees and orders, and transported goods and perishable packages for Inca emperors by means of a relay system. The system was reportedly developed by the 10th emperor of the INCAS, Tupa Inca Yupanqui (r. 1471–93).

*Chasqui* runners were trained from childhood, with only the most physically fit and fastest finally being chosen for service. The young men who served as runners played an important role in ensuring the Incas' control over their far-flung empire, which spanned from ECUADOR in the north to CHILE and parts of ARGENTINA in the south. Runners were dispatched from local *chasquiwasi* (houses of the *chasquis*), which were set several miles apart. Father Bernabé Cobo, a Spanish eyewitness, wrote that each station consisted of two buildings facing each other on either side of the road. At each house were two young men, ready to deliver messages in either direction. While one rested, the other was ready to run out and receive an incoming message. Throughout the Inca period, *chasqui* stations were manned 24 hours a day. Those who fell asleep while on *chasqui* duty or failed to deliver a message received the death penalty (see CRIME AND PUNISHMENT).

Each messenger carried a conch shell trumpet, which he used to announce his arrival at the next relay post, or *tambo*. *Tambos*, similarly manned with two runners, were set at regular intervals along the highways, in between the larger *chasquiwasi*. When a *chasqui* arrived at the next station, he passed his message or cargo (which he carried in a small pack strapped to his back called a *qipi*) to the next runner. He then rested and received food and drink before returning to his original station.

The *chasqui* ran at high speeds along the more than 14,000 miles (22,526 km) of interconnected Inca roadways, which were spread throughout PERU, Ecuador,

BOLIVIA, and parts of COLOMBIA, Argentina, and Chile. It was reported that a message from the coast to the Inca capital of CUZCO would arrive within two days, while a message from Cuzco to Quito in the northern reaches of the empire would arrive within a few days. In most cases, the messages or goods traveled about 50 leagues a day.

—John F. Chuchiak IV

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**Chavín** *Chavín* is the name associated with the earliest major Andean culture and artistic style. The term itself comes from Chavín de Huántar, an archaeological site in the Ancash Department of modern PERU. The Chavín period began around 1400 B.C.E. and lasted for about a thousand years. Archaeologists have advanced several theories regarding the culture's origins: Max Uhle saw Mesoamerican influence; Julio C. Tello, who conducted the early excavations at Chavín de Huántar, thought its roots lay eastward in the AMAZON Basin, given the depiction of Amazonian animals such as the cayman and the jaguar in the site's religious iconography. Others have pointed to influences from coastal and maritime cultures that predated the settlement of Chavín de Huántar. Sites influenced by the Chavín culture often include U-shaped temples and stone sculpture using kennings, double-profile heads, and reversible imagery to depict deities and tropical animals.

Although it has not been proven that the culture originated at Chavín de Huántar, that site was an important administrative and pilgrimage center. Highland agriculture there sustained several thousand people by the end of the Chavín period (ca. 300 B.C.E.), and social stratification had emerged (see AGRICULTURE), though little is known about the site's political organization. The most impressive ruins are the temple complexes, which have subterranean passages where some of the principal ritual objects were located. The most famous of these still at the site is the Lanzón, a large elongated granite shaft carved to depict an anthropomorphic deity. Probably the most famous Chavín artifact is the Raimondi Stone, an elaborately carved monolith, which has been on display in Lima's National Museum of Anthropology since 1874. Chavín de Huántar is a UNESCO World Heritage site.

The Chavín culture had religious and artistic influence over a region stretching from Cupisnique in the north to Ica and Ayacucho in the south. After the Chavín period ended, local and regional cultures showing some Chavín characteristics eventually emerged; these included groups such as the WARI and MOCHE.

—Kendall Brown

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**Chibcha** See **MUISCA**.

**chicha** *Chicha* is the Spanish word for the mildly alcoholic beverages fermented from MAIZE, fruits, seeds, and other plants that are consumed today from MEXICO to South America. *Chicha*'s fame derives from its use in the pre-Columbian Inca Empire, where it was the beverage of choice at ceremonies, political events, feasts, and funeral rituals (see **INCAS**). The Inca emperor and local lords provided *chicha* to commoners in exchange for LABOR. Elite *aqllakuna* women (see **ACLLA**) brewed *chicha* on a large scale in multiroom buildings (such as that excavated at the Inca city of Huánuco Pampa in northern PERU).

*Chicha* was also produced in households and consumed as a daily staple. Pre-Inca evidence of *chicha* production from the MOCHE, RECUAY, WARI, TIWANAKU, and CHIMÚ cultures spans the time from the Early Intermediate period (200 B.C.E.–650 C.E.) to the Spanish CONQUEST. *Chicha* use is evidenced by large jars with narrow necks that were used for cooking, fermentation, and storage and by decorated drinking vessels (see **ARCHITECTURE**; **CERAMICS**). The jars are associated with linear floor depressions, as well as grinding stones that were used to process malted corn kernels. A ceramic vessel from the Moche culture depicts individu-

als brewing *chicha*. Storage bins of uniformed-size corn kernels at Pampa Grande (Moche culture), dregs resulting from household *chicha* brewing at Manchan (Chimú culture), and pepper-tree berries recovered in a large brewery at Cerro Baúl (Wari culture) provide organic evidence of *chicha* production. Iconographic representations of the plant *Anadenanthera colubrina* on TEXTILES, pottery, and stone in Moche and Wari cultures suggests it was used as a hallucinogenic additive to *chicha*, as it is by shamans today. The earliest but tenuous evidence of *chicha* consumption in the Andes are ritual vessels decorated with corn motifs, which date from the Initial-period (1500–800 B.C.E.) site of Kotosh and the Early Horizon (800–200 B.C.E.) CHAVÍN site of Chavín de Huántar.

—James Sheehy

**Chichén Itzá** The center of Chichén Itzá dominated the political landscape of the northern Yucatán for most of the Early Postclassic period. The name Chichén Itzá means “by the mouth of the well of the Itzá” and refers to the MAYA city’s ninth-century conquest by peoples of the southern Gulf coast.

The city had a long and complicated history. It began as a minor settlement between 600 and 750 C.E., drawing on the elegant Puuc architectural style of centers such as Uxmal. But the Itzá invasion brought momentous changes. These aggressive peoples quickly extended their power throughout the north and east of the peninsula,



A glass of *chicha* (maize beer) and a basket of maize kernels. *Chicha* production is widespread though the Andean region. (Courtesy of J. Michael Francis)

eliminating the rival Yaxuná-Cobá group and establishing firm control over the economically critical salt deposits of Emal. By the late 800s, Chichén Itzá had displaced all other northern plains centers in terms of power and wealth. The Itzá operated a lucrative salt-for-OBSIDIAN TRADE. They also superimposed on their city an array of features commonly associated with Central MEXICO, including warriors, the Feathered Serpent god (QUETZALCÓATL), phalluses, and the reclining figures known as Chac Mool that were probably used as receptacles for ceremonial offerings. The long-supposed transfer of styles from the Toltec city of TULA to Chichén Itzá has recently come into question, however, given evidence that the latter actually predated the former (see TOLTECS).

Through their control of coastal waterways, Chichén's rulers also supervised a vast trade network; CACAO, seashells, feathers, and precious stones were all sought-after commodities. The city began to decline sometime after 1000, possibly as a result of the commercial and political disruptions occurring throughout Mesoamerica. The remaining Itzá relocated to the area of GUATEMALA's Petén, and the first Spanish conquistadores found only abandoned ruins where the mighty kingdom had once stood.

Despite its importance in Postclassic Mesoamerica, considerably less is known about Chichén's political and dynastic history than about the far older Maya centers of the southern lowlands. The increasing use of paper during the Postclassic period meant that few stone inscriptions survived in Chichén. Virtually all of these inscriptions date from the reign of K'ak'upakal K'awiil and his brother K'inil Kopol (ca. 900).

In death, Chichén Itzá has retained its powerful allure. Indeed, so many people visit the site every year that Mexico's National Institute for Archaeology and History has restricted access to temples such as the iconic Castillo. Regardless, Chichén Itzá seems destined to remain one of the most visited archaeological zones in the world.

—Terry Rugeley

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**childhood** See FAMILY.

**Chile** Early Spanish explorers picked up the word *Chile* from the INCAS, who used it to describe territory to the south of PERU. There are a number of theories

regarding the origin of the word; likely, it derived from the QUECHUA, Mapuche, or Aymara language.

Modern Chile stretches along South America's Pacific coast from roughly 17° S latitude to the tip of the continent. Its eastern boundary follows the Andes mountain chain down the spine of South America. Chile also has a territorial claim in Antarctica, directly south of the continent, and governs Easter Island. Chile's length means that it incorporates a wide variety of climatic zones, from the arid north to the deciduous forests of the south.

There is evidence that human activity began in Chile 30,000 years ago, and a number of archaeological sites reveal that both big-game hunting and some cultivation began to take place between 10,000 and 9000 B.C.E. On the eve of Spanish CONQUEST, Chile's indigenous cultures included the Diaguita in the desert to the north, the Picunche in the central valley, the Mapuche (Araucanians) in the southern forests, the seminomadic Pehuenche and Puelche in the Andes and the Patagonia in the fjords of the far south, and the Chono on and near the island of Chiloé.

Although indigenous groups in central Chile lived in close proximity to one another, they maintained important ethno-linguistic differences. For example, the Pehuenche were racially, culturally, and linguistically distinct from both the Mapuche of the plains and the Patagonians to the south. Generally, it is believed that the Mapuche developed culturally on the western side of the Andes and the mountain groups on the eastern side.

Most of these groups in central and southern Chile were divided into small, kin-based settlements but engaged in intergroup contact through the region's well-developed TRADE network. The intermediaries of this network were the Pehuenche and Puelche, hunter-gatherers who moved through different regions in pursuit of guanacos, ñandú (rhea), and pumas, which brought them into frequent contact with other ethnic groups. Contact and mobility were further increased almost immediately after the arrival of Europeans and, in particular, after the introduction of Spanish horses.

During the early period of the Spanish conquest, intertribal alliances were dynamic and complex. The Pehuenche and Puelche were neighbors and culturally similar, yet despite their proximity, they developed a political antipathy through their alliances with the Mapuche and the Huilliche peoples, respectively. The relationship was further complicated when the Pehuenche entered into multiple and fleeting alliances with Hispanic creole settlers.

DIEGO DE ALMAGRO led the first Spanish exploration of Chile from Peru in 1535. With the help of Prince Paullu, the Inca MANCO CÁPAC's brother, Almagro conquered the Andean provinces known to the Inca as Purumauca, Antalli, Pincu, Cauqui, and Araucu. At the eastern entrance to the Aconcagua Valley, which later became the gateway to Chile's capital, Almagro decided to turn back to Peru. However, before he left, Almagro waited for reports from the several expeditions he had sent ahead. One of these expeditions reached (and named) the port of Valparaiso,

while another, led by Gómez de Alvarado, went southward. Gómez de Alvarado reported to Almagro that the farther he traveled, the worse the terrain became. As he moved south, Chile's climate became increasingly cold, and the land, barren and full of large, muddy rivers. Alvarado added that he came across a number of indigenous groups, whom he characterized in a negative light. Alvarado was unimpressed with one group (thought to be the Huarpes), in particular, who, he said, dressed in pelts and ate only roots.

Alvarado's group met armed resistance. The Spanish fought off an attack at the Maule River and fought the "skirmish" of Reinoguelén at the junction of the Ñuble and Itata Rivers. This battle was the first contact between the Spanish and the Mapuche and resulted in the death of two Spaniards and the capture of scores of Mapuches. Nevertheless, Alvarado's disappointment did not prevent others from trying their luck in Chile; in 1541, PEDRO DE VALDIVIA led an expedition from Peru into Chile's Aconcagua Valley. Valdivia founded Santiago de la Nueva Extremadura, was named Chile's first governor, and sent his lieutenants south and east into what would eventually become the Argentine province of Cuyo (see ARGENTINA).

After founding the city of Santiago, Valdivia led an expedition south in 1546, which met with strong Mapuche resistance near the Bío-Bío River. Conflicts only increased when the Spanish presence grew after 1549 in response to the discovery of GOLD in the region. Valdivia's expedition established Spain's grip on much of Chile, but the conquest stopped short when Valdivia was killed by the Mapuche in 1553. Valdivia's former Mapuche groom, Lautaro, set an ambush for the governor as he rode to the aid of the Spanish fort of Tucapel.

Lautaro's knowledge of the Spanish had made him an indispensable military leader for the Mapuche. Armed with the euphoria of the victory over Valdivia and the knowledge that the Spanish would return to the south if not driven out of Chile, Lautaro led a Mapuche counteroffensive in 1557. After months of marching, he was nearing Santiago when he was intercepted by Spanish forces and killed in a battle with Chile's new Spanish governor, Francisco de Villagra.

This turn of events quickly evolved into the Arauco War, a seemingly eternal conflict between the Spanish (and later Chilean) soldiers and the Mapuches. The failures in these campaigns became an important conundrum for Spanish governors, writers, and soldiers alike, who were accustomed to quick conquests. An important literary representation of the Arauco War can be found in the "first American epic," *La Araucana* by Alonso de Ercilla y Zúñiga, originally published in 1569. As a soldier, Ercilla saw few victories for the Spanish during his brief stay in Chile, where he had arrived in 1557. Not surprisingly, his epic reflected the voice of a frustrated adventurer.

See also ARAUCANIANS (Vol. II); CHILE (Vols. II, III, IV); SANTIAGO DE CHILE (Vols. II, III, IV).

—Eugene Berger

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**Chimú** The Chimú were an Andean ethnic group that ruled an empire the Spaniards later called Chimor. Living along the northern coast of PERU, the Chimú flourished from 900 to 1460, when their kingdom was conquered by the INCAS. The great adobe coastal city of CHAN CHAN, founded around 900 C.E., was the capital of the Chimú Empire. At its height, Chimú territory stretched from Tumbes in the south over 600 miles (965 km) to Huaura, near the site of modern LIMA. The earlier MOCHE had inhabited part of that region, and the Chimú perpetuated some Moche traits but were also influenced by the WARI culture that expanded into northern Peru several centuries prior to their emergence.

Life in the arid coastal desert challenged the Chimú. Their AGRICULTURE required irrigation, and they built and maintained the most elaborate system of canals in the ancient Andes. Such projects demanded complex social and bureaucratic organization. Fish and shellfish taken from the coastal waters provided an important supplement to their diet. A powerful aristocracy dominated Chimú society, and the Chimú believed their king was a god. Much of the GOLD initially plundered by the Spanish conquistadores probably came from the Chimú region, for they had focused much of their craftsmanship on metallurgy and excelled as goldsmiths. They were also well known as weavers (see TEXTILES).

The Spaniards were able to obtain information about Chimú history and mythology as the Chimú had only recently been conquered by the Incas. Inquiries revealed that Tacaynamo had arrived by sea on a raft and established himself as ruler and high priest of the Moche Valley. Later Chimú kings claimed descent from Tacaynamo. In the mid-14th century, Tacaynamo's grandson Ñançenpinco led the first Chimú expansion, conquering the Santa and Jequetepeque Valleys to the south and north, respectively. A century later, the Chimú king Minchançaman carried out the last phase of Chimú imperial expansion, extending their rule over Tumbes near the present-day Peru-ECUADOR border and southward to the Chillón Valley. Minchançaman was still ruling when the Incas conquered the Chimú around 1460. They took him to Cuzco as a hostage in an attempt to ensure the cooperation of the Chimú.

—Kendall Brown

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John H. Rowe. "The Kingdom of Chimor." *Acta Americana* 6 (1948): 26–59.

**chinampas** Sometimes mistakenly called "floating gardens," *chinampas* are a Mesoamerican intensive agricultural system of high fertility, high yields, and multiple annual crops (see **AGRICULTURE**). Cultivators modified boggy areas by digging drainage canals and forming raised fields of rich canal mud piled between them. They also piled layers of mud and decaying vegetation on shallow lake bottoms until fields rose above the water level. Field margins were stabilized with wooden piles or wattle retaining walls, and trees were planted along the edges. Construction of *chinampas* was **LABOR** intensive and beyond the capabilities of **FAMILY** groups. The centralized authority of a chiefdom or state was required to mobilize sufficient labor to undertake the project.

Generally found surrounding or adjacent to urban settlements, *chinampas* were important resources for supporting large populations. *Chinampas* were constructed throughout Mesoamerica, appearing as early as the Late Formative period between the city of **TEOTIHUACÁN** and Lake Texcoco. Raised fields were not restricted to lake margins in arid highland areas; the **MAYA** built them in the wet lowlands. Extensive tracts of *chinampas* in Lakes Chalco and Xochimilco and surrounding the Aztec metropolis of **TENOCHTITLÁN**-Tlatelolco produced much of the food needed to support the capital of the empire (see **AZTECS**).

The canals permitted easy canoe transport of the crops to markets, maintained constant soil moisture, provided mud and floating plants to renew soil fertility, and were home to edible fish and lake animals. Aztec nobles sometimes became owners of these valuable resources after they were captured from other groups; they then rented them to farmers. Colonial documents reveal that many cultivators built their houses on the *chinampas* they farmed. Following the **CONQUEST** of **MEXICO**, Spaniards began to drain the Basin of Mexico's lakes and divert springs for drinking water. As a result, over time most of the pre-Columbian *chinampas* disappeared, and today only Xochimilco maintains a small area of them.

—Stephen L. Whittington

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**chroniclers** The chroniclers (*cronistas*, in Spanish), as understood in the 16th century, wrote about the lives and deeds of rulers and those who excelled because of their virtue, military skill, or intellect. Since their inception in the Middle Ages, chroniclers had a strong pedagogical orientation. The Castilian-Leonese legal code contained in the **Siete Partidas** (proclaimed as law in 1348) instructed the **MONARCHS OF SPAIN** to read or listen to the accounts of the lives of their predecessors and use them as guides for their own conduct. However, the moral, political, and military instruction of rulers was not the chroniclers' only job. They were also to describe the times. Epistemological standards, therefore, were key to the development and transformation of the tradition, perhaps being more important than a writer's literary or rhetorical ability. Chroniclers thus were expected to use reliable information (obtained from key participants, official documents, or, less commonly, those who witnessed events) and to speak from a position of social and intellectual authority.

Spanish expansion into the Americas brought about intense writing and publication of narratives about exploration, **CONQUEST**, indigenous life and history, and evangelization. While letters written by **CHRISTOPHER COLUMBUS**, **AMERIGO VESPUCCI**, and **HERNANDO CORTÉS** were often included as part of the historiographical corpus on Iberian colonial expansion, the chronicling of Spanish colonialism truly began with Peter Martyr d'Anghiera (1457–1526), who produced the first historical narratives about the Spaniards' conquest of the Americas. As reports from conquerors and explorers reached Spain, Martyr made sense of the news for a courtly audience familiar with classical and humanist traditions. The first Latin edition of Martyr's *Decades de orbe novo* (Decades of the New World) appeared in 1511; the work covered only the first decade of the colonial era, from Columbus's first voyage of 1492 to Vicente Yañez Pinzón's voyage to **BRAZIL** in 1499.

It was not until 1530 that Miguel de Eguía, the publisher in Alcalá de Henares, issued a complete edition with all of Martyr's "decades" (chapters). In 1520, King Charles I appointed Martyr royal chronicler, thus officially recognizing his endeavors as historian of Spanish colonization. Martyr's work contained the first authoritative representations of Amerindian populations and the colonization process. His descriptions of the inhabitants of the Antilles provided a lens through which his contemporaries tended to look at Amerindian populations as a whole; moreover, his criticism of some Spanish conduct in the Indies shaped future reflections on the colonial project.

After Martyr's death, the Crown made provisions to have Antonio de Guevara continue his work. A 1526 royal decree (*cédula*) ordered that all of Martyr's papers be put in Guevara's possession; however, Guevara never fulfilled his commission. Only with the 1532 appointment of Gonzalo Fernández de Oviedo (1478–1557) as a royal chronicler was the effort to write the history of Spanish expansion

reinvigorated. Acting under the authority and supervision of the COUNCIL OF THE INDIES, Oviedo set out to correct the work of Martyr, whom he had criticized for having indiscriminately recorded what his informants told him. Oviedo relied on his own lived experiences, published accounts, original documents, and interviews. He also made use of his power of attorney granted by the Crown to summon depositions from all royal officers in the Indies. Published in 1535, the first part of Oviedo's *Historia general y natural de las Indias* (General and natural history of the Indies) was the first major account of Spanish colonization published in the Spanish language.

Oviedo's work presents a complex view of Spanish colonization. While extolling the merits and accomplishments of the conquistadores, he also harshly criticizes the greed and destructive behavior of some of their most outstanding leaders. Harboring no doubt about the political and economic significance of conquest and colonization, Oviedo sets out to defend the legitimacy of Spanish claims to sovereignty in the Indies and justifies the destruction of indigenous populations based on derogatory views on their morals and nature. These themes proved to be of critical importance in subsequent histories of the Spanish conquest. Oviedo's *Historia* defined the course for future historians, whose accounts revolved around the interpretation of events relevant to the great debates on colonial policy. It also set the general tone of the discussion for chroniclers and historians such as Fray BARTOLOMÉ DE LAS CASAS, FRANCISCO LÓPEZ DE GÓMARA (1511–ca. 1566), and BERNAL DÍAZ DEL CASTILLO.

Prior to the publication of Oviedo's *Historia general y natural*, FRANCISCO DE XEREZ had published a brief account of the conquest of PERU. Xerez's contemporaries were astonished to read about the treasure ATAHUALPA had paid FRANCISCO PIZARRO in ransom for his freedom and about the subsequent execution of the indigenous ruler in spite of his compliance with the Spaniard's demands. Xerez's account helped undermine the legitimacy of the conquest, as FRANCISCO DE VITORIA's remarks morally rejecting the conquest of Peru made clear. Subsequent news about the civil wars among Spaniards in the New World caused outrage in Spain and helped undermine the conquistadores' reputation at court (see CIVIL WARS IN PERU). It was partly because of these accounts that the Crown moved to issue the NEW LAWS OF 1542, which sought to reform colonial administration, protect indigenous rights, and curb the power of the conquistadores in the colonies. In the proceedings before the Council of the Indies, Las Casas read from one of the earliest versions of the *Brevísima relación de la destrucción de las Indias* (*A Very Brief Account of the Destruction of the Indies*), a work that denounced the offenses committed by the conquistadores against the Indians. Las Casas's account played a critical role in shaping the course of reform drafted in the new legislation; at the same time, it cast a shadow on the historical meaning of the conquest and the merits of the conquistadores.

The political and ideological struggles of the 1540s and 1550s informed the production of two of the most important works of the 16th-century Spanish historiographical canon, Las Casas's *Brevísima relación* and López de Gómara's *Historia general de las Indias* (General history of the Indies), both published in 1552. Both Las Casas and Gómara openly condemned the evils of the conquest, although they had very different views on the legitimacy and desirability of conquest as a means for subjugating indigenous populations. Their works played a crucial role in supporting a negative perception of Spanish imperialism throughout Europe. Based on previous accounts, reports from the Indies, and interviews, the narratives provoked strong reactions among those who had participated in the conquest. Most notably, Díaz del Castillo, a veteran of the conquest of MEXICO, wrote a passionate reply from the eyewitness perspective. He aimed to counter the damage that López de Gómara and Las Casas had done to the public image of the conquistador.

In addition to the political debates, another key source of controversy was that of the writer's authority, as the transatlantic development of the genre had caused chroniclers to rely more heavily on empirical information to authorize their writings. Oviedo was the first to insist on the critical importance of eyewitness testimony and direct knowledge, and later PEDRO CIEZA DE LEÓN'S *Crónica del Perú*, whose first part was published in 1553, relied on his own eyewitness experiences and extensive fieldwork throughout Peru, which included interviews with indigenous informants. Like Bernal Díaz, Cieza saw himself as an outsider to the world of highly educated chroniclers, but both writers ended up consolidating new standards of truth and authority developed in accordance with their lived experiences.

See also LÓPEZ DE GÓMARA, FRANCISCO (Vol. II); OVIEDO, GONZALO FERNÁNDEZ DE (Vol. II).

—Cristián A. Roa-de-la-Carrera

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**Cieza de León, Pedro de** (b. ca. 1520–d. 1554) *Spanish chronicler of Peru* Pedro de Cieza de León, known by the end of his life as the “prince of Peruvian CHRONICLERS” for writing the first history of the Andes, was born in the Spanish town of Llerena, Extremadura, around 1520 into a family of minor merchants, notaries, and clergy. As a youth, he witnessed HERNANDO PIZARRO unload a treasure-laden ship in Seville in 1534; the treasure was part of the Inca ATAHUALPA's ransom. Thus inspired, on June 3, 1535, Cieza de León soon set sail for the Indies. He arrived first in HISPANIOLA and then departed for Cartagena. Cieza de León spent the next decade participating in expeditions throughout the

region under the leadership of Captain Jorge Robledo. The future chronicler took careful notes of his observations; these would eventually constitute his ethnographic accounts of the flora, fauna, and diverse peoples of South America and the momentous events he encountered firsthand.

A true soldier-chronicler, Cieza made frequent references to his balancing of both occupations as he helped to found CITIES in what is present-day southern COLOMBIA. He acquired modest wealth from the spoils of CONQUEST and eventually received an *ENCOMIENDA* at Arma near the Cauca River. When Sebastián de Belalcázar murdered his patron, Robledo, in October 1546 and sacked Cieza's *encomienda*, the chronicler left the region, turning up later that year in Popayán to join the loyalist forces, ironically under Belalcázar's leadership, in order to pursue the rebel GONZALO PIZARRO in PERU. Cieza's shift in alliances allowed him a firsthand view not only of the epic retaking of Peru by PEDRO DE LA GASCA's royalist forces but of the remarkable trek through the former Inca Empire, from Pasto to CUZCO (see INCAS).

Cieza had the uncanny ability to gain the trust of his informants, whether they were indigenous people or Spanish captains and governors. Soon after Pizarro's defeat, Gasca recognized Cieza's abilities as a chronicler and gave him access and perhaps resources to compile materials for his chronicles and histories. Though never the official chronicler of the Gasca administration, Cieza traveled widely under Gasca's authority and interviewed a wide range of officials, clergymen, indigenous CACIQUES, and, famously, some of the remaining Inca *quipucamayocs* (QUIPU "readers") in Cuzco. His writings are clear and informative and reflect more than an immediate witnessing of events; Cieza transcended the genre and wrote a work that put the Incas into universal history. His work became the crucial source for many historians who followed, especially for the Inca Garcilaso de la Vega, who quoted liberally from Cieza in his *Comentarios reales de los Incas* (*Royal Commentaries of Peru*). Cieza finished part 1 of his four-part masterpiece in September 1550, in LIMA, and soon thereafter began the return journey to Spain, where he had arranged to marry Isabel López de Abreu, the daughter of a merchant in Seville. He presented part 1 of his *Chronicle of Peru* to Prince Philip at Toledo in 1552, and it was approved for publication by the COUNCIL OF THE INDIES the same year. The work quickly became popular, with multiple printings throughout Europe.

Cieza did not live to see the publication of parts 2, 3, and 4 (all of which remained unpublished until the late 19th and 20th centuries). Nevertheless, he left instructions in his will to have the manuscripts, which circulated widely in the 16th century, published or sent to his much-admired fellow historian the Dominican friar BARTOLOMÉ DE LAS CASAS.

See also GARCILASO DE LA VEGA (Vol. II); PERU (Vols. I, II, III, IV).

—Michael J. Horswell

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## cities

### MESOAMERICA BEFORE 1492

The earliest cities in Mesoamerica were a cluster of settlements established in the Mirador Basin of GUATEMALA's northern Petén region and adjacent areas of BELIZE. A number of sprawling cities, including EL MIRADOR and Nakbé, emerged in the basin no later than the Late Formative period (400 B.C.E.–200 C.E.). At the center of these settlements were enormous elite residential and ceremonial compounds, many of which were connected to other such centers by elevated causeways. The ceremonial precincts were surrounded by residential areas that became progressively less dense as one moved away from the city center. El Mirador, for example, covered an area of 10 square miles (26 km<sup>2</sup>) and supported a population some estimate to have been as high as 80,000, a settlement density of about 30 persons per acre. If accurate, this would place El Mirador among the most densely populated cities ever to arise in Mesoamerica's lowlands, though the number of inhabitants was still well below that of cities elsewhere in Mesoamerica, particularly the highlands of Central MEXICO.

The most notable cluster of early settlements in the highlands was situated in the Valley of MEXICO, where contemporary MEXICO CITY is located. There, urban development dates to the Late Formative and Early Classic (200–600 C.E.) periods. Cuicuilco, on the southern edge of the valley, was the largest of several evolving settlements until it was partially destroyed by a volcanic eruption in about 150 C.E.; it was abandoned by 200 C.E. It is estimated that at its peak, Cuicuilco had a population of about 20,000, which would have made it the largest settlement in Mesoamerica outside of the Mirador Basin. Although the site has been obscured by lava, Cuicuilco was clearly a compact city and among the first to have had the sort of internally differentiated ECONOMY associated with urbanization, something that was not seen in the Mirador Basin cities.

TEOTIHUACÁN, located in the northeast portion of the Valley of Mexico, was initially a contemporary of Cuicuilco. It, too, grew rapidly after its founding in about 200 B.C.E. Teotihuacán's growth accelerated after the destruction of Cuicuilco, with the population reaching 60,000 to 80,000 by 200 C.E. By 300, most of the city's signature architectural features had been constructed, including the monumental Avenue of the Dead, the Pyramids of the Sun and the Moon, and the Ciudadela, a vast ceremonial and residential precinct situated near the city center (see ARCHITECTURE). Before its collapse in 650, Teotihuacán covered some eight square miles (8 km<sup>2</sup>) and was home to 125,000 to 200,000 people. Throughout the



Early Classic period, Teotihuacán was easily the largest settlement in Mesoamerica (and in the Americas) and among the largest on earth.

Archaeological excavations of areas outside the central ceremonial precincts have shown that Teotihuacán had an economically and ethnically diverse population. Residential compounds inhabited by peoples from the Gulf coast, modern-day Oaxaca, Yucatán, and Guatemala have been identified. Archaeologists have discovered more than 500 workshops in which CERAMICS, OBSIDIAN, and ground stone were manufactured. Workshops devoted to the production of perishable goods, though not identifiable through surface surveys, are likely to have been common as well. The most important occupational specialty appears to have been the manufacture of tools and other goods made of obsidian.

Teotihuacán also shows clear indications of centralized planning. The cruciform design is created by the three-mile-long (5-km) north-south running Avenue of the Dead, which bisects the city and establishes the general alignment of nearly all of its thousands of residential compounds, palaces, temples, and plazas. Though streets and structures in the city's four quarters were not arranged into a symmetrical rectilinear grid, they are aligned in a common orientation. The San Juan River, which flows through the city, was rechanneled to conform to the orientation of streets and structures, and drainage systems were built to direct runoff into the river. By 300 C.E., Teotihuacán had become the center of Mesoamerica's first true empire. For the next 300 years, the city's political influence extended throughout central and southern Mexico, reaching as far south as contemporary Guatemala. The city's political concerns seem to have been focused particularly on controlling the production, manufacture, and distribution of obsidian. Sometime around 650, Teotihuacán experienced a violent collapse. Its palaces and central ceremonial structures were defaced or destroyed, and the city was largely abandoned thereafter.

Other regions of Mesoamerica witnessed similar processes of population concentration and urban growth at roughly the same time as occurred in the Valley of Mexico. In the Valley of Oaxaca, for example, a city known today as MONTE ALBÁN was built atop a barren hill that rises from the valley floor. The hilltop forms a linear ridge on which massive temples, palaces, and plazas were constructed. Residential areas of the city were located on terraces built on adjacent hillsides. At its peak, from 500 to 900 C.E., the city covered about three square miles (7.7 km<sup>2</sup>) and was home to a population of 15,000 to 20,000. Unlike Teotihuacán, Monte Albán does not show evidence of central planning other than the elite residential and ceremonial complex found on the hilltop. Monte Albán was similar to Teotihuacán, however, in having a commercial urban economy, with a substantial portion of the population involved in nonagricultural production.

Substantial population and settlement growth in the Early Classic period occurred in the area surrounding the Mirador Basin in the northern Petén region of Guatemala

and adjacent areas of Mexico, Belize, and Honduras. Although the earlier Mirador Basin cities had declined or disappeared by the Classic period, a multitude of others, including TIKAL, CALAKMUL, CARACOL, Uxactún, Palenque, and COPÁN arose and continued the lowland urban tradition. Lowland cities differed significantly in physical layout from the patterns seen in Teotihuacán and Monte Albán. Maya cities of the Classic period were more similar to the earlier pattern found at El Mirador, with ceremonial and elite residential precincts surrounded by densely settled but economically rural areas. Indeed, few Classic Maya cities achieved the population density of the earlier Mirador Basin sites. Calakmul, for example, had a population estimated at 50,000 people spread over an area of 27 square miles (70 km<sup>2</sup>). Caracol was larger, with some 120,000 to 180,000 people spread over 65 square miles (168 km<sup>2</sup>). Both Calakmul and Caracol had a settlement density of 10 or fewer persons per acre, far below the density of 100 persons per acre that has been estimated for Teotihuacán and the residential areas of Monte Albán. Likewise, the density was significantly lower than the 30 persons per acre estimated for El Mirador. As at El Mirador, specialized craft production was much more limited in Classic Maya cities, as was the commercialization of urban economies. Most residents of Maya cities (including those in the Mirador Basin) remained agricultural in their economic orientation (see AGRICULTURE). For this reason, many scholars question the extent to which Maya settlements, even the largest, are properly classified as urban settlements.

The collapse of Teotihuacán in the late seventh century was followed by similar declines in Monte Albán and, most spectacularly, in the Maya lowlands. In the Valley of Oaxaca, Monte Albán had been abandoned by 1000, to be replaced by numerous smaller settlements dispersed throughout the valley. The collapse of cities in the Maya lowlands occurred in the eighth and ninth centuries. Unlike the central Mexican highlands, where the collapse or decline of urban centers was accompanied by population dispersal and the growth of new urban centers in the same general vicinity, the Maya region experienced a sharp drop in overall population. Some refugees from declining centers likely moved into adjacent highland regions of Guatemala and the Mexican state of Chiapas, while others moved north on the Yucatán Peninsula, where they were apparently absorbed into local groups and fed the growth of cities that emerged in the Late Classic (600–900 C.E.) and Postclassic (900–1519 C.E.) periods. The northern Yucatán Peninsula witnessed the most notable urban growth, at centers such as Cobá, CHICHÉN ITZÁ, Sayil, Uxmal, and MAYAPÁN. Nevertheless, these cities never attained the size nor exhibited the splendor of the earlier lowland Maya centers.

In the highlands of Central Mexico, the collapse of Teotihuacán was followed by a long period of political fragmentation. Local regions came to be dominated by regional centers, many of which had begun to form during Teotihuacán's dominance. Cholula and Cacaxtla in the

Valley of Puebla, Xochicalco in the Valley of Morelos, and El Tajín in coastal Veracruz are among the best known, but small cities of 10,000 or more dotted the landscape of the central and southern highlands. Many were built in defensible locations, reflecting the acute political competition and the high incidence of warfare that characterized the period. Xochicalco, for example, was built on a low hill ringed by terraces that formed defensive ramparts.

In the Early Postclassic period, in the 11th and 12th centuries, the city of Tula, situated just north of the Valley of Mexico, partially reintegrated many local regions, creating the short-lived Toltec Empire (see Toltecs). At its peak, Tula covered an area of about five square miles (13 km<sup>2</sup>) and had a population that might have approached 60,000. Though much of the site has been damaged or destroyed, Tula appears to have resembled Teotihuacán in the uniform orientation of its residential and ceremonial structures and in its overall cruciform design, indicators of central planning in the city's initial construction and subsequent growth. Also like Teotihuacán, Tula was a highly diversified manufacturing center.

With the fall of Tula in the late 13th century, Mesoamerica entered a period of political fragmentation that lasted into the early 15th century. By this time, however, urban centers were common throughout Mesoamerica. During these periods of political fragmentation, the characteristic political form was the city-state, known in Nahuatl as an *altepetl*, which consisted of an administrative center and a number of subordinate outlying settlements. The geographic and demographic scale of the *altepetl* varied, as did the form of the settlements found within them. Commonly, the administrative center of an *altepetl* was an urban settlement, where some combination of manufacturing, commercial, ecclesiastical, and administrative specialists were concentrated. Throughout the Postclassic period, and perhaps also in the Classic period, political competition pitted *altepetl* against *altepetl*. The subjugation of one by another regularly led to the creation of small and generally fragile "empires." In so far as *altepetls* were fairly evenly matched demographically and economically, it proved difficult for any to obtain a lasting advantage that could translate into sustained political domination. Teotihuacán had been able to achieve a striking measure of hegemony through much of Mesoamerica because its initial expansion predated the maturation of the *altepetl* organization in outlying regions. Following the destruction of Cuicuilco, Teotihuacán had emerged as an unrivaled power that was able to expand into a vacuum where it lacked meaningful competitors. It was a vacuum that quickly filled with regional centers, however, and thus Teotihuacán likely faced localized but progressively strengthening opposition in the years leading up to its final collapse. The Toltec expansion occurred in this more mature and hostile political climate, which goes some distance in explaining its lighter footprint and the shorter duration of its political dominion.

What most constrained urban growth and ensured that nearby *altepetls* were in rough parity were the primitive systems of transportation in pre-Columbian Mesoamerica. Lacking draft animals and wheeled vehicles, most goods were moved from their point of production to the point of consumption by human porters, known as *tlamemes*. This greatly limited the distances over which low-value commodities, including basic foodstuffs, could be moved before the cost of transportation overtook the value of the goods themselves (see food). Because of this, urban development was sharply constrained.

In both the Valley of Mexico and the Pátzcuaro Basin (in the contemporary Mexican state of Michoacán), the canoe offered lakeside settlements opportunities to draw supplies from a much larger territory than was practical for landlocked communities. In the Late Postclassic period, Tzintzuntzán, on the shore of Lake Pátzcuaro and the center of the Tarascan Empire, grew into a three-square-mile (7.7-km<sup>2</sup>) settlement populated by 25,000 to 30,000 people.

The preeminent example of a lakeshore settlement was Tenochtitlán, the most important of three cities that ruled the Aztec Empire (see Aztecs). Tenochtitlán was situated on an island in Lake Texcoco in the Valley of Mexico. From this position, the city was able to draw supplies from a multitude of smaller cities that through the Postclassic period had grown up along the lakeshore. Like Teotihuacán and Tula, Tenochtitlán was a planned settlement, divided into four quarters with a ceremonial precinct at the center. Much of the city was in fact built on land created through land reclamation, by dredging silt from the lake bottom and expanding what had begun as a small rocky outcrop into a sizable island. According to Aztec accounts, the city was founded in 1325. By the time it reached its full extent, it covered an area of more than five square miles (13 km<sup>2</sup>) and had a population estimated at well above 200,000 people. At a density of more than 150 persons per acre, Tenochtitlán was the most densely settled city, as well as the largest ever to arise, in Mesoamerica. Smaller ceremonial precincts were located in each of the four quarters of the city, and numerous open plazas that formed meeting places for periodic markets were scattered throughout the city. There were three main avenues, leading north, south, and west, each linking up with a broad causeway that connected the island to the mainland. The city itself was crisscrossed by canals, which allowed cargo-laden canoes to supply neighborhood markets. Freshwater was piped into the city from a spring at Chapultepec, located several miles west of the city on the mainland.

Finally, several Postclassic cities in the central Mexican highlands were known for their specialized functions. For example, in the Valley of Puebla, the city Cholula, which had some 100,000 inhabitants and was the second-largest city in Mesoamerica at the time of the Spanish conquest, was an important religious center and pilgrimage site (see religion). Texcoco, on the east side of the Valley of Mexico, was renowned as a center of learning. Azcapotzalco, on

the western shore of Lake Texcoco, had a famous slave market (see *SLAVERY*). Otumba, near the earlier city of Teotihuacán, produced *TEXTILES*, particularly ones made of maguey fiber. Though they varied in size, internal organization, and settlement density, when Spaniards arrived in Mesoamerica, they found a landscape dominated by scores of urban settlements.

### SOUTH AMERICA BEFORE 1492

The trajectory to complex society and what is usually termed *civilization* in South America differs somewhat from that of the Old World. In the traditional definition, civilized societies had centralized rulers who lived in palaces located in cities; these centers had specialized administrators, writing, stratified social classes, and a large resident population, and *TRADE* was conducted by a class of merchants who ventured their own money. These civilizations also often had a distinctive *ARCHITECTURE* and a high *ART* style.

The artistic achievements of Andean peoples in textile production or metallurgy cannot be denied. Likewise, their architectural monuments were impressive and are a tribute to a sociopolitical organization that enabled their societies to mobilize human energy on a large scale. Andean cities, however, continue to puzzle scholars because they appear to have lacked some of the above-mentioned characteristics of civilizations.

While there were large settlements in other areas of South America, the Andean region was most notable for its cities before the arrival of Europeans. Andean societies in both the highlands and the coast had overcome severe environmental challenges to produce a secure food supply; this, in turn, supported a larger population and led to more complex social and political organization. In the Andes, both on the coast and in the highlands, people lived in landholding descent groups from which they took their primary identity. These descent groups, called *AYLLU* in the highlands, were organized in an ascending series of ranked, dual levels, by means of which the larger society ensured access to agricultural products, marine resources, and the meat and fiber of llamas and alpacas. At the lowest levels, each descent group had a headman; at higher levels, these rulers were lords, called *KURAKA* in the highlands. Artisans and traders appear to have been organized into similar descent groups subject to a higher-level lord. At its apex, the whole polity was governed by two ranked rulers. This was true of the Inca Empire and all the societies that preceded it (see *INCAS*).

By 5,000 years ago, some Andean descent groups on the Pacific coast and in the highlands were living in larger settlements, while others were scattered across the countryside in homesteads and hamlets. These groups came together for religious festivals; the corporate nature of the society made it possible to organize the *LABOR* to erect large ceremonial centers. Most of the labor for these projects was not permanent but rather on a cyclical basis. Moxeque in the Casma Valley is a ceremonial com-

plex built and occupied between 3,500 and 3,000 years ago that exemplifies the beginnings of Andean urbanism. Two very large, and very different, adobe platform mounds were constructed in stages, each at the end of an esplanade made up of five large plazas aligned 41° east of north. The northern mound was ceremonial in function. The southern mound, of a different architectural design, appears to have functioned as a center of political administration and ceremony. The site has been partly destroyed through cultivation, but along either side of the esplanade of linked plazas were aligned small mounds and walled compounds that appear to have housed the elites associated with the corporate groups (*ayllu*-like). It is not known whether the two areas of domestic habitation or elite compounds were inhabited full time or whether these corporate groups resided on their lands most of the time and left a skeleton caretaker population at Moxeque between ceremonial occasions.

*TIWANAKU* lay just south of Lake Titicaca. It was located near agricultural land suitable for high-altitude crops, such as *POTATO*, and high-altitude pastures that were ideal for raising llamas and alpacas for fiber, transport, and meat (see *TRANSPORTATION*). Agricultural land was expanded through the construction of raised fields in wetlands and along the lakeshore. The lake also provided important aquatic resources, particularly fish and birds, and plants such as reeds. Before about 500 C.E., Tiwanaku was one of several small communities that served as ritual centers for the corporate groups living in the hinterland. By 500, it was linked to other groups by trade routes that brought meat and fiber from the herding groups in the high puna and products such as *MAIZE*, peppers, and salt from the warm valleys of the Pacific and *COCA* from the warm valleys of the eastern slopes of the Andean cordillera.

The exchange appears to have taken place in the context of repeated pilgrimages to the ritual center at Tiwanaku. Some corporate groups may have sent part of their group to live in these areas as colonists. By 800, the Tiwanaku divinities had become preeminent in the region, commanding devotion from different groups over a wide area. They were represented in a widely diffused art style, which was used on high-status and common *CERAMICS*, woven into textiles, and carved on the walls of temples. The ritual devotion brought wide access to human energy, which was used to bring red sandstone and blue andesite from distant quarries for the construction of monumental places of worship and ritual feasting. There were several immense temples: the Akapana with a seven-tiered pyramid, the Kalasasaya, and Pumapunku. All of these pyramids were enclosed within immense plazas, usually with a raised area where rituals could be performed before a large number of worshippers. The entire ritual area was set off from the rest of the city by a moat. To the east, within the moat and just beyond it, were enclosed compounds that housed the elite. To the south of the monumental area was an area of wetland, which provided grazing and water

during the dry season. Beyond this area to the south was an area of lower-status domestic occupation.

Neighborhoods were made up of groups of walled compounds. Within each compound were a number of houses, each with a kitchen area, a storage area, and trash pits. In some cases, there was evidence of weaving and other craft production. It has been suggested that the residents in these compounds may have been members of the same *ayllu*-like group. What is lacking at Tiwanaku from a Western point of view are districts of artisans and merchants, evidence for a standing military force or bureaucracy, and large palaces for rulers. Goods were circulated and exchanged, it would appear, during religious festivals.

The CHIMÚ Empire was an expansive polity that arose in the Moche Valley on the north coast of PERU about 900 C.E. The preeminent urban center was moved from the up-valley site of Galindo to uncultivated land on the littoral, signaling a major ideological shift. This new capital was CHAN CHAN, which served as the seat of the Chimú state until it was conquered by the Incas in the first third of the 15th century. Unlike Tiwanaku, Chan Chan was a new city that evidenced a certain amount of urban planning. At its apogee, the city covered some eight square miles (20.7 km<sup>2</sup>). The monumental core contained approximately 10 immense walled compounds, presumed to be the palaces of rulers and inhabited by their descendants after their death. On the eastern and northern sides of the core area were four large platform mounds, which may have been temples. However, with the Chimú Empire there is a change in Andean religion, with the rise of sacralized political rulers who were themselves the principal protagonists in religious rituals.

None of the 10 compounds are exactly alike, but in general, these great rectangular compounds, called *ciudad-elas* by some scholars, are aligned with the entrance on the north side in two roughly north-south columns. The internal divisions in most are tripartite, with about a third of the area at the entrance given over to an immense enclosed plaza. At the southern end was a raised area, which could have served as a proscenium for politico-religious rituals. The central area of the compound was made up of reception rooms and living quarters for the ruling elite. There were also large areas of what have been called storerooms, associated with U-shaped, niched structures, called *audiencias*; however, their precise function remains unknown. Finally, there was a large platform mound, which served as the burial place of the ruler. It probably was a center of ritual before and after his death. The final sector of the compound, between one-third and one-fourth of the total area, contained low-status housing, presumably for retainers, and a walk-in well, dug down to the water table, which provided water for everyday purposes and perhaps also to support limited gardens.

Between the great compounds were different kinds of structures, some evidently used by high Chimú authorities below the ruler. Others were the residences of provincial lords of different ranks, who may not have occupied them

full time. Finally, there appear to have been compounds associated with high-status craft production. To the west and south of the compounds associated with the rulers were cemeteries and extensive areas of walk-in wells and sunken gardens. There were also extensive areas of low-status, agglutinated structures within compound walls, which appear to have been the dwellings of common folk, grouped by their *ayllu*-like corporate groups. On the north coast, artisans and exchange specialists were grouped within such fictive descent groups that were subject to the higher-status lords. It is not known whether the population of Chan Chan was maintained by the stores of the ruler, supported by provincial lords, or if lands to the north of the city were assigned for cultivation. It is probable that all three modalities were used. Exchange appears not to have been institutionalized in markets, and most goods were probably redistributed by the rulers or the lower lords.

While the Chimú replicated elements of the architecture found at Chan Chan in their provincial centers, it was not always systematic. In contrast, the Incas, whose state expanded swiftly between the 13th and 15th centuries, used urban planning as a systematic part of their governing strategy. The city of Cuzco, which lies in a highland valley of the south-central Andes, was the capital and the cosmological center of the Inca Empire. The Inca state was divided into two moieties: the *banansaya*, or upper moiety, and the *burinsaya*, or lower moiety. This division was also found in the urban plan of Cuzco. Further, two of the four quarters (*suyus*) of the realm, Chinchaysuyu and Antisuyu, made up the *banansaya*, while Cuntisuyu and Collasuyu were in the *burinsaya*. This division extended outward from the city core to the surrounding valley and beyond, to the whole realm.

The core of Cuzco contained the compounds of each of the rulers, occupied by the ruler in his lifetime and by his descendants thereafter. There were temples and the *aqllawasi*, or “houses of the chosen women” (see *ACLLA*). Near the center of the city were two large contiguous plazas, the Aucaypata and the Kusipata, where ceremonies were held. These plazas were separated by one of the two rivers that delimited the city. The Temple of the Sun, or Coricancha, was the largest religious complex, but in general, buildings in Cuzco lack the monumentality of the temples of Tiwanaku or the compounds of Chan Chan. The one monumental construction associated with Cuzco is Sacsayhuamán, three immense zigzag walls on the hill above Cuzco, crowned with two towers. This was a sacred place and may also have served as a fortress. The blocks of stone that make up the walls are cyclopean and fitted together without mortar.

High-status Inca buildings within the city core were made of exquisitely fitted “pillow” masonry. They were built as walled compounds, or *cancha*, usually two to a city block. Streets were paved but narrow, with a drainage conduit down the middle; the Spanish complained that only two could ride abreast on one of these streets. The roads to

the different *suyus* came together at the Aucaypata. From the Temple of the Sun, the Inca conceived of 42 sight lines, or *ZEQUES*, that extended outward into the valley. Along these were *huacas* (shrines), natural features or artificial ones, such as houses or canals. Some of these shrines commemorated points in the Inca politico-religious mythology; others denoted boundaries between different social groups. Important mountain peaks or passes and sources of water for irrigation canals were significant points on the *zeques*. Non-Inca social groups, whether closely tied to the Inca or recently conquered provincial lords, were assigned lands for cultivation and house sites in the valley following the logic of the *zeques*.

Inca ECONOMY and society were highly planned and controlled. Large numbers of people were brought together, perhaps several times a year, but they may not have lived in the city permanently. The Inca state provisioned workshops and artisans; the *agllawasi* produced fine textiles as well as *CHICHA*. Inca armies were provisioned from the storehouses. Independent trade and exchange were not found here, nor was independent craft production; nonetheless, in Andean terms, Cuzco was an important and symbolic urban center.

### EARLY COLONIAL

The Spanish conquerors and colonists who ventured to the Americas after 1492 brought with them the notion that the city was the ideal form of human settlement. Cities were believed to offer inhabitants a more dignified and intellectually refined existence than villages, towns, or rural homesteads. Likewise, moral rectitude and virtue were associated with urban life. These positive attributes were held to be reflected in the physical layout and the general presentation of settlements: A well-designed and well-swept city was seen as an outward manifestation of the inner intellectual, spiritual, and moral virtues of its inhabitants. Spaniards differed from the Portuguese in this respect. The Portuguese, like British, French, and Dutch colonists elsewhere in the Americas, were much more inclined to live in villages and on rural homesteads. Alone among European colonizers of the Americas, Spaniards sought to use their colonial possessions as a palate upon which to construct cities that reflected Renaissance notions of ideal town planning and Christian ideas of virtue. While this was the intent, bringing it to fruition in the colonies often proved a difficult task.

The earliest Spanish settlements in the Americas, established on HISPANIOLA in the 1490s, were fortified centers with irregular internal plans. Setting aside the short-lived and ill-fated LA NAVIDAD established during CHRISTOPHER COLUMBUS's first voyage, the first efforts to create settlements began in 1493 with the founding of Isabela on the north coast of Hispaniola and a string of smaller outposts in the island's interior. It quickly became apparent that Hispaniola's southern coast was the more suitable for maintaining contact with Spain. By 1500, Isabela had been largely abandoned, and the center of

Spanish operations had moved to Santo Domingo on the southern coast. In an effort to remedy what was seen in Spain as a disorderly attempt at founding a colony by early administrators, in 1502, the Crown dispatched 2,500 settlers to Santo Domingo under the command of Nicolás de Ovando, the newly appointed governor of Hispaniola. Ovando arrived with orders to create settlements inhabited only by Spaniards, a precedent that in later years was applied in an attempt to segregate Spaniards and Indians into physically and administratively separate entities: the *república de españoles* and *REPÚBLICA DE INDIOS*. Shortly after Ovando's arrival in Santo Domingo, a hurricane destroyed the original settlement. This provided the governor the opportunity to resite the settlement and to create the first city in the Americas with a grid configuration, formed by aligning streets at right angles to create square or rectangular blocks around an open central plaza.

For the next seven years, Ovando presided over the founding of a network of settlements on Hispaniola, all apparently built in the grid design. By the time Ovando was recalled to Spain in 1509, roughly 8,000 to 10,000 Spaniards inhabited Santo Domingo and its satellites. The numbers increased further with the conquest and settlement of CUBA, where governor DIEGO VELÁZQUEZ DE CUÉLLAR established seven urban sites between 1511 and 1515. In 1513, the Crown issued a new and detailed set of instructions on the founding of settlements. These were given to PEDRO ARIAS DE ÁVILA to guide his efforts in establishing settlements on the mainland in the newly created province of Castilla del Oro in Central America. The 1513 document is the first to specifically mention and describe features of the grid design, apparently enshrining Ovando's earlier improvisations into official Crown policy. From this point forward, the Crown's instructions repeated or, in a few cases, refined and elaborated on the same general idea.

By 1519, there were perhaps 25,000 Spaniards in the Caribbean and Castilla del Oro, scattered among a couple of dozen settlements, most of them built in an approximation of the grid pattern favored by Ovando and the Crown. Nevertheless, the shifting and generally bleak economic outcomes of MINING and AGRICULTURE, combined with the catastrophic decline in the indigenous LABOR force, made it next to impossible for the Spaniards to construct stable and lasting settlements in the first decades of the 16th century. This came only later, following the Spanish penetration into Mesoamerica and the Andean region. Native societies in both Mesoamerica and the Andean region differed substantially from those of the Caribbean islands and the Central American lowlands, where the indigenous population was comparatively small and the main settlements were no more than large villages. Mesoamerica and the Andes, on the other hand, were both densely populated and had preexisting urban settlements. The premier example of a native urban center was the island city of Tenochtitlán, which was conquered by HERNANDO CORTÉS in 1521. On the eve of the conquest, Tenochtitlán was home to some 200,000 inhabitants, a far larger

population than that of any contemporary European city west of Constantinople. Though not configured in a tidy grid design, Tenochtitlán nevertheless induced awestruck commentary from the Spaniards, who witnessed it as a functioning indigenous city.

As it turned out, Tenochtitlán also provided the Spaniards with their first opportunity to faithfully implement the Crown's instructions on the founding of new cities. During the course of the conquest, Cortés and his allies reduced Tenochtitlán to ruins. Once the conquest was complete, Cortés set about reconstructing the city. An open plaza, or *zócalo*, was built in a location that overlapped the south side of the earlier ceremonial precinct. A church, built from the stones of the Aztec Templo Mayor, faced south onto the open square. On the square's remaining sides were government buildings and prominent commercial establishments. Streets extended outward at right angles from the four corners of the square, and other streets were set at right angles to these to form a grid. Residential (and dual residential-commercial) blocks were interrupted by smaller open plazas and church, convent, and hospital complexes. Following the Crown's guidelines, the city's most prominent residents, including government and ecclesiastical officials, nobles, and elite merchants, were granted residential lots nearest to the city center and along the principal arterials that intersected with the *zócalo*. Petty merchants, craftsmen, and others of more modest means were accorded residential lots elsewhere. Though the city was not walled, it was racially segregated, and no Indians were allowed to live within the planned portion of the settlement. Instead, beyond the grid, were irregularly organized indigenous residential areas.

The basic design of the refurbished Tenochtitlán, today's Mexico City, was thereafter replicated wherever circumstances permitted. Outside Mexico City, urban settlements in Mesoamerica and the Andes generally survived the conquest intact, making it difficult or impossible to impose a grid design. Ceremonial precincts were frequently converted into plazas, and churches were built from the stones of earlier pyramids and temples; however, the general configuration of streets and neighborhoods in most pre-Columbian cities was left intact. The grid pattern was instead replicated in two basic types of settlements: cities newly built to house Spanish immigrants (see *MIGRATION*) and towns formed as part of the 16th-century indigenous resettlement programs (see *CONGREGACIÓN*).

In furtherance of the policy of maintaining segregation between Spanish and Indian elements of colonial society, Crown officials set about constructing a series of new settlements intended to be inhabited only by Spaniards. In Mesoamerica, examples of provincial cities built mainly or exclusively to house Spaniards include Acámbaro (1526), Villa Rica de Chiapas (1528), Antequera (1529), Puebla (1531), and Valladolid (1541). A similar process occurred following the Spanish conquest of the Andean region. Administrative centers were built throughout South America, including the cities of

Cartagena (1533), Quito (1534), LIMA (1535), Asunción (1537), Popayán (1537), Bogotá (1538), Santiago (1541), La Paz (1548), and Caracas (1567).

Through much of Mesoamerica and the Andes, and everywhere in Latin America outside of these regions, indigenous populations of the early colonial period lived in small towns or villages, or on rural homesteads. The steep decline in the native population following the arrival of Spaniards only accentuated the dispersal, changing the countryside from an initial thick carpet of indigenous peoples to a lightly settled landscape most notable for its emptiness. Ecclesiastical authorities made modest efforts to assemble dispersed populations into nucleated settlements that were modeled after the cities built for Spaniards. This was most common at early convent sites in Central Mexico, such as Huejotzingo (1529), Chilapa (1534), Santa Fe de la Laguna (1534), and Tiripitío (1537). The major effort to resettle the indigenous population came later, however, when government authorities became involved in the last quarter of the 16th century. Colonial administrators throughout Latin America were ordered to gather together the dispersed survivors in the countryside and to concentrate them in thousands of newly formed settlements. These *congregaciones*, as both the program and the resulting settlements were called, were modeled on the grid pattern that had by this time become predictable and formulaic. Indeed, the basic pattern was established long before 1573, when King Philip II issued the Crown's final and most comprehensive set of instructions on urban design. These instructions were issued in time for the final *congregaciones* of the late 16th century but were little more than a summary of the practices that had been refined over the preceding 70 years.

See also *CITIES* (Vol. II).

—Chris Kyle  
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**civil wars in Peru** The Spanish CONQUEST of PERU was an era of great turmoil, heightened by civil war. Civil war among the INCAS facilitated the conquest. In the aftermath of the Spaniards' defeat of the Incas, the conquistadores fell to fighting among themselves over the spoils. Attempts by the monarchy to limit Spanish abuse and exploitation of the indigenous population led to yet more civil war.

When FRANCISCO PIZARRO and his band of Spanish soldiers and adventurers invaded Peru in 1532, they arrived at Tumbés to find the city ruined by war. Informants told them that in the wake of ruler HUAYNA CÁPAC's death, war had broken out between factions headed by two of the Inca's sons, HUÁSCAR and ATAHUALPA. They represented rival *PANAQAS*, or royal lineages, and to some extent different regions of the Inca Empire, with Huáscar's power centered at CUZCO and Atahualpa's around Quito. In the struggle, Atahualpa's forces defeated and captured Huáscar, whose followers saw in the Spaniards a way of reversing the war's outcome. Following Atahualpa's capture by Pizarro, Huáscar's *panaqa* cooperated with the Spaniards. One of its members, MANCO INCA, temporarily became a puppet ruler.

As for the Spaniards, following the capture and execution of Atahualpa and their occupation of Cuzco, they divided into two principal factions, headed by the four Pizarro brothers on the one hand, and DIEGO DE ALMAGRO on the other. Almagro and Francisco Pizarro had received a royal contract, or *capitulación*, to undertake the conquest, but Almagro felt cheated of his fair share of the plunder and political authority. King Charles I ordered that Pizarro govern northern Peru, and Almagro, the south, but the precise boundaries remained unclear. Pizarro managed to mollify his partner somewhat by helping fund a large Almagro-headed expedition into CHILE, which departed in July 1535.

By the time Almagro returned in 1537, discouraged and angered by his failure to find anything but hardship on his trek, Manco Inca had launched a massive rebellion against the Spaniards. Still threatened, the Spaniards in CUZCO, led by HERNANDO PIZARRO and GONZALO PIZARRO, had survived a ferocious siege. Almagro seized the city on April 18, 1537, and imprisoned the Pizarros. He also defeated a relief expedition under Alonso de Alvarado on July 13 near Abancay. Through his Chilean trek and seizure of Cuzco, Almagro was supported by Paullu Inca, one of Manco's half brothers. From his new capital of LIMA, founded in 1535, Francisco Pizarro sent emissaries to negotiate with Almagro, who as a sign of goodwill freed Hernando Pizarro, Gonzalo already having escaped. Hernando then led a force that on April 6, 1538, defeated Almagro at the BATTLE OF LAS SALINAS. The opportunistic Paullu switched sides before Almagro's imminent defeat. His refusal to join Manco meant that the division among the Indians continued. In fact, Manco continued to launch attacks against both the Spaniards and the indigenous groups who cooperated with them. Taken prisoner,

Almagro was executed on Hernando's orders, a decision that contributed to Pizarro's 20-year imprisonment in La Mota castle in Spain, when he returned there in 1539 to defend the Pizarrist cause against Almagrist accusations. In Peru, Almagrists took a bloodier revenge when on July 26, 1541, they broke into Francisco Pizarro's Lima mansion and murdered the conquistador. In the ensuing chaos, Diego de Almagro the Younger seized power and dominated Peru for a year until defeated at the Battle of Chupas (September 16, 1542) by a force commanded by Cristóbal Vaca de Castro, recently sent to Peru by the king to impose peace on the warring Spaniards.

Even the deaths of Pizarro and Almagro and the arrival of Vaca de Castro did not bring lasting peace, however. A new civil war erupted in 1544 when Blasco Núñez de Vela arrived as VICEROY and attempted to enforce the NEW LAWS OF 1542, by which Charles I tried to eliminate the abusive *ENCOMIENDA* system. Led by Gonzalo Pizarro, the *encomenderos*, who consisted largely of the early conquistadores and their supporters, took up arms against the viceroy. By October 1544, Núñez de Vela was driven from Lima; and on January 16, 1546, the viceroy was defeated and killed by Pizarro's forces at the Battle of Añaquito. Although encouraged by some of his followers to declare Peru independent and make himself king, Gonzalo declined. Massive resistance throughout the Americas compelled Charles I to rescind the New Laws. A new royal official, PEDRO DE LA GASCA, gradually weaned support from Pizarro by offering pardons and other rewards to rebels. At Jaquijahuana (April 9, 1548) Gasca's forces defeated Pizarro, who was abandoned by most of his army. The captured Gonzalo was executed the following day.

Pizarro's execution at first seemed to bring the civil wars to an end, but this, ultimately, was not the case. In 1552, the Crown again tried to curb Spanish abuse of the Andeans. Charles I demanded enforcement of earlier decrees that outlawed coercion of indigenous LABOR and required that Indian workers be paid adequate wages. Limits were also to be set on the amount of tribute that *encomenderos* could demand. As in the case of the New Laws of 1542, this threatened the interests of colonials who lived by exploiting the indigenous population. They needed workers particularly at the SILVER mines and on COCA plantations, where Indians were unlikely to work voluntarily (see MINING). A new war broke out on November 13, 1553, when Spaniards in Cuzco, led by Francisco Hernández Girón, rebelled. From Cuzco, the revolt spread to Huamanga and Arequipa. Royal power had been weakened somewhat by the 1552 defeat of Viceroy ANTONIO DE MENDOZA, although the interim viceroy, Melchor Bravo Saravia y Sotomayor, president of the Lima *AUDIENCIA* (high court), managed to gather royalist forces. In October 1554, the viceroy's forces defeated the rebels at the Battle of Pucará, near Lake Titicaca. This ended the period of civil wars in Peru, although one of the root causes—conflict over the exploitation of the Indians—was not entirely resolved. Nonetheless, royal power was established in Peru

and would be more thoroughly institutionalized in the following decades, particularly during the rule of Viceroy Francisco de Toledo (1569–81).

—Kendall Brown

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**clergy, secular** The evangelization of MEXICO was carried out by two main groups: the regular clergy, who followed the *regula*, or “rule” (Franciscans, Dominicans, Augustinians, and Jesuits; see RELIGIOUS ORDERS), and the secular clergy, who lived in the *saeculum*, or “world.” Although the regular clergy are most often cited for their role in the early religious history of New Spain, the secular clergy also played a significant role. Secular priests joined HERNANDO CORTÉS’s expedition to TENOCHTITLÁN, baptizing indigenous people and administering the sacraments along the way. After the initial wars of the CONQUEST, those conquistador-priests who did not receive royal appointments entered into contractual agreements with individual *encomenderos* (see ENCOMIENDA), who were obliged to care for the spiritual well-being of the native population assigned to them. However, because the secular clergy had a reputation for being ignorant, slothful, and immoral, Cortés suggested to King Charles I that only regular clergy, who were thought to live purer lives, be sent to New Spain.

Despite such requests, the number of secular clergy continued to grow, although not as rapidly as that of the regular clergy. Competition for provinces and parochial jurisdiction, nevertheless, frequently contributed to strained relationships between secular and regular clergy in the 16th century. In addition, the regular clergy traditionally served as an adjunct to the usual ecclesiastical hierarchy, which was composed exclusively of secular clerics. Typically, a secular clergyman would take precedence over a regular clergyman of the same rank, and regular clergy were also subject to the authority of the local bishop. Yet, due to unusual circumstances, regular clerics in colonial Latin America were allowed a larger role than they had in Europe. Seeing conversion as a solution to Spanish-indigenous relations, the monarch and the pope authorized regular clerics to administer the sacraments, fulfill various parochial duties, and, in many instances, function beyond episcopal control to convert the native population to Christianity. However, as the native population declined, so did the missionary

program; this, coupled with other changes in the late 16th century, eventually led the Spanish Crown to favor the secular over the regular clergy and begin the secularization of New Spain with the Ordenanza del Patronazgo (1574).

Unlike regular clergy, the secular clergy did not take vows of poverty and could own property. Indeed, secular priests actively participated in the colonial ECONOMY. Many secular clerics pursued additional economic endeavors to supplement their church salaries and the fees they earned from administering the sacraments. Some occupations were associated with their clerical careers, such as employment with the Holy Office of the Inquisition, or professorships in universities. Others’ financial endeavors were more commercial, and included trading in livestock, CLOTHING, slaves, CACAO, and other commodities (see SLAVERY; TRADE). For the most part, secular clerics concentrated on administering to Spanish populations and preferred appointments in CITIES, especially MEXICO CITY, leaving the regular clerics to attend to the indigenous population. The Spanish population and the potential wealth from mines and ports also attracted a large number of secular clerics. Not all priests looked for ways to increase or supplement their incomes, however. Some engaged in a variety of charitable works, founding colleges, convents, and chantries.

The complex ecclesiastical organization of the CATHOLIC CHURCH provided the secular clergy with a variety of positions, some of which (mainly the lower ones) were not filled until the late 16th century because of financial constraints. Bishops in New Spain enjoyed many administrative, legislative, and judicial privileges and commonly created staffs of numerous assistants to help them attend to their duties. Frequently, when a bishop died or was absent for an extended period, the cathedral chapter with its dignitaries and assistants would oversee the administration of the cathedral and diocese. Ideally, the bishop, episcopal staff, and cathedral chapter provided an organizational and administrative hierarchy for the parishes, which were made up of priests and their assistants. Finally, chaplains who served colleges, hospitals, monasteries, and other institutions, were also part of the secular clergy.

As a social unit, the secular clergy was divided into upper and lower categories of prestige and wealth. The bishop, his staff, and those priests who served on cathedral chapters made up the upper clergy. Parish priests, chaplains, and all other clerics lacking high ecclesiastical appointments made up the lower clergy. Because of the prestige and financial benefits allotted to the upper clergy, such clerics came mainly from the higher levels of society, while the lower clergy came from the middle to lower stratum. No indigenous or African individual entered the clergy in the 16th century.

See also CATHEDRAL CHAPTER (Vol. II); CATHOLIC CHURCH (Vols. II, III, IV); COFRADÍA (Vol. II); RELIGION (Vols. II, III, IV).

—Mark Christensen



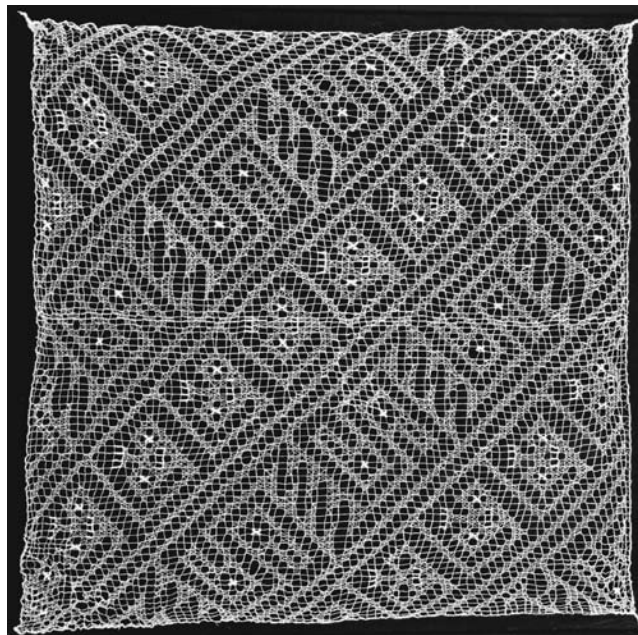
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**clothing** Depending on the climate and culture of an area, clothing in the pre-Columbian Americas consisted of a vast array of items. Animal skins, TEXTILES made from plant and animal fibers, and feathers all served to cover the body. Clothing not only kept people warm and dry but also indicated status and social affiliation; for example, because it was less LABOR-intensive than COTTON or wool textiles and was not as soft, clothing made from maguey-plant fibers was considered an indication of lower status. The AZTECS had strict rules governing clothing, including who was allowed to wear cotton and who must wear maguey. The INCAS referred to maguey-wearing peoples as “naked” because they did not wear “proper” clothing. Inca nobles felt their brightly colored and finely woven textiles marked them not only as Inca but as civilized.

In most of the cultures from Mesoamerica to South America, textiles were prized as status items because of the tremendous amount of time and resources that could go into their making. The more elaborately woven a textile was, the more valuable it was. MAYA stone carvings depict royal WOMEN wearing dresses and capes with complex geometric designs, and thousands of miles south in TIWANAKU, massive stone sculptures represent elite males wearing highly patterned clothing. While the methods of decoration and form varied, there were some nearly universal types of clothing. One was the tunic, a basic shirt form. Tunics sometimes had sleeves, which could be sewn on from separate pieces or formed from extra width on the shoulder falling down the arm. The length of a tunic could vary from just below the navel to ground length. Like most clothing in the Americas, tunics were not fitted; rather, they fell loosely around the figure. A belt could be added to fasten the tunic more tightly to the body. Tunics could be worn by men or women. Men frequently also wore a loincloth, a length of material that passed between the legs and then fastened around the waist, usually with ties. Loincloths could be decorated or plain and could have long flaps of material that fell over and covered the ties. Like other kinds of clothing, elaborate loincloth flaps could indicate social status, with more sophisticated designs indicating higher status.

ART from COSTA RICA depicts both men and women wearing loincloth-like garments. The women sometimes added a band around the breasts. Men could also wear a skirt of material that wrapped around the waist and fell to the knees. Maya rulers are frequently shown wearing a textile skirt, covered by a net of jade beads. This jade-bead skirt was associated with the MAIZE god and indicated the ruler’s role in keeping the favor of the gods of AGRICULTURE. Jade ensembles worn by Maya rulers could



The geometric bird design in this delicately woven headcloth from the Chancay culture (1100–1440) is only visible when the textile is extended flat. When worn, the design would have disappeared, although it remained a part of the spiritual value of the cloth. (Courtesy of the Michael C. Carlos Museum of Emory University/Photo by Michael McKelvey)

weigh more than 10 pounds (4.5 kg). Women sometimes wore skirts that left their breasts bare, as depicted in some west Mexican figures from Nayarit and Colima. More often, they wore some sort of dress. Dresses could be nothing more than long tunics, or they could be wrapped and pinned rectangles of fabric, as the Incas and other highland Andean women wore. The pins could be plain or elaborate and were also an indicator of social status. Over these dresses, many South American women wore a shawl, which could be used to carry children as well as cover the body. In many cultures, differences in color, pattern, and weaving could announce not only social status but also one’s social affiliation. Different patterns could belong to kin groups, and different cultures might prefer one kind of weave over another. People from the same area would be able to tell a person’s culture, village, and even FAMILY from their clothing. Similar to the Incas’ attitude toward maguey wearers, some modern QUECHUA speakers in the Andes referred to foreigners as *qualas* (naked), because while they wore clothing, it did not communicate much about the wearer.

Animal skins were also incorporated into indigenous dress. Some skins were coveted not only for their beauty but for spiritual reasons. The pelt of the jaguar, the largest wildcat in the Americas, was an important marker of status in many cultures. The jaguar, a night hunter that can swim as well as climb trees, was seen as a powerful spirit. Jaguars became closely connected with shamans and other spiritual specialists, and wearing their spotted



This female figure from Costa Rica's Florescent period (300–800) shows several forms of body adornment: a *tanga* (a thonglike loincloth), earrings, and elaborate body paint. Intricate knot patterns would have been applied to the body with ceramic stamps. (Courtesy of the Michael C. Carlos Museum of Emory University/Photo by Michael McKelvey)

skin may have symbolized the transformation of the shaman from human to spirit form. The strength and ferocity of the jaguar made it difficult to hunt, adding another level of prestige to wearing the skins. Dancers wearing jaguar skins are depicted on Maya ceramic cylinder vessels. Other animals that were hunted for their skins included foxes, pumas, and ocelots. Animal pelts were frequently used as headdress items in the Andes region. Wearing the animal's skin may have been associated with a clan's spirit founder or may have indicated the wearer's social role. It is also known that fox skins were worn by some coastal Andean men who protected fields of grain from hungry animals; perhaps they believed the fox's agility and hunting skill was thus transferred to them.

Many cultures of the Americas made sandals from plant fibers and/or leather. The footbed of a sandal could be made of leather or tightly woven grasses. This was held to the foot with leather straps or twine and in fancy cases with textile, as seen on rulers depicted on Maya stone monuments. Their sandals have enclosed heels and

ornaments attached to them. Miniature versions of fancy sandals have been found in Andean graves as offerings. These elaborate sandals have silver footbeds, held by red wool textile adorned with silver plaques. While these would have been impractical for walking, it is possible that similar sandals were worn by members of the elite during certain ceremonies.

Feathers were also an important aspect of clothing, adorning headdresses, capes, and shirts. They were also used to make fans. The status value of feathers lay in their color and scarcity. Perhaps the most difficult feathers of all to obtain were the tail feathers of the male quetzal bird. These feathers are exceptionally long (up to 25 inches [63.5 cm]) and a rich emerald-green color. The birds' natural habitat is in tropical areas that stretch from modern-day MEXICO into PANAMA. Naturally shy, quetzals spend most of their time high in the rain forest canopy. Compounding the difficulty of finding the birds was the fact that the males have only two tail feathers, so many birds had to be killed or trapped and plucked to produce just one item of clothing. One surviving Aztec headdress includes dozens of quetzal feathers in an extravagant display of wealth. Maya portrayals of kings in their royal regalia feature plumes of nodding quetzal feathers. The deep green color of quetzal feathers, like that of jade, was associated with growing plants and the earth's fertility.

Other colored feathers were used to decorate headdresses and ceremonial shields. Cultures on the western coast of South America traded with the jungle cultures of the east to procure feathers. The bright jewel tones of macaw, parrot, and even hummingbird feathers are found in coastal tunics, capes, and headdresses. Headdresses were important symbols of prestige and power. Many of them are depicted in ART as large, elaborate creations, which would have been difficult to wear. It is possible that a ruler only rarely wore very large headdresses.

Along with everyday clothing, people wore specific outfits for special occasions or certain tasks. Ball game players throughout Mesoamerica wore padded belts and other gear to protect themselves against the heavy rubber ball, which could weigh as much as a bowling ball. Warriors from Mesoamerica to the Andes frequently wore headdresses that announced their military status. They also carried shields, which could be elaborately decorated while still being functional defense mechanisms. Priests, priestesses, and other participants in religious activities often wore clothing designed for ritual (see RELIGION). Sometimes the clothing was a costume that allowed the person to act in place of a god; sometimes it carried symbolic references to the powers that were being called upon.

Another important aspect of body decoration was tattooing and body painting. Mummified remains with tattooed designs have been found in PERU and CHILE. People also painted and stamped themselves with more temporary designs. In Central America, cultures produced stamps with designs that could be dipped in

colorant and pressed onto the body. They also produced cylindrical forms with designs that could be rolled onto the body in a long strip. The materials used to make these designs could be colored clays, which came in a variety of shades from yellow to deep red; other dyes came from plant extracts. For example, the juice from the unripened jungle fruit *Genipa americana* will turn black and can stain the skin for up to two weeks. People could create designs on the body that could be as temporary or as permanent as they wanted, to fit in with the way they dressed themselves.

See also CLOTHING (Vol. III).

—Sarah E. M. Scher

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**Clovis culture** First identified at the site of Blackwater Draw in 1936 near the town of Clovis, New Mexico, and best known for the distinctive fluted Clovis spear point, the Clovis culture remains the earliest accepted evidence of humans in the New World. Prior to the 1926 discovery of similar, but smaller and less robust fluted points found with extinct forms of bison at the Folsom site in New Mexico, considerable debate raged surrounding the antiquity of human occupation in the New World. The discovery of unmistakable human artifacts found in direct association with extinct bison at the Folsom site confirmed that humans had indeed occupied North America at the end of the last ice age. In 1936, evidence for human occupation was pushed back even further, when larger and more robust Clovis fluted spear points were found in association with several species of extinct Ice Age animals, particularly mammoths, below a level containing Folsom points and bison bones. Although these artifacts were suspected to be exceptionally old at the time, it was not until the advent of radiocarbon dating in the 1950s that an age of circa 11,000 radiocarbon years before the present was confirmed, verifying the Late Pleistocene age of the Clovis culture. Recent redating of many previously investigated sites now suggests a minimum time range of circa 11,050 to 10,800 radiocarbon years ago for the Clovis culture, equivalent to some 13,250 to 12,800 calendar years ago.

In the years since their initial discovery at the Blackwater Draw site, Clovis points and related forms have been recognized and found across the entire continental United States and portions of Central and South America. Originally thought to represent a colonizing population that entered North America across the Bering

land bridge through an ice-free corridor, the Clovis culture rapidly spread across the continent during the same period in which nearly 35 species of Ice Age megafauna went extinct, prompting many researchers to hypothesize that the Clovis people were responsible for hunting many of these species to extinction. This has become known as the “overkill theory,” a fiercely debated hypothesis that states the Clovis culture possessed a highly specialized method of hunting large game that allowed them to rapidly spread across and adapt to new landscapes. As they entered new areas and hunted local game to extinction, they were forced to move on to new areas, continuing the expanding “wave” of both colonization and extinctions across the New World.

An opposing hypothesis suggests that the Clovis culture represents the spread of a new and innovative technology across a preexisting population. Current research continues to refine our understanding of the Clovis culture with data suggesting that multiple migrations along coastlines as well as overland routes were highly likely and that the Clovis people relied on a wide range of resources, not just large game. Whether Clovis represents a colonizing population or the spread of a new technology continues to be debated, but what remains remarkable is the rapid spread of the Clovis culture across the vastness of the New World.

—Thomas J. Loebel

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**coca** For thousands of years, the leaves of domesticated coca have played an important role in the cultures of South American indigenous peoples. The principal varieties were cultivated from the Caribbean coast to BOLIVIA. Indigenous cultivation and use of coca continues today in the Andes of PERU and Bolivia, where Aymara and QUECHUA Indians chew coca leaves with lime to release a mild stimulant that alleviates fatigue and hunger; coca is also widely used in ritual offerings. Coca leaves also contain important nutrients and vitamins, which make them nutritionally important in regions where the diet is high in carbohydrates. Archaeological evidence shows that the domestication of coca occurred in tandem with that of early FOOD crops such as squash and beans (see AGRICULTURE). Some 200 wild species of coca are found in the humid forests of the eastern slopes of the Andes in Bolivia and Peru.

The first variety of coca to be domesticated, *Erythroxylum coca* var. *coca*, comes from this region, with the other three domesticated varieties descending from it. The leaves of this species have the highest levels of cocaine alkaloid, although it is still very low. Limited quantities of coca are legally sold for this use in ECUADOR

and Peru. Nevertheless, it is this variety of *Erythroxylum* that is used in the production of cocaine. The second variety of *E. coca*, *E. coca* var. *ipadu*, is found in the western AMAZON region. The leaves are powdered and mixed with ash, which acts like lime. The powder is formed into balls, which are held in the cheek. This variety is probably pre-Columbian in origin.

The other species of domesticated coca is *Erythroxylum novogranatense*, of which there are two distinct varieties. *E. novogranatense* var. *truxillense* was the preferred coca in pre-Columbian times, prized for its superior flavor. It was grown along the coast of Peru in the warm zone on the lower western slopes of the Andes, called the *chaupiyunga*. There are two known sites where this coca was grown for the INCAS: Quibi in the Chillón Valley and Collambay in a tributary valley to the Moche River. It was undoubtedly also grown in Ecuador. This variety is legally grown today, inland from the Peruvian city of Trujillo; its aromatic oils were used to flavor Coca-Cola. The domestication of the Trujillo variety of coca is very old. Evidence for the preparation of lime dating to 7,000 years ago has been found at the Cementerio de Nancho ceremonial site on Peru's northern coast. The domestication of *E. coca* var. *coca* must have begun on the eastern slopes of the Andes at a still earlier date. Trujillo coca is intermediate in morphology between the coca of the eastern slopes of the Andes and the other variety, *E. novogranatense* var. *novogranatense*, called Colombian coca because it was found in COLOMBIA and VENEZUELA.

See also AGRICULTURE (Vols. II, III, IV); COCA (Vols. II, III); DRUGS (Vols. III, IV).

—Patricia J. Netherly

**codices** An indigenous manuscript format once common throughout Mesoamerica, codices are rightfully considered one of the great literary traditions of the world. The first archaeological evidence for the use of codices dates back to 600 C.E., though this consists only of small fragments that were found in MAYA tombs. The best-preserved examples are the Maya, Mixtec, and Borgia group codices from the Postclassic period (about 15 codices), and the Aztec and other codices from the early colonial period (more than 500 examples) (see AZTECS; MIXTECS). It is likely, though, that most Mesoamerican indigenous groups produced and used these documents for more than a millennium.

Although in relation to Mesoamerica the term *codices* generally refers to the various forms of indigenous manuscripts, it is also used to describe documents that were folded into an accordion-like (or screen-fold) shape. The paper was commonly made from *amatl* (fig-tree bark), maguey fibers, or deer hide. After the Spanish CONQUEST, European paper, which was often coated with a thin layer of white plaster, was used. A specialized painter-scribe,

or *tlacuilo*, applied the pictographic content and hieroglyphic text in vivid colors, frequently on both sides of the page. Its unique format made it possible to spread the codex so a large audience could view it, while still being easily portable in its folded state.

The subject matter of codices was diverse, covering themes such as RELIGION and myth, history and genealogy, politics and ECONOMY, cartography (see MAPS) and astronomy, or anything else that needed recording. As with modern-day books, it is common to find several of these themes combined together in a single codex. The narrative could range from epic tales of rulers (as in the Mixtec Codex Nuttall) to the daily life of commoners (the Aztec Codex Mendoza) (see LITERATURE). Codices were used by the literate nobility, priests and priestesses, and government officials, although the schematized pictographic style would have been comprehensible to the majority of the population, even to those who spoke different languages. These painted narratives were often performed orally and theatrically at feasts and other public events.

Although extant codices have been extremely useful in understanding Mesoamerican culture history, many of their pictographic qualities are still poorly understood, our knowledge being limited because so few survived the Spanish conquest. Several European CHRONICLERS described vast libraries housing codices, none of which were preserved. For the most part, it was the Spanish conquistadores and zealous priests who destroyed pre-Columbian codices, on account of their depictions of indigenous religious themes and the fact that the codices themselves were often considered sacred objects. Bishop DIEGO DE LANDA, for example, is reported to have burned at least dozens of Maya codices. After the conquest, several pre-Columbian codices were brought back to Europe as trophies; some of these texts survive today. Many of the colonial codices were created with the encouragement of European friars, who soon realized that the information they contained could be used to better understand and so convert Mesoamerica's indigenous groups. Perhaps the best-known example in this regard is the FLORENTINE CODEX, an encyclopedic manuscript composed by Aztec scribes under the careful supervision of the Franciscan friar BERNARDINO DE SAHAGÚN; this remarkable text includes both pictorial and alphabetic writing.

—Danny Zborover

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**Colombia** Few countries in the world boast a geography as diverse as the modern republic of Colombia. The 440,000 square miles (1.139 million km<sup>2</sup>) that make up its territory equal the combined areas of France, Spain,

and Portugal. It boasts two extensive coastlines, one that borders the Pacific and another to the north that runs along the Caribbean. To the east, the upper and lower llanos (plains) extend over an area that covers almost one-fifth of Colombia's total territory, with part of the AMAZON Basin filling in the southeastern corner of the country. To the southwest, just beyond Colombia's southern border with ECUADOR, the Andes Mountains narrow to a width of less than 125 miles (200 km). There, they split and fan out to form three separate ranges, the Cordillera Occidental, the Cordillera Central, and the Cordillera Oriental. The western and central ranges, dissected by the Cauca River, run vertical, almost parallel courses through the country. The Cordillera Oriental, by contrast, breaks from the central range just north of Pasto, where it rises sharply from the eastern banks of the mighty Magdalena River and then veers slightly to the northeast toward the Venezuelan border (see VENEZUELA). All three mountain ranges have innumerable mountain valleys, dominated by mountain lakes and rivers, and vast plains with fertile soils.

Colombia's unique topography and its location, with ties to the Amazon Basin, the vast Llanos, the Andes, and Central America (with its modern border with PANAMA), helped to make Colombia a natural conduit for the flow of peoples, goods, and knowledge. It is likely that MAIZE from Mesoamerica first made its way into South America via Colombia; likewise, it appears that MANIOC, first cultivated in BRAZIL, moved up to Mesoamerica through Colombia. The same appears to be true for the spread of pottery, which appears to have developed first in Colombia (see CERAMICS). Thus, for millennia, Colombia served as a veritable gateway between South America, Central America, and the Caribbean, leaving Colombia with one of the New World's richest and most complex pre-Columbian histories. Even within Colombian territory, the Cauca and Magdalena Rivers linked the north and the south, facilitating the movement of goods and peoples.

Compared to Mesoamerica and the central and southern Andes, Colombian archaeology is still in its infancy. Nevertheless, it has become increasingly clear that before the Spanish CONQUEST, the region supported a diverse mix of cultures and ethnicities, dispersed throughout most of the country. Large numbers of pre-Columbian settlements have been located along the Caribbean coast, as well as the Cauca river valley, and the highland plains of the Cordillera Oriental (which was home to the MUISCA Indians when Europeans first arrived in late 1530s). Unfortunately, little is known about the earliest human settlements in Colombia. Archaeologists have found only scant evidence for the Paleoindian and Archaic periods. Sites such as La Tebaida and La Elvira, both in the Cauca Valley, as well as El Espinal in Tolima, and the eastern highland sites of El Abra, Tequendama, and Tibitó, all appear to date back more than 11,000 years. At Tibitó, archaeologists found bones of extinct mastodons and horses. Likewise, in eastern Colombia's Llanos, there is little evidence of preceramic sites; archaeologists hypothesize that the earliest human

settlements in the Llanos date back to 15,000–5,000 B.C.E., with small populations that supported themselves largely by hunting large mammals.

Colombia's Caribbean zone also has a long history of human settlement. For example, beginning as early as the ninth century B.C.E., the Zenú (Sinú) peoples of the Caribbean lowlands began to construct a series of canals in the lower San Jorge River; eventually, this canal system developed into the largest hydraulic project in South America, covering an area of more than 1 million acres. By 2000 B.C.E., large numbers of coastal settlements existed along the northern coastline, with populations with mixed economies that relied on both marine goods and the cultivation of root crops such as manioc. Zenú society appears to have been highly stratified, with local rulers able to mobilize large numbers of laborers for communal projects.

Colombia's Caribbean region was also occupied by the Tairona, a Chibcha-speaking group that dominated the northeastern coastline around the foothills of the Sierra Nevada of Santa Marta. There, archaeologists have located numerous Tairona sites, some consisting of dozens of round wooden buildings and fine masonry platforms.

Perhaps the best known of Colombia's preconquest inhabitants were the Muisca (sometimes referred to as the Chibcha), who occupied the fertile plains of Colombia's eastern highlands. The Muisca were relatively late arrivals to Colombia's eastern highlands, having migrated to the region from northern Colombia and Venezuela at the beginning of the ninth century C.E. The Early Muisca period (800–1200) saw the emergence of ceremonial centers, a significant growth in interregional TRADE, the introduction of goldwork, and an intensification in WARFARE. The transition to the Late Muisca period (1200–1537) was not marked by dramatic changes; the eastern highlands experienced further population growth, a proliferation of different forms of pottery, and an increase in long-distance trade. Muisca markets were filled with goods obtained both within and outside Muisca territory. COTTON cloth, dye tints, COCA leaves, fish, TOBACCO, palm wine, and CHICHA, *barbasco* for fish poison, *cabuya* for ropes and cord, calabashes and gourds, fruits, animal skins, honey, wax, vegetables, spices, oils, and maize were all exchanged. Muisca merchants also traded salt and EMERALDS for GOLD, seashells, and other luxury goods not found in the eastern highlands. Precise trade routes remain unclear, but long-distance exchanges likely occurred through a series of intermediary towns.

The Muisca did not congregate in large urban centers; rather, they resided in dispersed homesteads, ranging in size from several dozen inhabitants to a few thousand. These settlements were spread throughout the entire territory, allowing the Muisca to take advantage of the resources and conditions of different ecological zones. On the eve of the Spanish conquest, Muisca territory corresponded roughly to the modern Colombian departments of Cundinamarca and Boyacá, covering a territory of more than 1,000 square miles (2,590 km<sup>2</sup>),

with a population that likely exceeded 500,000 inhabitants. Some scholars have suggested that when the first Spanish expedition arrived in 1537, Muisca territory was divided into two separate kingdoms, one ruled by the Zipa of Bogotá, and the other governed by the Zaque of Tunja. However, recent studies suggest that Muisca territory was far more decentralized, with powerful chiefdoms centered not only around Bogotá and Tunja but also at Turmequé, Cocuy, Duitama, and Sogamoso, among other independent chiefdoms.

When the first band of Spanish conquistadores arrived in Muisca territory, led by GONZALO JIMÉNEZ DE QUESADA, the region quickly emerged as the most important in Colombia. Attracted by its welcoming climate, fertile soils, dense indigenous population, and nearby access to gold and emerald mines, Europeans quickly moved in to settle the region's first three Spanish towns, Santafé de Bogotá, Tunja, and Vélez. Within a decade, the region had experienced significant change. By the time the AUDIENCIA (high court) was formally established in Santafé de Bogotá in 1550, European settlers had successfully introduced Old World crops such as WHEAT, barley, and sugarcane (see SUGAR), a variety of fruits and vegetables, and flax to make linen. Horses, cattle, pigs, goats, mules, and sheep also adapted quickly and easily to their new environment (see COLUMBIAN EXCHANGE; FOOD), and Spanish *encomenderos* (see ENCOMIENDA) reaped enormous profits through the collection of indigenous tribute and LABOR services.

Compared to the Spanish conquests of MEXICO, PERU, or GUATEMALA, the Spanish conquest of Muisca territory involved relatively little bloodshed; nevertheless, the arrival of Europeans and Africans still proved devastating to the Muisca population. Between 1558 and 1560, the entire eastern highlands was struck by a series of epidemics, which swept through Muisca territory (see DISEASE). In the province of Tunja alone, the Indian population fell by more than 30 percent in just a few years. By 1636, just a century after the conquest, Colombia's Muisca population had declined by as much as 80 percent.

While the majority of Spanish colonists in early colonial Colombia chose to settle within Muisca territory, other regions in Colombia also attracted Europeans. The location of pre-Columbian gold mines played an important role in determining the locations of Colombia's earliest European towns: Popayán (1537), Santa Fe de Antioquia (1541; reestablished in 1546), Tocaima (1545), Pamplona (1549), Ibagué (1550), Mariquita (1551), La Victoria (1557), and La Palma (1560) were all located near pre-Columbian gold-mining sites. Still, despite the fact that Colombia attracted significant numbers of European settlers, by 1560, most of Colombian territory remained far removed from Spanish control.

See also BOGOTÁ (Vols. II, III, IV); CARTAGENA DE INDIAS (Vol. II); COLOMBIA (Vols. II, III, IV); GRAN COLOMBIA (Vol. III); NEW GRANADA, VICEROYALTY OF (Vol. II).

—J. Michael Francis

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**Columbian Exchange** “Among the extraordinary though quite natural circumstances of my life,” wrote the 16th-century Italian Girolamo Cardano, “the first and most unusual is that I was born in this century in which the whole world became known.” The late 15th-century arrival of Europeans in the Western Hemisphere initiated a series of long-term and wide-reaching exchanges. People, animals, DISEASE, crops, commodities, and ideas flowed into new areas and in new directions. The biological and cultural exchange between the Old and New Worlds—labeled the *Columbian Exchange* by the historian Alfred Crosby—transformed diverse landscapes and disparate lives across the globe.

When CHRISTOPHER COLUMBUS reached American shores, he found a land that lacked the principal crops of the Old World, such as WHEAT, barley, and rye, and free of beasts of burden, such as horses and cattle. In the Americas, there were no European, Asian, or African domesticates, and conversely, in Europe, Asia, and Africa, there were no American plants or animals. The FOODS that today are often associated with countries' so-called traditional cuisines were not found in those places before 1492. Italians ate no tomatoes and the Irish no POTATOES; Indians (from India) consumed no chilies and Ethiopians no peanuts; Argentines ate no beef and Jamaicans no chicken. Only Old World elites drank coffee and tea, while the New World nobility enjoyed TOBACCO and chocolate.

The Old World emigrants of the 16th century immediately recognized the bounty of the Americas. Staple crops such as MAIZE, MANIOC, and potatoes, as well as other vegetables and seeds, spices, beans, chilies, and tomatoes provided rich sustenance. New World domesticates included amaranth (*Amaranthus*), avocados (*Persea americana*), beans (*Phaseolus vulgaris*), cashews (*Anacardium curatellifolium*), CACAO (*Theobroma cacao*), chilies (*Capiscum*), COTTON (*Gossypium*), guava (*Psidium*), maize (*Zea mays*), manioc (*Manihot esculenta*), papayas (*Carica papaya*), peanuts (*Arachis hypogaea*), pineapples (*Ananas comosus*), potatoes (*Solanum tuberosum*), squashes (*Cucurbita*), sunflowers (*Helianthus annuus*), tobacco (*Nicotiana rustica*), and tomatoes (*Solanum lycopersicum*).



Guinea pigs roam freely in a private residence in Ollantaytambo, Peru. (Courtesy of J. Michael Francis)

The more modest list of New World faunal domesticates included alpacas (*Vicugna pacos*), GUINEA PIGS (*Cavia porcellus*), llamas (*Llama glama*), and turkeys (*Meleagris*).

While Europeans were quick to identify the richness of the Americas, they also recognized that Old World crops, particularly geographically limited ones, such as SUGAR, could thrive in tropical environments. During his 1492 encounter with the Caribbean, Columbus collected samples of exotic and useful New World crops, including maize and cotton. During his second voyage of 1493, he and his settlers brought a wide variety of Old World plants and animals, including wheat, barley, grapes, chickpeas, olives, onions, horses, and cattle. Unbeknownst to both the Europeans and Americans, other living organisms, including bugs and diseases, also made the journey. From the Americas, a variety of syphilis arrived in the Old World. From Europe, a host of lethal pathogens, including smallpox, yellow fever, and influenza, invaded the New World. These first encounters typified important aspects of the Columbian Exchange. For one, they demonstrate that material exchanges moved both to and from the Old and New Worlds. They also illustrate that these exchanges were not always benign in nature. While the New World lacked the main Old World domesticated animals, it also lacked the pathogens of smallpox, bubonic plague, typhoid, influenza, malaria, and yellow fever, all of which stemmed from human-animal interaction. Furthermore, the exchange of goods came with important cultural components.

The Columbian Exchange did not simply involve trading valued commodities between Europe and the Americas; rather, the history of the biological and cultural exchanges during the early colonial period is a rich and truly global story. The American staples of manioc, potatoes, and maize became important global staples by the close of the 16th century. Manioc, a South American root crop also known as cassava, became an important component in West African AGRICULTURE as early as the 16th century. In 1593, for example, Sir Richard Hawkins, an important adviser to the English monarch, detailed the seizure of a Portuguese ship leaving Angola loaded with manioc. Nearly a century later, the Fulani and Hausa peoples of the kingdoms of the Kongo and Angola cultivated the crop.

Potatoes, which were once exclusively the food of Andeans, disseminated widely during the 16th century. While the Spaniards who first encountered them found them unusual, by the close of the century, potatoes were being cultivated in many parts of Europe and Asia. In 1600, the French botanist Olivier de Serres provided a detailed history of the tuber and described the crop's cultivation in North America, England, Switzerland, Spain, and France. Similarly, Chinese accounts from late in the century identified potatoes among a collection of new foreign domesticates that also included tomatoes, peanuts, and guava.

No staple spread the globe as quickly and widely as maize. By the close of the 16th century, it was cultivated in Europe, the Middle East, Southeast Asia, Africa, and

throughout the Americas. Leonard Rauwolf, an explorer and amateur botanist who collected seed samples from the Middle East, noted evidence of this distribution. In 1574, he found that maize was cultivated throughout the Ottoman Empire, particularly from modern-day Turkey to Jerusalem.

The movement and distribution of domesticates was not simply from the New to the Old World. Old World commodities arrived with the initial waves of European conquerors. The introduction of Old World commodities and LABOR systems altered the biological and cultural composition of the New World.

Sugarcane, a geographically limited Old World commodity that required tropical environs and massive labor, was a driving force behind European expansion in the Americas. Before the 16th century, sugar was almost exclusively cultivated in the East Indies and was available on the global market in only very limited amounts. Universally appealing and limited in quantity, sugar was more valuable than GOLD on the world market. By the mid-16th century, however, American sugar production dominated. In 1501, Columbus created the first sugar plantation in the New World, and in 1516, the first shipment of New World sugar arrived in Europe. The story of sugar production, however, was not a sweet tale. Rather, the rise of sugar was fundamentally linked to the rise of New World SLAVERY and the decline of indigenous peoples in the Caribbean and BRAZIL. On the island of HISPANIOLA (present-day Dominican Republic and Haiti), by 1600, the native population was nearly extinguished under the disastrous combination of labor exploitation and disease. In the absence of indigenous labor, Europeans imported massive numbers of enslaved Africans. By 1600, for example, some 15,000 African slaves were working on Brazil's 150 sugar plantations. In the century that followed, the number of African slaves increased tenfold.

Europeans took domesticated animals into the areas to which they moved. Early European voyagers introduced horses, cattle, pigs, chickens, and sheep, but the arrival of these animals did not come without costs. Sheep, for example, extracted a considerable toll on the physical landscape and so, also, the human landscape. In valleys north of present-day MEXICO CITY, widespread sheep production transformed the forest and farmland of the 1530s into the unfertile prairies of the 1560s. The native inhabitants of the areas, who subsisted mainly on slash-and-burn horticulture, were no longer able to feed themselves. As a result, more than 90 percent of the population was extinguished.

The demographic shifts associated with the Columbian Exchange were monumental. During the 16th century, Europe's population increased by nearly 20 percent and Asian populations by nearly 10 percent due to the new sources of food and wealth. The Americas, on the other hand, suffered the worst demographic collapse in human history. One of the most important biological exchanges between the Old and New Worlds took place

at the microscopic level. From the first decades of contact with Europeans, smallpox, typhus, influenza, and measles inundated susceptible American populations. The rapid spread of Old World diseases, described by scholars as "virgin-soil epidemics," affected entire communities, from the young to the old, the weak to the fit. Combined with European abuse and exploitation, Old World diseases disabled every indigenous group they touched.

The first recorded account of epidemic smallpox in the New World comes from the coast of MEXICO in 1517. By 1520, the disease had spread to the densely populated Valley of Mexico. In 1526, ahead of the Europeans themselves, the disease spread into Central America. By the end of the 16th century, the native population of Mexico City had been reduced to no more than 30 percent of its precontact strength. The 16th-century historian and polemicist BARTOLOMÉ DE LAS CASAS reported that the 6 million pre-Hispanic indigenous inhabitants of Hispaniola had been reduced to 30,000 by the 1550s.

While estimates of the Amerindian population before the arrival of Europeans vary considerably, it is likely that it was as high as 60 million. There is little scholarly debate on the significance of the rapid decline of native populations across the hemisphere, however. By the close of the 16th century, fewer than 10 million native inhabitants lived in the Americas. After a century of the Columbian Exchange, the human makeup of the Americas had changed dramatically. The populations of the Caribbean had virtually disappeared. Major population centers such as those in the Valley of Mexico and the Andes were exponentially reduced. Even in frontier areas, such as the AMAZON Basin, where Europeans rarely ventured, native populations fell victim to Old World diseases. Given the overwhelming decline of indigenous peoples, virtually everyone in the New World was directly affected by the Columbian Exchange.

The exchange of crops and commodities was accompanied by the exchange of cultural components such as ideas and institutions. The creation of sugar plantations, for example, came with the exploitive labor practice of slavery. During the 16th century, Europeans created the foundations for subsequent labor practices, particularly the transatlantic slave trade. With the dramatic decline in native labor, Europeans imported African slaves. Across this period an estimated 350,000 slaves were shipped to the Americas, with the vast majority winding up on Caribbean and Brazilian sugar plantations.

European cultural and ideological systems often served to justify the cruel and exploitive aspects of the Columbian Exchange. Early modern European political systems struggled to consolidate wealth and authority. Expansion into the Americas, hastened by debilitated local populations, provided new opportunities for Europeans to bolster their regional and global positions. While it is true that Europeans often lamented the abuse of Americans and Africans, this exploitation was justified and even bolstered by Old World, and particularly European, philosophical and religious traditions. For



example, by citing classical philosophy, religious interpretations, and medieval political thought, European monarchs defended the destruction of indigenous societies and the enslavement of Africans as aspects of a “just war” in the name of society and civilization.

After only a century, the Columbian Exchange had transformed the biological and cultural character of people around the world, and the effects were both uneven and complex. On the one hand, the introduction of valuable new sources of food fed population explosions in Europe and Asia. Europe, once a somewhat unimportant and fractured region of the Old World, found itself a controlling force in a global system of TRADE and exploitation. On the other hand, the introduction of Old World diseases and colonial systems of exploitation led to the demographic collapse, the most significant in human history, of indigenous Americans. The New World, once a chain of independent economic and social systems, became a colonized and subjugated source for the world’s wealth. Furthermore, the exploitive social and economic systems that formed during the earliest parts of the Columbian Exchange were limiting and lasting forces.

See also CATTLE (Vol. II); COLUMBIAN EXCHANGE (Vol. II); EPIDEMICS (Vol. II); SHEEP (Vol. II); SUGAR (Vols. II, III).

—R. A. Kashanipour

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**Columbus, Christopher** (b.1451–d.1506) *navigator and explorer credited with “discovering” the Americas* Christopher Columbus was born between August and October of 1451 in Genoa, Italy. At age 14, he attended Prince Henry’s school of navigation in Sagres, Portugal. His formative business endeavors included trips to Greece, Ireland, and possibly Iceland. Columbus’s taste for travel came at a unique nexus in European history. Access to prized silks, spices, and other goods from Asia and India were becoming increasingly difficult to procure. The seizure of Constantinople by Ottoman Turks in 1453 resulted in a geopolitical crisis for Europe, as the gateway land routes to the Asian markets were no longer considered reliable. Columbus, along with his brothers, devised a strategy for reaching Asia by sailing west across the Atlantic Ocean. Despite modernity’s widespread and erroneous belief that most 15th-century people believed the world was flat (propagated by Washington Irving’s

1828 biography of Columbus), most Europeans in fact accepted Arab, Greek, and Roman conjectures that the world was spherical. Hence, in theory, Columbus’s notion of sailing west to arrive at an eastern landmass was not at all revolutionary in the 1480s. Opposition to Columbus’s plan regarded the circumference of the globe, not its shape.

Columbus’s calculations of the distance between Europe and Asia via westward navigation were rife with errors. He drew on highly flawed works that miscalculated the proportion of the world’s landmass compared to its sea mass. Furthermore, he mistakenly calculated distances based on an Arabic model but did not recalculate his model to take into account the lengthier measure of an Arab mile, which was roughly 1,830 meters (about 1.14 miles) as compared to the Italian mile, which measured about 1,238 meters (about 0.77 miles). Columbus found it difficult to secure funding for his expedition because experts at the time recognized the faulty logic in his plan. He proposed an expedition of three ships to King John II of Portugal, whose advisers vetoed it because Columbus’s calculated distance to Asia was far too short. Columbus then turned to the Italian city-states of Genoa and Venice; neither expressed interest. His brother made overtures to King Henry VII of England, who warmed to the idea too late.

Columbus first approached the MONARCHS OF SPAIN, Ferdinand and Isabella, in 1486. They rebuffed his offer but sagely offered him an annual salary and free lodging and food throughout the country in order to keep him from gaining support elsewhere. After finally driving the Moors from Iberia in 1492, Columbus pressed his luck with a much more receptive Spanish Crown. Isabella dismissed him, but as he was leaving Córdoba, dejected, he was stopped by Ferdinand’s guards. The king of Spain was ready to defy royal advice and fund Columbus’s voyage. Indeed, the king would later claim credit for being “the principal cause why those islands were discovered.” Half of Columbus’s trip would be financed by private Italian investors and half by the Spanish Crown. The Crown offered him the title of “admiral of the seas,” as well as generous funding and terms of discovery and colonization (see CAPITULATIONS OF SANTA FE).

Columbus departed Spain with three ships—the *Santa Clara* (nicknamed the *Niña*), *Pinta*, and *Santa María*—on August 3, 1492. After replenishing supplies at the Canary Islands, the convoy began one of the world’s most famous treks, a five-week journey across the Atlantic Ocean. At roughly 2:00 A.M. on October 12, 1492, Rodrigo de Triana aboard the *Pinta* spotted land. Columbus named the island San Salvador, though exactly which island he first encountered is a source of debate. He soon met the native population, members of the Arawak or TAINO tribes. Columbus’s journal entries concerning this initial meeting recount his belief that the locals “would make good servants” and could be easily conquered and Christianized. From San Salvador,



The Franciscan monastery at La Rábida, famous for its association with Christopher Columbus. It has been suggested that Columbus first visited the monastery in 1485; however, it was not until 1491 that Columbus turned to the friars at the monastery to help him prepare his petition to the Spanish monarchs to support his voyage across the Atlantic. (Courtesy of J. Michael Francis)

Columbus ventured north to CUBA and HISPANIOLA, where the *Santa María* ran aground on Christmas morning. Dubbed LA NAVIDAD colony, Columbus left a crew of 39 men in what is now Haiti, hoping to return a year later to a thriving Spanish outpost. He finally docked in Spain on March 15, 1493, igniting a maelstrom of interest in his discovery.

Columbus returned to the Americas three more times. His second voyage led to the discovery of the Lesser and Greater Antilles and ultimately docked at Hispaniola, where La Navidad colony was found destroyed. Columbus instituted a brutal set of policies that devastated the Taino population; they were killed or enslaved in large numbers. On his third voyage in 1498, Columbus focused his travels on the northern crest of South America, exploring the coast of VENEZUELA and Trinidad. This voyage also highlighted his firm stance against Spanish dissent; discontent and disobedience among the settlers provoked harsh reprisals, including hangings. The dark side of Columbus's rule in the Americas was partially chronicled by the Dominican friar BARTOLOMÉ DE LAS CASAS, who accompanied him on his third voyage. In 1502, Columbus launched a fourth voyage in search of the Strait of Malacca to the Indian

Ocean, which led him to explore the coastline of Central America, including HONDURAS, NICARAGUA, COSTA RICA, and PANAMA. He was stranded in Jamaica for a year before returning to Spain on November 7, 1504.

Columbus's final years were marked by renewed piety and quarrels with the Spanish Crown over the pecuniary provisions of his initial contract. He died a wealthy man at the age of 55 on May 20, 1506, in Valladolid, Spain, unwavering in his belief that he had discovered a sea route to the Asian coast. His remains were originally interred in Valladolid, but over the succeeding centuries, they were scuttled from Spain to Santo Domingo, Dominican Republic, to Havana, Cuba, and finally back to Seville, Spain.

—Sean H. Goforth

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This late 19th-century mausoleum-monument, housed in Seville's cathedral, is believed to hold Christopher Columbus's remains. The few bone fragments in the tomb were subjected to DNA testing in 2003; however, the findings were inconclusive. The four heralds carrying Columbus's tomb represent the kingdoms of Castile, León, Aragon, and Navarre. (Courtesy of J. Michael Francis)

**congregación** A *congregación* was a nucleated settlement of indigenous people, typically consisting of a *cabecera*, or “head town,” and several nearby politically subordinate towns (*sujetos*); it was created under the Spanish colonial policy of forcibly consolidating scattered native populations. *Congregación* (the process of relocation, also known as *reducción*) was intended to facilitate acculturation to Spanish norms of civilized living and improve Spanish access to Native Americans for the purposes of governance, tax collection, distribution of LABOR, and religious indoctrination (see RELIGION).

In 1511, the protests of the Dominican order over the mistreatment of Indian laborers at the hands of Spanish *encomenderos* (recipients of labor grants) on the island of HISPANIOLA convinced the Crown that it was in danger of losing its only colony of any importance at the time in the Americas. The native population was dying off at an alarming rate due to overwork, malnutrition, physical abuse, and the introduction of Old World DISEASES. The dwindling supply of indigenous labor made it difficult to retain Spanish settlers or attract new settlers. In response, the Crown surmised that these problems could be solved by standardizing and limiting the largely unregulated institution of the *ENCOMIENDA*, which it did through the promulgation of the LAWS OF BURGOS in 1512.

While the Laws of Burgos failed to slow the population decline, they set a number of precedents for royal policies on the Indians, including *congregación*. The first article mandated that indigenous people living scattered throughout the countryside should be relocated to settlements near the Spaniards they served, the latter initially providing for the Indians' basic necessities and later ordering them to begin raising their own provisions. The old dwellings were to be burned to prevent the native people from returning to them. The second article mandated that the Indians were not to be harmed during relocation, and the remaining articles regulated various aspects of their lives and relations with their Spanish overseers. The first two articles became the blueprint for subsequent resettlement programs throughout Spanish America, under the direction of either civil or ecclesiastical authorities.

In New Spain (MEXICO), *congregación* began in the mid-16th century and was often carried out by the RELIGIOUS ORDERS. The first major effort at resettlement by civil authorities was completed between 1550 and 1564, and most of the native communities of later centuries were products of this initial series of *congregaciones*. The same could be said of GUATEMALA, where the Dominicans and Mercedarians created numerous *congregaciones* in the late 1540s and 1550s. While many of these settlements endured,

sometimes even into the present day under modern political configurations, others declined as their residents returned piecemeal to their ancestral lands. Some disappeared altogether within a few decades. The Mercedarians carried out a series of *congregaciones* in HONDURAS, beginning around 1540, although less is known about the stability of these settlements. In PERU, the process of *congregación* was implemented in the mid-1560s but did not have much momentum until it was stepped up under the administration of Peru's fifth viceroy, Francisco de Toledo.

Under a similar policy (*redução*) implemented by the Portuguese in BRAZIL, indigenous people were gathered into Jesuit mission villages (*aldeias*). Begun in 1550, the *aldeia* system was less ambitious than its Spanish counterparts and after peaking in the late 1550s and early 1560s, went into a period of decline, succumbing to the effects of WARFARE and Old World diseases.

See also CONGREGACIÓN (Vol. II); REDUCCIÓN (Vol. II).

—Michael S. Cole

## conquest

### BRAZIL

The initial encounter between Portuguese sailors and Amerindian set the tone for subsequent encounters and eventual Portuguese colonization. When PEDRO ÁLVARES CABRAL first stumbled upon the coast of BRAZIL in April 1500, he did not immediately begin settlement; rather, he replenished the supplies of his fleet, using Brazil as a convenient stopover point on his journey to India. Leaving behind a handful of convicts to establish an outpost and learn indigenous tongues, Cabral and his men were following a pattern that the Portuguese had previously employed in Africa: establishing a series of factories, or trading posts, with little attempt at controlling inland territory (see TRADE). Neither the new land nor its inhabitants were viewed as an imperial priority at this point. In many ways, this was a reflection of Portuguese reaction to the indigenous societies initially encountered in Brazil. Unlike the native civilizations in MEXICO and PERU, with dense urban populations and highly developed systems of AGRICULTURE and tribute, Brazil's indigenous population consisted largely of semisedentary peoples who practiced slash-and-burn agriculture and had subsistence economies (see ECONOMY). Accordingly, Brazilian Indians appeared to offer little in the way of wealth to early Europeans.

Brazil's indigenous population at the time of the conquest was highly diverse. Although demographic information is imprecise, scholars estimate that the new land was peopled by 2 to 5 million native inhabitants prior to the arrival of the Portuguese. Brazil's indigenous population during this period can be divided into three distinct groups. Tupí-GUARANÍ speakers, including the TUPINAMBÁ, were found along the coasts of Brazil from modern-day Ceará in the northeast to São Paulo in the south, then inland to the Paraná and Paraguay river basins. Non-Tupí speak-

ers, or Tapuya, lived in the north above Ceará and interspersed at different points along the coast, and included those who spoke Gê as well as other isolated languages. Finally, Arawak- and Carib-speaking peoples lived in the north (although the Portuguese would not have sustained contact with this last group until the late 17th century). Contact between different indigenous groups—including those who spoke similar languages—was limited mainly to trade, though military alliances were not uncommon. In this regard, there was a great deal of fighting among different indigenous groups, and WARFARE and the capture of enemies were extremely important.

Initial interaction between Europeans and indigenous groups in Brazil was based mainly on trade with both the Portuguese and French, who had also begun sailing to Brazil in the early 16th century. French and Portuguese merchants provided axes and other metal tools to the Amerindians in exchange for dyewood, the only resource that Europeans initially found to be of worth in the new land (see DYES AND DYEWOOD). Both Portuguese and French merchants attempted to exploit native rivalries—establishing alliances with competing indigenous groups—just as the natives themselves played one European side against the other. In this regard, the conquest of Brazil can in many ways be understood as a story of Luso-French rivalry.

In a juridical sense, the Portuguese traced their claim to Brazil through the TREATY OF Tordesillas (1494), which had divided the world between the Catholic kingdoms of Portugal and Castile. And yet, a generation after the discovery of Brazil, the Portuguese had done little to systematically colonize the new land; instead, it was the French who were making steady gains. In response to this threat, Portugal's King John III sent an expedition to Brazil in 1530. Accompanied by more than 400 colonists, Martim Afonso de Sousa was instructed to keep French ships away from the coasts of Brazil. Four years later, the Crown reinforced these actions by establishing a system of DONATARY CAPTAINCIES, geographic jurisdictions that were awarded to a lord proprietor; in exchange for these grants, recipients were responsible for settling the land. Based on grants of feudal lordship in medieval Portugal, the captaincy system had previously been used with varying degrees of success in Madeira, the Azores, and the Cape Verde Islands. In the case of Brazil, however, the attempt to use private initiative and resources for imperial aims for the most part failed. Only two of Brazil's original 15 captaincies were successful: Pernambuco and São Vicente. Significantly, both enjoyed relatively peaceful relations with local Amerindians. Additionally, the Portuguese colonists in Pernambuco began to cultivate sugarcane, establishing a plantation-based economy that initially relied on indigenous LABOR (see SUGAR). However, following the great epidemics that devastated Brazil's indigenous population in the mid-16th century, the Portuguese began to import large numbers of African slaves (see DISEASE; SLAVERY).

Following the failure of the donatary captaincies, the Portuguese Crown sought to reassert its control of the new land. In 1549, John III sent Tomé de Sousa to serve as Brazil's first governor general. Accompanied by a fleet of five ships, six Jesuit priests, and more than a thousand other men, the new governor would go on to found the city of Salvador da Bahia, Brazil's first colonial capital. Nevertheless, Luso-French rivalry in Brazil did not come to an end. In 1555, Nicolas Durand de Villegagnon, a French naval officer, led a band of soldiers and religious outcasts—mainly French Huguenots and Swiss Calvinists—to establish France Antarctique, a small colony and fort near modern-day Rio de Janeiro. Although the Portuguese initially did little to drive the French from their new colony, France Antarctique was subsequently weakened after the arrival of more French colonists, including Catholics who bickered with their Protestant counterparts over church doctrine. Following a series of Portuguese raids between 1565 and 1567, France Antarctique was abandoned, thus assuring Portuguese dominion of the new lands. In effect, by this point, all of the major factors in Brazil's first stage of history were complete: the decline of Brazil's indigenous population, the consolidation of Portuguese sovereignty, the beginnings of a plantation-based economy, the arrival of African slaves, and the founding of Brazil's major colonial CITIES.

### THE CARIBBEAN

Spain's first military conquests in the New World occurred in the Caribbean region and were based on general patterns established during the 800 years of Reconquista against the Moors, as well as the subsequent conquest and colonization of the Canary Islands. From CHRISTOPHER COLUMBUS's second voyage in 1493 until the final conquest of the major Caribbean islands and the advance toward the Central American mainland, the conquest of the Caribbean established the basic pattern of Spanish conquest and colonization of the rest of the New World.

The initial Spanish conquest of the Caribbean can be dated to the second voyage of Columbus to the island of HISPANIOLA in 1493. Returning to the New World with more than 1,500 Europeans, Columbus discovered that his first established colony at LA NAVIDAD had been destroyed, and all those he had left there, killed. To avenge the destruction of Columbus's first settlement, the Europeans who accompanied the explorer launched a war against the island's TAINO peoples; the conflict eventually led to the creation of Spain's first base of operations in a series of conquests. Soon, all of the major islands of the Caribbean fell under the control of the Spanish Crown.

In 1493, Columbus established a new settlement named Isabella on the eastern part of the island of Hispaniola, and the Spanish colony of Santo Domingo quickly became the first of a series of Spanish settlements that would serve as staging posts and launching points for the conquest of the rest of the Caribbean. However, in 1500, Columbus was removed as Santo Domingo's

governor; his replacement, Nicolás de Ovando, began the systematic conquest of the rest of the island of Hispaniola, launching two major wars in 1500 and 1504 in the hopes of discovering and exploiting more wealthy resources for Spain. When early expectations that GOLD and precious metals would be found in abundance on the island vanished, new groups of Spanish immigrants began to look to other islands for sources of quick wealth (see MIGRATION).

### Hispaniola (Santo Domingo)

Despite its paucity of mineral wealth, Santo Domingo remained an important colonial administrative center, with its own *AUDIENCIA*, or high court, which served throughout the 16th century as a major launching point for all subsequent conquest expeditions. It was also on the island of Hispaniola that the Spanish Crown introduced the *repartimiento* system, which divided the conquered indigenous populations into labor drafts for use by Spaniards. Similarly, following the promulgation of the 1512 LAWS OF BURGOS, Santo Domingo witnessed for the first time in the New World the creation of the *ENCOMIENDA* system in the Indies. Both systems proved devastating for the island's Amerindian population.

The Taino inhabitants of Santo Domingo did not survive long under Spanish rule. Various sources reported the initial Taino population of Santo Domingo to be anywhere from 4 million to slightly more than 100,000 people before the conquest. Regardless, according to all colonial accounts, by 1550, less than 200 native Tainos remained on the island.

### Puerto Rico

Using Santo Domingo as a base of operations, in late August 1508, the Spanish conquistador JUAN PONCE DE LEÓN, who had traveled with Columbus on his return voyage in 1493, began the conquest of the island of PUERTO RICO. Arriving with a small army of soldiers, Ponce de León established the settlement of Caparra as the first Spanish town, located at San Juan Bay. The island's small Taino population (estimated to have numbered fewer than 50,000) was unable to resist the Spanish conquest. The Spaniards quickly conquered and enslaved those Taino who fought them, forcing the native population to work in the few small gold mines discovered on the island (see MINING). A series of bloody rebellions occurred shortly after the initial conquest, led by the Taino leader Agueybana. These revolts ultimately led to the defeat of the natives and the deaths or flight of most of the island's remaining Taino residents. The lack of slave labor on the island resulted in the importation of some of the first African slaves into the Caribbean and the organization of slaving expeditions to the other larger islands; these efforts to procure additional slaves for the island also inspired early expeditions to the newly discovered mainland of South and Central America. By 1514, no more than a few thousand Tainos remained on the island.

### Jamaica

During his second voyage, Columbus encountered the island of Jamaica in 1494. After defeating the Tainos, Columbus claimed the island for Spain. Nevertheless, no effective attempts at conquest and colonization occurred until 1509, when Juan de Esquivel was sent from Santo Domingo to conquer the island and establish the first settlement. Esquivel's new town, called Sevilla la Nueva, located on the northern part of Jamaica, became the island's first administrative center. A series of small-scale wars with the Taino eventually led to the conquest of the island and the creation in 1523 of the town of Santiago de la Vega on its southern side. Once the Spanish discovered that Jamaica did not have any easily accessible gold mines or other mineral wealth, it dwindled to the status of a minor outpost; the island supported a small population that included a few Spanish ranchers. Eventually, Jamaica fell under the administration of the Columbus family, who received it in perpetuity as a type of personal fiefdom in compensation for the loss of many of their promised privileges.

### Cuba

The conquest of CUBA, the largest of the Caribbean islands and one of the last to become subject to Spanish rule, did not occur until 1511; in that year, the viceroy of the Indies, Diego Columbus, commissioned DIEGO VELÁZQUEZ DE CUÉLLAR to organize an expedition from Santo Domingo. The governor led a force of more than 300 men to conquer the island (alternately called the Isla Fernandina). Landing on Cuba's southern coast, Velázquez established the first permanent settlement on August 15, 1511, at the site of Baracoa. Over the next several months, Velázquez and his expedition subdued the eastern part of the island, leaving the western part of the island untouched for several years.

Taino resistance on the island of Cuba was actually led by the CACIQUE Hatuey, a Taino leader from Hispaniola, who had fled to Cuba to lead guerrilla warfare against the Spanish. Hatuey received significant support from Cuba's native inhabitants. For almost a year, the Taino resisted, pinning down the Spanish at their fortified town of Baracoa. Eventually betrayed by one of his own followers, Hatuey was later captured and executed by the Spanish; he was burned at the stake on February 2, 1512.

After 1512, the Taino of eastern Cuba offered only slight resistance to Spanish expansion, yet the Spaniards on Cuba committed many atrocities in their subjugation of the western side of the island, which was not complete until 1516. By 1517, Cuba was also experiencing a shortage of indigenous labor, and the small number of African slaves imported to the island still necessitated the enslavement of Amerindians from other regions. Several important slave-raiding expeditions were then sent out from Cuba in 1517 and 1518 under the command of FRANCISCO HERNÁNDEZ DE

CÓRDOBA (1517) and JUAN DE GRIJALVA (1518). During these two expeditions, Spaniards from Cuba discovered the Yucatán Peninsula and the existence of large populated empires of indigenous peoples on the Mexican mainland (see AZTECS; MAYAS). Cuba eventually became the staging ground for the later conquest of MEXICO and its mainland.

### Other Islands

From the earliest voyages of Columbus and other Spanish explorers, Spain claimed control over all the islands of the Caribbean, including the Lesser Antilles. However, once they discovered that most of these islands, especially those in the Bahamas and the Lesser Antilles, did not contain rich gold mines or other mineral resources, the Spanish effectively abandoned their efforts to colonize or settle them. With the exception of early settlements on the islands of Dominica and Guadalupe (Guadeloupe), both considered important weigh stations in the provisioning of voyages to and from the Indies, Spain effectively counted the costs of subduing the more warlike CARIB Indians on these islands as too high for such a low return.

The gradual eradication of the Taino inhabitants of the Caribbean islands and their replacement with African slaves eventually led to the establishment of Spanish colonies on the Caribbean's larger and wealthier islands. As the need for slave labor for the mines and early plantations increased, Spanish expeditions began to look to more distant lands to conquer and Amerindians natives to enslave. Although the first decade of the 16th century witnessed the creation of a few short-lived settlements on the Caribbean coasts of South and Central America, the first attempt at permanent conquest and colonization on the Caribbean mainland did not occur until 1514, with the expedition of PEDRO ARIAS DE ÁVILA. Nevertheless, even this expedition failed to find quick wealth or other mineral resources, and the colony was abandoned shortly afterward.

Early Spanish colonists on the larger Caribbean islands found vast tracts of available land but soon realized that the labor to mine the gold they discovered as their only valuable export product was quickly disappearing. European epidemic diseases initially devastated the indigenous population, and subsequent slave labor and forced *encomienda* service likewise took their toll on the already weakened native groups. Thus, ready access to large populations of Amerindians as forced laborers was essential to keep the colonists' early economy running. From 1492 to 1515, the need to discover more Indian labor served as the spur to the exploration and conquest of one island after another. The depletion of each region's native labor population led to the subsequent conquest of the next region; thus, the conquest of Puerto Rico, Jamaica, and Cuba ultimately resulted from the depletion of native laborers available on Santo Domingo. Similarly, the conquest of Mexico and the initial expeditions into North and Central America began with the depletion of native laborers on the

island of Cuba. The experience gained in conquering and administering their Caribbean island possessions, then, set in place the basic pattern of the Spaniards' conquest and colonization of the rest of the New World.

### CENTRAL AMERICA

Early explorations in the Caribbean set the stage for the conquest of Central America. On his fourth voyage in 1502–04, Columbus explored the Atlantic coasts of HONDURAS, NICARAGUA, COSTA RICA, and PANAMA. Near one of the Bay Islands, he encountered seagoing canoes laden with trade goods and finely dressed people. This was the first evidence of wealthy and powerful Mesoamerican cultures; however, apart from the early attempts to settle Panama, the conquests of Central America did not begin in earnest until after 1521 and the conquest of Mexico.

#### Panama, Costa Rica, and Nicaragua

Spaniards founded early settlements in Central and South America between 1504 and 1506. FRANCISCO PIZARRO initially established a settlement in COLOMBIA, but conflicts with local Indians forced him to relocate to Darién, in Castillo del Oro (Panama). In 1513, VASCO NÚÑEZ DE BALBOA crossed the Isthmus of Panama to the Pacific Ocean in his search for gold, pearls, and slaves. Arias de Ávila (known as Pedrarias) became governor in 1515 and dispatched various expeditions throughout the region.

In 1522–23, soon after the city of Panama was founded, GIL GONZÁLEZ DÁVILA and Andrés Niño received royal authority to sail and explore north along the Pacific coast. They traveled to western Nicaragua and Lake Nicaragua, where they encountered a large, wealthy, and culturally advanced Amerindian population. They eventually reached the Bay of Fonseca.

Pedrarias knew that the Crown planned to replace him as governor as part of its efforts to bring the Indies under direct royal control, so he decided to take over Nicaragua. He sent an expedition to the Pacific coast under the command of Francisco Hernández de Córdoba (not the explorer of the Yucatán), who founded the cities of Bruselas on the Gulf of Nicoya in present-day Costa Rica, Granada on the western shore of Lake Nicaragua, and León to the north.

Hernández de Córdoba decided to terminate Pedrarias's authority in Nicaragua. From León, he sent expeditions north into territory between Nicaragua and Honduras, where HERNANDO CORTÉS had claimed authority. Harassed indigenous groups called on Cortés for protection, and his forces blocked the forces of Hernández de Córdoba, who now feared Pedrarias's wrath. He invited Cortés to take control of Nicaragua. Cortés was organizing an expedition to Nicaragua when he decided to return to New Spain. Pedrarias arrived from Panama, took over, executed Hernández de Córdoba, and sent expeditions into Honduras, which he claimed.

In mid-1526, Pedro de los Ríos replaced Pedrarias as royal governor of Castillo del Oro and claimed juris-

diction over Nicaragua. Meanwhile, Diego López de Salcedo arrived as royal governor of Honduras and also claimed Nicaragua. He led an expedition to León in 1527. Unfortunately for him, the Crown decided to detach Nicaragua from Castillo del Oro and named Pedrarias governor of the new province. Pedrarias arrived in León and imprisoned López de Salcedo, only releasing him in 1529 after he renounced his claims to much territory, an act that finally settled questions about jurisdiction of Nicaragua and Honduras.

#### Guatemala and El Salvador

Spanish efforts to explore and conquer GUATEMALA and EL SALVADOR began in earnest after the conquest of Mexico. Their arrival was not a surprise to the local MAYA populations. In 1519, Aztec emperor MONTEZUMA had sent word to the K'iche' and Kaqchikel Maya that invaders had arrived from the east; and despite the fact that almost five years would pass before the first Spanish expedition arrived in the region, epidemic diseases had reached southern Guatemala as early as 1519–20. K'iche' and Kaqchikel emissaries met with Cortés in 1521 and 1522 and offered their alliances (see IXIMCHÉ).

PEDRO DE ALVARADO met with Kaqchikel ambassadors in Soconusco, which encouraged him to leave Mexico in late 1523 to invade Guatemala with an army of a few hundred Spaniards on foot and horseback, African slaves and freemen, and thousands of Nahuas and other indigenous allies. The captains were Alvarado, his brothers (Jorge, Gonzalo, and Gómez), their cousins, and Pedro Portocarrero. Alvarado (as did Jorge later) had married a royal Tlaxcalan woman, doña Luisa, shortly before the invasion, which helped him recruit native allies (see TLAXCALA).

Alvarado's forces crossed the K'iche' frontier early in 1524. The first battle at the Samalá River ended in Spanish victory. The second battle of El Pinar resulted in defeat for the K'iche's and the death of their ruler, Tecún Umán, now a Guatemalan national hero. After a third defeat in the Quezaltenango Valley, the K'iche's invited the invaders to their capital, Umatlán. Believing the invitation to be a trap, Alvarado destroyed the city.

Alvarado demanded reinforcements from the Kaqchikels. With fresh troops, the invaders continued to eliminate K'iche' resistance; they destroyed the Tz'utujil army at Lake Atitlán and headed into present-day El Salvador. At Acajutla, they engaged but could not defeat a Pipil force and turned back.

In mid-1524, Alvarado founded his colonial capital, Santiago de los Caballeros de Guatemala (Tecpán), near Iximché, the Kaqchikel capital. Demands for tribute, supplies, and labor soon strained the Spanish-Kaqchikel alliance and drove the Kaqchikels into the mountains, where they began a guerrilla war against the Spaniards that lasted six years. The Spaniards abandoned Iximché.

Cortés, who was in Honduras to quell Cristóbal de Olid's rebellion, sent for Alvarado. Some soldiers did not

wish to go and took refuge in Iximché. In early 1526, the city was burned when Alvarado and his allies defeated the rebels in battle. He marched with troops to Honduras, aided Cortés, and returned to Guatemala later that year with survivors from Cortés's army. One of these men was the conquistador BERNAL DÍAZ DEL CASTILLO, who later wrote *The True History of the Conquest of New Spain*.

In 1527, Jorge, Gonzalo, Gómez, and their cousins left for Mexico; they returned to Guatemala with 200 Spaniards and 5,000–10,000 Mexican allies for a massive assault against the Kaqchikels. Late in 1527, while Pedro de Alvarado was on his way to Spain, Jorge founded the colony's second capital at Bulbux-ya (Almolongo/Ciudad Vieja), near the base of the Volcán de Agua. Through the spring of 1529, Jorge campaigned as far as San Salvador and against the K'iche's and other Maya groups. He settled San Salvador, Chiapa, and San Miguel.

In 1530, Pedro de Alvarado returned to Guatemala, and the Kaqchikels finally surrendered. They were saddled with heavy tribute and labor obligations. Pedro left Guatemala again in 1535 for Spain via Honduras to avoid Alonso de Maldonado, who had been sent by the Audiencia of New Spain (see *AUDIENCIA*) to investigate charges of brutality (the Dominican friar BARTOLOMÉ DE LAS CASAS estimated that between the years of 1524 and 1540 Pedro de Alvarado and his brothers caused the deaths of 4 million Guatemalan natives). Maldonado quickly reduced the burdens imposed on the indigenous population when he took control in 1536. He retained power until 1539, when Pedro, exonerated by the Crown, returned. He brought with him a new wife, doña Beatriz de la Cueva.

Alvarado died in 1541 after being crushed by his horse during a battle in Jalisco. The *CABILDO* (town council) of Santiago de Guatemala named his widow, doña Beatriz, as governor. Her one-day rule ended with her death; an earthquake caused a torrent of water from the top of the Volcán de Agua to destroy the capital, which was subsequently moved to its third location, known today as Antigua.

### Honduras and Higueiras

Conflict and competition between Spanish captains, governors, and *audiencias* made the conquest of Honduras-Higueiras exceedingly complex. The province of Higueiras e Cabo de Honduras united two regions: Honduras included the eastern districts, territory west from Cabo Camarón to a point west of Trujillo and the Valley of Olancho; Higueiras extended along the Atlantic coast west and north to the Golfo Dulce region and toward the boundaries of Guatemala and Yucatán, and included all territory from the Caribbean coast south to Nicaragua and San Salvador.

Honduras-Higueiras was heavily populated when Spaniards arrived. Large towns existed in the valleys of Comayagua and Naco, and along the Ulúa River. The most complex cultures were in the rich Ulúa and Comayagua Valleys, while less complex ones characterized the Atlantic coast.

Indigenous resistance to the Spanish presence varied. Coastal native populations were easily subdued. Amerindians of the mountainous interior of Higueiras and the valleys of Comayagua and Olancho strongly resisted colonial campaigns. The inhabitants of Naco and Ulúa quickly accepted early Spanish presence but resisted permanent colonization.

Vicente Yáñez Pinzón and Juan Díaz de Solís explored the coast of Honduras in 1508, but conquest did not begin until 1524, when Gil González Dávila sailed to the northern coast. He had to throw many horses overboard in a storm at what became known as Puerto de Caballos. Afterward, he sailed west and founded San Gil de Buenavista. He sailed back along the coast, landed, and journeyed inland toward Nicaragua. The San Gil colonists soon moved to the indigenous town of Nito. Hernández de Córdoba in Nicaragua learned of the Spaniards to the north and sent HERNANDO DE SOTO and a company of men to engage them. González Dávila's force won the battle and returned to Puerto de Caballos, where González learned that other Spaniards had arrived.

Cortés sent Cristóbal de Olid and his forces to Honduras in 1524. Olid arrived at Puerto de Caballos, founded Triunfo de la Cruz, renounced Cortés's authority, and announced his intention to rule the province. When Cortés learned of Olid's rebellion, he sent Francisco de Las Casas in command of 150 men. They arrived off Triunfo de la Cruz just as Olid prepared to battle González Dávila. A storm destroyed Las Casas's ships, and Olid captured the survivors and defeated González. Las Casas and González eventually wounded their captor. They tried and executed him and reasserted Cortés's authority.

Unaware of Olid's defeat, in late 1524, Cortés organized an expedition of 140 Spaniards and 3,000 indigenous allies. This company was beset by starvation and disease as it marched through the tropical forests of Tabasco, Campeche, and Petén. In early 1525, they encountered the remnants of the Nito colonists. Cortés and about 40 Spaniards and some native fighters sailed to the Golfo Dulce, fought the inhabitants of Chacujal, and sent food back to Nito. Eventually, Cortés abandoned Nito and moved to Puerto de Caballos, where he founded Natividad de Nuestra Señora.

Rumors of the death of Cortés and his men reached New Spain and eventually his enemies gained control of Mexico City. He planned to sail back immediately, but only in 1526 did he finally do so, at the urging of supporters who had regained control. By the time Cortés departed, he controlled heavily populated districts inland, and indigenous leaders from a wide area had offered their allegiance to him.

Late in 1525, the Crown appointed Diego López de Salcedo as royal governor of Honduras as part of its plan to bring the governance of the Indies under direct royal control. López de Salcedo arrived in late 1526, after Cortés had departed, and led his forces to Nicaragua, where he claimed authority. He imposed such heavy



burdens on the native population along the way that they abandoned their towns and became hostile. López was imprisoned in Nicaragua until 1529 and was never able to reassert his authority as governor.

Andrés de Cerezeda became acting governor after the unpopular administrator died in early 1530. Cerezeda's rule was a period of anarchy and conflict; however, it also marked the beginnings of permanent colonization in Honduras and delimitation and occupation of Higuera.

From 1532 until 1544, the Crown authorized governors of Guatemala, Honduras-Higuera, and Yucatán to colonize the same general territory virtually simultaneously. This caused renewed confusion and conflict. The Crown appointed FRANCISCO DE MONTEJO, *adelantado* of Yucatán, as governor of Honduras-Higuera in 1535 and united the two provinces. Montejo renounced the governorship later that year because of his failure in colonizing Yucatán and precarious personal finances, but the Crown required him to take office.

Meanwhile, Pedro de Alvarado was asked to make the province part of Guatemala and intervened in Higuera, instituting important reforms. He sent his brother, Gonzalo, to found Gracias a Dios and then sailed for Spain in 1536. Despite misgivings, Montejo felt constrained to assume governorship. He established ambitious development plans and undertook the conquest of Higuera. By 1537, only small areas were truly pacified, and Lempira, a powerful indigenous leader of a territory in Higuera and neighboring San Miguel, led a general revolt centered on Peñol de Cerquín. The Spaniards under Montejo laid siege for months but could not breach the stronghold. Finally, they invited Lempira to negotiate, shot him in the forehead when he arrived, and entered the fortress as indigenous defenders stood by, stunned by their leader's death. Campaigns that continued through the spring of 1539 finally ended Amerindian resistance.

Five years of chaos followed Montejo's conquest of Higuera once Pedro de Alvarado had returned from Spain in 1539. Both men felt justified in claiming leadership. Eventually, the Crown decided Alvarado was more likely than Montejo to bring security and order to Honduras-Higuera. In exchange, Montejo received authority over Chiapas, which he claimed as part of Yucatán.

Therefore, in 1539, Honduras-Higuera became a province subordinate to Guatemala. However, after Alvarado's death, the union was dissolved, and at the end of 1541, Montejo was recalled to the governorship because of his administrative wisdom and military achievements. Nevertheless, his right to rule was soon disputed. The viceroy and Audiencia of New Spain attempted to reunite Honduras-Higuera with Guatemala in spring 1542. Unaware of Montejo's return, the Audiencia of Santo Domingo appointed Juan Pérez de Cabrera governor during that summer. By the end of the year, the viceroy had taken power from Montejo on behalf of New Spain. In response, Santo Domingo removed Pérez and reappointed Montejo as governor.

The NEW LAWS OF 1542, promulgated by the Crown to institute better government for the Indies, finally resolved this complex situation. In 1543, the Crown created the Audiencia de Los Confines, with jurisdiction and complete control over Honduras-Higuera, Guatemala, San Salvador, Nicaragua, Costa Rica, Chiapas, and Tabasco, and legal jurisdiction over Yucatán. Its members took office in 1544 and designated Gracias a Dios as the capital. With the imposition of firm royal authority, Honduras-Higuera finally entered a period of calm and order.

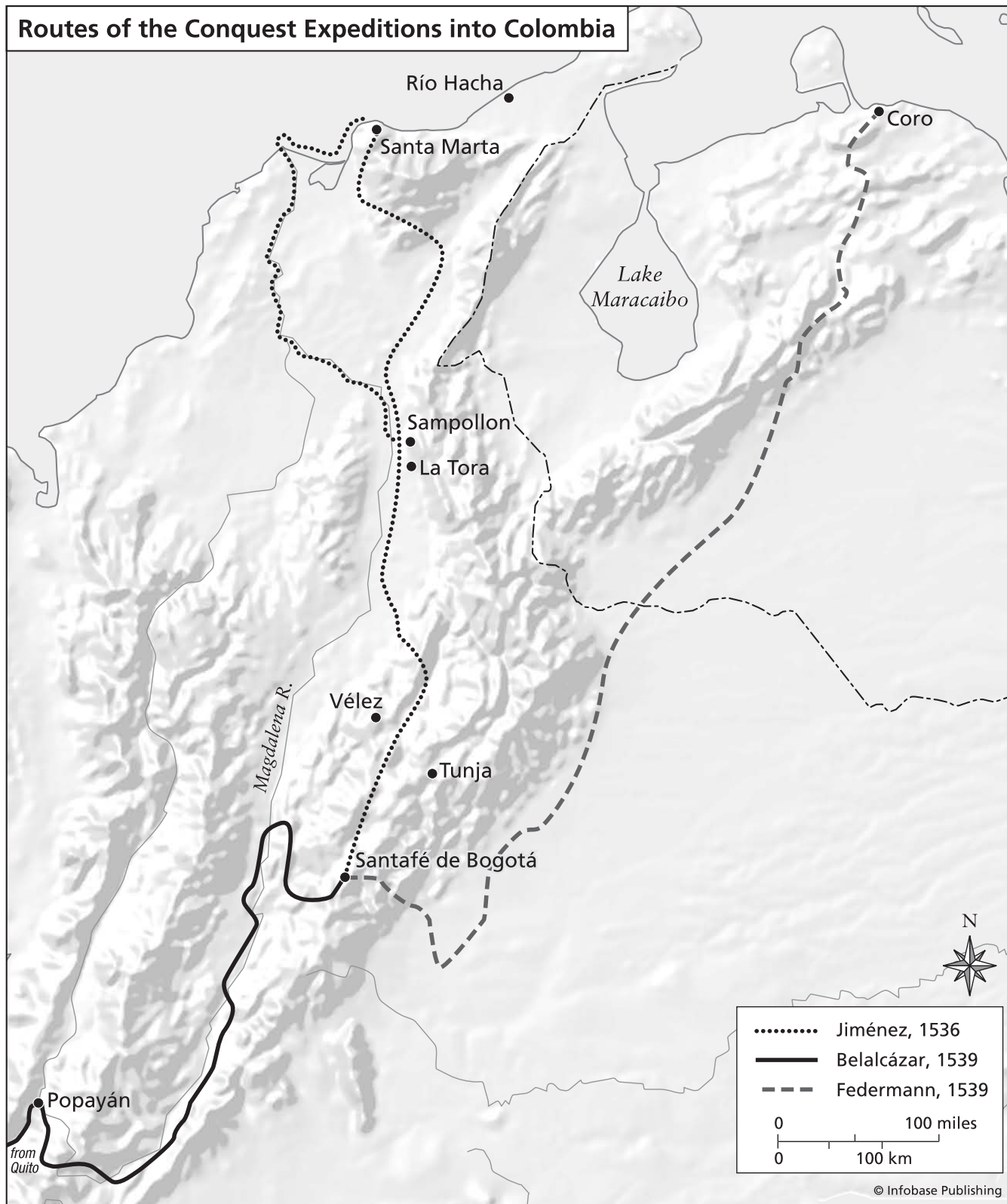
## COLOMBIA

The first Europeans to explore Colombian territory arrived less than a decade after Columbus's initial voyage to the New World. In 1499, ALONSO DE OJEDA led a voyage to the Guajira Peninsula, along the Caribbean coastline. A year later, RODRIGO DE BASTIDAS also explored Colombia's northern coast, where he and his companions bartered with local Amerindians for gold and pearls. However, fierce resistance from the region's indigenous population and limited evidence of mineral wealth delayed the establishment of permanent Spanish settlements along Colombia's northern coast. In fact, more than two decades passed before Bastidas returned to the region and founded Spain's first town in Colombia, which he named Santa Marta; Bastidas served as Santa Marta's first governor. During the first decades of the 16th century, Santa Marta attracted few Spanish settlers; those who did venture along Colombia's Caribbean coast did so in search of slaves to sell on HISPANIOLA or to barter with local Indians for gold or pearls. It was not until the mid-1520s that the Spanish Crown negotiated a formal agreement with Bastidas, entrusting the new governor with the conquest and permanent settlement of the province and port of Santa Marta. In 1533, Pedro de Heredia founded the Spanish town of Cartagena. From these two Caribbean outposts, Spanish expeditions began to explore Colombia's vast interior.

No single event influenced the exploration of Colombia more than the news of Francisco Pizarro's 1532 discovery of the Inca Empire in PERU. When reports of the fabulous riches to be had in Peru reached Santa Marta, many of the city's disgruntled residents abandoned Colombia for Peru. By early 1535, only nine horsemen and 40 foot soldiers remained. That year, fearful of losing its foothold in northern South America, the Spanish Crown negotiated a contract with Pedro Fernández de Lugo, granting him the governorship of Santa Marta and authorizing him to explore Colombia's interior. In November 1535, Fernández departed from the Canary Islands with a fleet of 10 ships and more than 1,200 passengers. Within three months of his arrival in Santa Marta, Fernández authorized his lieutenant, a 27-year-old lawyer named GONZALO JIMÉNEZ DE QUESADA, to lead a military expedition from the coastal city of Santa Marta into Colombia's interior.

In early April 1536, Jiménez departed with a force of roughly 800 Spaniards and a large number of indigenous carriers and African slaves; the Jiménez expedition was more numerous than the combined forces under Cortés in Mexico and Pizarro in Peru. Jiménez's men were divided into two separate groups, with 500–600 Spaniards march-

ing overland, supported by more than 200 others who boarded five brigantines and sailed up the Magdalena River. The official purpose of the expedition was twofold: to find an overland route from Colombia's Caribbean coast to newly conquered Peru and to follow the Magdalena River to discover its source, which some believed would



lead the expedition to the South Sea (Pacific Ocean). It found neither. Instead, nearly three-quarters of Jiménez's men perished, most from illness, hunger, and malnutrition. Some Spaniards fell victims to jaguar or cayman attacks or to mortal wounds from Indian arrows laced with a deadly 24-hour poison. Others, too exhausted or too injured to continue, limped back to the brigantines and returned to Santa Marta. Yet despite the high casualty rate, for the 179 survivors of the 12-month venture, the expedition proved to be one of the most profitable campaigns of the 16th century. In early March 1537, almost a year after they had set out from Santa Marta, Jiménez and his men successfully crossed the Opón Mountains and reached the densely populated and fertile plains of Colombia's eastern highlands, home to the MUISCA.

Jiménez recognized the importance of his discovery immediately. The dense population, rich agricultural lands, pleasant climate, splendid public ARCHITECTURE, and, perhaps most important, evidence of nearby sources of gold and emeralds were unlike anything they had seen elsewhere in the province of Santa Marta. Nevertheless, instead of returning to the coast to report their discovery to the man who had organized and funded the expedition, Santa Marta's governor, Fernández de Lugo, Jiménez and his followers chose to delay their return. Perhaps they did not want to risk losing the spoils of their hard labor and suffering to the many newcomers who would flood the region on hearing news of its riches. For the next two years, with no contact or correspondence with any other Europeans, the entire expedition remained in Muisca territory. From roaming base camps, they circulated throughout the eastern highlands, driven by their quest to uncover the region's riches and collect booty. They even ventured far outside the Muisca realm to investigate rumors of gold-filled palaces and mysterious tribes of AMAZON WOMEN. They formed alliances with some Muisca leaders, fought against others, and participated in joint military campaigns against the Muisca's fiercest enemies, the Panches. Remarkably, only six Spaniards died during the expedition's first 13 months in Muisca territory, and none as a result of military conflict.

Of course, the fact that the Spaniards did not lose a man in combat does not mean that the conquest lacked violent encounters. Jiménez and his men regularly looted Muisca shrines or captured and tortured local leaders, from whom they demanded large ransoms. At times, such as when Jiménez and some of his followers seized the cacique (chief) of Tunja in August 1538, and with him, a booty of more than 140,000 gold pesos and 280 emeralds, these strategies proved highly profitable. At other times, the Spaniards met fierce resistance; the region's most powerful ruler, often referred to simply as "the Bogotá," refused to submit to the authority of the newcomers or surrender any of his rumored treasure of gold and emeralds. His resistance cost him his life; and while Bogotá's successor, named Sagipa, established a brief alliance with Jiménez, his refusal, even under torture, to reveal the

secret location of his predecessor's treasure, ultimately cost Sagipa his life as well.

But even without Bogotá's fabulous riches, if indeed such a treasure ever existed, the conquistadores of New Granada all gained handsome rewards. By June 1538, when Jiménez decided it was time to divide the spoils and distribute the shares, the "official" booty exceeded 200,000 gold pesos and more than 1,800 emeralds. For the 173 foot soldiers and horsemen still alive when the shares were distributed, the expedition proved to be among the most profitable campaigns of the 16th century, perhaps second only to the conquest of Peru.

Soon after Sagipa's death, Jiménez's small force received unexpected visitors. In February 1539, NIKOLAUS FEDERMANN's expedition arrived from VENEZUELA; less than two months later, another expeditionary force, this one led by Sebastián de Belalcázar, arrived from Quito. It was with Belalcázar's arrival in Muisca territory that Jiménez finally learned of Fernández de Lugo's death. At Belalcázar's urging, Jiménez decided to establish three new cities in the region, an act that he believed would help secure his claims to the new territory. Thus, on April 27, 1539, Jiménez founded the city of Santafé de Bogotá, future capital of the New Kingdom of Granada; months later the cities of Vélez and Tunja were also founded.

## MEXICO

The Spanish conquest of the Mexica (Aztec) capital of TENOCHTTLÁN brought an expanding European empire into dramatic conflict with the most politically advanced civilization of 16th-century Mesoamerica, the AZTECS. The conquest of the Aztec Empire, however, was not a cultural or spiritual conquest but rather a political event, and the Spanish victory was in large part due to the nature of Central Mexico politics at the time.

The Spaniards' first American colonial experience was not in Mexico, but in the Caribbean. Columbus's famed 1492 voyage landed there first, and in 1493 his second voyage brought the first Spanish colonists to the Caribbean island of HISPANIOLA (modern-day Haiti and the Dominican Republic). From there, small groups of explorers set off to conquer other islands, such as Puerto Rico, Jamaica, and Cuba. The conquerors were not "soldiers" in the modern sense but partners in the colonial enterprise who earned a share of the spoils of any conquered lands.

Following this pattern of outward expansion, the first expedition to what is now Mexico set sail from Cuba in 1517. The Spaniards reached the Yucatán Peninsula first, where they encountered the MAYA. Maya resistance to the Spaniards was fierce, and expedition leader Francisco Hernández de Córdoba returned to Cuba just two and a half months after he had departed; Hernández had lost nearly half of his men and one of his ships in that time.

Despite Hernández's failed effort, Spanish interest in mainland Mexico persisted. Cuban governor Diego Velázquez de Cuéllar organized a second and third expedition. The second trip, led by Juan de Grijalva, sailed in

1518 and again headed for the Yucatán coast. Grijalva's crew, however, continued sailing west around the peninsula beyond the Maya region and became the first Spaniards to reach the area of Mesoamerica dominated by the TRIPLE ALLIANCE of Central Mexico before heading back to Cuba.

The Triple Alliance was an alliance of three indigenous groups: the Mexica, had their capital at Tenochtitlán and were governed by the famed ruler MONTEZUMA; the Acolhua, who ruled from Texcoco; and the Tepanecs, who were based in Tlacopán. All of these groups were Nahuas (speakers of the NAHUATL language) and had been forcibly expanding their political control in the region for about a hundred years before the Spaniards arrived. Under Mexica leadership, the Triple Alliance exacted tribute from most of the indigenous groups from the Gulf coast to the Pacific Ocean. The growth of Triple Alliance control had led to resentment among many central Mexican indigenous groups, and into this political context of military expansion and growing discontent entered the third Spanish exploratory expedition from Cuba.

This third voyage was led by Hernando Cortés. However, Cortés's appointment by Governor Velázquez proved controversial, and Velázquez himself was ready to assign the expedition to someone else just before it departed. Cortés, however, gathered his men and supplies and left Cuba before he could be stopped. In defiance of the Cuban governor, he left for Yucatán and retraced the course followed by Grijalva, sailing east to west around the Yucatán Peninsula and then continuing along the coast into Triple Alliance territory.

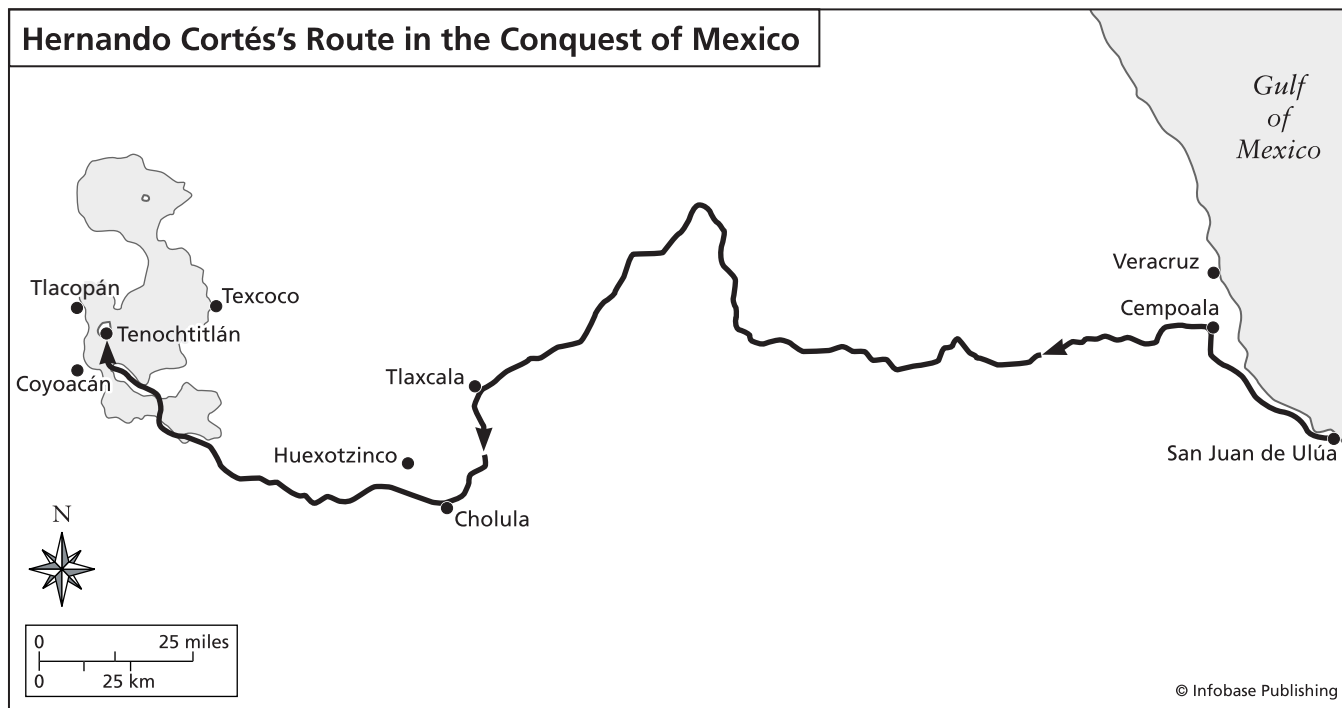
On April 21, 1519, Cortés's ships arrived in a harbor in this region; there the Spaniards built a fortified city, which they named Veracruz. They were met by an official

delegation sent by Montezuma and his allies, and the two groups exchanged gifts. The Spaniards did not understand Nahuatl but had two translators with them. One, a Spaniard named JERÓNIMO DE AGUILAR, spoke Maya (he had been shipwrecked off the coast of Yucatán years earlier). The second, a Nahuatl woman called La MALINCHE, spoke her native Nahuatl as well as Maya (she, too, had been held in Yucatán). Aguilar could move between Spanish and Maya, and Malinche could translate between Maya and Nahuatl. Thus, Cortés's group made themselves understood to the Triple Alliance representatives, and vice versa.

The Spaniards were intrigued by the Triple Alliance delegation; gifts of gold confirmed their suspicions that the Mexica possessed great riches. The Mexica, however, were less interested in the Spaniards and ordered them to come no closer to Tenochtitlán. The Spaniards had no intention of staying put but were ill prepared for a long trek from the coast into the central Mexican highlands to the capital.

It was another indigenous group who enabled Cortés to continue on his mission. Leaders of the local TOTONACS approached the Spaniards. The Totonac, tired of paying tribute and allegiance to the Triple Alliance, saw the Spanish arrival as an opportunity to cast off the Aztec imperial yoke and therefore offered their assistance. With Totonac guides, fighters, supplies, and valuable political knowledge, it was now possible for Cortés to plan a journey overland to Tenochtitlán. In June 1519, the expedition moved inland.

In the central Mexican highlands, the Spaniards encountered another group of Indians who harbored grudges against the Triple Alliance: the Tlaxcalans. The Tlaxcalans were also Nahuatl-speakers but were independent of and hostile to Triple Alliance control. They,



like the Totonacs, saw in the Spaniards a valuable political ally. After a short period of hostility, they, too, joined the Spaniards against Montezuma and his allies.

In October 1519, Cortés left Tlaxcala with nearly 300 Spaniards and 5,000 or 6,000 Tlaxcalan fighters. Together, they marched toward Tenochtitlán and just outside the city, were met by Cacama, the ruler of Texcoco and Montezuma's nephew, who accompanied the Spaniards into Tenochtitlán to meet Montezuma himself.

The city of Tenochtitlán was built on a swampy island in the middle of the shallow lake Texcoco; it supported a population of at least 200,000. (Paris, Europe's largest city at this time, had only 150,000 inhabitants.) The small island was unable to contain such a large number of people, and the city's inhabitants began to expand the livable area of the city by mounding up mud from the lake bottom until small plots of land formed above the waterline. These fertile pieces of recovered land, called *CHINAMPAS*, provided additional space for homes and garden plots. Between these *chinampas* was an intricate web of shallow canals of lake water much like those in the European city of Venice. To reach the surrounding lake shore, three causeways extended out from Tenochtitlán to the north, south, and west. To the east, one could travel by boat across the lake to Texcoco.

Cortés and his men entered this booming metropolis from the south, and Montezuma invited the Spaniards to stay inside the royal palace complex. Most of the Tlaxcalans and other indigenous allies were obliged to remain outside the city on the lake shore. This arrangement left the relatively small group of Spaniards inside the city vulnerable and anxious, and when Cortés learned that the Aztecs had attacked their Totonac allies near Veracruz, he seized Montezuma and held him captive.

Montezuma's imprisonment restored Totonac and Tlaxcalan faith in Spanish power, but Cortés misunderstood the nature of government among the Nahuas. Montezuma did not rule Tenochtitlán in the same way that European monarchs governed, and allegiance to any Aztec ruler depended, at least partially, on that ruler's ability to govern. If other leaders perceived Montezuma to be weak or ineffective, then it was expected that he would be replaced. Cacama, the ruler of allied Texcoco, did indeed notice that Montezuma was losing control of Tenochtitlán, and he rallied the rulers of surrounding towns to join him in an attack on the Spaniards. Cortés learned of the impending strike, however, and arrested Cacama and his conspirators before they could carry out the plan.

At the same time that Cortés was working to frustrate the attempts of indigenous leaders, Spaniards elsewhere were working to thwart Cortés's mission. From Cuba, Governor Velázquez dispatched a group of 800 men led by PÁNFILO DE NARVÁEZ to capture Cortés, who had disobeyed the governor's orders by sailing to Mexico, and take him back to Cuba as prisoner. Cortés, however, learned of their arrival on the coast and set off from Tenochtitlán for Veracruz. Cortés attacked Narvárez's

men at night, capturing Narvárez and persuading most of his men to accompany him back to Tenochtitlán to assist in the conquest.

He returned to the capital to find that things were not going well for the Spaniards who had remained during his two-month absence. Cortés had left Pedro de Alvarado in charge, and Alvarado had massacred a large number of indigenous nobles attending a religious festival. The killings had provoked Tenochtitlán's residents to attack the Spaniards, and fighting forced the Spaniards to retreat into the fortified palace compound.

Cortés brought a large group of Spaniards (about 1,300) with him from the coast and 2,000 additional Tlaxcalans, but the city's residents far exceeded the number of men in Cortés's party. The now hostile residents allowed Cortés to reenter the city unopposed, only to trap him there. They laid siege to the palace compound for 23 days; the Spaniards were effectively imprisoned within the fortified walls, completely cut off from food, ammunition, and the support of their indigenous allies.

In desperation, Cortés brought Montezuma out onto the rooftop of the palace to ask his people to end their attack. In the process, however, Montezuma was killed. The Spaniards, unable to withstand the siege, attempted to escape from the city during a strong rainstorm, late at night on June 30, 1520. The Mexica discovered them and attacked them as they fled on the causeway. Only a portion of the group, which included Cortés, reached the western shore of the lake alive.

These survivors marched north around the lakes towards the safety of allied Tlaxcala. They were attacked almost constantly; 860 Spaniards and 1,000 Tlaxcalans were killed before they finally reached Tlaxcala five days later. As the Spaniards rested and recovered from their injuries, the indigenous population of Central Mexico was overcome by the first wave of European diseases. With no natural resistance to these foreign illnesses, particularly smallpox, some 40 percent of the indigenous population of Central Mexico died.

Montezuma's successor, Cuitláhuac, contracted smallpox and died after only 80 days of rule. Cuitláhuac was followed in office by CUAUHTÉMOC. Nevertheless, the unexpected death of two Mexica rulers and the appearance of epidemic disease threw the capital into chaos. The Mexica were in no position to organize an offensive strike against the Spaniards as they recuperated in Tlaxcala. Cortés, on the other hand, had already renewed his quest to dominate Tenochtitlán.

First, Cortés began to secure the eastern road out of Tenochtitlán, which linked the city with critical supplies and support from the coastal city of Veracruz. Then he began construction of 13 ships in Tlaxcala, with which he could launch a lake-based attack on the island city. But, Cortés still needed access to the lake, and for this, he went to Texcoco on the lake's eastern shore. The ruler of Texcoco, Coanacoch, supported the Mexica, and frightened by Cortés's approach, he fled to safety

in Tenochtitlán. His brothers Tecocol and Ixtlilxóchtli, however, were on unfriendly terms with the Mexica. They stepped in to fill the leadership void and readily agreed to assist the Spaniards.

From Texcoco, Cortés organized his attack on the capital. For four months, the reconstituted Aztec army sparred with the Spaniards and their allies in a series of battles for control of the area around the lake. On April 28, 1521, Cortés launched his ships into the lake from Texcoco. Aztec canoes were no match for the larger European vessels fitted with canon. The ships began a blockade of the island city, cutting off access to food and water (the lake's water was salty).

Ships were but one element of Cortés's conquest strategy. The conquistador also possessed ground forces composed of Spaniards and large numbers of indigenous fighters. For three months, these groups, under the protection of the Spanish ships, fought to enter the city from the causeways; still, these efforts met with failure. In June, Aztec fighters surrounded a group led by Cortés, and Cortés narrowly escaped capture. Sixty-eight other Spaniards were captured alive and sacrificed to the Aztec gods.

In July, Spanish fortunes changed: Spanish ships landed at Veracruz, bringing much needed supplies and fresh fighters. At the same time, the city of Tenochtitlán was succumbing to the lack of food and water. The Aztecs withdrew to the northern area of Tenochtitlán, Tlatelolco, as the Spaniards made their way up from the south. By August 1, the Spaniards had entered the large marketplace in Tlatelolco; on August 13, 1521, Cuauhtémoc was captured and the Aztecs surrendered. Spanish military and political conquest of Central Mexico was accomplished.

### NORTHERN BORDERLANDS

From the Caribbean, Spaniards began to explore waters farther north at the turn of the 16th century. The first maps detailing portions of the FLORIDA coast date from 1500 and 1502. Interest in the land bordering the Gulf of Mexico attracted Juan Ponce de León, who had participated in Columbus's second voyage and later conquered Puerto Rico in 1508. In 1513, Ponce de León sailed north into the Gulf of Mexico and encountered indigenous peoples off the coast of eastern Florida. Eight years later, in 1521, he returned to the coast of Florida after receiving permission from the Crown to conquer it. Calusa Indians along the coast attacked his expedition force, and Ponce de León died shortly thereafter from his wounds after having returned to Cuba.

Antonio de Alamiros and Alonso Álvarez de Piñeda explored the Gulf of Mexico in the first half of the 16th century. Álvarez demonstrated that Florida was a peninsula and explored the coastal areas of current-day western Florida, Alabama, Louisiana, and Texas, including the Mississippi River. Further explorations of the Atlantic coastline resulted in more encounters with Amerindians, some of whom were captured and enslaved to work in

the Caribbean. In 1523, after presenting the Spanish Court with a captured indigenous person from islands off the coast of South Carolina, Lucas Vázquez de Ayllón obtained a license to colonize and convert native populations along the Atlantic coast. He recruited 600 colonists, including slaves and priests, and sailed to the coast, eventually erecting a small settlement called San Miguel de Gualdape on the coast of present-day Georgia. The colony failed, and fewer than one-third of the colonists made it back to Hispaniola. In the 1520s and 1530s, other Spanish explorations of the Atlantic and Pacific coasts resulted in increased knowledge of the North American coastline but failed to result in lasting settlements.

In 1528, Pánfilo de Narváez tried to explore and colonize Florida. The TIMUCUA Indians, who lived north of Tampa Bay, sent the Spaniards away with promises of gold and resources farther inland. The Apalachees were at first friendly but attacked the expedition once it took one of their leaders hostage. The expedition split, and a detachment sailed along the Gulf coast, facing storms, attacks, and food shortages. They were shipwrecked on the coast of Texas, where Karankawas enslaved some of the survivors. ÁLVAR NÚÑEZ CABEZA DE VACA and three others fled overland, acting as healers to ensure their safety until they met up with a Spanish slaving expedition in 1536.

Eleven years after the Narváez expedition, HERNANDO DE SOTO led another expedition to conquer Florida. De Soto's troops moved into territory inhabited by agricultural Mississippian peoples. There, de Soto captured slaves, robbed food stores, and killed those who resisted. Reports of gold drew his forces farther west, but after de Soto was killed in 1542, remnants of the group sailed down the Mississippi River and returned to Mexico.

Meanwhile, the northwestern frontier of the Spanish Empire had been the scene of a brutal expedition beginning in 1530 by NUÑO DE GUZMÁN, whose soldiers and indigenous allies stole, kidnapped, raped, and burned their way north. The province of Nueva Galicia was established in 1531 as a result, with its capital at Compostela. The crown awarded *ENCOMIENDA* grants to expedition members, and soldiers settled in the area. After several years, the Spanish settlements at Compostela and Chiametla greatly declined, while the indigenous population perished due to disease and harsh treatment. Nuño de Guzmán was arrested and imprisoned for his treatment of the Amerindians.

The return of Cabeza de Vaca's party in 1536 sparked renewed conflict in the north. In 1538, Fray Marcos de Niza accompanied Esteban, a member of Cabeza de Vaca's party, on an exploratory journey far north into Zuni country. While Esteban was killed, Fray Marcos's fantastic tales led to a large *entrada* force headed by FRANCISCO VÁSQUEZ DE CORONADO in 1540. This force failed to find riches in modern-day Arizona and New Mexico but engaged in hostilities with the Pueblo peoples along the Rio Grande. A detachment traveled east over the great plains, but injuries and harsh winters led

to the expedition's retreat to Mexico in 1542. Along the way, Coronado's force joined with troops under Viceroy ANTONIO DE MENDOZA to put down the fierce two-year rebellion of Cazcanes and Juchipilas. These indigenous peoples had laid siege to Guadalajara in a conflict known as the MIXTÓN WAR.

After the rebellion ended in 1542, the capital of Nueva Galicia was moved to Guadalajara, and more Spaniards moved to the frontier. In 1546, SILVER was discovered north of the Sierra Madre Occidental, and miners flocked to Zacatecas, Durango, Hidalgo, Guanajuato, Aguascalientes, San Luis Potosí, and Chihuahua in the 1550s. Presidios and missions were erected in these areas to attempt to control indigenous groups, but conflicts with peoples whom the Aztecs had called "Chichimecas" occurred frequently over the next century.

Coastal exploration of the northern frontier continued. In 1542, Juan Cabrillo sailed up the Pacific coast and landed at the harbor of present-day San Diego, California. After exploring the coast and exchanging arrows with the Ipai, the force traveled north to the site of present-day Los Angeles and then farther north until they reached the Rogue River in Oregon. The indigenous peoples they encountered communicated that other Spaniards had passed through the area. Cabrillo died during the winter, but Bartolomé Ferrer returned to Mexico in 1543. This expedition traveled more than 1,200 miles of coastline and bolstered Spanish claims to the territory. By the 1540s, it was clear that Baja California was a peninsula, but no permanent settlements were planted.

On the far northern frontier, conquest did not occur through military means. The Spaniards' chief gains were the knowledge of a good deal of coastal and some interior geography. By far, the largest effect of these early expeditions was the spread of disease. In Nueva Galicia, however, Spanish settlements were permanent by 1560. The discovery of silver created a strong motive for military presence and campaigns, such as the Mixtón War and against the Chichimecas.

## PERU

In 1532, a Spanish force led by Francisco Pizarro captured the Inca ruler Atahualpa, obtained a vast treasure in gold and silver, and extended Spanish sovereignty into the Andes (see INCAS). In some ways, the conquest of Peru seemed to replicate Cortés's conquest of Mexico (1519–21). Indeed, many of the factors that contributed to the Spaniards' success in Mexico also played a role in their conquest of Peru, including bitter rivalries and divisions among the indigenous groups, the Spaniards' technological superiority and horses, and the spread of Old World disease. There were also important differences, however. These included the fact that in the Andes, an apparently easy conquest, symbolized by Pizarro's capture of Atahualpa at Cajamarca in 1532, turned into a bitter struggle against Indian rebellions for a decade and the threat posed by a small neo-Inca state that endured until 1572.

The conquest of Peru was launched from Spanish strongholds in Central America. In 1522, Pascual de Andagoya sailed south from Panama to investigate reports of a rich, powerful indigenous culture called "Birú" (Peru). Those rumors, coupled with accounts of the vast riches won by Cortés and his men in the conquest of Mexico, captured the imagination and fueled the greed of men like Pizarro, one of governor Pedro Arias de Avila's chief lieutenants. Eager to win gold and glory for himself, Pizarro formed a partnership with DIEGO DE ALMAGRO, a business associate, and with a priest named Hernando de Luque. The new partners bought Andagoya's three small ships and after gathering men and supplies, sailed south from Panama in November 1524. With great hardship, they reached the San Juan River, then returned to Panama.

Despite the failure of this first voyage, Pizarro, Almagro, and Luque entered into a formal contract on March 10, 1526; they agreed to share equally in the costs and profits of the endeavor to seize the wealth of Peru. Their second expedition sailed soon thereafter. Pushing much farther south, again with great difficulty, they reached Isla del Gallo along the central coast of ECUADOR. There, many disgruntled participants abandoned Pizarro; however, "the famous thirteen" agreed to continue southward with Pizarro, encouraged by the discovery of several Amerindians on a raft laden with gold, silver, and fine cloth. The Spaniards struggled farther south and finally reached Tumbes, an Inca coastal city near the modern Peru-Ecuador border. Its wealth and splendor convinced Pizarro that the rumors and reports of Peru were indeed true.

Pizarro determined to return to Panama to organize an expedition of conquest. First, however, he returned to Spain and on July 26, 1529, secured from the queen a charter, the *Capitulación de Toledo*, authorizing the partners to undertake the conquest; the *capitulación* also granted Pizarro most of the rewards if the venture proved successful. While in Spain, Pizarro also met Cortés, with whom he discussed the conquest of the Aztecs. Finally, accompanied by half brothers HERNANDO PIZARRO, JUAN PIZARRO, and GONZALO PIZARRO, as well as other recruits, Francisco Pizarro returned to Panama. On learning of the *capitulación*'s contents, Almagro became furious and was convinced that Pizarro had cheated him; nevertheless, he had few options other than to cooperate.

In late 1530, Francisco Pizarro set out for Peru with 180 men and 30 horses. They plundered the coast of Ecuador before reaching Tumbes in February 1532. The Spaniards discovered that the city had been partially destroyed in a civil war among the Incas. HUAYNA CÁPAC, the last great Inca ruler, had died around 1530, probably from smallpox, which had spread from the Caribbean and devastated the Andean peoples. Two of Huayna Cápac's sons, half brothers HUÁSCAR and Atahualpa, fought to succeed their father. They represented rival *PANAQAS*, or royal lineages; Huáscar's power was centered in CUZCO, the Inca capital, while Atahualpa's power base lay in Quito, recently

added to Tawantinsuyu, as the Incas called their empire. Furthermore, the Incas had created the Tawantinsuyu through conquest, and many of the recently subjugated people were unhappy with the new demands imposed on them. Pizarro was eager to exploit the indigenous dissension, just as Cortés had reported doing in Mexico.

With reinforcements from Panama, Pizarro departed from Tumbes in May 1532, moving into the mountains toward Atahualpa's army, which had recently defeated and captured Huáscar. Indigenous spies and emissaries visited the Spaniards, bringing ominous gifts such as plucked fowls and ceramic castles. Atahualpa knew the strangers' movements and might have destroyed Pizarro's men in a mountainous ambush. Overconfident, he instead allowed Pizarro and his men to reach Cajamarca, where Atahualpa and his forces were encamped. Atahualpa reportedly intended to kill all the Spaniards, except for the blacksmith and the barber, the latter because he seemed to have a magical ability to help the Spaniards regain a healthy appearance. They would be castrated and kept to serve at court.

After reaching Cajamarca and encamping in the city, Pizarro sent two squads, headed by Hernando de Soto and Hernando Pizarro, to the Indian camp. Using Indians seized during Pizarro's second expedition as translators, the emissaries conversed with Atahualpa, who agreed to visit the Spaniards in Cajamarca.

The following afternoon, November 16, Atahualpa was carried into the town on a litter accompanied by several thousand bodyguards armed with ceremonial weapons. Pizarro sent out Dominican friar Vicente de Valverde, who explained to Atahualpa (through a translator) the *REQUERIMIENTO*, a legalism that asserted Spain's sovereignty over the New World by way of papal donation and that encouraged the indigenous peoples to become Christian. Never having seen a book, Atahualpa asked to see the Bible carried by the priest but haughtily threw it on the ground when he could make nothing of it. At that point, the priest ran toward the Spaniards, who were hidden in buildings around the square. They fired on Atahualpa's men and then stormed out, the horses trampling the Inca's escort. The terrified Amerindians tried desperately to escape from the walled square but were cut down. Spaniards killed the men holding Atahualpa's litter, but such was the bearers' discipline that others quickly stepped forward to keep the Inca from falling. Francisco Pizarro himself captured Atahualpa.

With Atahualpa as their hostage, the Spaniards enjoyed great influence in Tawantinsuyu. Atahualpa's own faction grudgingly obeyed the captive's orders, fearful for his safety. To them, he was not only the supreme ruler of a highly centralized regime but also divine. Worried that the Spaniards might ally with his defeated half brother, Atahualpa secretly ordered Huáscar's execution. Eager to take revenge on Atahualpa, Huáscar's supporters assisted the Spaniards. Away from Cajamarca, Atahualpa's lieutenants struggled to maintain control over Tawantinsuyu. Hoping to buy his



Felipe Guamán Poma de Ayala's illustration of Atahualpa seated before three kneeling Spaniards, Diego de Almagro, Francisco Pizarro, and Friar Vicente de Valverde. To the right of Valverde stands the indigenous translator Felipillo. (*The Royal Library, Copenhagen, Denmark*)

freedom, Atahualpa offered to fill a room once with gold and again with silver. While llama trains brought treasure to Cajamarca, the Spaniards reconnoitered.

In early 1533, Hernando Pizarro looted the great religious shrine at Pachacamac, near modern-day LIMA. Another contingent went to Cuzco, the Inca capital, where they stripped the walls of the Coricancha (Temple of the Sun) of 700 gold tablets, each weighing around 4.5 pounds (2 kg). By June, Atahualpa had amassed the promised ransom, making rich men out of all the Spaniards present at his capture; nevertheless, Francisco Pizarro refused to free him. Accusing Atahualpa of murdering Huáscar and organizing a rebellion, Pizarro executed his prisoner on July 26, 1533. Sentenced to be burned alive, the Inca converted to Christianity and was instead strangled, hoping thereby to save his remains for mummification and worship by his people, as was the case with his predecessors. Continuing his deceitful behavior, Pizarro ordered Atahualpa's remains burned and the ashes scattered. Hernando Pizarro left for Spain to pay



the king's share (the royal fifth, or *quinto*) of the treasure and to inform Charles I of their exploits.

In an effort to maintain order in the Tawantinsuyu, Francisco Pizarro installed Túpac Huallpa, a member of Huáscar's *panaqa*, as a puppet Inca; then, reinforced by 150 men under Almagro, the Spaniards set out for Cuzco. At Jauja, Atahualpa's supporters, under the command of the great general Quisquis, attacked but were overwhelmed by Spanish horsemen. In open terrain, Andean soldiers, armed primarily with clubs and slingshots, were no match for horses and Spanish steel swords and body armor. On November 8, at Vilcaconga, the advance guard commanded by de Soto was ambushed and was saved only by the arrival of Almagro. They fought another battle outside Cuzco before Pizarro's forces entered the city on November 15, 1533. Túpac Huallpa, meanwhile, had died in October, forcing Pizarro to turn to another of Huayna Cápac's sons, MANCO INCA. Manco received the royal tassel in December 1533; however, he proved to be less willing to play the role of compliant puppet than the Spaniards hoped.

The Spanish may have held Cuzco, but they had not pacified Tawantinsuyu. Drawn from Panama by reports of the gold and silver to be had in Peru, more Spanish reinforcements arrived, including those led by Pedro de Alvarado, a captain under Cortés during the conquest of Mexico. During the first half of 1534, Sebastián de Belalcázar led the conquest of Quito. Convinced of the need for more secure contact with Panama than Cuzco could afford, Pizarro founded the "City of the Kings," or Lima, on January 6, 1535, thereby improving the Spaniards' maritime communications. Pizarro also attempted to resolve his differences with his partner, Almagro. To this end, Pizarro encouraged his partner to explore the lands south of Cuzco, and in July 1535, Almagro and a large contingent of Spaniards and Amerindians headed into CHILE.

Meanwhile, Manco Inca grew tired of Spanish abuse and exploitation. In 1536, he secretly organized a massive army and then slipped out of Cuzco. Soon Cuzco, defended by 200 Spaniards and their indigenous allies, was under siege. Using slingshots to hurl flaming missiles onto Cuzco's thatched roofs, Manco's warriors forced most of the Spaniards into the shelter of the Incan armory, Suntur Huasi. The battle for Cuzco grew ever more desperate for the Spaniards, but Manco's army could not deal the death blow. Juan Pizarro was killed trying to drive the attackers from the great fortress and temple complex of Sacsayhuamán, perched on a hill overlooking the city. From Lima, Francisco Pizarro sent several relief expeditions, but they were ambushed before they reached Cuzco. The Incas attacked Lima itself but could not take it. Neither did they capture Cuzco, despite their overwhelming numbers. As the fighting grew more bitter, so, too, did the atrocities committed by each side. After a siege of several months, Manco's army withdrew. Ethnic rivalries among the indigenous people weakened Manco's Great Rebellion; indeed, some remained firm Spanish allies.

The failure of the Great Rebellion sealed the Spanish conquest of Peru, although it did not bring general peace to the Andes. Manco Inca launched another rebellion in 1539 and then retreated into the mountains north of Cuzco, setting up an independent kingdom at Vilcabamba, which survived until 1572, when the Spaniards destroyed it. Almagro seized Cuzco from the Pizarros in 1537 but was defeated at the BATTLE OF LAS SALINAS and executed on July 8, 1538. In retaliation, Almagro's men murdered Francisco Pizarro in 1541. To assert royal control over the Andes, Charles I sent Blasco Núñez de Vela to Peru as VICEROY, with orders to limit the conquistadores' exploitation of the indigenous population. His arrival in 1544 touched off a rebellion against the Crown (see CIVIL WARS IN PERU). The viceroy died in the rebellion. Only in the mid-1550s, more than two decades after Pizarro had initiated the conquest, did royal authority over Peru become more secure.

### SOUTHERN CONE

The conquest of the Southern Cone began early in the 16th century and refers to Spanish colonial incursions into what are now the nations of ARGENTINA, Chile, URUGUAY, and PARAGUAY. (The south of Brazil is often regarded as part of the Southern Cone, but Brazil's conquest is discussed in an earlier section of this entry.) The conquest of the Southern Cone began largely as an extension of Spain's conquest of the Inca Empire in Peru. By pushing south into Chile and from the Atlantic side, seeking the source of the Río de la Plata, or River Plate, the Spanish hoped to find more precious metals and ways to more efficiently ship the silver and gold they continued to seize from the Inca.

Juan Díaz de Solís discovered the mouth of the River Plate in 1516, but he and his men were all killed by local Querandí Indians soon after they arrived. FERDINAND MAGELLAN briefly explored the estuary as well in 1520, before continuing along his southerly route to the Pacific. Sebastian Cabot explored the Southern Cone's Atlantic coast in 1527 before founding the soon-to-be-abandoned town of Sancti Spiritus along the Paraná River. Cabot returned safely to Spain, where Charles I decided to fund an impressive force of 1,600 to accompany PEDRO DE MENDOZA in his attempt to settle the Southern Cone's east coast. Mendoza founded BUENOS AIRES in 1536, but such a large contingent proved difficult to provision. Spanish desperation stemming from lack of food and supplies provoked new hostilities with the Querandí, and Mendoza soon abandoned his men and died on his way back to Spain. In the meantime, Mendoza's subordinates had followed the Paraná upriver and founded Asunción in 1537. The remaining residents of Buenos Aires decided to abandon the town in 1541.

From Asunción, the Spanish planned to find mythical indigenous kingdoms with incredible wealth (see EL DORADO). Mendoza had named Juan de Ayolas to lead an expedition to find such kingdoms, but Ayolas disappeared while crossing the rugged Chaco wilderness.

With Mendoza dead and wealthy kingdoms nowhere to be found, Spanish colonists in Asunción shifted their focus from exploration to permanent settlement. The GUARANÍ were a sedentary people who occupied the southern Paraná Delta, where Asunción sits. Guaraní permanence in the area meant that if the Spanish were to occupy the region, the only two options were peaceful coexistence or a long and bloody war. With limited troops and resources, the Spanish favored the former. The indigenous political situation also favored a Spanish-Guaraní alliance. The Guaraní suffered frequent raids from nomadic tribes of the Chaco, such as the Guaycurú, Toba, Payaguá, Pilagá and Lengua, and therefore sought Spanish military assistance to repel them.

The architect of this alliance was Domingo de Irala, who became the default governor of Paraguay after Mendoza's departure. Charles I preferred a known entity, however, and in 1542, the king replaced Irala with Álvaro Núñez Cabeza de Vaca. Initially, the new governor was well received; however, he soon wore out his welcome. Cabeza de Vaca appropriated 3,000 palm tree trunks that had been designated to finish the "old" conquerors' settlement, using them in part to build his own residence, the houses of the "new" conquerors, and horse stables. Cabeza de Vaca made some strides in solidifying the Spanish-Guaraní alliance but later permanently damaged the colonists' relationship with the Agace peoples who controlled the strategically important confluence of the Paraguay and Paraná Rivers. The governor lost additional allies when a catastrophic fire charred more than half of Asunción, including great quantities of stored food. After an unsuccessful 1544 expedition to the Chaco, in which many Spanish were killed or became ill, Cabeza de Vaca and a few of his aides were arrested, and the governor was sent back to Spain in irons.

Upon Cabeza de Vaca's arrest, Irala returned as governor of Paraguay. During the instability that followed the change of command, the Agace and Guaraní joined forces and launched an attack on Asunción in 1545. This was successfully repelled, and in 1547, Irala led an expedition to Peru. When he arrived, he discovered that the Spanish conquest had already reached the region. Stopping in the province of Chiquitos, Irala sent word to the governor of Peru, PEDRO DE LA GASCA, that he wished to meet with him. Fearing a power struggle, Gasca prohibited Irala from staying in Peru, and Irala returned to Asunción.

In Irala's absence, Francisco de Mendoza attempted to have himself elected governor. A revolt ensued, and Mendoza was tried and beheaded. When he returned, Irala set out to create a successful economy based on Guaraní labor.

On the other side of the Andes, Diego de Almagro played a leading role in the conquest of the Southern Cone. Almagro led the first Spanish expedition into Chile from Peru in 1535. With the help of Prince Paullu, the Inca Manco Cápac's brother, Almagro conquered the Andean provinces known to the Inca as Purumauca,

Antalli, Pincu, Cauqui, and Araucu. At the eastern entrance to the Aconcagua Valley, Almagro paused and sent his lieutenants forward. Almagro's subordinates reached the Maule River and fought the "skirmish" of Reinoguelén, at the junction of the Ñuble and Itata Rivers. This battle represented the first Spanish contact with the Mapuches and resulted in the death of two Spaniards and the capture of scores of Mapuches. Almagro and his subordinates eventually turned back, but their discovery soon prompted other explorers to try their luck in Chile. In 1541, PEDRO DE VALDIVIA led an expedition from Peru into Chile's Aconcagua Valley. Valdivia founded Santiago de la Nueva Extremadura, was declared Chile's first governor, and sent his lieutenants south and east into what would eventually become the Argentine province of Cuyo.

After founding the city of Santiago, Valdivia led a drive southward in 1546, which met with strong Mapuche resistance near the Bío-Bío River. Conflict only increased when the Spanish presence was stepped up in 1549, in response to the discovery of gold in the region. Valdivia's expedition established Spain's grip on much of Chile, but the conquest stopped short in 1553, when Valdivia was killed by Mapuches. Valdivia's former groom, Lautaro, had set an ambush for the governor as he rode to the aid of the Spanish fort of Tucapel.

See also *BANDEIRAS* (Vol. II).

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**Copán** Copán is a major MAYA archaeological site located in the hills of western HONDURAS. It is significant for its remarkable ART, ARCHITECTURE, inscriptions, and history.

Copán lies in a broad pocket of the Copán river valley, which contains the largest expanse of productive

alluvial soils in the area. The site consists of a massive artificial acropolis, surrounded by extensive residential zones. The acropolis is composed of successive layers of civic-ceremonial construction spanning the Classic period (250–900 c.e.). Archaeologists have excavated tunnels throughout the acropolis to document the early architectural sequence of the site. The excavations indicate that the volume of construction increased most rapidly during the Early Classic period (250–550), suggesting the development of a centralized government.

The acropolis is organized around a series of courtyards. Major constructions include temples (Temples 11 and 16), palaces (the 10L-32 quadrangle), a ball court, and a council house (10L-22A). Numerous stelae (commemorative carved standing stones) and carved altars embellish the ceremonial center. The ceremonial buildings, especially the later major constructions, were built of fine masonry, each stone uniformly cut and coursed. The buildings are distinguished by elaborate mosaic architectural sculptures that were carved in place out of multiple blocks of stone.

The residential neighborhoods that surround the acropolis contained both elaborate elite residences and many middle- or lower-class dwellings. The total population of the site grew from a few thousand in the Early



Built during the reign of Copán's 13th ruler, Waxaklajun Ub'aah K'awiil (r. 695–738), this structure (Structure 10L-22) celebrates the first *k'atun* (20 years) of his rule. The structure is a symbolic representation of the Maya cosmos, with the building itself representing the mountain out of which maize was born. (Courtesy of J. Michael Francis)



This Maya glyph records the name of Copán's 13th ruler, Waxaklajun Ub'aah K'awiil. His lengthy reign (695–738) ended when he was captured and executed by the ruler of the vassal city of Quiriguá. (Courtesy of J. Michael Francis)

Classic period to 20,000–28,000 by its Late Classic apogee. The population collapsed during the mid-ninth century during the famous “Maya collapse.”

Copán artwork is of outstanding quantity and quality. The style is distinctive, one major element being its three-dimensionality. Most monumental Maya art is low-relief carving, but the artwork of Copán is often carved in the round or in high relief. Examples include the major stelae dotting the site and the architectural sculptures that graced the facades and roofs of major buildings. The sculptural style is elaborate and baroque: The subjects of sculptures are often buried in a riot of stone tendrils and volutes laden with iconographic meaning.

The glyphic inscriptions of Copán are significant not only for their extent—they make up one of the largest inventories of texts—but also for their excellence. They are beautifully executed, and the creativity with which the complex script was used has led to advances in its decipherment.

Although archaeological remains in the Copán Valley date back to the second millennium B.C.E., the Maya city seems to have been founded by a foreign ruler named K'inich Yax K'uk' Mo' in 436–437 C.E. He may have been a minion of the Central Mexico city of TEOTIHUACÁN: He is portrayed in Mexican garb and is

associated with Teotihuacán-style artifacts and architecture. Other major kings of Copán include the powerful Ruler 12, who reigned for most of the seventh century. His star-crossed successor, Waxaklajun Ub'aah K'awiil, was captured and sacrificed at the neighboring site of Quiriguá. Copán's last major king was Yax Pasaj, who erected a number of monuments shortly before the city drifted into its thousand-year sleep.

—Clifford T. Brown

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**Coronado, Francisco Vázquez de** (b. ca. 1510–d. 1554) *Spanish conquistador and governor of New Galicia* A Spanish explorer, Francisco Vázquez de Coronado led an expedition into the U.S. Southwest in response to reports of seven rich indigenous cities in the land of Cibola. The expedition made contact with the Hopi, Zuñi, and Pueblo peoples and provided important information about the geography of the Southwest, though it failed to find the riches it sought.

Born in 1510, Coronado was a friend and protégé of ANTONIO DE MENDOZA, the first VICEROY of New Spain (MEXICO). In Mexico, Coronado married Beatriz de Estrada, the daughter of New Spain's royal treasurer. He also headed forces sent by Mendoza to put down an indigenous rebellion in northwestern Mexico (New Galicia); he then became governor of the region.

When survivors of PÁNFILO DE NARVÁEZ'S disastrous expedition to FLORIDA wandered into Mexico with stories of fabulously rich cities to the north, Mendoza named Coronado to head an expedition to investigate. This expedition made contact with the Zuñis at Hawikuh (the supposed Cíbola) on the Arizona–New Mexico border in July 1540. Coronado sent a party under Pedro de Tovar to the northwest to explore the lands of the Hopis, and another group under García López de Cárdenas found the Grand Canyon.

In late 1540, the expedition traveled into north-central New Mexico, having been invited to winter with the Pueblos. Again, no riches were to be found. Ill prepared for the weather, the Spaniards took FOOD and CLOTHING from their hosts and raped Pueblo WOMEN. In the ensuing Tiguex War, Coronado and his men committed further atrocities against the Pueblos.

In April 1541, Coronado led a small party eastward through Texas and Kansas, searching for the land of Quivira. The survivors of the expedition returned to Mexico in 1542. Accused of mistreating the NATIVE AMERICANS, Coronado was subject to legal investigations. He died on September 22, 1554. Despite his expedition's failure to find the anticipated riches, the undertaking revealed the breadth of the continent and discovered the Continental Divide. The expedition also provided other important geographical and ethnographic information for later Spanish colonization of the lands that Coronado had claimed for Spain.

—Kendall Brown

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**corregidor/corregimiento** Within the Spanish system of government in the New World, the *corregidor* served as a local magistrate. The territory governed by a *corregidor* was known as a *corregimiento*. For all intents and purposes, in the colonial period prior to 1570, the

office of *corregidor* was indistinguishable from that of the *gobernador* or *alcalde mayor*. In general, all were local magistrates who received their authority ultimately from the Spanish Crown. The *gobernador* frequently governed a larger or more important territory. Similarly, the *alcalde mayor* might govern a province and be nominally superior to the *corregidores* in his region.

The Crown held the power to appoint local magistrates. This power was delegated, in most instances, either to the VICEROY or to the local high court, the *AUDIENCIA*. Frequently, the viceroy and/or high court would appoint individuals from among their own following, retainers and friends, to local magistracies. By 1570, a significant number of local magistrates came from the ranks of the conquistadores. Initially, some conquerors who held *ENCOMIENDA* grants were also allowed to serve as magistrates; however, the NEW LAWS OF 1542 abolished this practice and offered, instead, appointment to magistracies as a reward to those who had lost their grants of *encomienda*. As a result, many of the mature children of the first conquerors were appointed as magistrates in recognition of their parents' service.

The local magistrate was responsible for the collection of royal taxes within his district. He also supervised local justice in areas outside legally established towns. Furthermore, he had a general mandate to protect the indigenous population. He supervised the allocation of land by the royal government, conducting surveys and investigations. He was paid a regular salary out of the Royal Treasury, although if the treasury lacked funds, it might be difficult to collect the salary. He sometimes appointed assistants, or *tenientes*, to aid him in the execution of his duties.

See also *CORREGIDOR/CORREGIMIENTO* (Vol. II).

—John F. Schwaller

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**Cortés, Hernando** (b. 1484–d. 1547) *Spanish conquistador of Mexico's Aztec Empire and its capital city of Tenochtitlán* Born in 1484 to minor nobility in Medellín, Spain, Hernando Cortés was a restless youth during the age of CHRISTOPHER COLUMBUS'S transatlantic voyages. In his early 20s, Cortés defied his parents' wish that he become a lawyer; instead, he crossed the Atlantic where he found fortune and preferment in the Caribbean, as Spanish companies explored, conquered, and settled the islands. In 1506, Cortés settled on the island of HISPANIOLA; five years later, in 1511, he served as a captain in the CONQUEST of CUBA. It was not long before Cortés discovered his ambition and gift for leadership. In 1519, Cuba's governor, DIEGO VELÁZQUEZ DE CUÉLLAR, appointed Cortés to lead an exploratory expedition to

the Mexican coastline. Cortés, however, had other plans, turning the exploration into a two-year war of conquest against the Aztec Empire (see AZTECS).

After fighting minor skirmishes on the Yucatán Peninsula and acquiring his invaluable interpreter, La MALINCHE, Cortés and his men founded the city of Veracruz. Soon after, its *CABILDO* ordered Cortés to disregard Velázquez's orders and authorized him to engage in independent conquests. On the coast, Cortés first received emissaries from MONTEZUMA. While these emissaries brought gifts for the new arrivals, their main mission was intelligence gathering. Advancing inland, the Spaniards encountered several indigenous communities, including the territories of Cempoala and TLAXCALA, an Aztec enemy. On the verge of defeat, Cortés sued for peace and convinced the Tlaxcalans to join him in marching on the Aztec capital, TENOCHTITLÁN.

Upon arrival, Cortés was welcomed into the city by the emperor in an apparent surrender. After several months living in the imperial residence, Cortés left the city to deal with a rival company of Spaniards sent by Velázquez. While Cortés was fighting his fellow Spaniards, a fellow captain, PEDRO DE ALVARADO, incited a massacre of Mexica warriors during a festival in Tenochtitlán. Although allowed to reenter the city, Cortés found himself trapped in a hostile city. The Spanish leader hoped to use Montezuma to broker a peace accord; however, in the process, Montezuma was killed, apparently by his own subjects. Surrounded and lacking political leverage, Cortés was forced to flee to Tlaxcala in July 1520. Over the next several months, he combined localized military assaults with diplomatic initiatives to build a regional alliance that isolated the Aztecs in their island capital. This strategy led to a protracted siege and culminated in a bloody assault by combined Spanish-indigenous forces. In the wake of the Aztecs' defeat in 1521, Cortés consolidated Spanish control over the former empire and adjacent regions.

Between 1521 and 1528, Cortés was the effective ruler of New Spain, the new colony formed from the Aztec Empire. King Charles I named him governor and captain general of New Spain. Later, in 1528, Cortés was made *marqués* of the Valley of Oaxaca, with vast entailed estates in southern MEXICO. Seeking to repeat his earlier success, he led various unremarkable expeditions, from California to HONDURAS, between 1522 and 1538. In his final years, he accompanied the king (but did not fight) in the 1541 North African campaign. Cortés died in Castelleja de la Cuesta, Spain, on December 2, 1547.

Even before his death, Cortés had become the archetypal conquistador, and he has remained legendary ever since. His success is undeniable: He acquired wealth, royal favor, and noble titles. Contemporary CHRONICLERS and his own writings emphasize that the conquest of the Aztec Empire was due to his military genius. He used superior European technology and manipulated credulous "Indians" and a superstitious Montezuma to lead a few hundred Spaniards to defeat of an empire of millions.

More realistically, however, European technology in the form of the steel sword always gave the Spaniards an advantage, and the "Indians" across the Americas were no more credulous than Spaniards, with indigenous leaders manipulating Cortés as much as he did them. Likewise, the Spanish could not have triumphed without the aid of tens of thousands of native allies. But, perhaps the greatest ally of all was the onslaught of epidemic DISEASES from the Old World that killed far more enemies than either the Spaniards or their allies.

Cortés's true gift lay in understanding the limitations of Spanish advantages and the vulnerability of invasion companies. His strength lay in caution, and his tempered use of diplomacy was often countered by unexpected and shocking displays of violence. While Cortés arguably achieved greater success and fame than any of his contemporaries, in the end, he was but one of many armed entrepreneurs, following similar procedures as other conquistadores—seeking royal patronage, gaining indigenous allies, and capturing Amerindian rulers.

—Matthew Restall

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**Costa Rica** Costa Rica was an important geographical region, a place where many interactions between the inhabitants of South America and North America occurred. Archaeologists have divided Costa Rica into three major cultural regions: Greater Nicoya, the Atlantic Watershed/East-Central region, and the Gran Chiriquí-Diquís region.

The Paleoindian period (10,000–7000 B.C.E.) is represented by a Clovis quarry workshop at Turrialba, and Clovis stone points have been recovered at Guardiria, Lake Arenal, and Bolívar sites (see CLOVIS CULTURE). These spear points suggest that Costa Rica's early inhabitants lived in mobile bands and hunted large mammals, such as mastodons and giant sloths. Although mastodon bones have been found in the Atlantic Watershed/East-Central region, they are not associated with Paleoindian stone tools.

The archaeological record is somewhat sparse between 8000 and 2000 B.C.E.; however, it was during this period that climatic events led to the extinction of the megafauna and changed the lives of Costa Rica's pre-Columbian inhabitants. Evidence from Turrialba, Lake Arenal, Río Antigua, Guardiria, and Florencia indicate a shift to hunting small game and gathering plant foods. The few stone tools and cooking stones that have been found show similarities to contemporaneous technology from central Pacific PANAMA.

The Early Formative period (2000–1000 B.C.E.) marks the beginning of settled, or nonmobile, life in Costa Rica, evidenced by the small and highly dispersed villages at Ni Kira, La Pochota, La Montaña, and around Lake Arenal. People constructed round houses and made elaborate vessels and CERAMICS; they also used quartz and oval siliceous flakes, possibly for MANIOC graters. Burial sites consisted of rectangular pits located between the houses.

Based on the tools excavated, these peoples' diet consisted primarily of root crops and tree fruits. Evidence dating back to 2000 B.C.E. in northern Costa Rica indicates that people there cultivated MAIZE, which they ground using stone *metates*; they also consumed palm nuts and fruits.

By the Late Formative period (300 B.C.E.–500 C.E.) other Mesoamerican influences were present in Costa Rica. Archaeologists have found items such as mace heads, carved jade pendants, and anthropomorphic stone pendants called ax gods with MAYA and Olmec designs (see OLMEC). During this time, evidence from the sites of Severo Ledesma, Barrial de Heredia, Tibas, Arenal-Tempisque, Nacascolo, Las Huacas, Mojica, and La Regla indicate a significant population increase. People lived in large houses in semidispersed agricultural villages; they practiced intensive maize agricultural activities on alluvial plains. Monumental stone sculpture, greenstone pendants, ritual *metates*, GOLD pendants from COLOMBIA, and gigantic granite balls are indicative of social stratification.

In Greater Nicoya, burial offerings such as jade pendants made of raw materials from the Motagua Valley (GUATEMALA) and trichrome pottery with Mesoamerican design elements suggest the existence of long-distance TRADE, especially in luxury items. However, archaeological evidence at East-Central sites such as La Montaña, Barrial de Heredia, and La Fábrica reflect greater influence from South America than from other parts of Mesoamerica.

During the Middle Polychrome period, between 500 and 1000 C.E., regional cultural differences become more evident. Population growth continued, as did the number of nuclear settlements. Sites such as Las Mercedes, La Zoila, and Costa Rica Farm contain mounds, stairways, cobble-paved causeways, and anthropomorphic stone sculptures. Archaeologists have found stone cist tombs containing offerings such as polychrome pottery from Great Nicoya and Greater Chiriquí pottery, which suggest a vibrant regional trade. At sites such as Vidor and Nacascolo in Greater Nicoya, people intensified their exploitation of marine resources. Despite this intensification, the general subsistence ECONOMY remained similar to previous periods, and people continued to hunt, gather wild fruits and nuts, and practice AGRICULTURE. Polychrome pottery incorporates Mesoamerican decorative elements, reflecting the migration of Oto-Mangue speakers into this area.

During the Late Polychrome period, around 1000 to 1550 at Nacascolo, La Guinea, and La Ceiba sites in Greater Nicoya, people settled in circular houses along the Pacific coast. Pottery designs show similarities with Mixtec-Puebla style (see MIXTECS). South American influences were

observed at the East-Central and Gran Chiriquí-Diquís regions, where monumental architecture such as artificial mounds, stone causeways, and stone balls were found. Some of these balls were recorded at funerary sites such as Palmar and Piedras Blancas. People lived in villages such as San Isidro, Guayabo de Turrialba, La Cabaña, Rivas, and Murciélago, where they constructed circular houses. Flying-panel *metates* and human statues with trophy heads and metalwork also suggest South American influences. Subsistence was based on maize, beans, and the consumption of local tree fruits, in addition to the cultivation of tubers such as manioc. The local diet also included other goods such as molluscs, deer, peccary, tapir, agouti, and fish. People used lithic tools such as knives, scrapers, and *metates* to prepare plant and animal foods.

The first Spaniards who arrived in the 16th century at Greater Nicoya encountered highly stratified societies, such as Garabito, Pococí, Chira, Corobici, Orotina, Guetar, Tomi, and Chorotega. The Chorotega, who were of Mesoamerican origin, built villages arranged around a central plaza. They cultivated maize and beans and practiced rituals such as the *volador* (flying men) dance and *patolli* (a game with corn seeds). In other regions of Costa Rica, the Spanish encountered Chibcha groups such as the Bribri, Cabecares, Borucas, Cotos, Guaymí, and Quepos. Villages were divided into elite and nonelite groups and based their subsistence economy on agriculture, hunting, and gathering.

See also COSTA RICA (Vols. II, III, IV).

—Diana Rocío Carvajal Contreras

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**cotton** Cotton played a large role in the Americas both before and after the CONQUEST. Although cotton grows only in warm climates with generous rainfall, extensive TRADE networks and the collection of the fiber as tribute enabled cotton to be used by nearly all of the Americas' indigenous societies. Cotton cloth was produced for various purposes including decorative hangings or awnings for temples and marketplaces, marriage payments, battle armor, tortilla covers, or to adorn deities. It was most commonly used, however, to make CLOTHING.

The indigenous societies and economies of Mesoamerica relied heavily on cotton production and even used units of cotton as a form of currency. Cotton tied the MAYA into a broader Mesoamerican ECONOMY,

connecting the Yucatán Peninsula with Central MEXICO and HONDURAS. Maya villages in the eastern interior paid their rulers raw cotton and cotton TEXTILES, which were then exchanged and sold to the central and western parts of the peninsula and, subsequently, to other distant regions of Mesoamerica.

Because cotton could not be grown in the climate of the Valley of Mexico, the AZTECS acquired cotton through the tribute they collected from those they conquered. Cotton paid in tribute came in a variety of forms but most commonly in lengths called *quachtli* and cloaks (*mantas*). A pictorial document listing the tribute owed to the Aztecs—the *matrícula de tributos*—indicates that 241,600 cotton cloaks were to be paid annually. When these are factored among the additional cotton items and *quachtli* most tribute provinces paid every year, the role of cotton in the Aztec Empire is quite remarkable. In addition, Aztec traders (*POCHTECA*) and market vendors collected a wide variety of cotton throughout the valley, each variety having a particular value.

The Inca Empire rivaled that of the Aztecs with regards to cloth tribute payments (see INCAS). Various provinces under Inca rule were assigned to provide either cotton or their labor to weave cloth from cotton already acquired by the state. Indeed, cotton textiles were one of the highest forms of tribute to the Incas. Moreover, Andeans used cotton to create tunics decorated with squares and other abstract patterns set in specific repetitive designs to identify the ethnicity of specific indigenous groups.

The importance of cotton did not diminish with the arrival of the Spanish. In 1496, CHRISTOPHER COLUMBUS required the native population of HISPANIOLA to pay a tribute of “a Femish hawk’s bell . . . full of gold . . . or an *arroba* of cotton” every three months. Although cotton textiles did not play a role in the mercantilist colonial economy focused on the export of precious metals and other exotica, it helped to fuel the local economy. Spanish settlers depended on native cotton for local consumption. The demand for cotton textiles increased throughout the colonial period, especially in the cities and mining camps and was satisfied by tribute payments (this time to the Spanish) and the *obrnjes* of Spanish settlers not endowed with *ENCOMIENDA* grants.

See also COTTON (Vol. III).

—Mark Christensen

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**Council of the Indies** (1524–1834) The Council of the Indies served as the supreme governing body of the Spanish administration of the New World colonies. As an advisory council to the Spanish monarch, it had executive, judicial, and legislative control over the Indies.

With the Spanish exploration and CONQUEST of the New World, an empire began to form, and new governing institutions and administrative bodies for the administration of this empire evolved slowly from 1492 onward. At first, the Catholic monarchs Ferdinand and Isabella entrusted the governance of CHRISTOPHER COLUMBUS’S newly established Caribbean colonies to Isabella’s confessor, the bishop of Burgos, Juan Rodríguez de Fonseca (see MONARCHS OF SPAIN). The bishop of Burgos controlled the governance of the expanding colonies on behalf of both of the Spanish kingdoms from 1493 until the death of King Ferdinand of Aragon in 1516, when the crown of Castile formally received sole control over the New World. Under the new Castilian regent, Cardinal Francisco Jiménez de Cisneros, the governance of the Indies was handed to the newly formed Junta de Indias, headed by two members of the Council of Castile. From 1516 to 1524, the government of Spain’s New World colonies was entrusted to this small subcommittee of the larger Council of Castile.

After the discovery and conquest of New Spain (see MEXICO) and parts of the Central American mainland, the new monarch, Charles I, decided that a separate, more permanent governing body should be in charge of the administration of the expanding New World empire. Thus, on August 1, 1524, the Real y Supremo Consejo de Indias (Royal and Supreme Council of the Indies) was formed. It had executive, judicial, and legislative functions, which increased over time. The Council of the Indies was given control over all aspects of imperial and local government in the Indies, and also over the CASA DE CONTRATACIÓN, or Board of Trade.

From its outset, the Council of the Indies was composed of a president, who each week during *consultas* informed the monarch of the affairs discussed in council and requested his action on petitions and legislation. A variable number of councilors also sat on the council, most of whom were lawyers or jurists with previous government experience in the Indies. A prosecutor (*fiscal*), and several secretaries, notaries, and other lesser officials (including an official historian, or chief chronicler, of the Indies), a royal cosmographer, and a host of other attorneys and jurists, also sat on the council (see CHRONICLERS).

In terms of its duties and jurisdictions, the Council of the Indies was entrusted with the planning and proposal to the Crown of all administrative policies relating to the New World colonies, including issues such as the conquest, population, immigration, and indigenous relations. It was the Council of the Indies, in consultation with local government agencies in the New World (such as the viceroalties and AUDIENCIA courts), that proposed to the Crown the names of candidates for positions to be filled in the government of the Indies (see VICEROY/VICEROYALTY). The council also closely watched the activities of the officials it sent to the New World, formally administering and controlling the judicial reviews (*juicios de residencia*), or trials of exiting officials, that were held to ensure that no corruption or abuses were prevalent in



their administrations. In addition, the council reviewed all ecclesiastical appointments and suggested candidates for church offices; its members also examined and either approved or rejected all papal bulls or ecclesiastical regulation. Each day, the council read, reviewed, and reported on the correspondence and petitions that thousands of New World residents sent back to Spain.

The Council of the Indies came to control all aspects of military planning, militias, authorizations of new conquest expeditions, and other martial affairs. Similarly, in its exercise of judicial functions, the council served as a supreme court of final appeal on all judicial questions, either civil or criminal, arising in the Indies. In its judicial function, the council was later limited in civil cases to hearing only those involving disputes of more than 1,000 pesos in value so as not to overburden the councilors with less important cases.

See also COUNCIL OF THE INDIES (Vol. II); MINISTRY OF THE INDIES (Vol. II).

—John F. Chuchiak IV

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**Council of Trent (1545–1563)** The Council of Trent was convened by Pope Paul III as a response to the Protestant Reformation. As an ecumenical council, it had the authority to change the doctrines and practices of the CATHOLIC CHURCH. The council lasted until 1563, with deliberations falling into three major periods, 1545–47, 1550–52, and 1562–63. While the council issued decrees on a wide range of issues, a few in particular had a major impact on the church in the New World. In general, the council established that bishops should truly serve as pastors of their dioceses. Thus, the practice of multiple appointments was curtailed, and bishops were expected to reside in their dioceses. The council regulated financial issues, such as the endowment and support of benefices and the creation and regulation of pious works. Lists of prohibited books were authorized, and restrictions were confirmed over the translation of the Bible into common languages. The council also passed various decrees seeking to reform the clergy and outlining the bishop's authority over clergy in his diocese. The council ordered the creation of catechisms for use in each diocese. While the canons and decrees of the council had the immediate effect of law within the church, each diocese and ecclesiastical province had to hold its own council or synod to implement them. These were held in MEXICO and PERU in 1565. Because of the long delay caused by distance, the full texts of the decrees of Trent did not arrive in either viceroyalty (see VICEROY/VICEROYALTY) until long after they were issued, so the provincial

councils of Mexico and Lima gave blanket approval to Trent but later were unable to make any significant changes. The next provincial councils—Mexico (1585) and Peru (1582–83)—issued detailed rules on how the decrees of Trent were to be applied in the New World.

—John F. Schwaller

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*The Canons and Decrees of the Sacred and Oecumenical Council of Trent*, edited and translated by J. Waterworth (London: Dolman, 1848).

**coya** *Coya* is a QUECHUA term for the Moon, the INCAS' foremost female deity. The term was also used to refer to the principal wife of the Sapa Inca (chief ruler of the Inca Empire), as she embodied the Moon's most important daughter. Thus, the Sapa Inca was the son of Inti (the Sun), and the *coya* descended from the Moon.

The *coya's* link to the Moon gave her great power and authority in Tawantinsuyu, the Inca realm. She presided politically and religiously over Tawantinsuyu's WOMEN, leading their worship of female deities and heading female religious organizations. As leader of the lunar cult, she presided at the shrine of the Moon (Pumap Chupan) located next to the Temple of the Sun (Coricancha). Adorned with SILVER, the interior of Pumap Chupan stored the mummies of earlier *coyas*, which were brought out into the plaza for worship and to participate in important festivals.

The *coya* also filled important political duties. As mentioned above, she ruled over women, following the lead of Mama Huaco, *coya* of the legendary first Sapa Inca, Manco Inca (not to be confused with the 16th-century Inca). Mama Huaco was a fierce, warlike woman of great power, and later *coyas* were chosen for their abilities to lead and fulfill political and religious duties. At least some *coyas* seem to have been sisters of the Sapa Inca. The *coya* ruled Cuzco when her husband was absent on military campaigns.

Inca imperialism and the subsequent Spanish CONQUEST undermined the importance of the *coya*. The Sapa Inca and other important males practiced polygyny with women taken from the provinces, signaling not only the subjugation of those peoples but also the establishment of political bonds with them. Polyandry was not, however, permitted for the *coya*, and thus she could not extend her political influence in the same manner. The Spanish conquerors imposed a patriarchal political system that eliminated the *coya's* political role and introduced a religion that erased her ritual importance.

See also WOMEN (Vols. II, III, IV).

—Kendall Brown

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One of the finest structures in the entire Inca Empire, Cuzco's Coricancha, or so-called Temple of the Sun, was perhaps the most important religious shrine in Tawantinsuyu. Within its remarkable stone walls, the Inca worshipped all the major celestial deities. The temple also housed the most important royal mummies. Moreover, the complex Inca *zeque* system of radial lines all emanated from the Coricancha. The base of the temple still remains, on top of which the Spaniards erected the monastery of Santo Domingo. (Courtesy of J. Michael Francis)

## crime and punishment

### MESOAMERICA BEFORE 1492

Native Americans in Mesoamerica before 1492 tended to regard the world as unstable and prone to chaos. For the AZTECS, MAYA, ZAPOTECs, MIXTECS, and others, crime, like capricious supernatural forces, could threaten the fragile social order. The need to guard against chaos acted as a kind of organizing principle for Mesoamerican societies. Much as people sought to placate the gods by routinely performing religious rituals such as fasting, so secular authorities tried to limit crime by inculcating normative values and by swiftly and severely punishing transgressors. Native Americans devised police and judicial institutions, including courts, to deal with criminal acts. These institutions operated on the basis of established laws that defined acceptable behavior. Authorities were especially concerned about interpersonal crimes, which threatened the social order by disrupting FAMILY and community relations. Prominent among these crimes were assault, drunkenness, and adultery. The courts also distinguished between crimes of an economic and political nature, as well as between civil and criminal litigation. Furthermore, the legal system recognized different juris-

dictions for the religious and military spheres, as well as in the conduct of war (see RELIGION, WARFARE).

In Mesoamerica, codified laws applied to everyone, and societies dealt with criminals through formal governmental and legal channels. In the Aztec Empire, the *TLATOANI* (ruler) of Texcoco, Nezahualcōyotl (1418–74), reformed legal codes and devised a legalist system that standardized existing laws and upheld their strict, uniform application. Nezahualcōyotl's reforms consolidated previous precedents, creating a legal system that helped integrate the Aztec Empire. In Texcoco, as elsewhere, the administration of justice began at the *CALPULLI* level of each *ALTEPETL*, and their equivalents in Mixtec, Zapotec, and Maya regions. Local communities typically had a jail as well as a retinue of staff for policing and judicial duties. For many crimes, the law distinguished between *PIPILTIN* (lords) and *macehualtin* (commoners; see *MACEHUAL*.) In NAHUATL-speaking areas, a lower court, known as the *teccalco*, arbitrated cases involving commoners, while another, called the *tlacxitlan*, judged nobles. Dynastic rulers usually presided over routine or minor cases and consulted with councils and judges in serious or complex cases. An appeals process complemented the local courts.

If a case required further consideration, it could be tried before authorities beyond the *altepetl*. Appeals could reach the *cibuacóatl*, the emperor's second-in-command, whose deliberations were assisted by a council of judges. Imperial councils dealt with especially contentious or serious cases, including those involving matters of state.

Beyond formal laws and judicial institutions, Native Americans devised customs and social practices to maintain order. These included the performance of religious obligations, which inculcated ideas about self-discipline, morality, and proper conduct. Failure to adhere to religious strictures could inspire divine retribution. Mayas and Aztecs associated physical illnesses with punishments meted out by the gods. Beyond the religious realm, people were warned of the perils of disorder and were exhorted to follow proscriptions against criminal behavior. EDUCATION instilled in children a sense of acceptable behavior. Parents expected their children to act with humility and to be obedient and courteous. Respect for one's elders also figured prominently in social conventions. When people deviated from the norms of acceptable behavior, courts determined whether their actions constituted crimes, and when they did, judges imposed exacting punishments.

Aztec and Maya legal codes meted out severe punishments for crimes they deemed contrary to social harmony. Drunkenness was seen as an especially unacceptable form of behavior not only because it was inherently disruptive but also because it could engender further problems by impoverishing families and creating conflict. Most groups viewed adultery, among other sex crimes, as particularly heinous because it struck at the heart of family relations, thereby jeopardizing one of the foundations of society. Authorities also prosecuted other sorts of social crime. These included unruly and disrespectful behavior, particularly toward one's superiors.

Seniority, status, and office defined a person's duties and rights. Special laws governed the conduct of soldiers and priests. People were expected to behave in accordance to their place and function in the social hierarchy, and position did not guarantee exceptional or lenient treatment under the law. The courts imposed severe penalties on nobles, particularly when they served in official capacities. Nobles were held to high standards of conduct in office because they were expected to set a good example. In one instance, Nezahualpilli, the son of Nezahualcóyotl, sentenced his wife (a daughter of the ruler of Tenochtitlán) to death for adultery, along with her lovers. For commoners, sumptuary laws regulated personal appearance, restricting the types of CLOTHING and jewelry people could wear. Such laws even extended to the kinds of property people could own. Contraventions of sumptuary laws could prompt harsh reprisals, even capital punishment.

Punishments may have been severe both to preserve the social hierarchy and to serve as a deterrent. They also reflected the perceived gravity of offenses. The courts commonly imposed physical punishments. Corporal pun-

ishment sometimes included piercing, tattooing, and shaving the head to mark people as criminals. Other common punishments called for the removal of offenders from society, either through incarceration, banishment, or death. Death penalties applied in cases of recidivism and where land had been taken. Crimes such as adultery also warranted the death penalty, which was carried out either by stoning or hanging, regardless of a person's social position. Where appropriate, punishments could involve some form of reparation, particularly with property crimes and homicide. Courts required restitution for damaged goods or stolen property. In severe cases, Aztecs and Mayas imposed compensation by enslaving thieves and requiring them to serve their victims' families. Similarly, in cases of homicide, if the courts did not sentence perpetrators to death, they enslaved them to the family of the deceased. Because notions of justice were bound up with a concern for maintaining harmonious social relations, punishments had a restorative function and aimed to reestablish order.

### SOUTH AMERICA BEFORE 1492

Chronicling societal responses to criminality in pre-Columbian South America is enormously difficult. The paucity of primary source material makes it difficult to provide accurate depictions of crime and punishment. Furthermore, as opposed to Mesoamerica, which harbored the prodigious Aztec and Maya civilizations, the only civilization of similar size in South America was that of the INCAS. Overall, it can be said that most legal systems in South America were not codified, hence common law practices were prevalent as societal response to crimes was observed, adopted, and handed down from one generation to the next. Nevertheless, from the evidence that is available, it appears that harsh punishments were common, even for relatively minor infractions.

Of course, the dearth of resources makes generalizations largely speculative. For instance, the MOCHE, who flourished in PERU between 200 and 700 c.e., depicted images of crime and punishment on their ornately painted CERAMICS. However, these depictions remain subject to interpretation and scholarly debate regarding the nature of Moche laws, crimes, and the treatment of criminals. By contrast, for the Incas, the evidence is much more complete.

For the most part, the Inca state did little to intervene in the legal affairs of conquered communities. They did not create a state legal code, nor did they have a judicial system that regulated their territory. Nevertheless, in some cases, the state did intervene in judicial affairs. For example, capital offenses included crimes committed against the Sapa Inca; likewise, acts of treason and the destruction of state bridges were punishable by death. The chief method of execution was bashing the criminal's skull with a club, throwing the criminal off a cliff, or binding and leaving the same to starve. Evidence of criminal incarceration is almost nonexistent, with a lone (but oft-cited) record of an "egregious traitor" who was locked in a dungeon with venomous snakes and other dangerous animals.

Lesser crimes precipitated a variety of other punishments, ranging from public condemnation and humiliation to chopping off appendages, banishment, and torture. A separate justice system was in place for royals; many crimes, such as incest (outside of sanctioned marriage), which were punishable by death for commoners invited only mild physical punishment if committed by a noble. Any crime perpetrated by a commoner against a noble promised a harsher punishment, usually death. Instead of torture or death, royals were expected to be deterred from crime by a public rebuke that served to lower their prestige in the community, ostracize them from other nobles, and ruin their relations with the emperor.

Some trials were convened by state officials; however, most infractions were dealt with by local officials or community elders. Ad hoc hearings of more serious charges were presided over by higher-level officials. In the case of treason or serious crimes committed by nobles, the emperor decided personally, often with guidance from a privy council. Verdicts were swift; judgment was administered in less than five days after an allegation was made and the criminal detained. In cases of notorious criminals, punishments extended not only to the criminal and that person's family; some sources indicate that entire villages were razed.

What little evidence exists regarding other Andean societies suggests that Inca responses to crime were not unique. For example, anthropological studies indicate that the CHIMÚ civilization responded similarly, if not even more harshly, to crime. Murder, desecration of holy sites, and disrespect toward the deities was met with execution, with perpetrators thrown off a cliff or buried alive. Theft was another capital offense, predicated on the logic that all property was divinely bestowed; hence robbery was a religious sacrilege. Not only were the criminals quickly dispatched; anyone considered to have aided them was also summarily executed. Punishment, while sanctioned by state officials, was supported by the community at large to the extent that most of its members considered themselves to have been collective victims of the crime perpetrated.

Prior to 1492, justice in South America was uniformly decisive. Typically, criminals were physically punished, with death reserved for the most serious offenses. Societal hierarchies, both in terms of class and gender, were also reflected in the penal systems. Members of the nobility were often subject to milder punishments than were commoners. Still, the notion of redemptive justice was nonexistent, and the stunning effect of most punishments was directed toward deterring crime rather than exacting revenge. For the most part, responses to crime were considered to be a local matter, with the state intervening only when crimes affected imperial designs. In all, response to crime was quick, grave, and usually meted out by members of the community in which the crime occurred.

See also CRIME AND PUNISHMENT (Vols. II, III, IV).

—Richard Conway  
Sean H. Goforth

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**Cauhtémoc** (b. ca. 1497–d. 1525) *last supreme ruler of the Aztec Empire* Cauhtémoc (“Descending Eagle,” in NAHUATL) was the 11th and last *buetlatoani* (supreme ruler) of the Aztec Empire, ruling from 1520 to 1525 (see AZTECS). Despite his short and hectic rule, the life of Cauhtémoc is one of the best recorded from this dynasty by both Aztec and Spanish CHRONICLERS. Cauhtémoc was born ca. 1497 to the eighth Aztec emperor Ahuitzotl and Tiyacapantzin, a princess from Tlatelolco. He attended the main priestly school (*calm-eaac*) in TENOCHTITLÁN, the Aztec capital, and fought in several military campaigns against Quetzaltepec and Iztactlocan (see EDUCATION). In 1515 he was appointed as the “eagle ruler” of Tlatelolco.

In November 1519, Spanish conquistadores, led by HERNANDO CORTÉS, arrived at Tenochtitlán, only to be fiercely chased out in 1520 during the Noche Triste (“night of sorrows”). That same year, Cuitláhuac, who had replaced MONTEZUMA as the emperor, died of smallpox introduced by the Europeans (see DISEASE). Their cousin Cauhtémoc was promptly chosen as the successor to the throne. He took Xuchimatatzin, a daughter of Montezuma, as his wife and apparently killed one or more of Montezuma's sons, whom he considered potential rivals to the throne.

Unlike his cousin Montezuma, Cauhtémoc was strongly opposed to the Spaniards' presence in his land. When the Spaniards and their allies returned in the summer of 1521 to lay siege to Tenochtitlán, Cauhtémoc sought his own war allies among the Acolhuas and Tarascans, although with little success. Together with his smaller Aztec army, Cauhtémoc confronted the Spanish attack but later attempted to flee the city and was captured. According to several sources, it was Cauhtémoc himself who surrendered to Cortés and then begged him to take his life.

Cortés did not oblige; instead, Cauhtémoc was taken prisoner in Coyoacán, where he was tortured to reveal the location of a hoard of gold that allegedly had been hidden from the conquistadores. Still, he was able to keep his *buetlatoani* title while in captivity. In October 1524, Cortés left for HONDURAS to subdue a rebellion;

fearing that Cuauhtémoc might revolt in his absence, he took Cuauhtémoc and other indigenous rulers of the TRIPLE ALLIANCE with him. On the way, Cuauhtémoc was accused of plotting a conspiracy against Cortés and was hanged in February 1525. With this act, the long line of Aztec sovereignty in MEXICO came to an end.

—Danny Zborover

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**Cuba** Cuba, the largest island located in the Caribbean Sea, is surrounded by the Atlantic Ocean, the Gulf of MEXICO, the Straits of FLORIDA, and the Yucatán Channel. The island is defined by various terrains, ranging from rugged hills in the southeast, rigid mountains of the Sierra Maestra, and flat plains throughout.

The first peoples to inhabit the island were the Ciboney Indians, who arrived on the island around 1000 B.C.E.; and by 1000 C.E., the Ciboney had settled all across the island. However, they were soon joined by other waves of migrants. By 1050 C.E., Arawaks and their descendants, the TAINO, had also settled on Cuba. It was the Taino who first encountered the Spaniards upon their arrival in 1492.

The majority of what is known of Taino culture is derived from the chronicles of Spanish colonizers and the analysis of artifacts found in the region. The social structure of the Taino was matriarchal, with FAMILY names, material possessions, and social power passed down through the mother (as opposed to the father in many other societies). Organizationally, the Taino were divided into numerous chiefdoms throughout the Greater Antilles (Cuba, Jamaica, PUERTO RICO, and HISPANIOLA) with a CACIQUE, or chief, ruling over each. Recent research on the political structure of Taino society reveals highly organized chiefdoms. There is also some speculation that villages were socially divided between a ruling class, the *nitainos*, and a subservient class, referred to as *naborías*. The *naborías* did the majority of the agricultural work and hunting, while the *nitainos* supervised work, made ART and relics, and oversaw WARFARE.

Proof of the advanced state of the Taino ECONOMY stems from the technology used in AGRICULTURE, such as irrigation systems, and the extensive TRADE networks that extended across the islands of the Greater Antilles. Artifacts found in this region point to a deeply spiritual society, with a polytheistic RELIGION. Taino religious beliefs played important roles in society and daily life. Another central aspect of Taino life and culture was a ball game similar to soccer, found in many pre-Columbian societies in the region. The Taino version of the game was played with a hard ball on a paved court.

Taino culture flourished on the island until October 28, 1492, when CHRISTOPHER COLUMBUS landed in Cuba. Mistakenly believing it to be an Indian peninsula, Columbus claimed the land for Spain and called it “Juana.” It was not until 1508 that Sebastián de Ocampo circumvented Cuba, proving that it was an island and not connected to the mainland. Columbus later wrote that upon arrival he encountered the Taino who were “very friendly” and explained that they “would be good servants and I am of opinion that they would very readily become Christians, as they appear to have no religion.”

Though the Spanish overtook the indigenous population with relative ease, the Taino did put up a resistance. Shortly after Columbus landed in Cuba, Hatuey, a Taino cacique from Hispaniola, arrived to warn the local population of the Spaniards’ intentions. Hatuey led the first indigenous revolt against colonial rule in Cuba, which lasted until 1512, when Hatuey was captured and burned at the stake. By that time, a large portion of the indigenous population in Cuba had been devastated through DISEASE and abuse; as the indigenous population declined, Spanish settlers sought new sources of LABOR. In 1513, the first recorded slaves were brought Cuba, with a larger group arriving in 1520 to work the newly established SUGAR plantations (see SLAVERY).

Columbus returned to Spain and in his place DIEGO VELÁZQUEZ DE CUÉLLAR took charge of the conquest of Cuba and established the settlements of Baracoa (1512), Santiago de Cuba (1514), and La Habana (1515). As governor, from 1511 until his death in 1524, Velázquez ruled with few restraints, instituting an ENCOMIENDA system, which fueled the exploitation of Cuba’s indigenous population.

Havana quickly became the focal point of the island, and in 1537, the city became the seat of Cuba’s colonial government. As a stopping point for merchant ships traveling to and from Spain, the city attracted both commerce and pirates (see PIRATES AND PIRACY). While the colonial city grew, so, too, did tensions between the indigenous, the slaves, and the colonizers. In 1533, the first major slave uprising occurred on the island, and with the assistance of disgruntled slaves, pirates succeeded in attacking and burning Havana.

Though the city was quickly rebuilt, deep social tensions continued. Another Taino cacique named Guamá led his wife and 50 other men in a guerrilla-style revolt against the Spanish; this uprising lasted until Guamá’s betrayal and murder in the mid-1530s. By 1542, when the Spanish Crown promulgated the NEW LAWS OF 1542, which, among other things, sought to ban the *encomienda* system, the damage to the indigenous population proved devastating. By 1557, the Taino population in Cuba had dropped from 300,000 in 1492 to less than 500. The Spanish conquistadores had been able to overtake Cuba’s indigenous population for two reasons: First, the Spanish weapons of war were more advanced than those of the native people, and second, the Taino concept of warfare

varied greatly from that of the Spanish. Taino battles were won by capturing the enemy's women; heroes in warfare were those who captured material possessions and survived unscathed. The far more destructive strategy of capturing and killing indigenous leaders gave the Spanish an important military advantage.

By 1560, Havana had emerged as a leading center of commerce for the Caribbean and Central America, with a bright economic future in TOBACCO and sugar production. Tobacco, which Columbus encountered on his first visit to Cuba, was gaining popularity in Europe for its medicinal qualities (see MEDICINE). European demand for sugar was also on the rise. Columbus had brought sugarcane to the island during his second voyage in 1493, and with the steady arrival of 2,000 slaves a year from 1522 forward, Cuba's sugar industry grew quickly.

See also CUBA (Vols. II, III, IV); HAVANA (Vols. II, III, IV).

—Jennifer Schuett

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**CUZCO (CUSCO)** In the middle of the 15th century, the Inca ruler PACHACUTI INCA YUPANQUI redesigned the city of Cuzco and had it rebuilt over preexisting settlements as the capital of the Inca Empire (see INCAS). A century later, the Spanish chronicler PEDRO CIEZA DE LEÓN, who was among the first Spaniards to enter the Inca capital, was stunned by the richness and wealth of one of its principal buildings, the Temple of the Sun (Coricancha). He described a garden in which the “earth” was lumps of fine GOLD, planted with golden stalks of corn. They were so well planted, he said, that no matter how hard the wind blew, it could not uproot them. Cieza de León saw more than 20 golden sheep, with golden lambs, and the shepherds who guarded them, their slings and staffs, were also all made of gold. Aside from this, he reported many tubs of gold, SILVER, and EMERALDS, as well as golden goblets, pots, and other kinds of vessels. He described rich carvings and paintings on some of the temple walls and concluded that it was one of the richest temples in the entire world.

The Coricancha and, by implication, Cuzco itself came to embody Spanish fantasies about the treasures to be found in the New World, and they quickly took possession of many precious objects. The temple was stripped bare and integrated into the church and monastery of Santo Domingo, whose monks continue to administer this Inca monument.

Coricancha was a large complex composed of courtyards framed by buildings and enclosed by a perimeter wall. Most of the buildings were constructed of finely cut and precisely fitted ashlar, in what is known as the Cuzco masonry style; they functioned as temples dedicated to forces of nature, such as thunder, lightning, the Moon, and the Sun (see RELIGION). The latter was the most prestigious temple, and its walls were covered with gold plating. Some Spanish writers mention a large gold disk personifying the face of the Sun, which is said to have stood on the curved wall that remains today. The Temple of the Moon was clad in silver plating.

Other focal points of Cuzco were the main plaza and the hilltop structures of Sacsayhuamán. The main plaza was situated in the city center and was divided into a larger section named Aukaypata and a smaller one known as Kusipata. Aukaypata was covered with a thick layer of sand from the coast and filled with many gold and silver vases, as well as human and animal figurines. These were all given as offerings to the god Viracocha. Somewhere near the middle of this plaza stood an important, politically and ritually charged stone, designated as an *usnu*. The *usnu* was connected to a basin and drainage canals for liquid offerings. It served further as an observation point of the Sun from which, most likely, the ruler followed sunrises and sunsets along the horizon line of Cuzco, which was marked by a series of large pillars.

Aukaypata was bordered by palaces attributed to specific Inca rulers. For example, the Casana compound at the northwest corner was the palace of the Inca ruler HUAYNA CÁPAC, and the Hatuncancha compound at the southeastern corner of the plaza may have contained the palace of Pachacuti. Aukaypata was also bordered by *kallanka* buildings, which were large halls with numerous doorways used as temporary accommodations for traveling troops or in which ceremonies could be staged in inclement weather.

Sacsayhuamán is the impressive building complex that overlooks the city from a nearby hill to the north. Its construction was most likely initiated by Pachacuti. It consists of the well-known three staggered rows of zigzag walls composed of huge, perfectly fitted stone blocks. The site also boasts many other buildings; a long, flat, open performance space; numerous sculpted rocks; and a water system. Sacsayhuamán served multiple purposes: It housed a sun temple, a number of storerooms, and perhaps a palace. Later, the Spanish used it as a military fortress.

Sacsayhuamán served as the center point of the *hanan*, or upper section of Cuzco. Overlaid on the *hanan-burin* division was the partition into four quarters, or *suyus*, defined by four principal roads that departed from the main plaza and continued to the frontiers of the empire. Inca rulers referred to their empire as Tawantinsuyu, or “Land of the Four Quarters,” whose point of origin lay at the convergence of the four roads in the heart of Cuzco. Chinchaysuyu was the north-



According to one Spanish chronicler, the Inca ruler Pachacuti Inca Yupanqui brought in 20,000 laborers on a rotating basis to construct this monumental architectural complex, located in the hills above the Inca capital of Cuzco. Sacsayhuáman served as a ceremonial, religious, and military complex. (Courtesy of J. Michael Francis)

western quadrant; Antisuyu, the northeastern one; and Collasuyu and Cuntisuyu were situated in the southeast and southwest, respectively.

The third important spatial division was the *ZEQUE* SYSTEM. The *zeques* were 42 imagined lines, all of which radiated out from the Coricancha in the center of Cuzco. These lines were marked by approximately 328 shrines, which could be buildings or natural features. The lines were subdivided into groups belonging to each *suyu*; each line was further assigned to one Cuzco lineage, whose task it was to service and maintain all shrines on its *zeque*. Researchers have argued that the *zeque* system extended

conceptually throughout the Inca Empire and integrated metaphorically what the Incas constructed as sacred political landscape.

See also *Cuzco* (Vol. II).

—Jessica Christie

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**Dávila, Pedrarias** See ARIAS DE ÁVILA, PEDRO.

***defensor de los indios (protector y defensor de los indios)*** In general, the defense of the indigenous people of the New World was entrusted to all royal officials or functionaries until 1516, when the position of *defensor y protector de los indios* (defender and protector of the Indians) was created. Initially, it was only periodically exercised, by clergymen and even civilians; it did not become an established office, with a salary and specific duties and jurisdictions, until the creation of the general Indian court system (Juzgado General de Indios) in 1591.

The origins of the office of “protector and defender of the Indians” can be found in early Spanish civil and ecclesiastical laws, which entrusted local bishops in Spain with the protection of those considered minors or weaker members of society (widows, orphans, the sick, and the infirm) under the law. During the early administration of the Spanish colonies of the Indies, it became apparent that the indigenous peoples of the New World needed a similar protector to help mitigate the many abuses that colonists perpetrated against them. Although no official bishoprics were in place at the time, in 1516, the royal regent, Cardinal Francisco Jiménez de Cisneros, horrified at reports of abuses from the New World, saw the need to appoint a *protector y defensor de los indios* there. He selected BARTOLOMÉ DE LAS CASAS, then a local parish priest in CUBA, to serve as the first such protector. He sent a similar commission to the island of HISPANIOLA the same year, naming two Spanish Jeronymite friars as protectors there.

From 1516, the MONARCHS OF SPAIN began to designate and appoint at various times and in different places certain people, including bishops, friars, and civilians, as official defenders and protectors of the Amerindians. Since the position was only sporadically commissioned, defining the exact duties and powers of those who fulfilled it is difficult. In many instances, the officials were given jurisdictions that overlapped with those of local VICEROYS or AUDIENCIA judges (*oidores*), who also had a duty to protect the NATIVE AMERICANS. Many conflicts related to jurisdiction arose, as did complaints against the actions of the early protectors, and several wrote to the Crown requesting more specific information about their powers and responsibilities. After 1530, the Crown attempted to define more formally the duties and expectations of this official, yet between 1530 and the 1590s, commissions to the position were only sporadically awarded.

The formal, institutionalized, and salaried post of *defensor de los indios* was not created until the end of the 16th century, in regions with large indigenous populations, such as MEXICO and PERU. Individuals who held the position served as head of one of the newly created general Indian courts. These courts served as the courts of first instance for cases involving indigenous people, and the *defensor de los indios* had as his chief responsibility the protection of their rights and property. Eventually, a special annual half-*real* tax leveled on all indigenous tributaries raised the finances to fund the courts, which offered the New World’s native people free or low-cost legal aid.

Regardless of their ultimate powers and duties, the early *defensores de los indios* became important officials, serving as an official voice and helping to reduce the abuses and violations of indigenous peoples by colonists and even royal officials.



See also JUZGADO GENERAL DE INDIOS (Vol. II); LETRADO (Vol. II).

—John F. Chuchiak IV

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**de Soto, Hernando** (b. ca. 1500–d. 1542) *conquistador* in Central America and Peru, governor of Cuba, and leader of extensive expedition to Florida. A native of Extremadura, Spain, Hernando de Soto first reached the New World as an adolescent in 1514. He arrived in Castillo del Oro (the isthmus of PANAMA) as a member of a large expedition led by PEDRO ARIAS DE ÁVILA, better known as Pedrarias. In Panama, de Soto participated in a number of small expeditions, one led by the famous conquistador FRANCISCO PIZARRO. Later, in 1532, de Soto accompanied Pizarro on an expedition to PERU that led to the CONQUEST of the Inca Empire (see INCAS) and made Pizarro, de Soto, and other participants some of the richest men in the New World. After the conquest of Peru, de Soto returned to Spain and used his newly acquired wealth and prestige to marry Isabel Bobadilla, the daughter of Pedrarias, thus forming an alliance with an important Castilian FAMILY. While in Spain, de Soto also petitioned the Spanish monarchy for the governorship of either ECUADOR or GUATEMALA; however, he received neither. Instead, the Crown granted him the governorship of CUBA. De Soto was also granted the right to explore and conquer FLORIDA and other regions of North America.

The expedition disembarked in present-day Charlotte Harbor, Florida, on May 30, 1539. Searching for large waterways, rich Indian settlements, and GOLD, de Soto and his men traversed parts of present-day Florida, Georgia, South Carolina, North Carolina, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, and Texas. Several of de Soto's companions kept detailed accounts of their experiences, including their encounters with various Native American groups (see NATIVE AMERICANS). These writings provide some of the earliest demographic and ethnographic recordings of indigenous peoples in North America. The difficult and dangerous expedition significantly taxed the health of de Soto and his companions. Of the estimated 600 men who set out, only 311 survived. De Soto himself fell ill near the Mississippi River and died in June 1542. After his death, the remaining men abandoned the expedition, retreating overland to MEXICO.

—Justin Blanton  
Kathleen M. Kole

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**diabolism in the New World** Although all classes of early modern Christian society believed in the devil, the perception of his power and influence underwent significant transformations in the early modern period. As the Decalogue, or Ten Commandments, came to influence a moral system that defined idolatry and witchcraft, even devil worship, as offenses against God, demonology rose to new heights in Christian theology. Both this focus on the devil and the discovery of “heathen” cultures inspired many ecclesiastics to reexamine the role and power of the devil within Christianity, the results of which laid the groundwork for a variety of opinions concerning diabolism in the New World.

In a way, the Spanish brought the devil to the New World. Prior to the arrival of Europeans, the indigenous peoples of the Americas had never heard of such a being, nor had they a comparable figure in their RELIGIONS to this enemy of all Christendom. Indeed, the role of the devil in the New World before and after Spanish contact was an issue that evolved over time and inspired much debate among ecclesiastics. Upon their arrival, many friars came with hopes of a millennial age during which Amerindians would embrace Christianity and the devil would be defeated. At best, most friars viewed native people who had participated in idolatry, sacrifice, and other pagan rituals as naive and vulnerable to the deceitful devil or, at the worst, as malicious sorcerers who used demonic power against others, but not as devil worshippers. BARTOLOMÉ DE LAS CASAS saw Native American paganism as compliant with natural law and their desire for God, and not diabolical in nature.

As idolatry and other practices persisted into the mid-16th century, however, ecclesiastics began to see the devil's hand interfering with their goals. Native people who continued to practice precontact rituals and believe in their own deities in the presence of Christianity were no longer seen as simply “misguided” but as devil worshippers. With millennial aspirations gone, the devil became a stronger foe. Indeed, ecclesiastics perceived the devil as actively attempting to thwart Christianity in the New World by taking advantage of the native neophytes and tempting them in myriad ways to maintain or return to their precontact practices, especially idolatry.

In response, in 1553, Fray Andrés de Olmos wrote a treatise in NAHUATL that defined idolatry not as mere malfeasance but as diabolism. José de Acosta, while defending many of the virtues of indigenous culture, simultaneously equated those indigenous practices that resembled Christian sacraments with idolatry, arguing that it was nothing more than the devil's envy of and attempt to imitate God's true church. Finally, in 1562, Fray DIEGO DE LANDA used idolatry's perceived link to

devil worship to justify his violent campaign against the MAYA in Maní.

Moreover, in their efforts to instruct Native Americans on the diabolical roots of their continued idolatry and rituals, many 16th-century friars attempted to align the devil with indigenous deities thought to exhibit similar characteristics. In various publications, the Franciscan BERNARDINO DE SAHAGÚN identified the devil with Tezcatlipoca. In Nahua (Aztec) mythology, Tezcatlipoca, among other things, was a cunning deity who, through deceit and trickery, succeeded in overthrowing the more peaceful Quetzalcóatl. Seeing opportunity in aligning the two deceiving figures of the devil and Tezcatlipoca, Sahagún implanted the devil in precontact traditions. Furthermore, the illustrations in his *Historia general de las cosas de Nueva España* (*General History of the Things of New Spain*) portrayed two other major Nahua deities as the devil. With Tlaloc as a bearded goat and Huitzilopochtli as a demon, Sahagún made his view clear that these deities were not merely false idols but representations of the devil himself.

In Maya territory, Yucatec friars and their scribes followed similar patterns of aligning the devil with indigenous deities. Commonly, the deity Hun Ahau (One Lord) was used to represent the devil as the source of false wisdom. Maya myths of the underworld, creation, and death made Hun Ahau the most suitable choice. Associated with the day 1 Ahau, the Maya identified Hun Ahau with putrescence and the underworld; indeed, his POPOP VUH alias, Hunahpu, literally means “one lord of putrescence.” Hun Ahau was one of the Hero Twins who descended into the underworld to play a ball game and undergo a variety of deadly ordeals against the lords of the underworld, or XIBALBÁ. Through trickery, cunning, and deceit, Hun Ahau overcame the challenges to earn an elevated position among the underworld deities. Indeed, Landa stated that Hun Ahau was the “prince of all the devils whom all obeyed,” and the deity is listed in colonial Maya dictionaries as “Lucifer.” Moreover, the *Ritual of the Bacabs* places Hun Ahau at the entrance to the underworld.

The friars not only tried to convince indigenous groups that those they esteemed as gods were actually devils, but they also faced the challenge of conveying who the devil was when not appearing as precontact deities. In addition, because the native population vastly outnumbered the friars, the devil needed to be portrayed in indigenous languages. In other words, ecclesiastics needed to create a place for a colonial devil by using preexisting native languages that had no real equivalent. For the Nahuas, ecclesiastics used *tlacatecolotl*, or “human owl,” as the most common synonym for both the devil and his minions. In Nahua culture (see AZTECS), *tlacatecolotl* was a shape-changing shaman who took the form of an owl during his or her trances and who, while in this form, inflicted sickness and death on people at night. Ecclesiastics in the Mixtec region used a similar owl-per-

son, *tiñumi ñaba*, to represent the devil (see MIXTECS). For the Maya, ecclesiastical authors used the skeletal death god Kisin, or “flatulent one,” as the synonym for the colonial devil. Kisin presided over the afterlife of the deceased and is often associated with the decay, filth, and the stench of decomposition.

Overall, the devil in the 16th-century New World took on many precontact and colonial forms. Throughout the colonial period, the CATHOLIC CHURCH continued to reevaluate the devil’s role, power, and position in the New World. Indeed, diabolism seemed to wax and wane according to the native peoples’ adherence to Christianity.

See also CATHOLIC CHURCH (Vols. II, III, IV).

—Mark Christensen

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**Díaz del Castillo, Bernal** (b. ca. 1495–d. 1584) Spanish conquistador in Mexico and chronicler of the conquest Bernal Díaz del Castillo was an eyewitness to one of the most defining moments in history, the Spanish CONQUEST of MEXICO, after which he wrote his detailed chronicle *Historia verdadera de la conquista de la Nueva España* (*The True History of the Conquest of New Spain*) (see CHRONICLERS). Díaz del Castillo was born in the Spanish town of Medina del Campo in ca. 1495 and arrived to the New World as a young man in 1514. Before participating in HERNANDO CORTÉS’s fateful voyage in 1519, Díaz del Castillo took part in other expeditions as a foot soldier in Cuba and Yucatán. While his *Historia* covers the general period from 1517 to 1568, it focuses primarily on events from 1519 to 1521 and the downfall of TENOCHTILÁN and the Aztec Empire (see AZTECS).

Although Díaz del Castillo seemed to have had sincere admiration for Aztec ingenuity and social complexity, he repeatedly highlights the cruelty of their rituals, such as HUMAN SACRIFICE; he also writes of Aztec hatred of indigenous groups opposed to the TRIPLE ALLIANCE. As a soldier, Díaz del Castillo paid particular attention to the military aspects of the conquest and claimed to have fought in about 119 battles. At the same time, he was a keen observer of the politics of Mexico, HISPANIOLA, and Spain and provided important insights into indigenous culture, RELIGION, and internal factionalism, not just those of the Aztecs, but also less-known groups such as the Tlaxcalans and Cholulans (see TLAXCALA).

Between 1524 and 1526, Díaz del Castillo accompanied Cortés to HONDURAS, where he witnessed the execution of CUAUHTÉMOC. He was granted ENCOMIENDAS in Tabasco and Chiapas as a reward for his services but lost them in 1530; finally, in 1540, he settled in GUATEMALA. During those years, Díaz del Castillo returned twice

to Spain to defend his *encomendero* position, as well as Spanish actions in the conquest, which were challenged by Fray BARTOLOMÉ DE LAS CASAS. He began writing his retrospective *Historia* in 1551 and used Cortés's own letters to the Spanish king and Francisco López de Gómara's biographic chronicle, often taking a strong position against the latter. Many of the inaccuracies in Díaz del Castillo's chronicle are probably due to the fact he was writing three decades after the events he described. Furthermore, he was attempting to justify the Spaniards' actions during the conquest, depicting the conquistadores as the Christian liberators of New Spain both from the devil's influence and the brutal Aztecs. He emphasized his own poverty and the small return the conquistadores had received and thus hoped that his chronicle would guarantee prosperity for his heirs. Although a copy he sent to Spain in 1575 was published posthumously in 1632, he kept working on another version until his death in Guatemala in 1584. This manuscript was published as late as 1904 and is considered today one of the most detailed chronicles of the conquest of Mexico.

—Danny Zborover

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## disease

### THE AMERICAS BEFORE 1492

The pre-Hispanic Americas are sometimes described as a tropical, disease-free Eden. The 18th-century MAYA of Yucatán remembered the pre-Hispanic world in idealized terms: "There was then no sickness," they wrote. "[T]hey had then no aching bones; they had then no high fever; they had then no smallpox; they had then no burning chest; they had then no abdominal pains; they had then no consumption; they had then no headache. At that time the course of humanity was orderly. The foreigners made it otherwise when they arrived here. They brought shameful things when they came." Disease and sickness were, of course, present long before the arrival of Europeans, though it is certainly true that they were limited in comparison with the massive series of epidemics that occurred during the 16th century.

Two main factors impeded the development and evolution of infectious diseases in the New World. First, interaction between humans and animals was relatively infrequent, which hindered the interspecies transfer of pathogens. Epidemiological scholarship has shown that many of the most lethal and contagious diseases, such as bubonic plague, smallpox, and the common cold, originated among animals. The domestication of cattle, swine, and fowl in the Old World brought humans in close, regular contact with ancestral forms of these diseases (see COLUMBIAN

EXCHANGE). Centuries of contact allowed mutations to cross between species and to humans. Given that relatively few animals were domesticated in the New World, the species barrier remained largely intact there, with relatively few diseases jumping from animals to humans.

Second, geographic variation limited the diffusion and migration of indigenous diseases, since pathogens, like all living organisms, evolve under specific climatic conditions. Broadly organized on the north-south axis of the Americas, where the altitude and climate vary widely, pre-Hispanic societies were often spread over different zones. The Aztec Empire, for example, included both the tropical lowlands of Central America and the high-altitude deserts of the U.S. Southwest (see AZTECS). To spread throughout the empire, the pathogens responsible for any disease would have had to withstand the heat of deserts, the cold of mountains, and the humidity of jungles. Furthermore, some pathogens depend on biological hosts that exist only in specific environs. For example, malaria can only be transferred to humans from mosquitoes, which live only in tropical conditions.

Our understanding of disease in the Americas before the arrival of Europeans is informed mainly by archaeological, iconographic, and epigraphic data. This reveals that American populations suffered from a host of ailments that can be broadly divided into three groups: congenital diseases, localized infections, and acute diseases. Burial sites in PERU, for example, detail the presence of tuberculosis in the Americas. Carved reliefs from MEXICO depict people with degenerative bone disorders.

A host of congenital diseases—broadly defined as degenerative ailments stemming from inherited traits—afflicted indigenous populations. Evidence of such diseases is easily identified in Classic-period (250–900 c.e.) Mesoamerican sculpture. Depictions of royalty from the city of Palenque during the seventh century show cases of acromegaly (enlarged facial bones) and polydactyly (extra digits) among several ruling families. These conditions did not hinder normal activity, nor did they pass between nonfictive relations. Palenque's lord Pakal, who led a massive period of expansion and reigned for more than 40 years, had an enlarged forehead and nasal bones.

Localized infections often stemmed from environmental conditions and often resulted in developmental disorders. Malnutrition or an imbalanced diet was the cause in many cases. Respiratory and gastrointestinal infections appear frequently in the archaeological record. For instance, Peruvian mummies from the 10th century show clear evidence of fatal cases of tuberculosis. While often deadly, such infections tended to affect individuals and generally were not contagious. Acute pathogens, on the other hand, could infect large populations, and variations of typhus, malaria, and syphilis were all found among pre-Hispanic populations. While many New World societies were concentrated in densely populated areas, these diseases do not appear to have spread beyond

specific regions because of their geographic limitations. And while particularly the origins of typhus, malaria, and syphilis have been the subject of debate among scholars, most agree that variations of these diseases may have developed in both the Old and New Worlds. Syphilis, for example, seems to have evolved as a disease spread by topical contact in the New World, while in the Old World it was spread through sexual interaction.

The Nahuas of Central Mexico believed that illness was caused by a lack of equilibrium in the individual or society. Sickness was thought to be caused by many factors, including religious impropriety, sexual transgressions, extreme emotions, and physical stress (see RELIGION). The heart and soul, called *teyolia* in NAHUATL, were believed to be intertwined and were the keys to controlling disease and curing it. Sexual conduct with a person outside of one's social class could thrust one into a phlegm-ridden illness. Transgressions of this sort threatened the broader social order, and not surprising, recovery involved restoring harmony through sacrifice and penance. Another important concept in the Nahua ideology of disease involved disembodied life forces called *tonalli*, which were represented as spirit or animal companions that people had to appease. The spiritual essence of the *tonalli* was believed to reside in supernatural and natural spaces; disturbance of these spaces resulted in illnesses that correlated to specific sites on the human body. Finally, human life was thought to emanate from luminous gases called *ibiyotl*, which were powerful enough to both cause illness and heal sickness. Individuals who maintained social and personal balance were thought to give off beneficial emanations, while the ill gave off mal airs. Curing the infirm itself often involved pungent remedies.

### EARLY COLONIAL LATIN AMERICA

The arrival of Europeans in the Americas initiated the most devastating series of endemic outbreaks of disease and demographic decline in human history. Diseases that evolved alongside humans in the Old World ravaged susceptible populations in the New World, transforming the social, political, and economic landscape. With basic social and political institutions weakened, the way was open for CONQUEST and exploitation. The Spanish apologist and chronicler BARTOLOMÉ DE LAS CASAS wrote that with the conquest came “illness, death and misery” (see CHRONICLERS).

In the century that followed the arrival of Europeans, native peoples fell victim to a host of highly communicable Old World diseases, including bubonic plague, hemorrhagic fever, influenza, measles, smallpox, and typhus. The outbreak and spread of disease among susceptible groups—referred to as “virgin-soil epidemics”—reduced indigenous populations by anywhere from 50 to 90 percent over the course of the 16th century. While before the arrival of Europeans the Amerindian population had numbered between 60 and 100 million, by the close

of the 16th century, fewer than 10 million indigenous inhabitants remained.

A new disease affected everyone in indigenous society; old and young alike fell ill. Genetic weakness or biological inferiority had nothing to do with this, as concluded by some 19th-century imperials. The simple truth was that the native population lacked exposure to Eurasian diseases and so was not resistant to them. Moreover, many were already weakened by malnutrition, poverty, and overwork. Europeans, on the other hand, had built up their resistance to disease through exposure from a young age. They therefore might be passive carriers of a disease. And when they fell ill, the results tended to be less severe.

Although poorly understood by both native people and colonialists at the time, the introduction and spread of disease followed clearly identifiable patterns. First, diseases traveled along both human and animal corridors. With Old World settlers and their livestock came new diseases with variant strains. Some pathogens, such as smallpox and measles, were spread through person-to-person contact, while others, such as bubonic plague, spread through animal vectors. The earliest epidemic, which followed the arrival of the first European settlers in 1493, passed from animals to humans and then between humans. Old World livestock, particularly hogs, sparked the first outbreak of influenza among the native inhabitants of the island of HISPANIOLA (present-day Haiti and Dominican Republic). The sickness spread rapidly through both the island and region.

Second, disease often outpaced European contact. For example, in 1518, a Spanish ship touched ground along the coast of Yucatán; the vessel carried a slave who was infected with smallpox. The disease passed from village to village as indigenous communities communicated and traded (see TRADE). As a result, smallpox epidemics erupted in GUATEMALA in 1519 and in the Andes in 1524, years before the arrival of Spanish explorers. According to a MAYA chronicle of Guatemala, 1519 was a year when “First there was a cough, then the blood was corrupted.” The next two years became known as the time that “the plague spread.” When the Spaniards arrived, they encountered native communities already at war with Old World pathogens.

Third, virgin-soil epidemics touched entire native communities, regardless of sex, age, or social class. On the mainland, smallpox struck first. In 1520, the disease known as *buey zabuatl*, or “great spots,” in NAHUATL reached TENOCHTITLÁN (present-day MEXICO CITY) and quickly spread throughout the city. “There came to be prevalent a great sickness, a plague,” remembered an indigenous witness. “All were covered with pustules that were spread everywhere—on the face, on the head, on the breasts. . . . No longer could they walk, no longer could they move. They could not even turn their heads. They could not lie on their sides, belly, or on the back. And when they moved, they screamed.”

Fourth, sociogeography influenced the rates of decline and recovery. In tropical, densely populated areas, including the Caribbean and mainland coasts, indigenous communities declined at rates that in some instances approached 100 percent. The speed and scale of decline left affected communities permanently debilitated, and the great majority never recovered. On the island of Hispaniola, for example, the native TAINO were virtually extinguished by 1590. In tropical, moderate to highly populated areas, such as the Yucatán and Central America, indigenous communities experienced slow but sustained population loss. Epidemic diseases occurred less frequently but consistently took their toll. Although the Yucatán was first New World site of smallpox, the native population continued to suffer from epidemic eruptions well into the 19th century. In temperate, densely populated regions, such as the Valley of Mexico and the Andes, indigenous societies suffered dramatic and widespread population loss during the initial outbreak of a disease; however, as the colonial period advanced, they slowly recovered. Large populations living in close proximity both sped the decline and promoted resistance. Epidemics may have spread through CITIES at staggering rates, but often they did not tear down the social institutions that supported the sick and infirm. Elite indigenous families, for example, continued to hold positions of authority in spite of suffering losses. Local populations in these areas proved to be the most resilient and eventually recovered from the series of epidemics.

Finally, diseases became regular and devastating occurrences. In the Valley of Mexico, indigenous and Spanish sources recorded the regularity of outbreaks, beginning with *huey zabuatl* (smallpox) in 1520. Successive epidemics included *sarampión* (measles) in 1531, *zabuatl* (a type of pox) in 1532, and a ravenous and highly destructive disease called *cocoliztli* (hemorrhagic fever) from 1545 to 1548. *Paperas* (mumps) erupted in 1550, followed by a general plague of nosebleeds, coughing, and skin abscesses in 1559 and 1550, *matlaltotonqui* (green fever) in 1563, and the return of *cocoliztli* from 1576 to 1580. While smallpox and measles claimed the most victims, the two outbreaks of hemorrhagic fever illustrate the pervasive, all-encompassing nature of epidemic disease. Weakened by the depopulation during the previous decades, hemorrhagic fever consumed the Valley of Mexico in both the late 1540s and 1570s. Spates of disease were sparked by a combination of factors: intense demands for native LABOR and several years of drought and pestilence had limited agricultural production, which led to widespread hunger (see AGRICULTURE). Normal relationships of reciprocity, such as caring for the ill, fell by the wayside as individuals struggled to meet even their most basic needs. A witness to the epidemic opined: “It is the nature of this illness that it causes great pain at the mouth of the stomach and comes with fever all over

the body. Death arrives after six or seven days.” The psychological effects of these epidemics bore a heavy burden on indigenous people. Birthrates plummeted to nearly half of their preconquest rates, and colonial officials battled against infanticide.

The combination of epidemic diseases, WARFARE, economic exploitation, and environmental crises left many indigenous societies in a state of near or total collapse (see ECONOMY). Three hundred years after the arrival of Europeans, the Maya of Yucatán mourned: “. . . the mighty men arrived from the East [and] they were the ones who brought disease. . . . they wrote the charge of misery. . . . the introduction of Christianity occurs; blood-vomit, pestilence, drought, locusts, smallpox, and the importunity of the devil.”

See also EPIDEMICS (Vol. II); MEDICINE (Vol. III).

—R. A. Kashanipour

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## Dominican Republic See HISPANIOLA.

**donatary captaincies** During the first 30 years after the discovery of BRAZIL in 1500, the Portuguese Crown largely neglected the development and colonization of the new land (see CONQUEST). Preoccupied with its imperial aims in Asia, the Crown used Brazil primarily as a stopping place during the lengthy and dangerous journey to India. Accordingly, the first Portuguese to settle in Brazil were for the most part petty merchants, shipwrecked castaways, and penal convicts. The French, however, began to make inroads along Brazil’s coasts in the 1520s in an effort to control the TRADE in Brazilian dyewood, which was becoming increasingly important in European markets (see DYES AND DYEWOOD). In response, the Portuguese Crown determined that the new land would have to be settled in a more systematic way if it were going to remain Portuguese. Accordingly,

in 1534 King John III introduced donatary captaincies to Brazil.

Under the new system, Brazil's coastline was divided into 14 jurisdictions, or captaincies, with northern and southern borders that were separated by a fixed distance (generally between 90 and 300 miles) and extending indefinitely into Brazil's western interior. Each captaincy was assigned to a donatary (*donatário*), or lord proprietor, who was awarded certain privileges pertaining to colonization and settlement, including the right to establish towns, enforce laws, levy taxes, and receive tithes. The new system was based on earlier Iberian traditions—especially grants of feudal lordship in medieval Portugal—but was modified to meet Portugal's imperial aims in the Atlantic. The same system had been used in the settlement of Madeira, the Azores, and the Cape Verde Islands and reflected the limited resources of the Portuguese state at this time; in essence, it shifted the burden of colonization from royal to private interests.

If the Crown had high hopes for the captaincy system in Brazil, it was soon disappointed. Many colonists felt they were unjustly ruled by their *donatários* and soon denounced them. Rocky relations between Portuguese settlers and indigenous groups further contributed to the system's decline. Some captaincies, moreover, were never settled by their *donatários*, while others were left in various states of abandon. Of the original 14 captaincies, only two—Pernambuco and São Vicente—ever met with a measure of success, due largely to favorable indigenous relations and the introduction of sugarcane in the 1530s and 1540s (see SUGAR). Within a generation, it was apparent that the Crown would have to play a more active role in the colony's affairs if Portugal were not to lose control of Brazil to other European powers. Consequently, in 1549, the Crown sent Tomé de Sousa to serve as Brazil's first governor general; Sousa established the seat of royal government in the city of Salvador da Bahia. Although vestiges of the original 14 donatary captaincies remained for the next 200 years, the system itself effectively came to an end in the mid-16th century, as the Crown reasserted its control over the colony.

See also CAPTAINCIES GENERAL (Vol. II).

—Erik Myrup

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**dyes and dyewoods** Evidence of the use of dyes and dyewoods (varieties of wood used to dye TEXTILES, CERAMICS, and other items) prior to the arrival of Europeans has been found all over the Americas. The indigenous mastered the art of dying, and, in fact, dyes and dyewoods were often used as a form of tribute during the colonial period. The immense influence that dyes and dyewoods have had on global trade has been somewhat overlooked, though many of them are still in production. Indigo was perhaps the most important colonial export, behind SILVER; and cochineal was one of the most expensive. Indigo, *palo de Campeche*, cochineal, and brazilwood were all highly important to the European textile industry.

The extensive indigenous knowledge of natural dyes is often attributed to their ceremonial and medicinal value (see MEDICINE). While cultures outside of America often incorporated colors into certain hierarchies, the peoples of the New World saw them more often as universal. Colors were commonly associated with the cardinal points; red and white signifying the east or west, depending on the culture, blue signifying the south, and black the north. In some cultures, the color red represented fire, sun, or blood.

In his 16th-century chronicle, the Florentine Codex, the Franciscan friar BERNARDINO DE SAHAGÚN detailed the depth and complexity of indigenous knowledge of dyes (see CHRONICLERS). Written and compiled between 1547 and 1558, the codex described many of the processes and materials used in MEXICO and Central America. It discussed many unique dyes, as well as tempering agents. The dyes were used primarily for coloring textiles but also in other applications, such as to color pottery. Indigo, for example, could be used as a dye or as paint. Some of the more familiar dyes, dyewoods, and blends were the following:

#### Dyes, Dyewoods, and Blends

COLOR	COMMON/ENGLISH NAME(S)	INDIGENOUS NAME(S)	SPANISH NAME(S)	SCIENTIFIC NAME
Red	Cochineal/carmine	Nocheztli	Cochinilla, grana cochinilla	<i>Coccus cacti</i>
Red	Logwood	Hitzcuahuitl, huiscahuite	Palo de Campeche	<i>Haematoxylum campechiana</i>
Yellow	Ochre	Tecozahuitl	Ocre	iron oxide
Blue	Indigo	Tlachehuilli, xiuhquiltl, jiquilite	Añil	<i>Indigofera suffruticosa</i>
Green	Cochineal and alum	Quiltic		

Pre-Columbian textiles, particularly early examples, are rare and often poorly preserved; nonetheless, the evidence suggests that indigenous groups from Mesoamerica to the Andes possessed remarkably varied palettes and created some of the finest textiles of anywhere in the world. Ancient specimens revealing resist-dyeing techniques, such as batik and tie-dye, have been unearthed at several sites in PERU, demonstrating not only the prolonged existence and use of dyes but also the mastery of advanced techniques.

Many dyeing techniques might have been lost had it not been for their economic value (see ECONOMY). The collection of cochineal, for example, is a difficult and time-consuming process. It is one of very few dyes made from an animal rather than a mineral or plant. The cochineal insect nests in the nopal cactus; in order to use it as a dye, it must be collected, boiled, dried, and otherwise processed. Indigo, because it is not water soluble, is likewise difficult to work with, yet it also was used for

many purposes by the indigenous Americans. The use of pre-Columbian dyes, especially indigo and cochineal, has continued not only because of their unique properties and inimitable hues but also because of their global economic success and sustained value.

See also BRAZILWOOD (Vol. II); COCHINEAL (Vol. II); INDIGO (Vol. II).

—Tyler Morell

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## economy

### THE CARIBBEAN BEFORE 1492

The first inhabitants of the Caribbean islands, a cultural group known as the Archaic or Guanahatabey, were hunters and gatherers who likely arrived from FLORIDA or the southeastern United States. They did not produce CERAMICS or practice AGRICULTURE but did possess the skills to navigate the sea passages between the islands in search of raw materials and FOOD (such as mollusks and fish). The Caribbean ecosystem lacked large land animals, so hunting was limited to birds, reptiles, and different species of *jutía*, an indigenous rodent. Sea mammals such as manatees, the now-extinct Caribbean monk seal, and dolphins were also hunted for their meat, bones, and teeth.

Current archaeological evidence indicates that agriculture came to the Caribbean with immigrants from the Orinoco delta area in northern South America. These new arrivals, who belonged to the Arawakan linguistic family and were known as the Igneri or Saladoid, cultivated tuber crops such as MANIOC (also known as cassava or yucca), the batata, or sweet POTATO, and MAIZE. Manioc was grated to make a starchy flour, which was used to make *casabe* bread. The Saladoid peoples also grew *ají*, or hot peppers, COTTON and TOBACCO, as well as other plants for fibers, medicinal purposes, and dyes (see DYES AND DYEWOOD; MEDICINE).

TRADE appears to have been an important component of Saladoid economic activity. Raw materials as well as finished products made from stone, seashells, and presumably other perishable plant and animal goods were traded between villages and islands. Saladoid ceramics were decorated in hallmark white and red paint patterns and were also traded.

Recent archaeological records indicate that the Saladoid trade networks were extensive, stretching from Central America to the northern coast of South America. Ax heads and celts made of jadeite from the Motagua Valley in GUATEMALA have been found on the island of Antigua. Non-native peccary and jaguar teeth, together with condor-shaped carved figurines made from South American turquoise and jadeite, have been discovered at the La Hueca site on Vieques Island.

The Classic TAINO or Arawak culture, which arose from the Saladoid culture and later South American influences, saw the development of new agricultural practices, stone carving, and ceramic traditions. Economic activities were allocated according to gender and age. WOMEN undertook most of the productive work, including food preparation, making of pottery and textiles, and most domestic activities. Activities such as farming, hunting, fishing, trading, and the manufacture of weapons, tools, and ritual objects were male occupations.

Taino agricultural practices were adapted to the terrain and climate of the Caribbean. For example, in the Xaraguá region of the Dominican Republic, the Taino built terraces to farm hillside plots and developed irrigation techniques for their *conucos*, or fields. Spanish accounts describe extensive *conucos*, with hundreds of thousands of cassava plants.

Fishing continued to be an important activity, with intensive exploitation of tidal and mangrove areas. The production of cotton textiles, with dyed design and featherwork, was widespread. The Taino also introduced metalwork to the Caribbean. Naturally produced GOLD-SILVER or gold-copper nuggets, known as *caona* or *tumbaga*, respectively, were cold hammered to produce ornaments such as the *guanin*, or gold disk, that was



worn by the *CACIQUE* or village chieftain as a symbol of authority.

Society revolved around the village, or *yukayeke*. The typical Taino village consisted of the *cacique*, supported by *nitainos*, or nobility, with the *naborías*, or commoners, forming the bulk of the population. The *behique*, or spiritual leader, and skilled artisans who produced goods for trade and for the elite also enjoyed special positions within the village. There were regional polities in which a *cacique* was recognized as the overlord of a number of autonomous *yukayekes*. While the Taino did not develop *CITIES*, they did build large ceremonial centers, or *bateyes*, that consisted of plazas and ball courts lined with large stone monoliths, many of which were carved with petroglyphs. The inhabitants of neighboring villages gathered at these *bateyes* for religious celebrations and to conduct trade (see *RELIGION*).

Interisland sea trade and communication links were maintained by the Taino, whose canoes were made from trees trunks and could carry up to 80 passengers, or a sizable cargo. Trade was conducted by *nitainos* with access to surplus foodstuffs, raw materials, and other valuable goods, although there is no evidence for a specialized trader class. Nevertheless, some regions and even islands were renowned for certain products. For example, the inhabitants of the small island of Mona produced an especially fine type of *casabe* bread, reportedly only for the *caciques* in neighboring *HISPANIOLA* and *PUERTO RICO*.

Despite adverse sea currents, there is some evidence of direct sea contact and perhaps trade between the Taino and inhabitants of Mesoamerica. *BARTOLOMÉ DE LAS CASAS* reported seeing beeswax, presumably from Yucatán, in *CUBA*. *BERNAL DÍAZ DEL CASTILLO* encountered a Taino woman from Jamaica, held captive by the *MAYA* of Cozumel. One Taino artifact, a manatee bone spatula, was found at the Classic Maya site of Altun Ha in *BELIZE*.

The Taino shared the eastern Caribbean with the Caribs, a distantly related group that also migrated from northern South America. Early European explorers remarked on the Caribs' aggressiveness and practice of *CANNIBALISM*. The Caribs inhabited both islands of the eastern Caribbean, as well as the mainland in what is now *GUYANA*. They maintained an extensive sea trade network, connecting their island outposts with South America. Carib society was in many ways similar to that of the Taino: They shared an economy based on the production of manioc and other agricultural products, supplemented with fishing, hunting, and gathering. The Caribs also produced excellent textiles and were skilled ceramists; however Carib society was uniquely organized around raiding neighboring nations and enslaving the inhabitants (see *SLAVERY*).

Among the Carib males, power and status were rewards for courage and success in *WARFARE*. While women (both native Carib and enslaved Taino) took care of the crops, produced utensils and textiles, and cared for the children, the men dedicated their time to hunting, fishing, and building and mending their canoes. Carib villages did

not have a structured hierarchy. Rather, individual males with enough prestige and influence could mobilize the village for a particular purpose, such as launching a seagoing canoe or planning a trading voyage or raid.

Enslaving expeditions provided the Caribs with captives, who formed a large portion of their workforce. Generally, male prisoners were killed and ritually consumed, while females became the concubines of successful warriors. There is evidence, however, that the Caribs also traded with their neighbors. The large tree trunks used by the Caribs to make their canoes were available only on the larger islands inhabited by the Taino. The Caribs also traded for metals, foodstuffs, and textiles with the Taino and with groups on mainland South America.

## MESOAMERICA BEFORE 1492

Cities and trade played prominent roles in Mesoamerica's pre-Columbian economy. Trade can be traced back to Mesoamerica's distant past, preceding even the establishment of settled societies with permanent agriculture. Variations in the availability of raw materials and the type of agriculture practiced gave rise to distinct local economies; thus, trade was crucial to supplying resources that were not available locally.

The rise of Mesoamerican city-states led to an expansion in the volume of trade. As urban centers with large populations consumed more goods, regional exchanges grew into long-distance trade networks that extended throughout Mesoamerica and beyond. Trade helped to integrate Mesoamerica's dispersed economic areas, and as a result, a change in the economic conditions in one area could have far-reaching consequences in another. Trade also helped promote a more stable supply of essential goods and generated wealth, which, in turn, further stimulated artisan production and the market. Prosperous cities embarked on monumental public *ARCHITECTURE* projects such as the pyramids of *TEOTIHUACÁN*, which further contributed to the economy by requiring *LABOR* and materials collected through trade or tribute. Prior to the Spanish *CONQUEST*, Mesoamerican societies such as the Aztec Empire (see *AZTECS*) had complex and highly regulated economies characterized by vibrant markets, specialist artisan production, slavery, compulsory labor drafts, and the receipt of tribute from conquered communities.

Agriculture formed the basis of Mesoamerica's economy. *NATIVE AMERICANS* practiced different kinds of agriculture, depending on factors such as topography and climate. In arid or tropical areas that were poorly suited to permanent agriculture, people relied on hunting, gathering, and fishing to supplement the *FOOD* they cultivated. To further bolster food supplies, people domesticated and raised animals such as turkeys, small dogs, and bees. Some communities relocated to follow the seasonal availability of food. Others moved in a regular cyclical fashion, as, for example, those who practiced slash-and-burn agriculture. While cultivation techniques could

vary considerably, most people ate a staple diet of MAIZE, beans, and squash, supplemented by other local foods.

In areas of intensive, permanent agriculture, Mesoamericans employed generally similar forms of land tenure. Households owned plots of land, or *MILPAS*, which typically passed to subsequent generations through inheritance. Beyond household plots, there were community-owned lands set aside for the group's subsistence and to provide tribute in the form of food to religious and political elites. Dynastic rulers, nobles, and religious officials also had their own lands, particularly in larger and more socially stratified communities. These plots were tended by commoners, often in exchange for their own rights of access to land. In city-states, slaves captured in war also provided agricultural labor.

Permanent agriculture provided a basis for the rise of complex societies in Mesoamerica. Beginning with the Olmec civilization, which developed along the Gulf coast after 1500 B.C.E., city-states contributed to economic expansion and diversification. Large urban centers such as Teotihuacán (250 B.C.E.–750 C.E.), which arose after the decline of the OLMECS, were established in areas with fertile, rich soils and supplies of freshwater. Teotihuacán's irrigation network helped support the city's vast population, estimated to have been about 200,000 people at its height. Food surpluses in city-states contributed to greater social stratification. Slaves occupied the lowest level in society and lived apart from commoners and elites. Typically, commoners worked as farmers, artisans, and/or merchants, while the elite obtained their social position by fulfilling political and religious functions.

As cities grew in size and wealth, they embarked on the construction of monumental architecture. This included the famous basalt heads of the Olmecs and the pyramids of Teotihuacán and TIKAL, among others. City-states depended on complex labor arrangements to support these public works projects. At the household level, men worked as farmers or in trades, while women reared children, maintained the home, and raised crops and wove fabrics both for their families and for sale in local markets. Women also managed household income and often were responsible for meeting the FAMILY'S tribute obligations. Beyond these daily tasks, households periodically came together to perform joint labor duties, as in times of harvest or in gathering essential materials such as wood. Residents also participated in public works projects, both at the village level and for larger polities. Although slaves supplied unskilled labor in cities, artisans and farmers also contributed to construction projects through rotational labor drafts. Highly skilled stone masons and sculptors were particularly important in the building of rulers' palaces, temples, and pyramids.

With the rise of city-states and the expansion of their spheres of influence, trade came to occupy an increasingly important place in Mesoamerican political and economic life. The Olmecs influenced both the societies that succeeded them and neighboring Mesoamerican areas. This

cultural influence can be seen in the monumental architecture of ceremonial centers, as well as graphic writing systems and the adoption of long-distance trade. The Olmecs established formal trade mechanisms and developed markets for their goods; for instance, they exported rubber balls to groups that had adopted their ceremonial ball games. The Olmec legacy of regional and long-distance trading continued through the Classic period (ca. 250–900 C.E.) in city-states such as Teotihuacán and MONTE ALBÁN.

Because Mesoamerican communities relied on long-distance trade for much of their prosperity, economic dislocation in one place could have profound consequences elsewhere. The demise of Teotihuacán destabilized the economy of Maya areas, for example, fragmenting trade networks and thus interrupting the supply of OBSIDIAN and other valuable commodities from Central MEXICO. Such upheaval heightened rivalries between Maya city-states, precipitating warfare and enabling other urban centers to rise to dominance. Scholars argue about the causes of decline in Classic-era Maya kingdoms, proposing variously famine, DISEASE, or internal conflict, but diminishing trade may also have been either a cause or a symptom of the decline. The vacuum in long-distance trade was filled by the rise of the TOLTECS in Central Mexico (900–1150) and with them came a degree of economic revitalization in the Maya areas. For example, CHICHÉN ITZÁ rose to prominence as a commercial center at this time.

In Mesoamerica, goods were transported by human carriers because of the absence of draft animals. Rugged topography hindered long-distance transportation, as did problems of food supply. Because they had to employ people to carry goods, merchants preferred to trade lightweight and luxury goods that could command high prices. Obsidian remained a valuable commodity both because of the strength it lent to tools and its limited supply. The trade in obsidian thus underpinned regional and long-distance exchanges. Merchants turned to canoes as an efficient and affordable form of transportation on lakes and the few rivers that could be navigated. Canoes varied in size, from small craft to seafaring vessels more than 40 feet long. Larger canoes could transport considerable loads of goods and many passengers. The Maya switched to overseas transportation in the face of interruptions to overland trade after the demise of Teotihuacán. Cozumel became an important trading center for coastal transportation. The Maya dominated trade with markets as far away as the Valley of Mexico and the Gulf of HONDURAS. Some scholars argue that Mesoamerican trade extended as far north as modern-day New Mexico and perhaps as far south as COLOMBIA, or even PERU.

Trade occupied a crucial place in Mesoamerica's economy because people could generally obtain only a portion of the goods they needed locally. There were considerable variations in the availability of resources across different parts of Mesoamerica. Salt extraction, for example, was a mainstay of the economy in coastal

regions in northern Yucatán. Obsidian deposits were confined mainly to the Pachuca area of Central Mexico and the highlands of Guatemala. Among metals, copper, gold, and iron ore (used to make mirrors) were found in western Mexico and Oaxaca. Tropical areas supplied other luxury items such as quetzal feathers and jaguar pelts. Coastal, lowland areas specialized in the cultivation of cotton, vanilla, CACAO, rubber, lime, and honey. By contrast, highland areas typically relied for their income on cochineal (see DYES AND DYEWOOD), textiles, and stones such as jade and turquoise fashioned into tools or jewelry.

The diversity in the location of raw materials also promoted specialization. Some communities were known for their trade specialties, for instance, the Mixtec metalworkers and Zapotec potters (see MIXTECS; ZAPOTECs). Indeed, elites from distant cities sometimes recruited esteemed artisans; thus, Zapotec craftsmen formed their own neighborhood in Teotihuacán. Throughout Mesoamerica, artisans usually lived in separate communities. They formed their own wards in larger polities. In Central Mexico, Xochimilco was renowned for its CHINAMPA agriculture, canoe making, and carpentry, while stonemasons, lapidaries, and tailors contributed to nearby Texcoco's prosperity. Artisans constituted a distinct social group in these polities. Skills tended to remain within the same families, with offspring commonly inheriting their parents' trades. Mesoamerica's artisans included carpenters, stoneworkers and sculptors, potters, basketmakers, weavers and tailors, and sandal and reed makers. In larger communities or those catering to lucrative urban markets, some artisans specialized as lapidaries, metalworkers, featherworkers, and papermakers. Painters and scribes provided their services to communities too, as did musicians, healers, scholars, priests, and warriors.

Artisans obtained raw materials and sold their finished goods in various types of markets. Marketplaces in village plazas catered to most people's daily needs, while regional markets offered a wider range of products. Transactions took place through commonly recognized means of exchange, such as cacao beans. Cacao beans functioned as a currency throughout Mesoamerica, although other acceptable currencies included copper axes and textiles, particularly cloaks. Native Americans coveted textiles as valuable items because their manufacture involved a considerable investment in highly skilled labor. Obsidian, jade, salt, and shells were also exchanged in commerce, particularly in Maya areas.

At the summit of regional commerce lay the city-state in whose marketplaces were sold commodities imported from throughout Mesoamerica. Government officials supervised the operations of these markets, ensuring that exchanges conformed to strict rules regarding prices and weights and measures. The preeminent market of Mesoamerica in the immediate precontact period was Tlatelolco, located in the island heart of the Aztec Empire. At the time of conquest, Spanish observ-

ers commented on Tlatelolco's orderliness, the immense number and range of goods, and its remarkable size, with thousands of customers visiting each day. Such was Tlatelolco's grandeur that the conquistador Bernal Díaz del Castillo wrote that several soldiers in his company, who had visited Constantinople and Rome, claimed they had never seen such an impressive marketplace.

Long-distance merchants delivered goods to markets such as Tlatelolco. Like artisans, merchants constituted a distinct, hereditary group with their own corporate organization. They occupied an intermediary place in society, neither commoner nor elite, although some Maya merchants approached the upper social ranks. Merchants maintained communities in distant lands and became agents for commercial exchanges and political relations. The *POCHTECA*, or long-distance merchants in the Aztec Empire, acted as ambassadors, establishing ties with trading partners. Indeed, the *pochteca* functioned as a kind of vanguard for Aztec imperial expansion, providing intelligence about economic, political, and military conditions that could assist in conquests and the formulation of state policies.

The size and complexity of urban economies called for careful planning and regulation. This proved especially important in supervising markets, labor recruitment, and securing essential resources through tribute. To this end, the Olmecs established regular land and river transportation routes while also building strategic settlements at the perimeter of their territory to promote defense and trade. Similarly, Teotihuacán's rulers pursued expansionist policies designed to monopolize the supply of obsidian. City-states frequently sought to extend control of their hinterlands. For the Aztecs, strategic marriages, military alliances, FLOWER WARS, and conquests formed part of a complex political economy that was bound up with imperial expansion and dominance.

## SOUTH AMERICA BEFORE 1492

Due to its extreme variations in climate and physical geography, South America has many different economic systems. Braced between the Andes mountain range and the AMAZON River and its tributaries, South America features some of the world's most fecund, as well as most difficult, terrain. Vast arid plains consume huge swaths of land, most notably in modern-day ARGENTINA, BOLIVIA, CHILE, Peru, and URUGUAY. While common latitudes give rise to similar climates throughout much of the world, in South America, latitudinal variations have produced a rich diversity of ecosystems. The enormous altitudinous and latitudinal differences made travel and the introduction of technology exceptionally difficult, which was key in shaping of South America's economies. Sophisticated economic systems, most notably in the Andes, developed to overcome these impediments; they incorporated many of the traits that economists now praise, including division of labor, specialization, and long-distance trade networks. Finally, refinements to and expansion on the accomplishments of previous civilizations often enabled

later civilizations to enjoy increasing levels of economic wealth prior to the arrival of Europeans.

The mixed blessing of geography produced disparate economies. Where larger and more sophisticated political systems emerged, economies were able to thrive by taking advantage of what economists now term *specialization*. Rather than everyone trying to produce everything, producers focused on a narrow range of products, according to their skills and abilities. In other areas, the inability of political regimes to coopt isolated producers stymied efficiency, leaving economies small and static. Therefore, by 1492, while some economic systems in South America were as sophisticated as those in contemporary Europe, others were more rudimentary, with nomadic foragers in the southernmost parts of the continent and more basic agricultural and farming economies elsewhere.

Still, even advanced South American economies differed in two salient ways from those in Europe. First, while many South American ethnic groups used metals to craft jewelry, metals were not widely used to make tools. Second, the European “beasts of burden” were never used in agricultural production in South America. Instead, due to the steep terrain of the Andes and the inability to adapt the wheel (which was used in several societies in building toys and the like) for transportation, animals such as the llama and alpaca were used mainly for transportation purposes. Given these limitations, it is no surprise that road systems were more complete and complex in high-altitude areas where the chief animal of transportation, the llama, thrived.

Although animals were for the most part not used in farming in South America, water-borne transportation systems and terracing for irrigation enabled long-distance trade and economic development. The majority of South American economies were characterized by a domestic mode of production; hence, self-sufficiency, developing plots of land for food, and manufacturing cloth and utensils were the cornerstones of economic activity. Gender-determined roles were prevalent in many daily activities, but given the number of tasks that required more than a single family to complete, such as construction and harvesting, communities tended to be made up of kin-based networks (see *AYLLU*). As a result, land and resources were viewed largely as communal.

Semipermanent agriculture-based economies built around the cultivation of tubers, beans, and cotton (crucial for the construction of fishing nets) began to emerge in South America at least 4,000 years ago. In economic terms, the most significant of the incipient settlements in the Americas was the Norte Chico civilization, which consisted of more than two dozen population centers in north-central Peru. Centralized control of the Norte Chico economy almost certainly emanated from an inland site, although two coastal sites indicate that trade networks were in place. The production of cotton and edible plants dominated economic activity, while bartering guaranteed the flow of goods. Norte Chico was less remarkable for

its economic dynamism than for the expansive reach of its economy (it included many of the high plateaus of the altiplano) and for laying the foundation for Andean trade that flourished in subsequent civilizations.

The establishment of communities along the Pacific coast of South America was aided by the incorporation of fish into the food supply; it provided much-needed protein into settlers’ diets and facilitated permanent settlement. Communities in many lowland areas, which succeeded in domesticating only ducks, needed to hunt for game, which increased not only the rigors of daily life but stymied more permanent settlement and, hence, delayed the construction of infrastructure such as irrigation channels or roads.

The CHAVÍN civilization, which flourished along the Peruvian coast between 900 and 200 B.C.E., marked a high point of economic activity during the Early Horizon period and was instrumental in laying the foundations for later economic systems. The Chavín produced pottery and textiles in significant quantities, and their metallurgical skills were notably advanced. Cloth production was revolutionized during this time owing to their dedication to textiles, which they used both for individual and ceremonial purposes. The Chavín also developed a long-distance trade network, made possible by their domestication of the llama; this vast trade network extended north into Ecuador and south possibly as far as the northern coast of Chile.

The largest and most advanced pre-Columbian economic system in South America was that of the INCAS. Of course, the socioeconomic achievements of the Norte Chico, Chavín, WARI, TIWANAKU, and CHIMÚ, among other civilizations, laid the foundations for the Inca economy. Divided into four administrative sectors, the Inca Empire controlled more than a million square miles (2.59 million km<sup>2</sup>) of territory, with some 80 provinces composed of disparate indigenous groups. The Inca economy was controlled mainly by the state, which held large quantities of land and exercised significant control over the various modes of production and the redistribution of food, products, and even people (see *MITA*; *MITMAQKUNA*; *YANA*). The production of wool, cotton, and maize, for example, was mainly controlled by the state. The state could thus support a vast bureaucracy and maintain a large standing army; state-controlled resources were also used for ceremonial and martial purposes.

Cloth was the most prized product of Inca industry, and women were specially selected for weaving (see *ACLLA*). The main exception to state control was the cultivation of potatoes; households grew and harvested this vegetable in accordance with their needs. Though the Inca economy was advanced in many respects, a centralized monetary system was never introduced. Despite being perhaps the world’s only civilization to cultivate crops at altitudes higher than 9,000 feet (2,743 m), the Inca economy thrived because of its long-distance exchange networks, including more than 15 miles (24 km) of roadways, integration of various pockets of skilled

producers in different parts of the empire, and efficiency in addressing the basic needs of the citizenry.

Elsewhere, in the commodity-rich Colombian hinterland, the MUISCA flourished in the century prior to the arrival of Europeans. The mining of commodities such as coal, copper, gold, EMERALDS, and salt drove the economy. Coal, emeralds, and salt were in such abundance that they were used as de facto currencies. Other exchanges, for products from basic staples to luxury goods, relied on bartering. The Muisca's destruction, however, was sown into their commodity-driven wealth: Their inordinate amount of gold, as well as its prominent use in ceremony, inspired the myth of EL DORADO, which captivated Spanish audiences and incited numerous expeditions just over a century after their rise.

The asymmetric development of economic systems in South America before 1492 was largely a by-product of geography and the availability of natural resources. In seeking to explain certain pockets of economic advancement, scholars have termed the more sophisticated South American economies *archipelagoes*. Economic specialization in the archipelagoes of South America can be traced back to at least 2400 B.C.E. The predominance of ceramics and embroidered textiles in burial sites on the Peruvian coast that date as far back as 1600 B.C.E. indicates the development of a state system of politics and remarkably sophisticated specialization and connotes unusual wealth. Still, in most parts of South America, economic activity remained in a basic agricultural phase until well after the arrival of Europeans. Access to protein-rich fish and long-distance trade networks ensured that the most sophisticated economies emerged along the Pacific coast of South America and to a lesser extent in pockets along the Amazon and Orinoco Rivers. Expansive road systems, which were often built upon those of preceding civilizations, increased the likelihood of economic vitality. At the time of Spanish contact, the Inca Empire dominated much of South America, and its economy rivaled those of Europe in its breadth and efficiency. The extraordinary wealth of advanced economies in South America, however, served only to attract the interest of European conquistadores.

### EARLY COLONIAL LATIN AMERICA

The early decades of Latin America's colonial economy were dominated by the quest for precious metals, the accumulation and exchange of local products, and the control of indigenous labor. Of course, in much of the New World, pre-Columbian modes of production and exchange continued well into the colonial period; however, this does not imply that there were not fundamental changes for Native Americans. Initially, the first waves of Spanish conquistadores resorted to looting as a primary strategy for acquiring precious stones and metals. HERNANDO CORTÉS, for example, stole large quantities of Aztec gold during the early stages of the conquest of Mexico, only to lose it all when he and his men were forced to flee TENOCHTITLÁN during the Noche Triste.

In the conquest of Muisca territory, GONZALO JIMÉNEZ DE QUESADA and his band of 173 conquistadores pillaged more than 200,000 pesos of Muisca gold and more than 1,800 emeralds. And, most famously, following the capture of the Inca ruler ATAHUALPA, FRANCISCO PIZARRO and his men secured a ransom equal to more than 1 million pesos. Despite royal attempts to curb the practice, the early decades of the conquest witnessed extensive pillaging and looting of native gold, silver, food, and other products.

The prevailing economic doctrine of all the European powers was mercantilism, or the measuring of a country or empire's prosperity by the accumulation of wealth or capital. The most obvious wealth to come from the New World were the specie (coined money) of gold and silver. Official reports estimate that between 1500 and 1650, roughly 180 tons of gold and 16,000 tons of silver were sent from the New World to Spain; however, most of this wealth was generated after 1560, when silver production rose dramatically. Nevertheless, the search for precious metals helped to fuel the processes of exploration and colonization of the Americas.

Silver MINING in Mexico began less than a decade after the fall of the Aztec Empire, with the discovery of silver mines in Zumpango and Sultepec; these first strikes were followed by additional finds in 1534 at Taxco and Tlalpujahuá, also in Central Mexico. However, none of these mines matched the tremendous silver deposits discovered at Zacatecas in 1546; in fact, only the silver mines of POTOSÍ in Peru, discovered in 1545, yielded more silver than those of Zacatecas during the 16th century.

In addition to silver, South America offered large quantities of gold, particularly in New Granada, where gold mining began in the early 1540s in places such as Popayán and Antioquia. Still, the early colonial mining techniques used by Spaniards relied heavily on preexisting indigenous methods of extraction and refining. For example, the Amerindians of the Andes had longstanding traditions of mining, smelting, and refining metals. Moreover, early settlers depended almost exclusively on native labor, which became increasingly problematic as populations declined as a result of disease, exploitation, and MIGRATION.

For both the Spanish and Portuguese, another major source of revenue was obtained from the production of SUGAR. By 1503, the first sugar mill was built on the island of Hispaniola, and as the demand for sugar rose, along with its price, early colonists in the Caribbean responded. By the 1530s, there were 34 sugar mills on Hispaniola. As Spain expanded its colonial possessions into Central and South America, so sugar followed. The Portuguese also sought to profit from Europe's growing demand for sugar, and by the early 16th century, sugar mills had begun to appear in BRAZIL.

Also crucial to both the Spanish and Portuguese Empires was the exchange of dyes and dyewoods, which included indigo, cochineal, and brazilwood. The export of cochineal was second to silver in New Spain, reaching a yearly value of 600,000 pesos in value by the late 1500s.

Other important industries were shipbuilding, which began in PANAMA and other parts of Central America.

While there is no denying the importance of mineral wealth, sugar, dyes, and other commodities, the most important source of wealth in the early colonial period was human labor. In the early decades of conquest in the Caribbean, much of this labor was forced Indian labor. As indigenous populations dwindled, Spaniards increasingly looked to other islands and the mainland as potential sources of slave labor. This pattern began to shift with the major conquest campaigns of Central Mexico and South America.

With the discovery of large population centers in Mexico, Peru, and Colombia, Spanish conquistadores (with royal authority) issued *ENCOMIENDA* grants to their most loyal followers. An *encomienda* grant included Indians, who were required to pay the holder, or *encomendero*, an annual tribute (typically paid in two annual installments). The size of these grants varied from one region to another, but many included hundreds, if not thousands, of tribute-paying Amerindians. In Peru, for example, some *encomenderos* regularly yielded annual incomes of 5,000 to 10,000 pesos. Again, the source of this wealth varied between regions; some *encomenderos* received payments in gold or silver, while others were supplied with cloth, agricultural products, salt, or other goods, which they then exchanged for specie. *Encomenderos* regularly used their subjects for personal services as well, forcing them to build houses, work private lands, or watch over herds. In many cases, these labor services were uncompensated.

The *encomienda* system dominated the early decades of the colonial economy; in 1542, the Crown attempted to curb the abuses of the *encomienda* system by prohibiting the granting of new *encomiendas* and mandating the transfer of existing *encomiendas* to the Crown upon the death of the current holder. However, these efforts were met with violent resistance (see CIVIL WARS IN PERU), and the Crown was forced to delay its efforts to abolish the *encomienda* system. By the middle of the 16th century, the steep demographic decline, largely due to the introduction of Old World diseases, began to threaten the economic viability of the *encomienda* system. Increasingly, as the indigenous population declined, Spanish and Portuguese settlers turned their focus across the Atlantic in search of a vast and inexpensive source of labor. In 1518, the Spanish Crown issued the first *ASIENTO*, or slave-trading contract, to transport African slaves to the New World.

See also *ALCABALA* (Vol. II); *ALMOJARIFAZGO* (Vol. II); *ECONOMY* (Vols. II, III, IV); *MINTS* (Vol. II); *MONOPOLIES, ROYAL* (Vol. II); *QUINTO* (Vol. II); *SMUGGLING* (Vol. II); *WEIGHTS AND MEASURES* (Vol. II).

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**Ecuador** Ecuador has a rich pre-Columbian history that extends from Paleoindian times to the Spanish CONQUEST. Geographically, the country has been divided in three distinct regions: the coast, the sierra, or highlands, and the AMAZON. Its resources and strategic position on the Pacific coast between Mesoamerica and PERU have played an important role in exchange networks and the origin and transmission of different pottery, metalwork, TEXTILES, and stonework styles and traditions.

Early Paleoindian occupation dates to around 11,000 B.C.E. at sites located mainly in the highlands, such as El Inga. There, scholars have identified two lithic traditions: fishtail points and Clovis fluted points, as well other spear points such as Ayampitin-like (teardrop and laurel leaf-shaped) and Paiján-like points, and various stemmed points (see CLOVIS CULTURE). El Inga was a campsite and

workshop occupied by a mobile population who hunted megafauna. OBSIDIAN fishtail points have also been found at Tabacundo, Cayambe, Imbabura, and Quitoloma and basalt fishtail points at Tuquer, Chitán, and Tulcán. Barbed, lanceolate, and stemmed points and bone tools have been found at Chobsi cave and Cubilán. Obsidian points found at these highlands sites indicate an early regional trade with the coastal lowlands that extended from Mullumica-Yanaurco-Quicatola. Evidence of megafauna and associated human remains were found at Riobamba, and mastodon bones and stone tools have been found on the Santa Helena Peninsula.

Between 10,000 and 6000 B.C.E., the Las Vegas peoples inhabited various sites along the coast in Santa Elena Peninsula. After the extinction of the megafauna, these communities developed a diverse ECONOMY, exploiting marine, estuarine, and terrestrial resources. Between 8000 and 4000 B.C.E., they began to cultivate squash and root crops, and by 6000 B.C.E., they were cultivating MAIZE (see AGRICULTURE). Stone and shell tools were used for woodworking and in cultivation. These coastal communities lived in round houses. Their funerary practices, subsistence patterns, and stone tools have many similarities to those found in Cerro Mangote in PANAMA, suggesting early ties with Mesoamerican peoples.

Ecuadorian pre-Columbian inhabitants were among the first in the Americas to discover the mixture of clay, water, and fire that led to the invention of pottery, which started the Formative period around 5500 B.C.E. (see CERAMICS). Permanent communities that used Valdivia pottery at Loma Alta, Real Alto, La Emerenciana, San Pablo, Perinao, Punta Concepción, and Punta Tintina cultivated fields in the floodplains, using slash-and-burn agriculture. Along the coast, human populations fished, cultivated, and gathered plants and shellfish. At inland sites, they resided in U-shaped villages and dispersed hamlets, with oval houses built around a central plaza; these people also cultivated maize, squash, beans, and roots, which they stored in pits. To complement their diet, they later hunted terrestrial mammals, especially deer and other small game. Grounding stone tools such as *manos* and *metates* were used to process plant products. Sites that date back to this period also contained raised platforms, stone-faced terraces, and stone tools used to process COCA.

The Machalilla phase, or Middle Formative period, dates from around 2000 to 1000 B.C.E. Sites associated with this period have been identified in the sierra and on the coast and include La Plata, La Ponga, Cotollao, Chimborazo, Cañar, Loja, El Oro, Chanduy, Salango, and Cerro Narrio and in the Amazon region at Cueva de los Tayos. This period saw the intensification of maize cultivation, hunting, and fishing. Centers of ritual and exchange appeared in all three geographical zones, which helped to stimulate long-distance economic activity. The exchange provided exotic materials such as thorn oyster shells, pottery, turquoise, and lapis lazuli. These luxury

items were used by the elite as symbols of their religious authority and social prestige.

The Late Formative, or Engoroy-Chorrera, period (1000–500 B.C.E.) manifested at sites such as Chanduy, Palmar, Salango, Putushio, La Chimba, Chorrera, Engoroy, Cerro Narrio, Peñón del Río, Isla Plata, and the Guayas. It saw a further intensification of agricultural activity, particularly the cultivation of maize and beans, as well as fishing, shellfish gathering, and the hunting of small game, including rabbits and deer. It also saw the introduction of animals from the south, such as llamas and GUINEA PIGS. Similarities between anthropomorphic Chorrera figurines and Ixtlán figurines suggest long-distance sea trade extending south to Peru and north as far as MEXICO.

The next period is called Regional Development and dates from 500 B.C.E. to 750 C.E. Social complexity and stratified societies emerged as a result of interaction and competition over long-distance exchange networks. Changes occurred in pottery styles and stone tools, both of which became highly diversified. This period was also characterized by widespread textile production, the introduction of metalwork, and the long-distance exchange of thorn oyster shells and obsidian. By this time, sociopolitical units, or *señoríos*, began to emerge in Ecuador at sites such as Tejar-Daule, La Tolita, Tuncahuán, Cerro Narrio, Jama-Coaque, Bahía, Guangala, Jambelí, Guadula/Selva Negra, and Consanga-Pillaro.

Along the coast, in the Amazon, and in the highland regions, inhabitants all cultivated and consumed maize, beans, POTATO, and MANIOC. They also exploited marine resources and domestic Muscovy duck, in addition to guinea pig, agouti, and deer. Tools consisted of net sinkers, root graters, spindle whorls, T-shaped polished stones axes, shell objects, and obsidian blades. Monumental ARCHITECTURE, such as elaborate tombs, platform mounds, and *tolas*, or earth mounds, have been found in ceremonial centers. These centers were important in both religious and economic activities (see RELIGION). Evidence of GOLD production at Chorrera burial sites dates to as early as 500 B.C.E. During this period, part-time specialists crafted elaborate gold ornaments and copper tools that were used by chiefs and placed in their graves.

The period of integration, between 500 C.E. to 1534, is characterized by the regional stratification of sociopolitical units, or confederacies (*confederaciones*). It also saw tremendous population growth, evidenced by clear signs of agricultural intensification. Specialized merchants and exchange trade networks, as well as the Inca conquest, also characterized this period (see INCAS). Evidence of these changes have been found at sites such as Manteño/Huancavilca, Atacames, Milagro/Quevedo, Capuli, Cuasmal-Tuza, Cosanga-Pillaro, Puruha, Cara, Paltas-Catamayo, and Napo.

Specialized merchants, or *mindaláes*, such as the Manteño, traded regional and luxury goods across great distances. Trade items included salt, dried fish, coca,

COTTON, thorn oyster shells, gold and copper ornaments, and fine TEXTILES. Some of these items were transported by sea, on large rafts made of logs; in this way, merchants took goods as far north as Mexico and down to Peru. Goods were also exchanged in local marketplaces, or *tiangueces*, located strategically between the highlands and lowlands. Local residents used hatchet-shaped copper as currency, which also has been found by archaeologists working in west Mexico and northern Peru.

These patterns were disrupted in the middle of the 15th century with the arrival of Inca forces from the south. Inca armies arrived in Ecuador around 1460, under the command of Prince Túpac Yupanqui, during the rule of the emperor PACHACUTI INCA YUPANQUI. Ecuadorean communities put up fierce resistance to the Inca's imperial campaigns; however, in the end, the Incas managed to subdue most of Ecuador. They accomplished this largely through alliances with local rulers, although they did have to militarily conquer Riobamba, Latacunga, Quito, Otavalo, and Caranqui, all important regions for the control of commercial activities and route trades between the highlands, the coast, and the Amazon. Following their arrival, the Incas built cities and administrative centers at places such as Tomebamba, Quito in the highlands, and Ingapirca in Hatun Cañar Province. It was in this sociopolitical environment that the Spanish conquistadores arrived in 1526 and founded the city of Quito in 1534.

See also ECUADOR (Vols. III, IV); GUAYAQUIL (Vols. II, III); NEW GRANADA, VICEROYALTY OF (Vol. II); QUITO (Vols. II, III).

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## education

### MESOAMERICA BEFORE 1492

What is known about educational practices in Mesoamerica during the Formative (1600 B.C.E.–200 C.E.) and Classic (200–850 C.E.) periods comes from the study of the social contexts in which writing systems and calendrical and astronomical calculations were employed and passed from one generation to another. More detailed ethnohistorical evidence regarding educational practices exists for the Postclassic period (850–1519), particularly in Mexica society (see AZTECS).

Perhaps the most specialized area of knowledge in Mesoamerica pertained to the calculation of calendrical cycles and their depiction in sculpture, pottery, and

screenfold books, or CODICES. The divinatory calendar contained 260 days and was composed of two cycles: a progression of numbers (1–13) and a rotation of 20 day signs referring to animals, plants, and natural phenomena, with the names and depictions of these signs varying from region to region. Various Mesoamerican societies developed a highly formalized iconographic system to depict day signs, which continued to be used in sculptures and codices in the Postclassic period. Another time count was the 365-day year; the combined use of the 260-day and the 365-day cycles allowed for the unique designation of a specific day in a 52-year cycle. The MAYA also used a "Long Count," which placed dates within a cycle of 5,125.25 solar years. Given the expert knowledge involved in maintaining these cycles, relating them to social and astronomical phenomena, and divining potential outcomes on the basis of these data, only a small number of specialists and priests mastered the system. Although priests associated with major Classic-period ceremonial centers were in charge of orchestrating public ceremonies according to their calculations, there were also independent calendar specialists who tended to the needs of individual commoners.

Among the Maya, typically only members of the elite were trained as scribes, and the names and ranks of such individuals are known from some epigraphic texts that bear their creator's signature. It is also likely that Zapotec epigraphic texts were composed by elite scribes rather than by commoners (see ZAPOTECs). In the Postclassic period, there appears to have been a division of labor between a specialist who composed and painted pictographic texts on screenfold books—called a *tlacuilo* by the Nahuas—and the *amapobuani*, or specialist who recited these books' contents to an audience. Literacy seems to have been the province of members of noble lineages, who were selected by specialists to receive instruction in reading and writing. Nevertheless, the fact that the Aztec ruler Itz'coatl (r. 1427–40) ordered a public destruction of painted books suggests that literacy trickled down to some specialists regardless of their social status.

Most commoners were destined by birth to an informal education based primarily on the acquisition of knowledge necessary to practice subsistence AGRICULTURE, hunting, and animal husbandry on the one hand, and weaving, midwifery and cooking on the other; such a division of LABOR provided each gender with expertise in areas seen as complementary (see FAMILY; TEXTILES). Those who practiced a particular craft, such as stonemasons, masons, artisans, or fishermen, were expected to pass their knowledge on to their children, although some large urban centers, such as TEOTIHUACÁN in Central MEXICO, had workshops with master workers and large numbers of apprentices.

Due to the existence of detailed accounts compiled in the 16th century by the Franciscan BERNARDINO DE SAHAGÚN, more is known about Aztec education than any other such system in Mesoamerican society. Two verbs in



NAHUATL were used to convey the notion of “education”: *huapabua*, meaning to “teach,” “educate,” and “render strong” or “firm,” and *izcaltia*, meaning to “animate,” “elevate,” and “develop.” Both terms signal that among the Aztecs, educational practices were seen as the long-term inculcation of pragmatic and moral precepts that reproduced collective values across all different sectors of society.

It is important to note that there was a major distinction between two Aztec educational institutions. The *calm-eccac* trained individuals to become *tlamacazqueh* (priests) or other religious specialists, while the *telpochcalli* prepared any able-bodied *telpochtli* (young man) for WARFARE (see RELIGION). Most of the youths who attended the *calm-eccac* were *PIPILTIN*, or nobles. The men and WOMEN who undertook this educational regime were required to do penance by bleeding themselves with thorns, to fast and to bathe only at precise intervals, and to commit to a life of celibacy.

If a young boy was offered by his parents to the *telpochcalli*, he would serve the community and become a warrior. Trainees began their career by sweeping and performing menial tasks; at age 15, they would be given heavy kindling loads to carry back to the community. Those who proved to have a “good heart” were called *tiachcaub*; those who were deemed judicious were called *telpochtlabto*, and they spoke for all of their peers. When a *telpochcalli* graduate became a warrior, he was awarded the title of *tlacateccatl*, *tlacochcalcatl*, or *cuauhtlabto* after he had captured four enemies in combat.

Aztec nobility was held to high moral standards; drunkenness, for example, was punishable by execution (see ALCOHOL; CRIME AND PUNISHMENT). Training in singing and lofty rhetoric was an integral part of an Aztec noble’s education; some studied ceremonial singing at the Mixcoacalli (literally, “House of the Cloud Serpent”) or at one of the various sites devoted to religious education in the Templo Mayor complex in the ceremonial center of the Mexica capital, TENOCHTITLÁN. An example of the broad range of oral performances that Aztec nobles and well-educated people were expected to master is found in the Huehuetlahtolli, or “Words of the Elders.” This collection of speeches to be given in specific contexts (for example, when greeting another noble or addressing a commoner audience) also includes oral performances for various life events, such as birth and marriage, regardless of social status. The transmission of knowledge in Mesoamerican societies sought to replicate an unchanging social order and tended to limit specialized knowledge—such as literacy and calendrical calculations—to a small group of individuals who were elite members or had strong ties to local elites.

### SOUTH AMERICA BEFORE 1492

Because of a lack of written records, reliable evidence of educational opportunities in ancient South American civilizations is scarce. Pre-Columbian education systems in South America were largely informal. For those outside the royal classes, formal educational opportunities were

largely nonexistent. What few educational opportunities existed were oriented toward specialized trades, such as weaving (see *ACLLA*), with women playing central roles. Despite the enormous gains made by South American civilizations over the millennia before the era of European contact and colonization, educational opportunities were typically limited to the verbal recounting of life experiences and wisdom passed from generation to generation; only the innermost cabal of a civilization’s governing class may have enjoyed formal schooling. What formal educational opportunities that existed were restricted to Andean societies in the Inca Empire (see INCAS).

Given that formal education was inaccessible to commoners, knowledge was passed down to children from parents, community elders, and older siblings. For the children of the Inca nobility and provincial leaders, education took place in Cuzco over a four-year span. In their first year, students learned QUECHUA, the official language of Inca. In the second year, they were taught Inca religion. The third year focused on the use of the *QUIPU*, a specialized accounting system that involved representing values by tying knots into rope. The final year of study was dedicated to Inca history. Instruction was provided by the *AMAUTA*, or wise men, who ensured retention through a routine of practice, repetition, and application. Discipline was maintained by threats and beatings, limited to a single beating per day, administered by hitting the soles of the feet. Young women of the nobility were sometimes afforded specialized training, although this took place in the houses of elder noblewomen in Cuzco rather than in a formal school setting.

Outside of the nobility, the only group that had access to formal education was the adolescent women of conquered groups. The Incas selected girls around the age of 10 to train as “chosen women,” or *aqllakuna*. These women were taken to provincial capitals where they studied several aspects of clothmaking, such as spinning and weaving, as well as brewing *CHICHA* and studying religion. The education module of *aqllakuna* was typically four years, after which they were taken to Cuzco and presented to the Inca king, who decided how they would be utilized.

See also BOOKS (Vol. II); EDUCATION (Vols. II, III, IV); UNIVERSITIES (Vol. II); UNIVERSITY OF MEXICO (Vol. II); UNIVERSITY OF SAN MARCOS (Vol. II).

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**El Dorado** The myth of El Dorado (a Spanish term meaning “the gilded one”) has its origins in a MUISCA tribal chief who, it was claimed, covered himself in GOLD dust and then bathed in a mountain lake, possibly Lake Guatavita, near modern BOGOTÁ. This practice was plausibly a part of a pre-Columbian Muisca ceremony; however, the original mythology quickly morphed into the rumor of the existence of a city of gold. Thus, the quest for El Dorado spurred numerous 16th-century Spanish expeditions throughout South America.

The story of El Dorado first caught the ear of the conquistador GONZALO JIMÉNEZ DE QUESADA, who led the first Spanish expedition into Muisca territory in COLOMBIA’s eastern highlands. The story quickly traveled among Spanish conquistadores and, combined with other early contact rumors, produced a widely held belief that an El Dorado reigned over a kingdom of incalculable wealth. Unsatisfied with the riches found in Muisca territory, the Spanish misinterpretation of El Dorado was readapted literally, instigating searches for a city made of gold or replete with gold mines. In 1541, this myth spurred FRANCISCO DE ORELLANA and GONZALO PIZARRO to depart Quito and undertake an expedition of the AMAZON Basin in search of the mythic land. Instead, Orellana became the first European to navigate the length of the Amazon River. The 16th century featured a slew of other expeditions in search of El Dorado, most notably those by Philipp von Hutten (1541–45) and Sir Walter Raleigh (1595).

—Sean H. Goforth

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**El Mirador** The Late Preclassic MAYA site of El Mirador is located at 17.75° N latitude and 89.92° W longitude in GUATEMALA, four miles south of its northern border with MEXICO. El Mirador is one of the largest CITIES ever constructed by the Maya and contains enormous monumental ARCHITECTURE. Its rulers and 80,000 people dominated the region during its Late Preclassic prime (400 B.C.E.–100 C.E.). El Mirador succeeded its neighbor Nakbé, which had dominated the region in the Middle Preclassic. At the end of El Mirador’s history, Maya power had shifted to the city of TIKAL.

El Mirador’s urban plan included two major civic zones joined by a paved road (*sacbé*), which formed an east-west orientation 1.25 miles (2 km) long. El Tigre, a massive 215-foot (65.5-m) temple pyramid, protruded through the tall rain forest canopy in the Western Group. El Tigre faced eastward and consisted of multiple temples at various levels formed by basal platforms of stone rubble fill. El Tigre represents a Maya innovation—the triadic group—a layout with a large temple pyramid fronting a plaza and small flanking temple pyramids facing the plaza, with the whole arrangement organized in a C shape.

La Danta, the largest temple pyramid at El Mirador, is 230 feet (70 m) high. La Danta was supported by a 22-foot- (6.7-m-) high basal platform around a low hill,



View of La Danta pyramid at El Mirador, completely covered in vegetation (Courtesy of J. Michael Francis)

covering more than 950,000 square feet (88,258 m<sup>2</sup>) of terrain. Several small temple pyramids sit on the basal platform, including a small triadic group. Second- and third-level platforms rise another 90 feet (27.5 m), and the main triadic group of the Danta temple towers above all.

—Walter R. T. Witschey

**El Salvador** El Salvador is the smallest nation in Central America and the only one not to border the Atlantic Ocean. The development of present-day El Salvador was forged by indigenous groups that lived on the margins of Mesoamerica's most powerful civilizations, those of the AZTECS and the MAYA. Around 3000 B.C.E., the area of El Salvador was first occupied by Nahua Indians from MEXICO. These early peoples became known as the Nahua Pipil. The pre-Columbian history of El Salvador was dominated by the Pipil, though MIGRATION and outside influences, especially from the Maya, account for a few distinct native cultures and language systems that are often considered under the rubric of "Pipil." Pipil oral tradition emphasizes kinship with the Nahuas in Central Mexico, though scholars typically associate the history and culture of the Pipil also with the Maya, whose influence resulted from migration and CONQUEST. The Pipil enjoyed an AGRICULTURE-based ECONOMY and a social hierarchy similar to that of the Aztecs and Maya. Notably, the Pipil abolished HUMAN SACRIFICE early on in their society, a remarkable distinction from other groups in pre-Columbian Mesoamerica.

The character of Pipil culture was subsumed under the imposing control of the Maya in El Salvador for most of the first millennium C.E. Remains of limestone pyramids built by the Maya still adorn the countryside of western El Salvador. As Maya influence declined in the ninth century, the Pipil are believed to have organized their polity, known as Cuzcatlán, into two federal states, each divided into smaller principalities. The Pipil also constructed urban centers that remained populated into modernity, and some of which have become modern cities, such as Ahuachapán and Sonsonate. Sometime after 1000, another wave of migration brought a people known as the Izalco Pipil to the region from lands west of the Lampa River. Archaeological research and folklore suggest that these peoples were refugees from the Toltec Empire and had Toltec and Nahua ethnic roots (see TOLTECS). They also experienced significant Central Mexico influences and spoke NAHUATL.

The Pipil, with their various influences, accounted for most human settlement in El Salvador prior to the arrival of the Spanish. In 1524, PEDRO DE ALVARADO was dispatched from MEXICO CITY by HERNANDO CORTÉS to extirpate indigenous resistance south of Mexico. Alvarado was initially stymied by fierce Pipil resistance, led by a leader called Atlacatl. Alvarado was forced to retreat to GUATEMALA from El Salvador. After successive attempts

in 1525 and 1528, Alvarado finally subjugated the Pipil. The Spanish were disappointed to find that El Salvador harbored few precious metals.

See also EL SALVADOR (Vols. II, III, IV).

—Sean H. Goforth

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John Bierhorst. *The Mythology of Mexico and Central America* (New York: William Morrow, 1990).

**emeralds** The term *emerald* is derived from a Persian word that appeared in Greek as *smaragdus*, meaning "green stone." Emeralds are found at only a few localities around the world and have long been valued by royalty and the wealthy because of their rarity and beauty. The only known source of the stones in the Americas before the arrival of Europeans was COLOMBIA. After the CONQUEST, however, other sources were discovered in BRAZIL and North Carolina. Sources were also reported to have existed in eastern ECUADOR, GUATEMALA, and PERU but are as yet unconfirmed.

Beryls, a compound of aluminum beryllium silicate, or Al<sub>2</sub>Be<sub>3</sub>(Si<sub>6</sub>O<sub>18</sub>), come in various colors, but emerald green ones are considered the most valuable. In emeralds, replacement of beryllium by alkali oxides and aluminum by chromic or ferric oxides is common. The emeralds' distinctive green color is caused by trace amounts of chromium or vanadium. Emeralds are often clouded by inclusions (known as *jardin*) and show an irregular color distribution. Characteristics of emeralds, including color, transparency, inclusions, trace elements, specific gravity, refractive index, appearance through filters, and fluorescence under ultraviolet light, vary depending on source. These traits allow identification of the source through microscopic, physical, chemical, or nuclear analysis.

Most emeralds occur in metamorphic rocks as a by-product of the environment that created the rocks, but Colombian deposits based on hydrothermal processes are unique in the world. Colombian shales at Muzo and Chivor were being mined by the MUISCA Indians earlier than 1000 C.E. Secondary deposits resulting from weathering or other decomposition of emerald-bearing matrix occasionally produce emeralds, but such deposits are rare. One is located at Ganchalá, Colombia.

During the pre-Columbian period, Colombian emeralds were traded as far south as BOLIVIA and as far north as MEXICO. Traders could have carried small emeralds from Colombia on foot or by boat along the Pacific coast with relative ease; alternatively, stones could have been passed from hand to hand through elite exchange. Polished emeralds used in jewelry have been found in graves at Sitio Conte, PANAMA, and date back to 700–900 C.E.

Emeralds and other beryls are the hardest naturally occurring substances in the Americas; therefore, evidence of worked emeralds is very rare for the period before the

arrival of Europeans, who introduced hard metal tools. Polishing and carving could only have been accomplished through friction from beryl grit adhering to cords, reeds, or hides and laboriously rubbed against the stone's surface. One emerald of uncertain origin carved into the shape of a man (part of the Hudson Museum collection at the University of Maine) resembles stone figures produced in Guerrero, Mexico, between 900 and 600 B.C.E. Besides its overall shape, the stone is marked by straight cuts and conical drill holes.

Only one other description exists of what seems to have been a pre-Columbian carved emerald. During the period of CONQUEST, both FRANCISCO PIZARRO and HERNANDO CORTÉS sent emeralds to the Spanish Court. Cortés obtained most of his emeralds from the Aztec capital of TENOCHTITLÁN, but at least one came from the Hall of Justice in Texcoco. This emerald was reported to have the shape of a pyramid and to be as broad as the palm of the hand. The accuracy of the description cannot be verified because the object disappeared while en route to Spain.

—Stephen L. Whittington

#### Further reading:

J. Michael Francis. *Invading Colombia: Spanish Accounts of the Gonzalo Jiménez de Quesada Expedition of Conquest* (University Park: Pennsylvania State University Press, 2007).

**encomienda** This term for an important institution of colonial Spanish America comes from the Spanish verb *encomendar*, meaning “to entrust.” What was entrusted by governmental or royal officials to a recipient (usually a Spanish male) were the LABOR and tribute of an indigenous group. In exchange, each *encomendero* (holder of an *encomienda* grant) was supposed to provide protection and religious instruction to the Indians of his *encomienda* (see RELIGION). Fundamentally, an *encomienda* grant was the reward Spaniards expected for risking their lives and investing their own resources (weapons, horses, capital) in the various campaigns of CONQUEST and colonization. These expectations were not new; rather, they were based on previous experiences during the lengthy reconquest of Spain from the Moors (Reconquista). CHRISTOPHER COLUMBUS learned too late that the deep-seated anticipation of such prizes was a powerful force. Spaniards nominally under his command in HISPANIOLA soon turned away from the TRADE-oriented enterprises he favored, flouting his authority in order to operate within their own Reconquista traditions.

American realities both fulfilled and confounded Spanish ambitions. The most profitable *encomiendas* tended to be those in the two main conquest areas of MEXICO and PERU. Generally speaking, the grants in these areas were established faster, were larger, and included the delivery of both workers and goods. One of the main reasons they got such a quick start is that they were based on portioning out already-existing communities of peoples who lived much like Europeans. The numerous so-called imperial peoples of these two regions were already accustomed to the consequences of victory and defeat in ways that meshed with the *encomienda* system, so obligations to *encomenderos* were not entirely unexpected burdens. Thus, the *TLATOANI* of an *ALTEPETL* in the former Aztec Empire was prepared to channel labor and tribute to the new overlords just as he had previously to indigenous ones.

Both the *encomiendas* of Mexico and Peru benefited from a native rotary labor draft: the *MITA* (from the term for “turn”) in the QUECHUA-speaking Andean region, and the *coatequitl* (“turn-work”) in NAHUATL-speaking Mesoamerica. Nonetheless, Peruvian *encomenderos* enjoyed an initial advantage over their Mexican counterparts. Andean peoples had already developed highly effective techniques for MINING and refining SILVER (sometimes superior to imported European technologies), so *encomienda* labor could be more readily put into procuring this vital lubricant of international commerce.

*Encomiendas* tended to be less viable and valuable in regions where the peoples and natural resources were less like those of Mexico and Peru. Least amenable to Spanish demands were small groups of nomadic peoples who were unaccustomed to providing tribute and labor.

The *encomienda's* fate varied within the vast reaches of Spanish America. A key variable was the sheer number of those demanding a share of indigenous labor. Where such claimants were fewer, *encomiendas* sometimes lasted until the end of the colonial period, but in regions where they were many and increasing, the colonial *encomienda* eventually gave way to other forms of labor procurement.

See also ENCOMIENDA (Vol. II); REPARTO (Vol. II).

—Barry D. Sell

#### Further reading:

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James Lockhart. “Encomienda and Hacienda: The Evolution of the Great Estate in the Spanish Indies.” In *Of Things of the Indies: Essays Old and New in Early Latin American History*, 1–26 (Stanford, Calif.: Stanford University Press, 1999).



**family** Distinct patterns and values from both sides of the Atlantic informed family life in Latin America. Prior to European contact, the relative hierarchy of a given civilization in Mesoamerica or South America correlated to family structure. The definition of family therefore varied according to location. In Iberia, family laws and customs arose from centuries of overlapping Christian and Muslim influence, and family models and norms in Latin America changed dramatically after 1492 when Iberian and Amerindian traditions merged.

#### MESOAMERICA BEFORE 1492

In Mesoamerica and imperial Aztec society, families lived in organizational units known as *calpullis* (see **AZTECS**). Originally, these were based solely on kinship ties, though by the 15th century, the *calpulli* was more diverse in its makeup; it was a multigenerational grouping that shared communal land, worshipped together, and paid tribute collectively. Marriage was a crucial step in Aztec society, as it formally marked the transition to adulthood. Young men and women married between their late teens and early 20s. The ceremony began with a four-day period when both man and woman fasted and restrained from bathing. The fourth night saw physical consummation of the union followed the next day by a private ritual bathing and public wedding banquet. The new couple brought its productive and reproductive **LABOR** to the *calpulli*. In Aztec society, when a man and woman married, their union was primarily between two families (not between the couple and the church, as it would be in the colonial era).

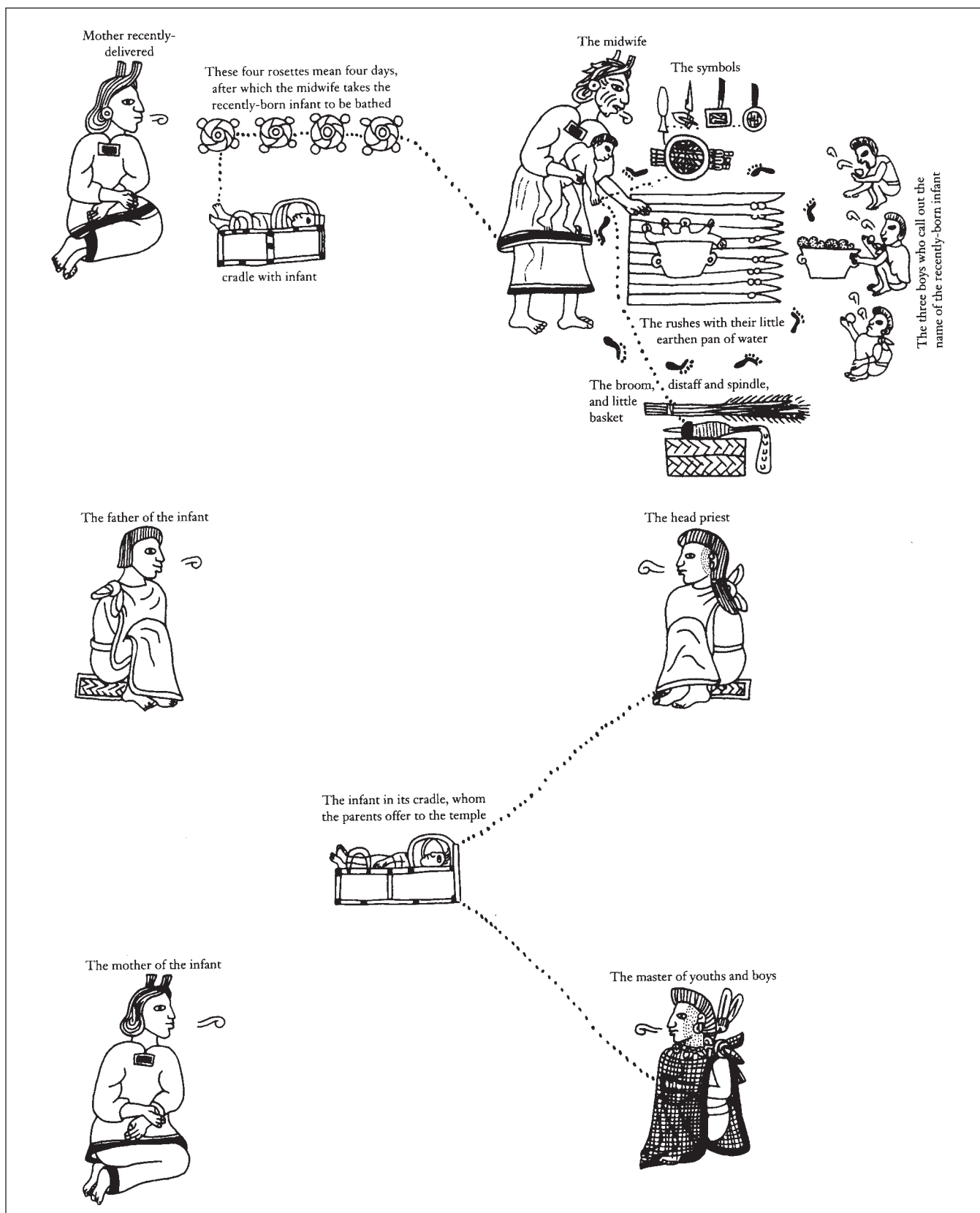
The Aztec *calpulli* had an overarching family structure with both matrilineal and patrilineal descent. Aztec inheritance practices, for instance, were bilateral and

could pass from mother to daughter as well as from father to son. Power in society could follow either female or male bloodlines, though it tended to follow the male. At marriage, a woman might join the *calpulli* of her husband or he might join that of her family. Scholars have suggested that this flexibility allowed men to take advantage of the family lines (blood or marriage) that best furthered their political goals.

This was particularly true for the elite in Aztec society, whose marriages stood apart from those of commoners (see **MACEHUAL**; **PIPILTIN**). For elite individuals, marriage often promoted political alliances between different regions, similar to marriage among European royalty to promote dynasties. Elite Aztec males and high-ranking imperial officers could take more than one wife. This helped to increase the size of a household and added labor power that could ultimately increase the family's wealth. While polygamy was common through much of the pre-Columbian Americas, it usually occurred only among the ruling class.

The relationship of sexuality and virginity to marriage differed in pre-Columbian societies from the Iberian world. In Aztec culture, sex was viewed as pleasurable activity rather than a sinful one, and those who engaged in sexual relations before marriage did not carry a stigma. Chastity as a value was emphasized mainly for the daughters of the elite. For married couples, however, sexual monogamy was the cultural norm, and adultery was severely punished (see **CRIME AND PUNISHMENT**). Overall, the institution of marriage was more flexible for the Aztecs than it was for Spaniards. For instance, if a couple reached an impasse in their relationship, they were permitted to

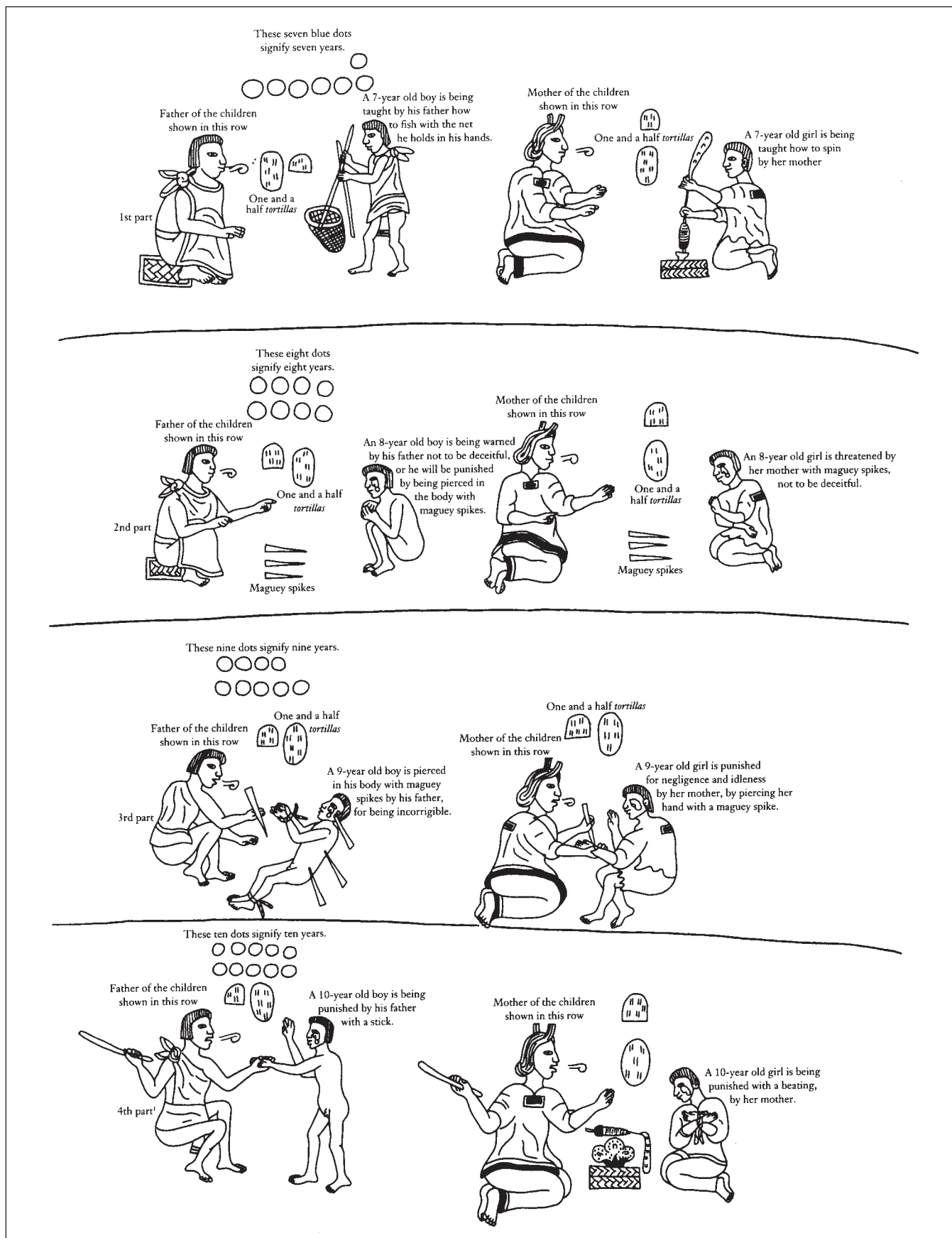
*(continues on page 142)*



Named after the Spanish viceroy of Mexico (Antonio de Mendoza), the Codex Mendoza was compiled roughly two decades after the conquest of the Aztec Empire. The information contained in this remarkable work was gathered from Indian scribes and interpreters who had firsthand knowledge of the Aztec Empire before the arrival of Europeans. The image above and the four that follow illustrate some manners and customs in Aztec family life, from birth through childhood and marriage. The illustration above relates the customs associated with birth. (Codex Mendoza, Courtesy of Frances F. Berdan and Patricia Reiff Anawalt)

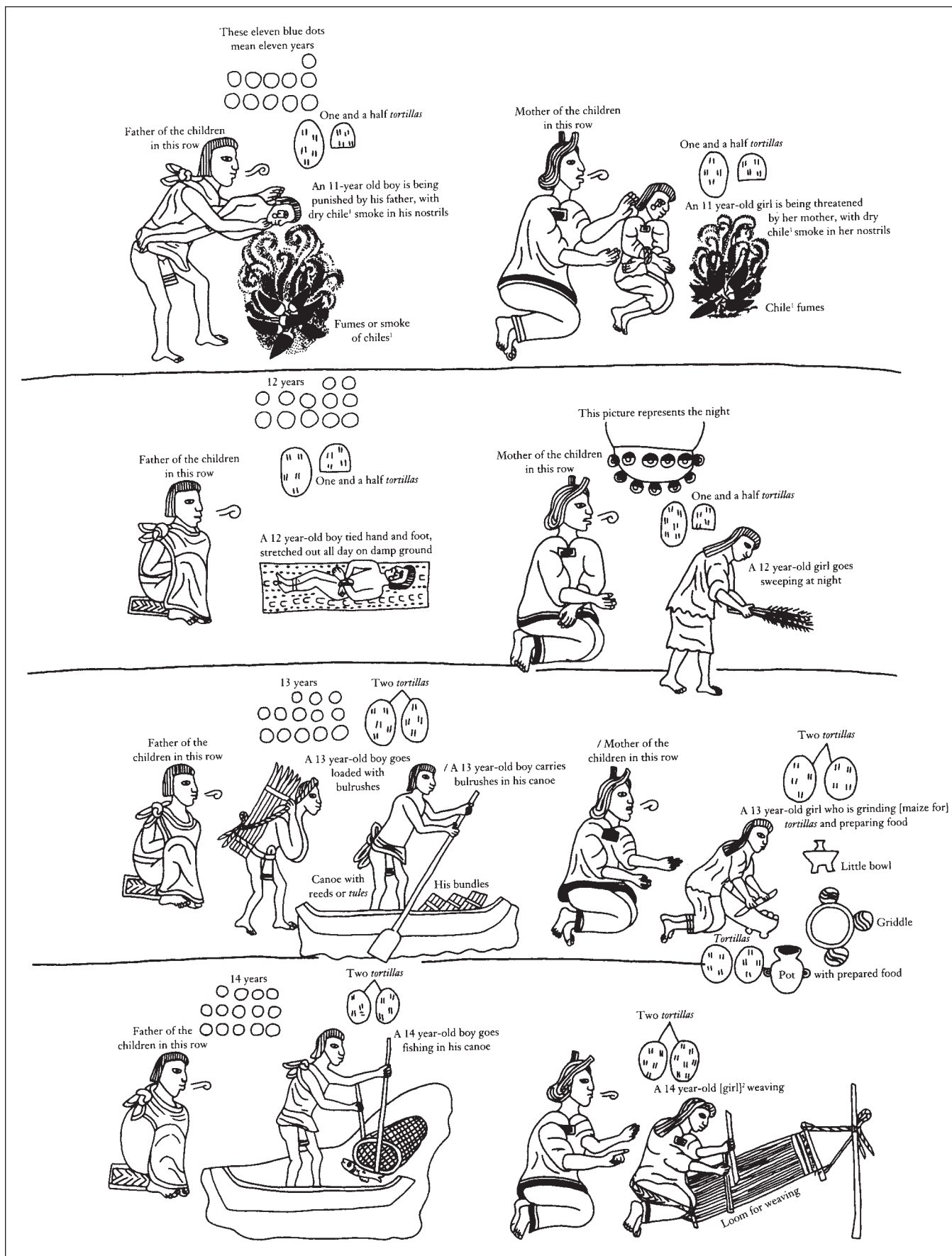


Here, the Codex Mendoza illustrates the education of young Aztec boys and girls between the ages of three and six, as well as their tasks and food rations. (Codex Mendoza, Courtesy of Frances F. Berdan and Patricia Reiff Anawalt)

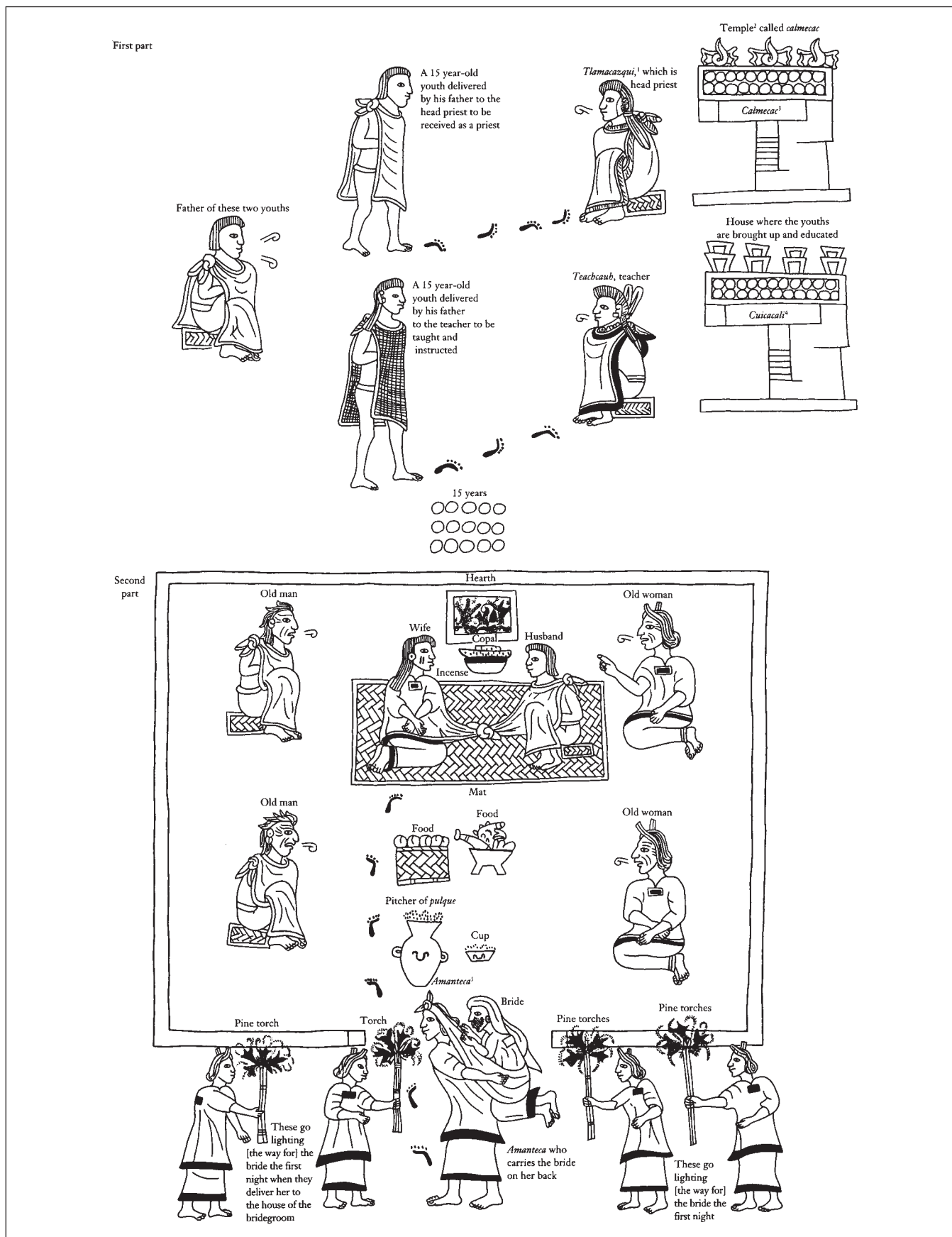


The drawings above include additional tasks for young boys and girls as well as the punishments they received for being negligent or disobedient. (Codex Mendoza, Courtesy of Frances F. Berdan and Patricia Reiff Anawalt)





More punishments and tasks for boys and girls aged 11 to 14 (Codex Mendoza, Courtesy of Frances F. Berdan and Patricia Reiff Anawalt)



At the top, young adolescent boys enter one of two houses (the *calmecac* or the *cuicacali*) for formal education. Below is an illustration of a wedding ceremony. (Codex Mendoza, Courtesy of Frances F. Berdan and Patricia Reiff Anawalt)

(continued from page 136)

separate and could remarry if they so chose. Moreover, in some rural areas of the Aztec Empire, men and women lived together as man and wife after a betrothal but before a formal marriage ceremony. This practice, known as *montequitl*, was a kind of trial marriage.

To understand how families lived and related to one another, they must be examined in the context of labor and political structures in their respective societies. In many pre-Columbian societies, men's and women's work roles were complementary. Households depended on men and women, as well as members of several generations, in order to undertake the tasks necessary for survival, accumulate surplus materials, and reproduce. The Aztecs lived in a world of gender complementarity. Women's roles were respected, and women functioned in positions of power within the marketplace and the *calpulli*. While not fully egalitarian, the celebration of both female and male roles was very different from European culture of the same era. Some scholars have argued that gender hierarchy increased in Aztec society as the empire expanded during the late 15th century. Thus, at the height of Aztec power, women lost some of their status to men.

Other societies in Mesoamerica showed distinct patterns with regard to family. The MAYA civilization, which reached its height long before the Aztecs rose to prominence, had a more hierarchical society and emphasized male power over gender complementarity. Kin groupings among the Maya were based solely on patrilineal descent. The Nudzahui (MIXTECS) of Oaxaca, on the other hand, exhibited far more gender egalitarianism than the Aztecs did. They accorded power to women among the ruling group and female succession, and while this was not the norm, it did occur frequently.

### SOUTH AMERICA BEFORE 1492

In pre-Columbian South America, scholars know most about family life in the Andes, and particularly in the Inca Empire, which was at its height when Spanish conquistadores arrived on the continent (see INCAS). Andean society was based on the kinship unit called the *AYLLU*. All members of an *ayllu* could trace their ancestry back to the same couple. Members of the same *ayllu* tended to marry each other, a practice known as endogamy. Like the Mesoamerican *calpulli*, the *ayllu* functioned as a way to structure labor, foster community, and reproduce. Men had access to *ayllu* resources such as land or herds through descent from their fathers. Women, likewise, had access to *ayllu* resources through their mothers.

In Andean cosmology, the relationship of male to female was complementary, and Andean society, be it in rulership, labor roles, or community structure, reflected that complementarity. Andean deities had clear gender identities and distinct domains. The female deity Pachamama, the earth goddess, needed male deities such

as Illapa, the god of thunder and lightning, so that the earth and rain could together produce crops. Men's and women's daily roles in Andean life were held in similar balance; only by working together could men and women survive and flourish.

Children learned these gender-specific and complementary roles from birth. Spanish CHRONICLERS report that Andean boys and girls began to help their parents with light work at the age of five. Until the age of nine, though, play was the dominant aspect of children's lives. Through 12 years of age, girls practiced weaving, and boys hunted small game or watched over herds. When boys turned 18, they had to pay half-tribute to the Inca. Young women had increased duties. At 20, men owed full tribute. It was assumed that one would marry and become an adult in the community about this age, and so complementary were male and female roles that without the support of a woman, a man was unlikely to be able to meet his daily needs and pay full tribute.

Marriage was common in Andean society. In the marriage ceremony, the man and woman came together as different but equal beings; through speeches and ritual gift exchange, the couple acknowledged that both must play a role to ensure the proper functioning of their household. Within the *ayllu*, men plowed fields, herded animals, and fought. Women wove and made CLOTHING for their families, cooked, brewed, farmed, and raised children. The labor of each was a contribution not to the family per se but to the *ayllu*.

The Andean path to marriage could involve a form of trial marriage known as *sirvanacuy*, whereby a young man and woman lived together prior to a formal marriage ceremony. Typically, the couple would live in the household of the young man. This trial marriage allowed the couple, as well as their respective in-laws, to determine if the union was suitable. Should the couple decide to separate rather than marry, no formal mark of shame followed either. If the couple had children, those children were accepted into society without the mark of illegitimacy. Once a couple did marry through a formal ritual, it was expected that they would remain monogamous. Adultery was not tolerated within the *ayllu*. If a married couple chose to separate, the woman could move home to her family, but there was no formal divorce.

In regions outside of the Inca Empire, family life was marked by patrilineal kinship and prescribed gender roles. For the TUPINAMBÁ peoples, a seminomadic, forest-dwelling group in BRAZIL, leadership was a male preserve. The Tupinambá lived in settlements of 400 to 800 people, which were further divided into multifamily units. Gender and age determined daily activities. Women dominated agricultural life, growing mainly MANIOC and COTTON (see AGRICULTURE). Men cleared fields by taking down large trees and hunted and engaged in WARFARE. Marriage was a fundamental part of Tupí society; it could be polygamous and often tied kin further together.

## EARLY COLONIAL LATIN AMERICA

After the conquest, family makeup and practices in the Americas changed. First and foremost, the DISEASES that came with the Europeans devastated indigenous populations, dramatically altering their way of life. Second, while relationships between indigenous (primarily women) and Spaniards (primarily men) cemented political alliances, they further challenged indigenous family structures as the power balance shifted to Spanish control. Third, Spanish society, through the laws of the Crown, the evangelization campaign of the CATHOLIC CHURCH, and Spanish cultural practices emphasized different values for family life and sexuality.

The demographic decline in the Americas after 1492 profoundly affected indigenous family life. As families shrank in number, there were fewer hands to respond to the demands of the Spanish rulers. In addition to death by disease, the forces fighting the Spanish were primarily male, so the death rate among young men increased also through war. When groups became too small to support themselves, they had to expand by adopting kin from outside. The movement of native men in this era—primarily to escape forced LABOR—also influenced family patterns by creating a gender imbalance at home. Many of these “outsiders,” known in the Andes as *FORASTEROS*, had married into communities by the second and third generation of the colonial era. Ultimately, the increased death rate meant that families had difficulty transferring political power smoothly from one generation to the next, and their kinship ties were stretched thin. Families adapted creatively to these challenges; nonetheless, change in indigenous family structures was inevitable.

Over time, the Spanish influenced centuries-old Amerindian concepts of family, as well as norms and morals. In particular, scholars note that concepts of honor and shame associated with the Iberian Catholic tradition were transferred to indigenous groups. Long-held Aztec ideas about sex as both necessary and pleasurable were challenged by the Europeans’ equation of sexual activity with sin. Likewise, Andean ideas about trial marriage were incompatible with the European emphasis on maintaining sexual purity until marriage in the case of young women. While this emphasis had something in common with the Aztec nobility’s emphasis on chastity for its daughters, for indigenous society at large, the value associated with the loss of virginity marked a dramatic change for young women.

The power associated with mothers and grandmothers changed under Spanish rule. Whereas Inca and Aztec mothers had political and legal power alongside that of men, Spanish women had less recourse. Through the concept of *patria potestad*, the legal control of all members of a household rested with the father. Women did not have legal control over themselves or their children, making all members of a household, except the father, legal minors. Indigenous parents may have attempted to

work within Spanish legal structures to continue traditional inheritance practices for several generations.

The conquest of Latin America also promoted new kinds of “family” structures hewn from pre-Columbian and Iberian traditions. Spaniards joined in sexual union with native women, and the idea that such unions could foster political relationships in HISPANIOLA, and later in MEXICO and PERU, was shared by indigenous as well as European men. Furthermore, as marriage had been fundamental in promoting political alliances in pre-Columbian society, the Spanish Crown passed a decree in 1514 that allowed the marriage of Spanish men and indigenous women. The Crown hoped that such marriages would help cement military alliances with native chieftains and quiet church critics who abhorred cohabitation. The law legitimated what was already occurring in practice. In Mexico, for instance, the king of the TLAXCALA gave numerous princesses to Spanish conquistadores, including HERNANDO CORTÉS. The Tlaxcalans, allies to Cortés and his small band of soldiers in 1519 through 1521, were eager to strengthen their political ties through a new generation born of these women. The Spanish men, however, for the most part took the princesses as concubines while waiting to take Spanish wives. This also occurred in the Andes.

While the norm was out-of-wedlock Spanish-indigenous unions, marriages did occur. Most commonly it was Spanish men who married indigenous women; there are very few documented cases of Spanish women marrying indigenous men. Catholic marriage was more common between elite native women and Spaniards because only marriage could ensure legal access to property. When a Spaniard contracted marriage with a native woman, the main motivation was not love but the acquisition of the lands and laborers tied to her family. In the Andes, Alonso de Mesa married the Inca noblewoman Catalina Huaco Oollo in 1552. The daughters of Aztec king MONTEZUMA, Isabel and Leonor, also married Spanish men.

Whether in marriage or cohabitation, Spanish and indigenous unions produced a new generation of Latin American children. Known as *mestizos*, the first generation was accepted into Spanish society (see *MESTIZAJE/MESTIZO*). Many mestizo children were taken from indigenous mothers to the households of their fathers in the Americas or sent to Spain to be raised by Spanish aunts and uncles. By the late 16th century, mixed-race children formed an increasing sector of the population and became less socially accepted. For those born out of wedlock, the status of illegitimacy carried significant legal implications: They could not receive inheritances, obtain an EDUCATION, or enjoy honorable social standing.

The importation of African slaves, a practice that picked up tempo in the late 16th century, had important implications for family (see SLAVERY). The Atlantic slave trade destroyed many traditional African family norms, especially the role of parents in choosing a marriage partner and the practice of bride wealth, the custom of

the transfer of valuable property from the family of the groom to the family of the bride, most common among agricultural societies in Africa. African men and women struggled to create new kin networks in the Americas. They did so in the face of generally high child mortality and the inhumane practice of separating children from their mothers. Still, slaves used legal devices to gain the right to marry as well as the chance to remain in proximity to their spouses, rather than being sold away to new owners. They accumulated cash to buy freedom for their children. Thus, even within the institution of slavery, family ties emerged as a critical nexus of resistance.

Even for those who held the most political, social, and economic power in colonial Latin America, the conquest challenged family relationships. The disruption of marriage and domestic life by transatlantic travel had an important influence on the lives of women and children back in Spain. “Abandoned” wives often filed petitions with the king of Spain seeking to know the whereabouts of their husbands and to make them responsible for their financial obligations to the family. To this end, the Crown issued a decree in 1528 declaring that married men who resided in the Indies without their wives must either return to Spain or make arrangements to have their wives travel from Spain to the Americas. This decree did result in the reunification of some families, but many more remained separated by the events of conquest. Thus, women and children were left to forge ahead alone in a society where men’s power and honor were paramount in the family structure.

The family unit was critical in restructuring society in the Americas after the arrival of Europeans. The larger and more hierarchical the society in terms of class or race, the more differentiation existed in terms of family groupings and the values attached to marriage and sexuality. Throughout the long period of transition, gender was a major indicator of family roles and responsibilities.

See also *BIENES DE DIFUNTOS* (Vol. II); *FAMILY* (Vols. II, III, IV); *GODPARENTAGE* (Vol. II); *GRACIAS AL SACAR, CÉDULAS DE* (Vol. II); *LIMPIEZA DE SANGRE* (Vol. II); *SEXUALITY* (Vol. III).

—Jane Mangan

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**Federmann, Nikolaus** (b. ca. 1505–d. 1542) *German conquistador, governor of Venezuela, and cofounder of Bogotá* Born in Ulm, Germany, Nikolaus Federmann was an official of Welser, a German banking firm that had been granted the governance of VENEZUELA in 1529. Serving under Ambrosius Alfinguer in the city of Coro on the northern coast of Venezuela, Federmann took command of the province of Venezuela while Alfinguer recovered from wounds received during an expedition to the interior. Acting against Alfinguer’s orders, Federmann led 116 men south in search of a body of water that would lead to the Pacific Ocean, which Europeans at the time called the South Sea. Federmann and his men traveled more than 100 miles (160 km) south to the Llanos region of Venezuela before turning back, having failed to find access to the Pacific. Federmann returned to Coro. On his arrival, Alfinguer had him removed from Venezuela.

Federmann returned to Ulm, where he wrote a monograph about the different indigenous groups he had encountered. In 1533, Federmann learned that Alfinguer had died in Venezuela. He immediately approached the Welser company to return to Venezuela. Although initially named as governor of Venezuela, legal issues surrounding Federmann’s earlier expulsion forced the Crown to name Georg von Speyer to that position instead. Federmann, serving as lieutenant governor, returned to Venezuela in 1535.

Federmann spent much of his first year arguing with local officials. With new restraints on Welser’s power and with new demands made of him, Federmann found little political support in Coro. In 1536, against the instructions of Governor von Speyer, Federmann and a collection of men traveled southwest from Coro in search of the rich kingdom of EL DORADO. Losing men to hostile native groups, wild animals, and DISEASES, Federmann eventually made his way to COLOMBIA’S eastern highlands, where he encountered another expeditionary force, led by GONZALO JIMÉNEZ DE QUESADA. With 160 men, Federmann began to settle the area around BOGOTÁ, where Jiménez de Quesada’s men had arrived two years earlier. In an effort to secure his rights to the new region, Federmann returned to Spain in 1539 to present his claims. Federmann defended himself against the Welser firm, who charged him with withholding taxes and acting disloyally toward the Crown. Federmann solved the legal problems by relinquishing his territorial claims in the New World. He never returned to either Ulm or Venezuela and died in Valladolid, Spain, in 1542.

—Spencer Tyce

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**fleets/fleet system** To protect and regulate their trade with their American colonies, first Spain and then Portugal organized their commercial shipping into fleets (*flotas*). These armed convoys guarded the traffic from foreign enemies but also hindered the development of intra-imperial trade.

Once Queen Isabella and her adviser Jorge Rodríguez de Fonseca forsook their plan to make commerce with the colonies a Crown monopoly, Rodríguez began to create the policies and institutions to oversee commercial activities. In 1503, Isabella established the CASA DE CONTRATACIÓN (Board of Trade). Headquartered in Seville until 1717, it oversaw Spain's transatlantic shipping, registered goods and people going to and from the New World, trained pilots and navigators, and acted as a law court for crimes committed at sea and for maritime suits.

The Casa de Contratación regulated TRADE but increasingly had to deal with attacks on the ships by French pirates and privateers and to a lesser extent by Muslims. French corsairs plundered the Aztec treasure sent by HERNANDO CORTÉS to Charles I. By 1526, the king had ordered the Casa de Contratación and the COUNCIL OF THE INDIES to require that ships no longer sail singly, but in twos or threes to better protect themselves (see PIRATES AND PIRACY). This failed to provide sufficient security, however, and in the 1540s, the Crown ordered that all merchant vessels sail to and from the Americas in large fleets. Heavily armed naval vessels accompanied each fleet.

By the 1560s, the fleet system had reached its maturity. Each year, two fleets sailed to the Spanish New

World loaded with merchandise to sell to the colonists and returned with American treasure. The government collected the *avería*, or fleet tax, to pay for the armed escort. After its cargo and passengers had been registered by the Casa de Contratación, the *flota* departed in the spring from Seville, although as the years passed and larger ships made transitting the Guadalquivir between Seville and the ocean more difficult, many fleets left from Cádiz or Sanlúcar on the coast.

The *capitana*, a naval vessel commanded by the head of the flotilla, sailed at the head of the convoy, while the *almiranta*, another naval ship, sailed at the rear. Many of the merchants on board the ships were also well armed. The *flota* proceeded first to the Canary Islands and then navigated westward to the Caribbean. Some merchant vessels stopped in PUERTO RICO, HISPANIOLA, and HONDURAS, but most continued to Veracruz on the Mexican coast. The transatlantic transit generally took about two months. On arrival at Veracruz, the *flota* held a great fair at the nearby inland town of Jalapa, with merchants from MEXICO CITY arriving to buy goods.

The other convoy, destined for northern South America and PANAMA, was called the *galeones*. It set sail from Seville in August or September, putting in at Cartagena to trade and to send word to the Peruvian VICEROY in LIMA of its arrival. PERU's viceroy then sent a Pacific fleet (often called the *armada del sur*, or "southern armada") to Panama, carrying the Crown's revenues and merchants' SILVER. Lima's merchants bought goods in Panama from the *galeones* to sell throughout the viceroyalty. They then loaded them on



Modern view of the Guadalquivir River in Seville, Spain, with the Torre de Oro in the foreground (Courtesy of J. Michael Francis)

pack trains and hauled them over the isthmus, where they were embarked on the Pacific fleet (see TRANSPORTATION). The *armada del sur* had a difficult task in coordinating its arrival in Panama with that of the *galeones*. If the armada arrived long after the *galeones*, the European merchandise might decay in the tropical climate or be plundered by marauding buccaneers. On the other hand, if the armada reached Panama too early, the treasure they carried was exposed to pirates and was idle capital that might have been invested more profitably in another enterprise.

The *flota* and *galeones* usually gathered at Havana on the north coast of CUBA and sailed back to Spain together, starting out late in the year, once the hurricane season was over. The return trip was the most dangerous part of the voyage because enemies knew the vessels were laden with GOLD and silver. They preyed on vessels that became separated from the main fleet. Nevertheless, while some ships were lost to storms and others to corsairs, the fleet system generally succeeded in protecting the transatlantic trade in the 16th century. Only in 1628 did a Dutch squadron commanded by Piet Heyn capture the entire treasure fleet.

The Spanish fleet system also included a transpacific component, the Manila galleons. It began in the 1560s as a means of carrying mail, silver, and officials to Spain's outpost in the Philippines and made the return trip carrying a cargo of East Asian silks, spices, and other luxury goods. The Manila galleons sailed westward from Acapulco on the coast of MEXICO to Guam and then to the Philippines. From Manila, they had access to Chinese merchants. The return voyage followed favorable currents across the north Pacific to California and then southward to Acapulco. Spain tried to limit such shipping to one or two vessels per year to prevent American silver from leaking out of the empire, and the government prohibited Peruvian merchants from trading directly with China; nevertheless, there was probably a good deal of contraband trade.

The Portuguese did not develop a similar system to regulate and protect shipping to BRAZIL until the mid-1600s. Portuguese caravels plying the transatlantic waters tended to be small and set sail from a number of Lusitanian and Brazilian ports. The Portuguese Crown showed little inclination to centralize the commerce in the 16th century, and consequently merchantmen had to protect themselves against corsairs and privateers. Only in 1649 did Portugal create the *Companhia Geral de Comércio* (General Company of Commerce) to oversee and protect two annual fleets to Brazil.

Although the fleet system protected Spanish shipping, it hindered commercial development. It impeded the free flow of goods, favoring instead the interests of merchant guilds (*consulados*) in Seville, LIMA, and MEXICO CITY. With the decline of its maritime power in the 17th century, Spain could no longer send annual convoys, and often two or three years passed between the arrival of the *flota* or *galeones*. In the colonies, this created severe shortages of merchandise and huge fluctuations in the price

of goods. These conditions, in turn, enticed the colonists to trade with Spain's rivals, such as French, Dutch, and English merchants who were drawn to Spanish waters with the aim of securing American gold and silver.

See also FLEETS/FLEET SYSTEM (Vol. II); MANILA GALLEONS (Vol. II); SHIPBUILDING (Vol. II).

—Kendall Brown

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**Florentine Codex** This monumental work in NAHUATL and Spanish was completed under the direction of the famed Franciscan friar BERNARDINO DE SAHAGÚN. It is bound in three volumes, which are divided into 12 parts called “books.” The Florentine Codex (see CODICES) currently rests in the Laurentian Library in Florence, Italy, having arrived there no later than 1588. Almost certainly, this remarkable codex was a present from the king of Spain to a leading member of the Medici family, Cardinal Ferdinando, who had a keen interest in rare and exotic manuscripts. Don Luis de Velasco delivered this gem of Nahuatl scholarship. Velasco was the son and namesake of an earlier VICEROY of New Spain and later followed in his father's footsteps and served in the same capacity.

The aura of prestige and importance implied by its donor, recipient, and bearer are justified by its contents. Sahagún conceived of it as something akin to an encyclopedic history of traditional Nahua (Aztec) life and culture (the first 11 books), culminating in an account of the CONQUEST of MEXICO (book 12). As a description of a particular late precontact indigenous culture, it is unique in size, coverage, sophistication, and depth in the entire colonial Western Hemisphere. Its hundreds of folios are written in parallel Nahuatl and Spanish columns and copiously (if not fully) illustrated. Sahagún began work on the manuscript in the late 1540s. The copy that ended up in Florence was finished several decades later, although Sahagún's study of Nahuatl and the Nahuas continued until his death in 1590.

One of the primary purposes of the work was to demonstrate in context the many registers of the Nahuatl language: formal and colloquial, straightforward and allusive. This was to assist priests in learning the subtleties of Nahuatl in order to root out practices and beliefs contrary to Christianity (see DIABOLISM IN THE NEW WORLD). Thus, in addition to descriptions of such practical matters as occupations and the various names and uses of Mesoamerican flora and fauna, the Florentine Codex includes accounts of pre-Hispanic deities and their attributes and accouterments.

Enhancing readers' skill in preaching and hearing confession was another aim of the codex. One of the most notable sections is book 6, dedicated to "Rhetoric and Moral Philosophy." It includes examples of orations on the accession of rulers, parental advice to children, and prayers to some of the principal non-Christian gods and goddesses. Such features of traditional Nahuatl rhetoric as indirection, inversion, verbal ornamentation, and metaphor are demonstrated. Studying these and similar texts greatly helped conscientious clerics who attempted to master a language that in some respects differed greatly from European languages.

The authenticity of this massive text is due principally to the team that Sahagún assembled to gather, write down, and verify the information. Over several decades, accomplished Nahua Latinists (ex-pupils of the Franciscan) consulted with high-ranking Nahua elders from various *ALTEPETL* (city-states); Nahua scribes recorded the results. Hence, the Florentine Codex is a rich source for scholars working in fields as diverse as anthropology, linguistics, art history, ethnography, and history.

—Barry D. Sell

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**Florida (La Florida)** During spring 1513, JUAN PONCE DE LEÓN set sail from the Caribbean in search of new islands to claim for the Spanish Crown. On Easter Sunday (Pascua Florida) he sighted land and named the newly discovered territory *La Florida*. Florida is a large peninsula located in southeastern continental United States. Made up almost entirely of karst terrain, the region's limestone beds are among its defining features. Additionally, the landscape takes its shape from two coastal plains and the Appalachian foothills in the eastern panhandle. In the early 16th century, the subtropical region of Florida rested on a low tidewater plain.

However, Florida's earliest human inhabitants, the Paleoindians, encountered a much drier climate when they entered the region 10,000 years ago. Consequently, they lived near limestone rain reservoirs, sinkholes, and springs. These freshwater resources also attracted large populations of game, including bison, camelids, raccoon, horse,

sloth, muskrat, and deer. Florida's early inhabitants used unifacial and bifacial tools carved from wood, stone, and ivory to hunt and prepare food. As a people dependent on hunting and gathering, the Paleoindians led a nomadic existence, moving according to the availability of food.

Several changes in the climate and ecosystem transformed Florida's Paleoindian societies. During the Archaic period, which began around 7500 B.C.E., warmer global temperatures melted the glaciers, and ocean waters covered nearly half of present-day Florida's surface area. On the other hand, the process also made freshwater more accessible. During the Late Archaic period, around 3000 B.C.E., population growth led to the founding of numerous towns along the coast and along the tributaries of St. John's River. A thousand years later, the Archaic peoples developed fired clay pottery (see CERAMICS). As this technology spread, new regional pottery styles came into being. For example, the Deptford culture developed a unique pottery style using quartz and clay particles in the post-Archaic period, around 500 B.C.E. Located along the Gulf coast, the Deptford subsisted primarily from marine resources. Furthermore, they used a variety of tools, wooden knives, clay fired pots, woven nets, baskets, canoes, and grinding stones (see METATE).

While Late Archaic villagers cultivated fields of squash and gourds, it was not until after 750 C.E. that the inhabitants of northeastern Florida began to harvest MAIZE. This practice eventually spread to other Indian communities. Maize production led to more stratified societies and to agriculturally based villages (see AGRICULTURE). Between 1100 and 1550, the Fort Walton culture emerged as one of the largest and most complex cultures in pre-Columbian Florida. The nearby Suwannee Valley culture also developed into an important agricultural society. This community preceded the TIMUCUA, which refers to a village in the Suwannee Valley and the language spoken by multiple indigenous communities in north and central Florida.

Other important indigenous groups present during the early colonial period included the Glades near Biscayne Bay (known to the Spanish as the Tequesta, Boca Ratones, and Santaluces), the Calusa located around Lake Okeechobee, the Ais near the southern extreme of the St. John's River, and the Guale of southeastern coastal Georgia.

Early Spanish explorations of Florida, inspired by Ponce de León's 1513 voyage, led to a series of failed expeditions during the early 16th century, including Lucas Vázquez de Ayllón in 1526, PÁNFILO DE NARVÁEZ in 1528, HERNANDO DE SOTO from 1539 to 1541, and Tristán de Luna in 1559 (see CONQUEST). It was not until 1565 that Spain established its first permanent colony: St. Augustine. The Spanish Crown enlisted PEDRO MENÉNDEZ DE AVILÉS to explore Florida, build and fortify two cities, and introduce the Catholic faith to the indigenous populations. After founding St. Augustine, Menéndez secured Spain's place on the Florida coast through alliances with local indigenous chiefs and the eradication of France's Fort Caroline.



Under Menéndez's governorship, secular priests established the first mission site at the Amerindian village of Nombre de Dios just outside St. Augustine. Menéndez traveled northward among the Guale-speaking villages and in 1566 founded the town of Santa Elena (near present-day Parris Island, South Carolina). The Spanish introduced domesticated livestock, such as chickens, cows, and pigs, as well as metal farming tools (see COLUMBIAN EXCHANGE). New agricultural crops were also brought to Florida, including peaches, peas, WHEAT, and oranges. Colonial contact led to cultural exchanges that dramatically transformed the diet and daily lives of Florida's indigenous communities.

—Kathleen M. Kole

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**flower wars (flowery wars)** The flower, or flowery, wars (*xochiyaoyotl*, in NAHUATL) were unlike ordinary Aztec conflicts conducted for the purpose of CONQUEST or subduing revolts (sometimes called “angry wars”). Rather, these staged and highly formalized battles took place between the armies of the TRIPLE ALLIANCE and their opponents, on a prearranged date and within a consecrated space designated for the purpose. The fighting, often preceded by visits and gift exchange between the antagonistic rulers, began with the ritual burning of paper and incense. Once the fighting had begun, the prime goal was apparently not to kill the enemy soldiers but rather to stun and capture as many of them as possible alive. Those who did not directly participate in the battles were not taken captive. Nevertheless, according to historical sources, many soldiers were indeed killed in these conflicts, and such a death was considered honorable and “blissful.”

The context and purpose of this unusual practice was multifaceted and changed over time. The earliest recorded flower war was instigated in 1375 between the kingdom of Chalco and Acamapichtli, the first Aztec ruler, and may have lasted for 12 years (see AZTECS). This allowed both sides to demonstrate their military power and thus determined potential political dominance at a relatively low cost. Other historical sources claim that it was Montezuma Ilhuicamina's (Montezuma I) adviser, Tlaacélel, who first proposed the practice as a way of providing a ready supply of sacrificial victims for Aztec ceremonies (see HUMAN SACRIFICE). These public events at TENOCHTITLÁN and other regional CITIES surely served to intimidate potential adversaries of the Triple Alliance, and the name for these wars might have derived from the wall of flowers behind which the enemy rulers secretly

observed the sacrifices. At the same time, sacrificial victims were also captured during the ordinary conquest wars, while in some flower wars more soldiers were killed than taken for sacrifice.

Another motive stated by the Aztecs for these wars was to provide battlefield experience for their soldiers and exercise military strategies. Potential opponents for a flower war were those armies considered equal in strength to the Aztec themselves, and emphasis was placed on hand-to-hand combat and individual fighting skills rather than indirect attack with spears and arrows. Thus, the flower wars required fewer men than for regular battles, and soldiers were occasionally chosen from among the nobility (although captured nobles were mostly released).

One prolonged flower war was fought between the Triple Alliance and their bitter enemies the Tlaxcalans (see TLAXCALA). According to the Aztecs, these recurring flower wars allowed the Tlaxcalans to “remain” unconquered, while providing their own armies with the necessary battlefield practice. However, the Aztecs experienced considerable losses in these wars, and it is likely that they were indeed trying to conquer and incorporate the Tlaxcalans into their empire by slowly wearing down their forces. These efforts failed, however, and the Tlaxcalans eventually joined the Spaniards in their conquest of Tenochtitlán.

—Danny Zborover

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## food

### MESOAMERICA BEFORE 1492

The Mesoamerican diet consisted of a rich array of wild and cultivated foods. The cultivation of New World plants and animals began around 10,000 B.C.E. and continued well into the Postclassic period. Mesoamericans ate mainly a vegetarian, carbohydrate-rich diet; nothing was more important to life than what is often described as the Mesoamerican trinity: MAIZE, beans, and squash.

According to the creation tale of the K'iche' (Quiché) MAYA of GUATEMALA, the POPOL VUH, human life was born from maize. As the principal staple crop throughout Mesoamerica, maize played a central role in the physical and spiritual lives of indigenous peoples. Maize was consumed daily in the form of tortillas, tamales, stews, and beverages. The crop's life cycle served as a metaphor for the intersection between the human and metaphysical worlds (see RELIGION). The farming of maize required careful and continuous attention, just as the deities required regular offerings (see AGRICULTURE). Unlike other crops, seeds can only be successfully germinated with human attention. Changes in weather patterns could turn future bounty into immediate scarcity, similar to the fickle nature of many Mesoamerican deities.

For both the Classic-period Maya and the Postclassic AZTECS, the god of maize controlled fertility and abundance. Growing maize, however, was not a single crop affair. Since the Preclassic period, beans and squashes were grown along with maize. Mirroring the stratification of the forest—with canopy, understory, and shrub layers—maize, beans, and squash were grown in a three-tiered fashion, with maize at the top, beans supported along the stalks, and squashes growing in the shade. Beans and squash also replenish nitrogen in the soil, which maize rapidly takes from it.

Although approximately 80 percent of the Mesoamerican diet consisted of maize, beans, and squash, a host of other foodstuffs were available. In the Classic period, the Maya, for example, raised MANIOC as a staple crop. Since the Preclassic period, farmers raised chilies, tomatoes, avocados, papayas, and CACAO, while deer, ducks, rabbits, and fish provided protein and other nutrients. Fields and forests existed as fluid areas of propagation and experimentation. Using mainly swidden, or slash-and-burn, agriculture, Postclassic Maya farmers from the Petén region allowed fertile fields to return to jungle but continued to collect from mature trees. Likewise, farmers in eastern GUATEMALA allowed domesticated and wild cacao stands to intermingle and harvested from both. In the Valley of MEXICO, domestic turkeys, dogs, and insects provided protein, while in Yucatán, wild deer and iguana supplemented the diet.

The production and consumption of food was subject to strict social and gender divisions. Highly valued foods, such as cacao and PULQUE, were reserved for the elite. Under the Aztecs' rigid hierarchy, the illicit sale and consumption of ALCOHOL brought severe penalties (see CRIME AND PUNISHMENT). Those caught selling alcohol to commoners were punished by death, as were drunken non-noblewomen under the age of 70. While restraint and moderation were typical in many Mesoamerican societies, during religious festivals, elites enjoyed massive feasts. Spaniards reported that in 1520, MONTEZUMA held a feast that consisted of more than 300 dishes.

Throughout Mesoamerica, the kitchen was the preserve of WOMEN, and the three-stone hearth was the center of the domestic ritual space. The preparation of food fell largely into the hands of women, and the clay griddle, or *comal*—a ritualized object—was exclusively the domain of women. Cooking was the focus of all girls' training and prestige. In addition to assisting in the fields, women of all ages learned the arduous and time-consuming task of maize preparation, which involved grinding dried maize into flour for tortillas and tamales. The continuous LABOR, according to one Spanish source, left women's hands "blistered, raw, and festering." Food preparation, however, was not just menial labor but a praiseworthy craft. At the time of the CONQUEST, the elite praised cooks for their commitment and skill. According to the 16th-century FLORENTINE CODEX, "the cook is the one who makes *mole*, [she] makes tortillas [and] is wiry

and energetic. The good cook is honest, discrete, one who likes good food, an epicurious taster."

Mesoamerican subsistence and dietary patterns consisted of a rich but fragile balance of labor and ecology. With the production of food dependent on human labor, periodic shortages threatened even the most dominant societies. The so-called Great Maya Collapse in the ninth century seems, in part, to have been linked to a massive food shortage caused by ecological changes. Even during the expansionist period of the Aztecs, the capital city of TENOCHTITLÁN suffered widespread famine during the 1450s. While the arrival of Europeans in the 16th century strained Mesoamerican production, many of the basic forms of consumption and subsistence proved resilient to the pressures of colonialism.

### SOUTH AMERICA BEFORE 1492

The history of the domestication and adoption of the first food crops in the Old World is better known than the trajectory of domestication and farming of food crops in the New World. The process began in both hemispheres at the end of the Pleistocene period but involved different kinds of crops. In the Old World, the emphasis was on the domestication of cereals, including barley, oats, and WHEAT, and large animals such as sheep, cattle, and horses for food, fiber, and transport (see TRANSPORTATION). In South America, the important plant domesticates were root crops, including sweet potato, manioc, and POTATO; seed crops were less important. The only large domesticated animals were the llama and alpaca; the llama was used for transport, meat, and fiber and the alpaca for fiber (see TEXTILES).

As the Ice Age waned, the early populations of hunter-foragers who had entered South America at least 11,000 years ago began to shift toward hunting smaller game, such as deer and peccary, and intensified their foraging for plant foods. Many of the earliest sites of human occupation in South America are found within a broad swath of territory that circled the core of the AMAZON rain forest, beginning in the northwest and extending across present-day COLOMBIA, VENEZUELA, and the Guianas, southwestward across eastern BRAZIL, and then to the west across southern Brazil and eastern BOLIVIA. These areas had more seasonal climates with a dry season of several months' duration and ranged from savannas to dry deciduous forests. In such environments, vegetation is controlled by rainfall and the length of the dry season. Some plants that adapted by storing starch in underground tubers or rhizomes against the dry months became important foods for foragers because their rhizomes and tubers were available when other foods were scarce. As the climate warmed at the beginning of the Holocene period, people began to foster and then cultivate some of these previously gathered foods.

This explains one of the central characteristics of South American foods: Many of them are roots rather than seeds. Another characteristic of these crops is that they can be propagated by sowing a piece of the tuber or rhizome

rather than by seed. Arrowroot (*Maranta arundinacea*) was one root crop considered indigenous to northern South America and the Caribbean. The South American species of yam is *Dioscorea trifida*, which may have been domesticated between eastern Brazil and Guiana. Yams can survive for months without rainfall and can be stored dry for up to six months. Another crop, grown in the lowlands, along the Pacific coast and at lower elevations in the Andes was *achira* (*Canna edulis*). No longer cultivated as a field crop, *achira* is still found in house gardens today. The sweet rhizomes can be eaten raw or cooked. Mature rhizomes can be left in the ground for up to two years.

Two other lowland crops were even more important: sweet potato (*Ipomoea batata*) and manioc, or cassava (*Manihot esculenta*). Sweet potato is still a major food source, today second only to manioc, which was more important in the past. The sweet potato sets seed but can be grown from stem cuttings. It may have been domesticated in northern South America. In contrast, it has now been established that South American manioc was first domesticated in southern Brazil. Nicknamed the “bread of the lowlands,” manioc is extremely productive. The crop can be stored in the ground for up to two years. There are two cultivated forms: bitter and sweet manioc. Bitter manioc contains chemical compounds called cyanogenic glucosides, which may have protected the plant from insect pests. These must be removed before it can be eaten. Sweet manioc does not contain these compounds. Both varieties of manioc can be processed into a dry meal (*farina*). Manioc sets seed but is commonly propagated from stem cuttings. It was one of the earliest domesticates and had spread to the west coast of South America by 9,000 years ago.

Potatoes were grown from the lowlands to the very highest altitudes of the Andes. Wild potatoes were eaten by early foragers in CHILE more than 13,000 years ago. There are many wild varieties, and by 10,000 years ago, some of these were being domesticated. There are eight domesticated species and literally thousands of varieties of this important crop. Special varieties can be grown at very high altitudes where no other crop will thrive. With special processing, these can be freeze-dried and made into a flour, called *chuño*, which keeps indefinitely; it is eaten in soups. Like the flour made from manioc, this was a lightweight transportable foodstuff that made long-range mobility possible. Many of the other potato varieties were developed to survive in particular microenvironments in the mountains. Farmers planted different varieties as insurance against loss from frost, drought, or excessive rain.

Other important plants contributed carbohydrates to the Andean diet. One was the peanut, another early domesticate from southern Brazil, which had made its way to the Pacific coast by 8,500 years ago. The peanut is a seed in a hard shell; it grows underground as an adaptation to the dry season. It is high in fats and proteins, which make it an important complement to crops that have high carbohydrate content but are low in fats and oils. Another important early domesticate was squash, which was prob-

ably first cultivated for its oil-rich seeds. Later, the flesh, which is stringy and bitter in primitive squashes, was improved through selection, and squash began to be cultivated as a vegetable. The principal domesticated squashes were *Cucurbita moschata*, the variety grown today in the lower and mid-elevations of the Andes, and *Curcubita ficifolia*, grown at still higher altitudes with cooler temperatures. The wild ancestor of *Curcubita moschata* may well have been domesticated again as a form adapted to the semiarid coast of ECUADOR and northern PERU; it is called *Curcubita ecuadorensis* and has not survived in its original form. It was reported from the Las Vegas site of coastal Ecuador with dates of 12,000 to 8,000 years ago. Seeds from a form slightly more like modern domesticates were found at sites in the Nanchoc Valley in northern Peru, with dates of 11,000 to 10,000 years ago.

Three different beans were domesticated in South America: the jack bean (*Canavalia plagioperma*), which was probably eaten green; the lima bean (*Phaseolus lunatus*); and the common bean (*Phaseolus vulgaris*). The beans were also very early domesticates and provided important amounts of protein in the diet. Native South American seed crops were minor but highly nutritious. Best known are quinoa, a chenopod related to North America goosefoot, and lupine, an amaranth-like Old World millet. Maize was originally domesticated in southwestern Mexico. The earliest date for maize in South America, which comes from the western Amazon region, is nearly 7,000 years ago. Different varieties of popcorn and seed corn were developed in South America, some returning to Mesoamerica; however, corn, beans, and squash never became the staple triad in South America as they did in Mesoamerica and North America.

Other foods enhanced the indigenous diet and provided essential nutrients. There were four domesticated species of chili peppers (*Capsicum*) in South America: one in northern South America, two in the Amazon region, and one in the Andes and the Pacific coast. Peppers not only perked up an otherwise bland diet but were highly nutritious, providing vitamins and other nutrients. Most fruits were tree fruits and included *paca* (*Inga paca*), *lúcuma* (*Lucuma bifer*), avocado (*Persea americana*), and the tart fruits of *Bunchosia*. Cacao (*Theobroma cacao*) was apparently domesticated for its fruit in the Amazon. Amazonian peoples fostered but did not domesticate important nuts such as the Brazil nut and the peach palm, which were important sources of protein and oil.

While a lot is said about the importance of hunting as a source of meat, once people began farming, fishing may well have provided much of the protein people required. This is true for the farmers of the Amazon, who also hunted, and for those of the coastal valleys west of the Andes. In addition, the tradition of fishing and shellfish collecting along the littoral and the estuaries of the rivers on the Pacific coast dated back at least 10,000 years. Local wild animals, including some rodents and lizards and occasionally deer and peccary, were hunted. As farming became more important, fishers began to dry

and salt large quantities of fish and shellfish, which were traded inland in exchange for agricultural products (see *TRADE*). Herding peoples in the high Andean grasslands also dried meat (*charqui*, or “jerky”), which they traded for crops grown at lower altitudes, particularly maize. Because llamas were so important as sources of fiber, small rodents were trapped and one, the *cuy*, or GUINEA PIG, was domesticated and raised in large numbers.

### EARLY COLONIAL LATIN AMERICA

The arrival of European settlers to the Americas marked the beginning of a long process of culinary fusion. While European settlers may have marveled at the bounty of New World foods, their palates were driven by their taste for Old World cuisines. Native peoples, cast to the bottom of the colonial hierarchy, were charged with feeding the colonizers but were generally prohibited from consuming Old World luxuries.

The first settlers unsuccessfully attempted to introduce European crops and animals to the Caribbean (see *COLUMBIAN EXCHANGE*). These ventures foreshadowed the trajectory of agriculture and food during the early colonial period. Staples struggled to survive, while livestock proved invasive. Shortages of food were frequent for colonizer and colonized alike. In 1493, for example, the first European settlers unsuccessfully attempted to grow wheat and barley in the Caribbean. These crops, adapted to high altitudes and cool weather, were unviable in the tropics. In 1494 and 1495, therefore, there was a dramatic shortage of grains. Old World livestock, on the other hand, thrived. Hogs quickly invaded every ecosystem and, incidentally, spread the first epidemic outbreak of influenza (see *DISEASE*).

The Amerindian pantry contained a rich diversity of foodstuffs. When Spanish soldiers marched in to the Valley of Mexico in 1520, they marveled at the quantity and variety of foods available in Aztec marketplaces. HERNANDO CORTÉS, writing to the Spanish king, described the markets as the largest and richest in the world. Maize was available in multiple forms—fresh, dried, and processed. The list of New World fruits seemed boundless and included avocados, chilies, squash, tomatoes, and melons.

The pre-Hispanic diet, which was based mainly on carbohydrate-rich vegetables, found little favor among Europeans. In Mexico, ubiquitous maize-based foods such as breads (tortillas and tamales), stews (*atoles*), and fermented beverages (pulque) offended European sentiments. The conquistador BERNAL DÍAZ DEL CASTILLO equated a diet based on maize with a life of misery. In the Andes, potatoes also found little favor among early European settlers. The potato was seen as a food of paupers.

A massive, weeklong series of banquets held in MEXICO CITY in 1538 were emblematic of the European palate in early colonial Latin America. The festivities took place on a grand scale in the central plaza of the city. Included on the menu were an assortment of meats, sweets, and liquors. Largely excluded, however, were Amerindian foods. The city plaza of the city had

been staged as a hunting ground stocked with wild and domestic animals, including sheep, cattle, swine, deer, and chickens; turkeys were noticeably absent. Old World fruits, such as apples and pears, and delectables such as honey-coated marzipan were available in abundance. New World fruits, which every indigenous person consumed, did not appear on the banquet tables. Chocolate, in the form of a beverage, was the only New World item worthy of mention by the events' chroniclers.

For the early colonial indigenous, who were legally prohibited from consuming luxuries such as WINE and could not afford European commodities such as meat and wheat, the pre-Hispanic diet remained largely intact. Native Mesoamericans subsisted on maize, while native Andeans continued to farm potatoes. Colonial officials, however, placed great pressure on the ideological systems that reinforced those agricultural patterns. Priests and friars attempted to eliminate indigenous loyalties to agricultural deities by teaching new forms of subsistence (see *RELIGION*). In Mexico, they forwarded wheat, olives, and grapes—the principal components of the Eucharist—as alternatives to maize, beans, and squash. Nevertheless, these plants grew in only limited regions and were susceptible to disease. In the early colonial period, therefore, wheat tortillas, wine, and olive oil became markers of colonial status and Catholic piety.

While the kitchen existed as an important female-centered ritualized space in many pre-Hispanic societies, Catholic authorities attempted to move cooking to a secular realm during the early colonial period. For indigenous women, the home moved from being a source of power and prestige to a place that limited their authority and agency. Nahua (Aztec) midwives from the period warned newborn girls: “You will become fatigued, you will become tired; you are to provide water, to grind maize, to drudge.”

The introduction of colonial subsistence and economic systems came with great costs (see *ECONOMY*). Periodic food shortages struck even the most fertile areas. In the 1540s and 1570s, the inhabitants of MEXICO CITY suffered widespread famine, which sparked massive outbreaks of *cocoliztli* (hemorrhagic fever) and killed nearly half the population. In the Mezquital Valley north of Mexico, the introduction of sheep farming turned fertile plains into a barren desert in less than two decades. Subsequently, indigenous people and Europeans living in the area were forced to resettle.

See also *FOOD* (Vol. III).

—R. A. Kashanipour  
Patricia J. Netherly

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**forastero** In Spanish, the term *forastero* means “from the outside.” It can also be used to refer to a person who “comes from a place outside of his or her native community.” In colonial Spanish America, *forasteros*—also referred to as “vagabond Indians,” or *indios vagabundos*—were, specifically, Indians who had left their natal communities to migrate to and integrate with other Indian communities. *Forasteros*’ legal obligations and social status were defined in colonial society. As a distinct category of persons, they were seen in opposition to *originarios*, or Indians who lived in their native communities. The Crown perpetuated the *originario-forastero* dichotomy throughout the early colonial period.

In colonial Latin American society, *forasteros* were considered a social problem for several reasons. Their migrations confounded the Crown’s tax- and tribute-collecting efforts. Moreover, Spanish *encomenderos*, who held grants to the right of indigenous LABOR on their lands, complained to the king about the NATIVE AMERICANS who became *forasteros* (see ENCOMIENDA). In particular, they noted that because vagabond Indians avoided taking their turns in the *MITA*, or forced labor obligation in the mines, they did not pay tribute to the Crown (see MINING). Ultimately, the movements of *forasteros* created shortages of labor in the mines and hindered the Spaniards’ ability to extract natural resources using indigenous labor. To stanch the uncontrolled MIGRATION of *forasteros* throughout the New World Spanish colonies, numerous legislative attempts were made by colonial VICEROYS to restrict nonmandated Indian movements to places outside their native communities and, further, to move them back to their original communities.

See also FORASTERO (Vol. II).

—Tien-Ann Shih

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**Franciscan millennial kingdom** This term refers to the belief shared by many Franciscan friars that the end of the world—the thousand-year reign of Christ on earth (the millennium)—was close at hand. The Franciscan order (Order of Friars Minor) was founded in the 13th century in Italy by St. Francis of Assisi (see RELIGIOUS ORDERS). It grew rapidly and gained great popularity in late medieval Europe. There were several internal disputes regarding the best way to follow the rule of the order, and as a result, the

order split into several branches. The Observant branch was deeply influenced by the writings of a 13th-century Cistercian monk, Joachim of Fiore. Observant monks rigorously applied the Rule of St. Francis, embracing personal poverty and the notion that they could bring people closer to Christ by exemplifying a Christ-like life.

Fiore described the history of the world as falling into three eras, each identified with a part of the Trinity. The first age was that of God the Father and lasted until the coming of Christ. The current age is that of God the Son. Fiore believed that this current age would quickly end and usher in the era of the Holy Spirit, which corresponds to the Kingdom of Heaven on earth as described in the book of Revelation. This last age, the Franciscans theorized, would occur once the gospel had been preached to the last person on earth. As a result they took to the missionary effort in the New World with great fervor, confident that within their own lifetimes the Kingdom of Heaven would be at hand.

The millennial fervor of the Franciscans in the New World was seen most clearly in their evangelization in MEXICO. The friars who first arrived there were from an Observant province in Spain, the Holy Gospel Province, which had set about reforming the order from within. The friars were highly dedicated to regaining the early purity of the Franciscan rule, living in complete poverty, depending on the alms of the faithful, and living a life as close to that of Jesus as possible. They believed that in this way they could demonstrate the true nature of Christianity to the indigenous peoples of the New World, in spite of the language and culture barriers. Their efforts were chronicled by a member of the order, Fray Gerónimo de Mendieta, in his book *Historia eclesiástica indiana* (Ecclesiastic Indian history). In this history, Mendieta applied the tripartite division of history developed by Joachim of Fiore to the ages of the evangelization of the Indies. He felt that the “golden age” of evangelization had already occurred in the early 16th century with the efforts of the first missionaries, and that by the 1560s and 1570s, they had already entered the end times and witnessed a visible decline. The feeling that the end of the world was near continued to be an important theme for Franciscan missionaries.

See also CATHOLIC CHURCH (Vols. II, III, IV); FRANCISCANS (Vol. II).

—John F. Schwaller

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# G

**Gasca, Pedro de la** (b. 1493–d. 1567) *royal official, diplomat, bishop* Born into a modest *hidalgo* family in Navarregadilla, Spain, Pedro de la Gasca began his studies in canon law at the University of Salamanca (see SALAMANCA, SCHOOL OF) and continued at the University of Alcalá de Henares, receiving his law degree in 1521. He returned to Salamanca in order to continue his education and soon distinguished himself for his intelligence. Gasca became vicar of the archbishop of Alcalá de Henares in 1537 but soon began a political career as *visitador*, or inspector, of the Kingdom of Valencia and as a member of the Council of the Inquisition. Gasca established a reputation as a loyal and uncompromising royal servant, particularly for his hard-line stance toward the *converso* and *Morisco* populations of Valencia.

In 1545, when news of GONZALO PIZARRO's rebellion in PERU reached Charles I, the king chose Gasca to reestablish royal authority in the new colony. A faction of *encomenderos* in Peru had risen against the VICEROY, Blasco Núñez Vela, after he had attempted to enforce the NEW LAWS OF 1542, which threatened *encomendero* authority and privileges (see CIVIL WARS IN PERU; ENCOMIENDA). Gasca sailed for Peru in 1546, with the authority to achieve order by any means necessary. He landed in PANAMA where he enacted his plan: He offered amnesty to Pizarro's supporters in exchange for their cooperation. For six months, Gasca built a coalition with whom he sailed for LIMA in 1547. There, he continued to undermine the rebel cause by political means. In 1548, Gasca's now-formidable army confronted Pizarro's dwindling forces outside Cuzco. Pizarro and his few remaining allies were annihilated.

Gasca left Peru in 1550 after initiating a series of administrative reforms. Charles I rewarded him on his return to Spain with the bishopric of Palencia, over which he presided until 1561, when he became bishop of Sigüenza.

—Jonathan Scholl

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**gold** Gold was the object of desire for all conquistadores; CHRISTOPHER COLUMBUS required it of the native people in 1492, HERNANDO CORTÉS searched for it among the AZTECS of TENOCHTITLÁN in 1519, and FRANCISCO PIZARRO exacted it from the Andeans after his capture of ATAHUALPA in 1532. After the dust of CONQUEST had settled, Spaniards demanded gold as tribute from the indigenous population and even organized expeditions to find the mythical city of gold EL DORADO. Although the Spaniards' demand and search for gold met with varying degrees of success, gold played an important role in the initial conquest and colonization of the Americas.

Prior to the Spanish arrival, all of the Americas' settled indigenous cultures possessed and/or worked gold, though to varying degrees. The AZTECS called it *teocuitlatl*, "excrement of the gods"; the MAYA called it *takin*, "excrement of the sun"; and the INCAS referred to gold as the "sweat of the sun." The connection between gold and the divine was purely aesthetic. The luster of gold gave the metal a unique beauty, and its malleability made it a

desirable metal for the ornamentation of shrines, temples, ritual objects, and various other artifacts. Indeed, gold items ranged from large masks to small, delicate bells. For indigenous cultures, the value of gold was in its beauty, not in its economic worth or buying power.

Understandably, the Amerindians found it strange that the Spaniards always appeared to be on the hunt for gold. More than one native person commented on how the Spaniards “thirsted mightily for gold; they stuffed themselves with it; they starved for it; they lusted for it like pigs.” While such comments encourage the idea that the Spanish conquest was driven by the conquistadores’ thirst for gold, this assumption fails to appreciate the role of precious metals in mercantilist Europe and the Spanish Empire (see *ECONOMY*). In an empire whose wealth was based on bullion, it was not enough for conquistadores simply to discover and claim new territories. New colonies required immediate economic viability, namely gold, to repay the debts conquistadores acquired to finance their expeditions. Unlike the native peoples, Spaniards saw little value in gold artifacts themselves, just the worth of the metal itself. Thus, once seized, items made of gold were melted down to facilitate the settling of debts, payment of the conquistadores’ shares, and procurement of supplies. Because of its central financial role in conquest and settlement, the availability of gold in Central MEXICO and the Andes helped draw Spanish conquistadores and settlers, while the Yucatán Peninsula’s dearth of gold helped discourage the foreigners’ presence.

Moreover, in order to justify a new colony and be awarded positions of authority, conquistadores needed to discover gold to convince the Crown of the expedition’s success. Men such as Columbus, Cortés, and Pizarro saw gold as a means to an end—the governorship of a new colony. In more practical terms, gold was also the most transportable, divisible, compact, nonperishable item of value that existed at the time. Thus, the significance of gold in the Americas shifted drastically after the Spaniards’ arrival. Gold had a vital, unchallenged economic and political role in the conquest and early colonization of the Americas, and its eventual MINING and exportation throughout the colonial period created a demand for local products that helped shape regional economies.

See also *GOLD* (Vols. II, III).

—Mark Christensen

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**González Dávila, Gil** (d. 1543) *explorer and conqueror of Nicaragua* Gil González Dávila explored and named NICARAGUA. González heralded from a noble family from Ávila, Spain, and benefited greatly from his family’s ties to Bishop Rodríguez de Fonseca. In 1519, after serving

as royal treasurer on the island of HISPANIOLA, González received a commission from the Crown to explore the regions west of PANAMA, with Andrés Niño serving as his pilot. Despite the fact that the governor, PEDRO ARIAS DE ÁVILA (Pedrarias), had been ordered to provide the expedition with assistance, ships were not supplied. González was forced to transfer supplies over land to a Pacific base in order to build the ships for the expedition, which finally departed on January 21, 1522.

While Niño sailed on, González traveled by land up the Pacific coast, across what is now Panama and COSTA RICA, before turning inland. He claimed to have baptized more than 32,000 indigenous people en route and to have collected tribute from their chiefs. When he arrived at Lake Nicaragua (which he named after the local chief, Nicarao), his scouts reported that it drained into the Atlantic, sparking hope that it could be the much-sought sea passage across the isthmus. While González’s first encounters with the indigenous population were peaceful, this came to an end when he was ambushed by the CACIQUE Diriangen.

With that, González retreated back to Panama and then to Santo Domingo to escape arrest by Pedrarias. By the time he returned in March 1524 to look for Lake Nicaragua’s Atlantic drain via the eastern shore, several other explorers had taken an interest in Nicaragua. Pedrarias had sent his own expedition, and HERNANDO CORTÉS did likewise, from MEXICO. González established San Gil de Buenavista as his base, and a number of confrontations ensued. Ultimately, Francisco de las Casas, who had been sent by Cortés to deal with the treasonous explorer, took González to Mexico, from which he was sent to Spain for trial. He died in 1543.

—Angela Granum

**Grijalva de Cuéllar, Juan de** (b. ca. 1490–d. 1527) *explorer, conquistador, captain of expedition to Yucatán and Mexico’s Gulf coast* Born in the Spanish town of Cuéllar near Segovia ca. 1490, Juan de Grijalva came to the New World before he was 20 years old. Together with his uncle, DIEGO VELÁZQUEZ DE CUÉLLAR, Grijalva took part in the CONQUEST and subjugation of the island of CUBA from 1510 to 1511. Velázquez had been given permission by the VICEROY of the Indies, Diego Columbus (CHRISTOPHER COLUMBUS’s eldest son), to conquer the island and serve as its new governor. After the final conquest of the island and the establishment of a colony, Grijalva served under his uncle in minor governmental offices.

As soon as the governor of Cuba received the reports of the 1517 expedition to Yucatán, led by Captain FRANCISCO HERNÁNDEZ DE CÓRDOBA, Velázquez prepared to send a second, larger and stronger fleet to explore the new lands. Velázquez chose his nephew to serve as captain general of the new expedition. The expedition also counted on the navigator and pilot of the Córdoba expedition, Antón de Alaminos. To captain the four ships, in consultation

with Grijalva, the governor selected PEDRO DE ALVARADO, FRANCISCO DE MONTEJO, and Alonso de Ávila.

On April 8, 1518, what came to be known as the Grijalva expedition set sail from Havana. With four ships and more than 300 men, the expedition was one of the largest expeditions formed in the Indies. The expeditions' chaplain, Juan Díaz, also served as the company scribe; Díaz recorded the entire voyage and its exploits in his publication, *Itinerario de la Armada* (The armada's itinerary).

Grijalva's ships arrived first at the island of Cozumel and then crossed to the mainland of the Yucatán Peninsula. There they saw three large towns with stone houses and large towers, which were later described by a member of the expedition, BERNAL DÍAZ DEL CASTILLO. The fleet continued along the coast of the Yucatán Peninsula and headed southwest toward the region of Campeche. While on shore, Captain Grijalva and his men had a violent encounter with a group of armed MAYA warriors. The Spaniards named the battle site Puerto de la Mala Pelea (harbor of the terrible battle).

Grijalva's expedition set sail once again, continuing southwest. Almost 100 nautical leagues (approximately 345 miles [555 km]) west of Laguna de Teminos the fleet came to the mouth of a large river, which the captain general named after himself. Soon, the fleet was met by more Maya, who expressed a desire to TRADE with the Spaniards. Urged by reports of GOLD, the fleet continued west along the coast, lands of the Totonac peoples (see Totonacs). Just north of present-day San Juan de Ulúa, the Spaniards explored a large gulf with three islands; they named them the *Isla de Sacrificios* after finding evidence of HUMAN SACRIFICE. From there, Grijalva's fleet reached as far northwest as the mouth of the Río Pánuco (near today's Tampico, MEXICO) before turning back toward Cuba.

The significance of Grijalva's expedition lies in the fact that most of his captains and crew would take part in the subsequent conquests of Mexico and Central America. These included Alvarado (conqueror of GUATEMALA, 1522–24), Montejo (conqueror of Yucatán, 1527–37), and Alonso de Ávila (conqueror of Yucatán/HONDURAS, 1527–37). Although Grijalva himself would not take part in any of the major conquests, he did go on to command several smaller expeditions that explored and traded along the Central American coast. It was during one of these expeditions, in 1527, that Grijalva died from wounds inflicted during a battle with Central American indigenous people.

—John F. Chuchiak IV

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**Guadalupe, Virgin of** See VIRGIN OF GUADALUPE.

**Guaraní** The Guaraní people occupied the regions of modern PARAGUAY, southern BRAZIL, southern BOLIVIA, and northern ARGENTINA. They are believed to be distant relatives of the Tupí peoples of the Brazilian AMAZON (see TUPINAMBÁ). The Guaraní language is considered part of the subfamily of Tupí languages and is the source of several English-language terms, such as *jaguar* and *piranha*. Much of what is known of Guaraní history has been passed down through oral transmissions, and these vary significantly by tribe. According to Guaraní mythology, the sun god Tupã, along with the moon goddess, Arasy, emerged from the earth in the hills of Areguá, Paraguay. From there, they created the rivers, seas, stars, animals; and from clay, they created the Guaraní people. Guaraní RELIGION centered on beliefs in nature. Because of the importance of religion, the leadership of tribes often fell to a religious leader known as the CACIQUE. The cacique also served as a practitioner of traditional MEDICINE.

Guaraní society was organized on a communal basis. Villages were composed of communal shelters that might house 10 or more families. As a seminomadic people, the Guaraní practiced subsistence farming and slash-and-burn AGRICULTURE. They grew MANIOC, MAIZE, beans, peanuts, and yerba maté, a tea. When the soil was depleted, within three to five years, villages moved to new locations. When the Spanish conquistadores arrived, beginning with the 1516 expedition of Juan Díaz de Solís, many Spanish towns were built on earlier Guaraní settlements (see CONQUEST). At the time of contact with the Spanish, estimates place the number of Guaraní at nearly 1.5 million. Over time, the Guaraní blended with the Spanish to form a nation of mestizos, and the region later became incorporated into the Viceroyalty of Río de la Plata (see MESTIZAJE/MESTIZO; VICEROY/VICEROYALTY).

See also GUARANÍ (Vol. II).

—Michael S. Coe

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**Guatemala** The first human settlers in Guatemala arrived from present-day MEXICO more than 12,000 years ago. Pre-Columbian Guatemala boasts one of the richest historical traditions in Mesoamerica; myriad well-preserved archaeological sites have provided great insight into the peoples that inhabited the country. High-quality CERAMICS and stone carvings, elaborate burial and religious temples, and a written language are among the achievements that have aided study of the nation's distant past. Throughout the era of ancient history, the OLMECS and MAYA dominated the region for some two millennia, until the arrival of the Spanish in the 16th century.

The earliest evidence of human settlement dates back as far as 18,000 B.C.E.; OBSIDIAN arrowheads from this time



have been found in various parts of the country. More concrete evidence of contiguous human occupation dates to 10,000 B.C.E. The early peoples were hunter-gatherers, eventually adopting MAIZE from Mexico sometime around 3500 B.C.E. By 2500 B.C.E., several small-scale settlements had emerged around the lowland Pacific portion of Guatemala, including settlements around Tilapa, La Blanca, Ocós, El Mesak, and Ujuxte. Evidence of pottery in Guatemalan settlements emerged 500 years later.

The Monte Alto culture became the first large-scale civilization in Guatemala, as well as Mesoamerica, and a primary influence of the Olmec and Maya. The Pacific site of Monte Alto was first settled around 1800 B.C.E., and the area grew into a regional center between 400 B.C.E. and 200 C.E. Forty-five extant structures mark the remains of the Monte Alto culture, which feature carved stone heads and “potbellies,” or male figures carved from boulders. These relics were often magnetized, making them the world’s oldest magnetic artifacts. The sites and carving techniques used at Monte Alto were either contemporary to or heavily influenced by the earliest Olmec peoples.

The Olmecs, centered in southeastern Mexico, appear to have developed long-distance TRADE networks that widely affected Guatemala. Obsidian and jade were both highly prized commodities in Olmec culture and widely believed to have been of Guatemalan origin. As the Olmec culture declined between 400 and 350 B.C.E., offshoot cultures emerged that bridged the technological feats of the Olmec and the rise of Maya. Perhaps the most important archaeological site in Guatemala from this era is Tak’alik A’baj’, located 120 miles from Guatemala City. Eighty-two structures, a dozen plazas, two recreational ball courts, and a hydraulic system that supported saunas ensured this locale was a thriving hub. Beyond being an important commercial center between the eighth century B.C.E. and ninth century C.E., Tak’alik A’baj’ served as a nexus between pre-Olmec cultures, Olmec influences, and the rise of the Maya in Guatemala.

The seminal Maya settlements emerged about 1800 B.C.E. in the Soconusco region along the Pacific coast of southern Mexico and Guatemala. Over the succeeding centuries, the Maya expanded throughout much of southern Mexico and large swaths of Central America. By 800 B.C.E., the Guatemalan site of Kaminaljuyú had emerged as the chief source of jade and obsidian in the rapidly expanding Maya territory. ARCHITECTURE soon became a hallmark of the civilization, as crude burial mounds gave way to stone-tiered pyramids and large urban centers in such places as EL MIRADOR and, later, TIKAL.

The Maya also made significant achievements in astronomy and mathematics, having independently developed a series of remarkable innovations: the concept of zero by 36 B.C.E.; a complex calendrical system, with a 365-day solar calendar and a 260-day sacred calendar; and a host of impressive celestial observations. In fact, the Maya are believed to be the only pretelescopic civilization to accurately record the unique characteristics

of the Orion Nebula. Aside from the sciences, the Maya developed the only complete written language in the pre-Columbian Americas.

Despite the immense achievements of the Maya over a wide range of fields, the Classic Maya civilization (250–900 C.E.) began to decline in the late eighth and early ninth centuries. Recent scholarship has focused on ecological factors such as overpopulation, endemic WARFARE, severe drought, and soil exhaustion as being central to the decline. Maya development from the first millennium on shifted north, as separate polities emerged in the Yucatán in the epoch prior to Spanish discovery. By the 16th century, the Maya had devolved into competing city-states, with rival cities constantly fomenting war against one another. Amidst this turmoil, the Spanish encountered the Maya in 1502.

The Spanish CONQUEST of Guatemala began in 1523 when HERNANDO CORTÉS dispatched PEDRO DE ALVARADO to Guatemala from MEXICO CITY. Initially, Alvarado allied with the Kaqchikel Maya to fight against their traditional rivals, the K’iche’ (Quiché). Alvarado and his Kaqchikel allies began the conquest by confronting the K’iche’, who mustered a force more than 8,000-strong. The combined forces easily defeated the K’iche’, who were led by Tecún Umán, now regarded as Guatemala’s national hero, on February 20, 1524. Destroying much smaller forces on his way, Alvarado burned the K’iche’ capital on March 7, 1524. He then proceeded to IXIMCHÉ, where he established a base camp, and by 1525, Alvarado’s forces had systematically sacked and destroyed nearby cities, including three regional capitals. For his service, Alvarado was named captain general in 1527.

Having solidified his power base in Guatemala, Alvarado turned against his Kaqchikel allies; after a long and bloody conflict, he eventually subdued them in 1530. Battles with other groups continued until 1548, when the last Maya, in Nueva Sevilla, was defeated, leaving the Spanish in control of the region. The Spanish quickly moved to institutionalize their power. The installation of the ENCOMIENDA system was met with fierce resistance by Guatemala’s indigenous populations, and the colony’s opposition was instrumental in the revision of the practice under the NEW LAWS OF 1542. In 1543, an AUDIENCIA was established in Guatemala, exercising jurisdiction over much of Central America.

See also GUATEMALA (Vols. II, III, IV); GUATEMALA CITY (Vol. IV).

—Sean H. Goforth

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**guinea pigs (*cu*)** Over at least the last five millennia, domestic guinea pigs have played a multitude of roles in western South America. Known as *cu* in the Andes, guinea pigs have an important role in folk medical diagnosis, are considered a great delicacy, and are regularly sacrificed to the gods. These medium-sized rodents appear regularly in archaeological deposits, colonial documents, shamanic rites, Andean households, and stewpots and for a time were even featured in a Peruvian comic strip (see **FOOD**).

Domestic guinea pigs are classified as *Cavia porcellus* and are probably related to the wild guinea pig (*Cavia aperea*), which is native to South America. Guinea pigs were domesticated by 2500 B.C.E., if not earlier. Domestication led to an increase in their average body weight and litter size and to the appearance of white or multicolored hair.

Documents from the centuries following the Spanish CONQUEST in 1532 show that guinea pigs played similar roles then as they do today, and based on archaeological data from sites such as Lo Demás, an Inca-era (ca. 1480–1532) site south of LIMA, PERU, these practices were pre-Hispanic (see INCAS). At Lo Demás, four naturally mummified guinea pigs with slit stomachs exactly replicate the use of these animals as diagnostic devices in modern healing ceremonies, in which the shaman rubs

the patient with a live guinea pig and then slits its stomach open to see which organs are affected. Another Lo Demás specimen found as a burial offering had its throat slit. Similar finds have since been reported from other earlier sites.

—Dan Sandweiss

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**Guyana** The land now comprising modern-day Guyana in northeastern South America is characterized by diverse ecological zones. The territory includes an alluvial coastal plain, tropical forest hills and highlands, and interior savannas, crossed by large rivers such as the Branco and Essequibo, which are part of the Amazonia watershed. The earliest indications of human occupation of the area date back to between 10,000 and 8000 B.C.E., when small nomadic bands of Paleoindians using finely made flint and jasper spear points hunted now-extinct species of megafauna.

With climate change and the disappearance of large herbivores from the ecosystem, the local populations began to exploit other **FOOD** sources, foraging for



A 500-year-old guinea pig excavated at the Inca fishing site of Lo Demás in the Chinchua Valley, Peru. The slit stomach indicates that this specimen was part of a curing ritual like those still carried out in the Andes today. (Courtesy of Dan Sandweiss)

shellfish, seeds, nuts, and fruits, in addition to hunting smaller animals and fishing. These new cultural adaptations to the environment, which included the Alaka culture near the Essequibo, produced less refined stone tools but left the first examples of rock ART, in both caves and shelters, including multicolored paintings of plants and animals and geometric designs.

AGRICULTURE and the production of pottery appeared around 4000 B.C.E., by which time the region's indigenous population had developed economic and cultural traits similar to those practiced when Europeans arrived (see CERAMICS). Seminomadic groups of farmers lived in large villages, where they cultivated MANIOC (cassava) and other tuber crops using slash-and-burn agriculture. They supplemented their diet through fishing and hunting. There is also evidence of extensive contact with neighboring cultural groups, such as influences from the Barrancoid culture of the Orinoco Delta to the northwest, which flourished between 800 B.C.E. and 1000 C.E.

By the 16th century, Guyana was inhabited principally by CARIB, Arawak, and Warrau-speaking groups. They continued to farm manioc, their principal crop, in addition to sweet POTATO and MAIZE. They also cultivated pineapples, avocados, papayas, and other tropic fruits and fished the many rivers of the interior, using traps, nets, and even poisons. Hunting deer, monkeys, tapir, and capybara was also an important activity. Both coastal and interior peoples participated in the wider TRADE networks that connected the Orinoco and AMAZON watersheds with the Guyana coast and even the Caribbean islands to the northwest.

The Carib, also known as the Karinya or Kalinago, were by far the most numerous group; they controlled the waterways of the Orinoco River, the upper Essequibo River basin, and into the southern part of the country. Like their relatives in the Leeward Islands of the Caribbean, the Carib of Guyana were feared warriors. The Akawois/Agawai, who were related to the Carib, were a seminomadic people whose territory extended across the region of the lower Essequibo. They eventually displaced the Carib from parts of the interior.

The Arawak or Lokono people inhabited mainly the coastal area, from the Orinoco Delta almost to the mouth of the Amazon River to the south. The Arawak shared many cultural traits with their relatives, the TAINO of the Caribbean islands, including well-developed and complex social structures. The Arawaks controlled much of the trade along the coast and the interior, especially that in luxury items such as metals and jewelry.

The Warrau/Warao inhabited the swamplands of the Orinoco Delta to the north and into northwestern Guyana. The Warrau were renowned as canoe makers and basket weavers and for their expertise at fishing.

During the mid- to late 16th century, European explorers (German, Spanish, and English) launched expeditions along the coast and into the interior of Guyana in search of EL DORADO, the legendary ruler of a gold-rich kingdom supposedly located in the region. While some indigenous

peoples traded and established friendly relations with the Europeans, others resisted their encroachment by force. In either case, the lives of Guyana's native inhabitants were dramatically altered during the period of CONQUEST.

See also GUYANA (Vols. II, III, IV).

—Francisco J. González

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#### Guzmán, Nuño de (Nuño Beltrán de Guzmán)

(b. ca. 1490–d. 1558) *president of Audiencia of New Spain and conqueror of New Galicia* Nuño de Guzmán's career in MEXICO lasted barely a decade, during which he briefly became the most powerful authority there. Born around 1490 to a noble family of Guadalajara, Spain, with strong ties to the Crown, Guzmán's service to Charles I led to his appointment as governor of Pánuco Province, in northeastern Mexico, in 1525. Arriving in Mexico in 1527 he sponsored further bloody campaigns in Pánuco and exported thousands of indigenous slaves to the Caribbean islands in exchange for livestock (see SLAVERY). In 1528, he became president of the first high court, or AUDIENCIA, while still holding the governorship of Pánuco. Generally thought to have dominated the *audiencia*, Guzmán persuaded the *oidores* (judges) to sponsor an expedition to the west.

Beginning his campaign with the execution of the indigenous ruler of Michoacán, whom he accused of treason, Guzmán led thousands of conscripts from Central Mexico and Michoacán, as well as several hundred Spaniards, on a campaign that brought extensive violence and disruption to New Galicia (see CONQUEST). He established four enduring Spanish towns there; Compostela became the first capital. Guzmán's ambition was to join Pánuco and New Galicia into one vast jurisdiction and outflank HERNANDO CORTÉS; however, the arrival of ANTONIO DE MENDOZA as VICEROY in 1535 put an end to the ambitions of both men. Dismissed from the presidency of the *audiencia* even before he completed the conquest of New Galicia in 1531, Guzmán also lost the governorship of New Galicia in 1536. Arrested on charges relating to his various offices, he was jailed in MEXICO CITY and sent to Spain in 1538, where he lived until 1558 in a kind of legal limbo at court.

—Ida Altman

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# H

**Habsburgs (Hapsburgs)** The Habsburgs were a central European royal family that ruled Spain from 1517 to 1700. Maximilian I, a Habsburg and Holy Roman emperor from 1508 to 1519, married his son Philip the Fair to Juana, the daughter of Ferdinand II of Aragon and Isabella of Castile in 1496 (see *MONARCHS OF SPAIN*). Juana inherited the throne of Castile when her mother died in 1504, but Juana's insanity prevented her from ruling (she is known to history as Juana the Mad). Her father acted as regent until his death in 1516, when Juana and Philip's son Charles became ruler of both Castile and Aragon.

Born in Ghent in 1500 and raised in the Low Countries, Charles I arrived in Spain in 1517 to become its first Habsburg monarch. Two years later, he was elected Holy Roman Emperor Charles V. He faced a serious threat to his power in 1520 with the outbreak of the Comunero and Germanías revolts, which reflected the Spanish nobles' dissatisfaction with Charles's reliance on non-Hispanic ministers and advisers. Nonetheless, with the Habsburgs' territories in central Europe plus Spain's overseas colonies, Charles ruled over the greatest European empire of the period. In 1524, he established the *COUNCIL OF THE INDIES* to govern the American colonies and sent high courts (see *AUDIENCIA*) and *VICEROYS TO MEXICO* and *PERU* to wrest control of those lands from the conquistadores (see *CIVIL WARS IN PERU; LAS SALINAS, BATTLE OF*). *AMERICAN GOLD* and *SILVER* flowed into Spain, although not in the great quantities reached at the end of the 16th century.

Foreign threats to the empire and Habsburg dynastic ambitions consumed much of Charles's energy and many Spanish resources. The Protestant Reformation began in

1517, the same year that Charles ascended to the Spanish throne, and Charles thrust Spain into the futile struggle to maintain Catholic hegemony in Europe. Meanwhile, he tried to block French expansion south into Italy. The Turks threatened Spanish and Habsburg interests in the Balkans and the Mediterranean. All of this led to a series of costly wars. His struggle against the Franco-Turkish alliance proved indecisive. Charles was forced to recognize his defeat in the Peace of Augsburg (1555) by the Schmalkaldic League of German Protestant princes. Exhausted, he abdicated in 1556 in favor of his son Philip II but divided the empire, leaving the Germanic and Austrian territories and the imperial title to his brother Ferdinand. King Charles spent only 16 years of his nearly 40-year reign in Spain.

Besides Spain, Charles left Philip the Spanish Netherlands, Italy, and the Americas. He had arranged Philip's marriage in 1554 to Mary Tudor, queen of England, in an attempt to protect Spain's hold over the Low Countries against France. The English alliance failed, however, with Mary's death in 1558 and the ascension of the Protestant Elizabeth to the throne. Philip dutifully pursued his father's foreign policies to protect Habsburg territorial interests and defend Catholicism. He found, however, that Charles's wars had left the monarchy bankrupt. Philip moved to consolidate Spanish hold over the American colonies and benefited from a great upsurge in treasure from the Mexican and Peruvian mines (see *MINING*). Nevertheless, even the American gold and silver was insufficient to offset the costs of Habsburg dynastic ambitions and *WARFARE*.

See also *CHARLES I* (Vol. II); *PHILIP II* (Vol. II).

—Kendall Brown

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**Haiti** See HISPANIOLA.

**Hernández de Córdoba, Francisco** (d. 1517)

*Spanish conquistador who led an ill-fated voyage from Cuba to Mexico* Little is known of Francisco Hernández de Córdoba's life prior to 1517, except that he was born in Spain and was evidently wealthy. At some point having migrated to CUBA, where he was unsatisfied with life, Hernández proposed westward exploration to the island's governor, DIEGO VELÁZQUEZ DE CUÉLLAR. The governor eventually gave his consent, enabling a convoy of 110 men on three ships to depart from the port of Santiago de Cuba on February 8, 1517. Among the men who accompanied Hernández were Antón de Aliminos, CHRISTOPHER COLUMBUS's chief navigator, and BERNAL DÍAZ DEL CASTILLO, who later chronicled the journey as part of his remarkable account of the CONQUEST OF MEXICO (see CHRONICLERS).

On March 4, 1517, Hernández's fleet was approached by 10 Indian canoes off the coast of the Yucatán. The following day, scores of canoes arrived to transport the Spanish ashore. Widespread apprehension about the native people's intentions proved well founded; as the conquistadores approached the nearby town of Catoche, they were ambushed. The technological superiority of the Spaniards' weapons permitted them to startle the Indians, and they beat a hasty retreat. The brief encounter produced two lasting results. First, the Spanish were able to capture two indigenous men, who later became the first interpreters of the Mayan language (see MAYA). Second, while the conquistadores were fighting for their lives, their chaplain entered the town and set about stealing some trinkets, made partly of GOLD, which proved instrumental in fomenting successive Spanish expeditions.

From Catoche, the Spaniards cautiously navigated the Mexican coast, landing some two weeks later, where they were again approached by Amerindians. Fearing conflict, the Spanish quickly refilled their water casks and departed. Ten days later, they went ashore at Champotón, to be surrounded once more. This time, fighting the Maya proved much more costly. Indigenous forces attacked the Spanish in waves. Díaz del Castillo recounts that the Indians cried "*calachumi*," meaning "leader" or "chief," which ignited focused attacks on Hernández, who was struck by at least 10 arrows. The Spanish broke camp and hurried to their ships, with only one man, named Berrio, left uninjured. Fifty Spanish sailors died that day, and another five died of their wounds days later. Aliminos encouraged a

circuitous return to Cuba, skirting FLORIDA in search of much-needed freshwater. The lack of freshwater exacerbated conditions aboard the ships. Francisco Hernández de Córdoba died of his wounds days after returning to Cuba, a fate also shared by three other men.

—Sean H. Goforth

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**Hispaniola (La Española)**

The island of Hispaniola is one of the Greater Antilles group in the Caribbean Sea; it is nestled between CUBA to the west, PUERTO RICO to the east, Jamaica to the south, and the Bahamas to the north. In 1697, the Treaty of Ryswick between Spain and France officially divided the island into two colonies. More than a century later, in 1844, the island acquired its present division into two nations, Haiti in the western one-third and the Dominican Republic in the east. The entire island was known to its indigenous inhabitants as Haiti; *Quisqueya* (*Kiskeia*) is the indigenous term used today to designate the island.

The entire island was once covered with dense tropical and pine forests, with a great diversity of flora and fauna. Human habitation, colonization, overgrazing, and recent development have caused the extinction of some species, as well as considerable deforestation; nevertheless, the island still supports unique ecosystems with endemic orchid species, birds, lizards, and native palms. An average daily temperature of 82 degrees is moderated by constant ocean breezes. Summer rains and hurricanes can be devastating. Earthquakes have destroyed entire cities, as happened to Santiago and La Vega in 1562.

The earliest evidence of human occupation on Hispaniola dates back to 4000 B.C.E., with the arrival of immigrants from Central America; this was followed by an Archaic, or preceramic, MIGRATION around 2000–1000 B.C.E. from northeast South America. A later migration from the Orinoco river system occurred at some point around 500 B.C.E.

Each of these human populations left evidence of their material culture and settlement patterns. From the preceramic migrations, hunters and gatherers left worked chert. There are signs of CERAMICS and cultivated root crops from 500 to 250 B.C.E.; by 1000 C.E., there is clear evidence of complex social, political, and religious organization, manifested in the construction of ball courts and ceremonial plazas, petroglyphs, ritual objects such as *zemies* (tripointed carved stones), and tools for grinding plants.

Between 1000 and 1492, preceramic settlers interacted with the latest migrants; through such interactions and adaptation to new environments, the TAINO Indians emerged as a distinct regional population. The Taino spoke an Arawakan language. These people adapted well

to their environment and developed agricultural systems based mostly on root crops introduced from the mainland, such as yucca, or MANIOC (*Manibot esculenta*), MAIZE (*Zea mays*), beans, squash, and peppers (see AGRICULTURE). The Taino also were seafarers who constructed huge dug-out canoes that could transport as many as 150 people (see TRANSPORTATION). Their economic prehistory up to the contact period shows successful adaptations to island environments, which combined farming practices with hunting and fishing (see ECONOMY). With the island's relatively low people-to-land ratio, the indigenous inhabitants were able to produce virtually everything they needed locally; however, they also supplemented local goods with products acquired through raids and TRADE with other islands and the mainland, creating a unique way of life that was at its height at the time of the Spanish invasion.

When CHRISTOPHER COLUMBUS arrived in December 1492, he and his men encountered the Taino. At the time, the Taino were a large population, with complex economic, political, and cultural organization. Taino settlements consisted of five principal *cacicazgos*, or chiefdoms, headed by CACIQUES named Guarionex, Caonabo, Behechio, Goacanagarix, and Cayacoa. Columbus also met the Ciguayos (who spoke a different language) in the region of Macorix. The Tainos had subsistence plots (*conucos*) and home gardens, where they planted manioc, maize, yautia (*Xanthosoma*), and fruit trees. COTTON and other plants were used to produce elaborately woven cloth, baskets, and hammocks (*hamacas*) (see TEXTILES). Settlements (*yucayeches*) were located around ceremonial plazas (*bateyes*), which were used for ball games and ritual musical performances (*areitos*) (see MUSIC). These plazas were surrounded with large rectangular houses for the caciques and round houses, or *bohios*, for extended families. Taino social organization exhibited hierarchies between *nitáinos* (elites) and *aborías* and included division of LABOR by gender and age, along with craft, medical, and religious specialization (see WOMEN).

The relationships between Tainos and Columbus, initially peaceful, soon turned violent as the Spaniards plundered villages, demanded GOLD, and raped, mutilated, and murdered. Before he returned to Spain, Columbus built the first fort, LA NAVIDAD, where 39 of his men remained. The following year, Columbus embarked on his second voyage to the Americas and returned to Hispaniola; he brought Old World plants such as sugarcane, and European livestock such as pigs, goats, and cattle (see COLUMBIAN EXCHANGE; SUGAR). However, when he arrived at La Navidad, he discovered the fort destroyed and the men killed.

Despite the setback, Columbus continued his plans to colonize the island. The first colonial settlement, La Isabela, was located in the north. The site, however, was eventually moved to the south-central region where Bartolomeo Columbus founded the city of Santo Domingo, which became the *sede virreinal* (seat) of the Spanish colonial enterprise (at least until 1600). Santo Domingo is today the oldest colonial city in the Americas.

Between 1493 and 1498, internal strife arose between Columbus and many of the Spanish settlers who had joined him; in part, the conflict was rooted in the settlers' refusal to engage in manual labor and their demands for land and riches. Consecutive governors sent by Spain organized a provisional power structure between 1500 and 1509, including *repartimiento* and later *ENCOMIENDA* grants (granting of lands and indigenous laborers to colonists); they also established a high court, or *AUDIENCIA*, to settle legal disputes.

Through the *encomienda* system, the Tainos were forced to pay tribute, work in gold mines and sugar mills, and to cultivate FOOD for the local Spanish population (see MINING). Mistreatment became so severe that many Taino committed suicide, and women aborted or committed infanticide. Others simply ran away to the mountains. Those who remained were devastated by WARFARE, forced labor, and DISEASES such as smallpox, influenza, and measles.

Census figures reveal a staggering rate of extinction for Tainos; from an estimated 200,000 at initial contact, to 40,000 by 1510, and 3,000 by 1519, around 500 of whom had escaped into the mountains with a leader named Enriquillo. In response to the dramatic population decline, Spanish settlers quickly introduced African slaves (see SLAVERY). As early as 1503, slaves were brought to the island to help replenish the dwindling Taino labor force. Less than 50 years after Columbus first set foot on Hispaniola, approximately 12,000 slaves had been introduced. By 1560, few Tainos remained on Hispaniola; however, food production techniques, land-people relations, place-names, as well as many Taino terms had been adopted by Spaniards, Africans, and the growing mixed population. These influences continue to survive.

The 30,000 square miles (77,700 km<sup>2</sup>) of Hispaniola, from prehistory to 1560, offer a remarkable example of biological, social, and cultural transformation. As the first territory in the Americas to be explored, conquered, and colonized by the Spanish, it witnessed momentous and devastating events that transformed the Americas and the rest of the world. From Hispaniola came the first European taste for important foods from the New World, such as manioc, maize, chili peppers, and tomatoes. Hispaniola also experienced the first hemispheric biological exchanges of animals, humans, and plants; likewise, it served as the location of the earliest New World experiments in plantation economies, based on monocrop production of sugar and TOBACCO.

See also DOMINICAN REPUBLIC (Vols. III, IV); HAITI (Vols. III, IV); HISPANIOLA (Vol. II); SANTO DOMINGO (Vols. II, III, IV).

—Lidia Marte

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**Honduras** Honduras is a small country that straddles the Central American isthmus. GUATEMALA borders it on the west and NICARAGUA on the east, with EL SALVADOR on the southwest. It is mostly a mountainous country, which supported early agricultural communities in the Ulúa, Chamelecón, and COPÁN river valleys and around the shores of Lake Yojoa in the west (see AGRICULTURE). These early communities were mostly Lenca, whose language and culture differed from that of the MAYA, who established themselves in the Copán Valley. Evidence suggests that Lenca nobility interacted freely with the Maya and even established residences in the Maya capital of Copán, though there may have been racial tension between the two groups during the Classic period (250–900 c.e.).

The pre-Columbian history of Honduras was dominated by the rise and fall of Copán. The later centuries are told in historical inscriptions from that site, while archaeologists have relied on CERAMICS, soil samples, and excavations for information about the prehistory of Honduras. Scholars have concluded that the Preclassic period was marked by three main influences: the introduction of the Maya into Honduras, TRADE and cultural contacts with KAMINALJUYÚ, and the eruption of Ilopango Volcano.

It is not known precisely when the Maya arrived in the Copán Valley. Evidence from there and from Lake Yojoa indicate charcoal burning and MAIZE cultivation in Honduras as early as 4500 B.C.E. This is well before the rise of Izapa culture in the Late Preclassic period along the Pacific Guatemala coast. Kaminaljuyú in the Guatemala highlands, and Chalchuapa in the shadow of Ilopango Volcano in El Salvador, served as conduits of the Izapa and, later, their culture to western Honduras.

The spread of writing, belief systems, sculpture, ceramics, and ARCHITECTURE does not in itself infer the movement of people. Indeed, local chiefs in north and central Honduras, where Lenca dialects dominated, were able to command LABOR resources to build raised platforms for elite residences and places of worship at Yarumela, Los Naranjos, and Baida in the Comayagua Valley and at Santo Domingo, Río Pelo, and La Guacamaya to the north. These places bore spatial similarities to the much larger centers of Kaminaljuyú, Chalchuapa, and Usulután; and ceramics manufactured in the latter were traded throughout Honduras. Even Los Achiotés and Cerro Chino in the Copán Valley were organized on the pattern of the Lenca sites to the north and east.

The Copán pocket itself was different, however. While it shared in the Usulután trade, Copán did not develop monumental architecture during the Preclassic period. Then, sometime between 200 and 250 c.e., Ilopango Volcano erupted. The massive ashfall buried Chalchuapa and cut off Honduras from the Pacific coast. Trade connections with Kaminaljuyú were broken, and within a 60-mile (96.5-km) radius of the eruption much of the land was rendered unfit to support dense populations for up to 200 years. As a result of this disaster, many Lenca centers disintegrated; the Preclassic period was over.

The effects of the eruption spread far beyond Honduras. Trade from Central Mexico and the city of TEOTIHUACÁN shifted north to river routes through the Petén. EL MIRADOR and, later, TIKAL, CALAKMUL, Palenque, and other Maya sites rose to prominence. In Honduras, CACAO, which formerly was grown mainly on Pacific coast plantations, now began to be cultivated on the Caribbean coast.

It was at this time that the population of the Copán Valley, although still relatively small, began to grow and coalesce. A system of drainage canals was started, and the first ceremonial center, called Yune by archaeologists, was built. There is speculation that some of the refugees of the eruption brought their talents and families to Honduras and particularly to Copán. Curiously, structure 10L-7 at Copán bears a doorjamb inscribed with the Long Count date 8.10.10.16, which corresponds to April 4, 249 c.e. This is the end of the range of time for



The remarkable Stela 13 was commissioned by Tikal's ruler Siyaj Chan K'awiil II (r. 411–456). The front of the stela (pictured here) shows the ruler in ornate and archaic Maya regalia, with additional symbols that represent his Central Mexico ancestry. (Courtesy of J. Michael Francis)



The side of Altar Q at Copán shows Yax K'uk' Mo', the founder of the dynasty there, literally passing the torch to his 16th successor, Yax Pasaj Chan Yoaat. The latter, who commissioned this piece, is thereby claiming an unbroken chain of legitimacy from the founder. (Courtesy of Janice Van Cleave)

the Ilopango eruption and could be an important reference to it at Copán.

Two other early dates are recorded at Copán. Stela I, erected in 676 records that on December 18, 159 c.e., 120 years had been completed since some unknown event. The event occurred at or by “bent kawak” in the land of a person called “Foliated Ahau.” Interestingly, the “bent kawak” also appears on Tikal’s Stela 31 and at Yaxchilán, both in association with the foundations of dynasties. Stela 4 at Copán, raised in 726, also refers to the events of 159 and to Foliated Ahau.

Foliated Ahau is also identified on a carved peccary skull found in a tomb at Copán. The cartouche in the center shows two people sitting on either side of a stela and altar. The inscription reads “*hun ahau waxak chen kaltoon foliated ahau,*” which translates as, “On October 21, 376, the stone was bound by Foliated Ahau.” This date is just two years before the invasion of Tikal by Siyaj K’ak and his Central Mexico army. The subordinate person on the left, who points to the text, is none other than Yax K’uk’ Mo’, who invaded Honduras in 427, killed the ruler, and

established a Maya dynasty at Copán that lasted almost 400 years. The person on the top right appears to be Yax Nuun Ayiin, the son of a ruler whom scholars have named Spearthrower Owl; it was Yax Nuun Ayiin who was placed on the throne of Tikal by Siyaj Kak in 378.

For years, archaeologists speculated on the identity of this Foliated Ahau person, but more recent analysis concludes that it is a title of royalty. The peccary skull translation is, therefore, more precisely, “On October 21, 376, the stone was bound by His Majesty.” If “his majesty” is indeed Yax Nuun Ayiin of Tikal and Yax K’uk’ Mo’ is his subordinate, then the peccary skull is witness to a vassal relationship of Copán to Tikal. In fact, the Mayan name for Copán is *Xukpi*, which means “corner bundle.” The “bundle” is Tikal, which is represented in the glyph for a hair bundle. The “corner bundle” would be a contemporary recognition that Copán was a frontier outpost of Tikal’s authority.

As ruler, Yax K’uk’ Mo’ radically transformed both Copán and the entire river valley. In his new capital, he set in motion a massive building program, which included the



construction of new temples, reorganizing the Yune platform, and laying out the great plaza. He drew villagers into urban centers and set up noble fiefdoms. He established a new RELIGION of blood sacrifice and direct intercession by the ruler between the deities and the populace. His son, Popol Hol, solidified his achievements and set in motion the Copán dynasty, which would eventually overshadow, if not subjugate, the Lenca centers in western and central Honduras. Copán's dominance persisted at least until 738.

In 738, the 13th ruler of the Copán dynasty, Waxaklajuun Ub'aah K'awiil, was defeated and killed by his rival in Guatemala; from that point on, the dominance of the capital over the rest of Honduras began to fade. In 822, the Copán dynasty failed, and local chieftains once again asserted their independence. By 1200, the cities were abandoned to the jungle. The Maya still existed in the countryside, and in 1530, a local chief named Copán Calel led a rebellion against the Spanish, and thus it was his name that became associated with the ruins of Xukpi. The first recorded visit to the site of Copán was by Spanish conquistador Diego García de Palacio in 1576.

See also HONDURAS (Vols. II, III, IV).

—Janice Van Cleve

#### Further reading:

Ellen Bell, Marcello Canuto, and Robert Sharer. *Understanding Early Classic Copán* (Philadelphia: University of Pennsylvania Museum of Archeology & Anthropology, 2004).

**huaca** (wak'a) The term *huaca* (wak'a) is a QUECHUA word for an Andean sacred place or object. A *huaca* could be a temple, mountain peak, cave, spring, or any unusual natural object. Some *huacas* were idols. Adoration of *huacas* predated the rise of the Inca Empire (Tawantinsuyu) (see INCAS). Each *AYLLU* (clan or ethnic group) had its own *huacas*. Worship of *huacas* included prayer, rituals, offerings of FOOD and drink, and sacrifice of animals and occasionally humans (see HUMAN SACRIFICE). Andeans also considered mummies of important persons to be *huacas* and worshipped them. The mummies of deceased rulers were preserved in the Inca capital of Cuzco and were brought out to participate as *huacas* in important festivities. In their attempts to control conquered *ayllus*, the Incas sometimes carried off *huacas* to Cuzco, where they held the sacred objects hostage. By so doing, they hoped to ensure the cooperation of the subject peoples.

Spanish conquistadores looted many *huacas* as they searched for treasures, particularly GOLD and SILVER buried in elite tombs or used to adorn temples. They plundered the great pilgrimage shrine of Pachacamac on the coast near present-day LIMA. When FRANCISCO PIZARRO and his men arrived in Cuzco, they destroyed the mummies of the deceased Inca rulers as part of the campaign to stamp out indigenous RELIGION. Andean grave robbers were, and still are, called *huaqueros*.

The term continued in use after the CONQUEST to differentiate between Andean religion and Christianity. In the mid-1560s, Spanish priests discovered a revival of Andean religion, which became known as the TAKI ONQOY (dancing sickness). Its adherents chastised Andeans for abandoning the *huacas* and revealed that the *huacas* would rise up to kill or expel the Spaniards through DISEASE, earthquakes, and other disasters if Andeans would begin worshipping the *huacas* again. *Taquiungos* were messengers of the *huacas* or deities.

—Kendall Brown

#### Further reading:

Bernabé Cobo. *Inca Religion and Customs*, translated and edited by Roland Hamilton (Austin: University of Texas Press, 1990).

**Huáscar** (Washkar) (b. ca. 1495–d. 1532) *Inca emperor* Born sometime around 1495 in Cuzco, Huáscar was one of the Inca emperor HUAYNA CÁPAC's oldest sons and reputedly his designated heir: Huayna Cápac was said to have more than 50 sons, and after the untimely death of his chosen heir, Ninan Cuyochi, he named Huáscar as his preferred successor (see INCAS). Huáscar was groomed as an administrator from an early age.

Leaving Huáscar behind as an administrator in Cuzco, in 1524, Huayna Cápac journeyed to the northern provinces near present-day Quito, ECUADOR, to continue his conquests; there, he joined the company of his favorite son and trusted general, ATAHUALPA, and his designated heir, Ninan Cuyochi. Atahualpa was both Huáscar and Ninan Cuyochi's younger half brother. During the campaigns near Quito, Ninan Cuyochi died of a strange DISEASE, which may have been smallpox.

After the death of Ninan Cuyochi, Huayna Cápac continued to expand the empire; however, now having more affection for his surviving son Atahualpa, and reportedly at Atahualpa's urging, he realized that the empire was too large to be ruled by a single Inca from the capital of Cuzco. Before his death by disease in 1527, Huayna Cápac made the fateful error of dividing the empire into two halves. One half was to be ruled from Cuzco, with Huáscar as its emperor; the other was to be ruled jointly by Huáscar and his younger half brother, Atahualpa.

Huáscar was envious of Atahualpa's status as Huayna Cápac's favorite son. Even before the death of their father in 1527, the empire and its armies and administrators had divided into factions that supported either Huáscar or Atahualpa. A majority of the administrators, nobility, and bureaucrats in Cuzco supported Huáscar. Atahualpa, on the other hand, enjoyed the support of the bulk of his father's army, which was stationed in the north. When Huayna Cápac died, the empire was thrown into a long, bitter, and violent civil war that did not end until 1532,

with the arrival of the Spanish conquerors under the command of FRANCISCO PIZARRO.

Late in 1532, Atahualpa's armies, led by his general Quizquiz, managed to take Cuzco and capture Huáscar. Despite being imprisoned by the Spaniards, Atahualpa sent the order to have Huáscar murdered. But after Huáscar's brutal death in late 1532, his supporters and allies continued to fight against Atahualpa and his followers; moreover, they offered aid to the Spaniards in the ultimate CONQUEST OF PERU.

—John F. Chuchiak IV

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Juan de Betanzos. *Narrative of the Incas*, translated and edited by Roland Hamilton and Dana Buchanan (Austin: University of Texas Press, 1996).

### Huayna Cápac (Wayna Qhapaq, Tito Cusi Gualpa)

(d. ca. 1527) *Inca emperor* Huayna Cápac was the last great Sapa Inca (r. ca. 1493–1527) before the Spanish CONQUEST OF PERU in the 1530s. His death touched off a civil war between factions headed by two of his sons (HUÁSCAR and ATAHUALPA), and the Spaniards exploited the conflict to defeat the INCAS.

Before his unexpected death in the mid-1490s, Huayna Cápac's father, Topa Inca Yupanqui, had named two of his sons to succeed him. He first designated as his heir Tito Cusi Gualpa, the youngest son of his principal wife (*COYA*), Mama Ocllo. Shortly thereafter, however, the Inca changed his mind and settled on Cápac Guari, the son of one of his secondary wives. Supporters of Tito Cusi Gualpa killed the rival in the ensuing struggle, and he became Sapa Inca, assuming the name Huayna Cápac. He was a young boy, however, and for several years his uncle, Huaman Achachi, acted as regent. When he began to rule, Huayna Cápac ordered the execution of two of his brothers, whom he perceived as dangerous rivals, and married his sister Cusi Rimay. When she died, he married another sister, Chimbo Ocllo. As was customary, he also had secondary wives and concubines taken from provinces throughout Tawantinsuyu (the Inca Empire).

Huayna Cápac ruled for a quarter-century and founded the Tumipampa *PANAQA* (royal *AYLLU*, or lineage group). He repelled a minor invasion of GUARANÍ-speaking Chiriguanos from PARAGUAY. Huayna Cápac's predecessors had already extended Tawantinsuyu throughout the central and northern Andes, and he added to it Quito (whose conquest had begun under his father) and the territory of the Chachapoyas.

A smallpox or measles epidemic spreading southward from the Caribbean killed Huayna Cápac around 1527 (some scholars have placed his death as early as 1525 and as late as 1530) (see *DISEASE*). He had designated a son named Ninan Cuyochi as his heir, but he, too, died during the epidemic. Two other sons, Atahualpa and

Huáscar, each supported by rival *panaqas*, fought a bitter civil war to succeed Huayna Cápac. This conflict greatly facilitated the Spanish conquest of Peru, as FRANCISCO PIZARRO and his men arrived just as Atahualpa's faction had triumphed.

—Kendall Brown

### Further reading:

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**human sacrifice** Human sacrifice appears to have been an important facet of cultures in the Americas before European contact, particularly in Mesoamerica. South of Mesoamerica, the Chibchas of PANAMA, Caucás of COLOMBIA, Jíbaros of ECUADOR, the TUPINAMBÁ of BRAZIL, and various cultures in PERU offered human sacrifices in religious rituals and to commemorate important events (see *RELIGION*). Eyewitness accounts, depictions in pre-Hispanic ART and documents, and skeletal remains recovered from caves, cenotes (sinkholes), and other deposits provide convincing evidence of the practice. However, scholarly debates continue about the extent, scale, and disparate purposes of these sacrificial rites.

Sacrificial victims could be men, WOMEN, or children, depending on the context. For example, in some regions, a principal motivation for WARFARE was to take captives for sacrifice; not surprisingly, most of these captives were male. In other contexts, women were sacrificed by being buried alive or poisoned in order to accompany a deceased leader into the afterlife as wives or servants. Children became sacrificial victims because of their innocence or because their tears resembled rainfall, which the priest hoped to stimulate. Some cultures treated future victims with respect, granting them special privileges and even adopting captive members of enemy groups for a period of time. This partly explains why some went willingly to their deaths, but ALCOHOL and drugs also reduced resistance.

The lives of sacrificial victims were terminated through diverse means. Possibly the most widespread practice was decapitation with a knife or ax. Decapitation was associated with the Mesoamerican ball game; friezes show that losing the game often meant losing one's head. The head might be displayed on a skull rack (called a *tzompantli* by the AZTECS) or deposited in a pit beneath a building or in a plaza.

Heart extraction was another common method of human sacrifice. In Mesoamerica, priests stretched the victim over a sacrificial stone, opened the chest with a knife, and tore out the still-beating heart. In areas under influence from Central Mexico, the heart was thrown into a receptacle held by a reclining stone figure (*Chac-Mool*) and burned. In some Mesoamerican rituals, sacrificial



A section of the stone skull rack, or *tzompantli*, at the Aztec ruins of the Templo Mayor complex in Mexico City (Courtesy of J. Michael Francis)

victims were bound to scaffolds and shot with arrows or *atlatl* darts or disemboweled with spears. A series of carved stone relief panels at MONTE ALBÁN, Oaxaca, depicts disemboweled and sexually mutilated men.

On other occasions, victims were thrown from cliffs or down stone stairways. Some ball game reliefs show victims rolling down stairways with their arms and legs tied behind them. In Yucatán, individuals were pushed off the edge of the sacred cenote at CHICHÉN ITZÁ to drown in the deep water (see MAYA).

War captives in the Aztec and Tupinambá cultures fought gladiatorial battles using inferior weapons against fully armed warriors. Children were taken to mountaintops in the Andes and given intoxicating beverages before being left to die of exposure. Victims' eyes were stabbed

with sharp instruments and their skulls were smashed with clubs. Some victims were roasted over fires. The scalp was torn from the skull, skin was cut from the face of living victims, and ceremonial suits were tailored from flayed skin.

Europeans in the early colonial period responded to these practices with disgust. Despite their concerted efforts to abolish human sacrifice, it continued in remote areas.

—Stephen L. Whittington

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Nigel Davies. *Human Sacrifice in History and Today* (New York: Dorset Press, 1981).



**Incas** The Incas were a group who settled in the Cuzco Valley in the south-central Andes of South America between 1000 and 1400 C.E.; there, they founded the city of Cuzco (in modern-day PERU) on the site of earlier settlements. The new city quickly emerged as the capital of the largest empire ever forged in South America.

The Andes Mountains are situated between a narrow and arid coastal desert strip in the west and jungle and rain forest regions to the east; many peaks in the ranges reach elevations above 19,685 feet (6,000 m) and are covered in snow. Although initially a highland culture, the Incas' territorial expansion acquainted them with contrasting topographic and climatic zones; they learned to adapt to and exploit the many micro-environments concentrated in relatively small areas. The Incas traded surplus goods with their neighbors for those that they lacked (see TRADE). This system founded the important Andean principle of complementarity. The Incas indigenous language was QUECHUA, which continues to be spoken by their descendants, primarily in the central Andean region. What we know about the Incas comes from Spanish chronicles and historical documents and from archaeological excavations.

Before 1400 C.E., the Incas formed but one of a multitude of localized ethnic polities, or *señoríos*, rivaling for power in the Cuzco Basin. Scholars characterize preimperial Inca society as a chiefdom. Sometime around 1400, the Incas began to emerge as the dominant regional polity, conquering, subjugating, and forging alliances with their neighbors. The archaeological record of these neighbors is dominated by Killke CERAMICS, which have been found in the center of Cuzco, in the Cuzco Valley, as well as in outlying areas. Some of the larger and more

powerful ethnic groups were the Anta and Ayarmaca to the west and northwest of the Cuzco Valley, the Cuyo to the north, and the Pinahua to the southeast. Over the course of several generations, Inca society transformed from a small, localized state to a vast empire, encompassing contiguous territories from southern COLOMBIA to CHILE and northwestern ARGENTINA. This empire, known as Tawantinsuyu (Land of the Four Quarters), was ruled from the capital city of Cuzco, which became its physical and ideological center.

One of the strategies the Incas used to justify and legitimize their growing power was to veil their origins in mythology. The archaeological record has identified and confirmed certain sites mentioned in Inca oral traditions, and the chronology of the ethnographic accounts squarely matches the archaeological data. The two dominant origin tales say that the Incas were not locals but foreigners sent by deities from supernatural places. The first narrative puts their point of origin on the Island of the Sun in Lake Titicaca, in modern BOLIVIA. It was there that the creator god Viracocha called forth the Sun, the Moon, and the stars from holes in a sacred rock outcrop. This outcrop became one of the most important pilgrimage sites in the Andes and was appropriated by the Incas into their state ideology. The outcrop has been identified and investigated as the principal sanctuary on the Island of the Sun and is situated in its northern sector. After setting the celestial bodies in motion, Viracocha fashioned humans. The Sun named Manco Cápac and Mama Ocllo as the principal couple, brought them forth from the rock outcrop, and sent them on an underground journey in a northwestern direction to find a "chosen" valley for their people to settle. They reemerged at a location known as Tampu T'oqo.

Scholars believe that the official Inca myth centered on this site and on another called Pacariqtambo. Tampu T'oqo was a place with three caves, located near Pacariqtambo. Today, a town named Pacariqtambo is situated in the province of Paruro, south of Cuzco. The ancient Pacariqtambo has been identified as the Inca site Maukallaqta and is located less than six miles (9.6 km) north of contemporary Pacariqtambo. The nearby carved rock outcrop, called Pumaaurqu, is thought to have been the origin place Tampu T'oqo. The creator called forth Manco Cápac and Mama Ocllo and their three brothers and three sisters; from them came the Inca ancestors from the central cave, and the Maras and Tampu peoples from the adjoining caves. The brothers and sisters were paired as couples, with Manco Cápac and his sister-wife Mama Ocllo assuming leadership. The four couples began to search for fertile lands, followed by many local groups. From the mountain of Huanacauri (outside present-day Cuzco), they saw a fertile valley. A golden rod was cast into the earth, and when it stuck firmly in the ground, the Inca knew they had found their home. Manco Cápac led his party into the pre-Inca settlement that was to become Cuzco. Manco was the only brother left because the other three had been transformed into stone or locked in a cave during the journey.

### RULERS

Manco Cápac was the first in a line of 13 Inca sovereigns (Sapa Incas) who governed before the Spanish invasion of 1532; these 13 rulers (also referred to simply as Inca) included three who governed in the postcontact 16th century. The term *Cápac*, meaning “noble” or “of high status” in Quechua, was adopted by some later rulers and lineages to signal that they were close to the royal descent line that, beginning with Manco Cápac, identified rulers as sons of the Sun and emphasized their close linkage with rock shrines. The history of Inca rulers is known through partial biographies by a number of Spanish CHRONICLERS. Manco Cápac and his followers were the first to live in what was to become the imperial capital of Cuzco. At the time of their arrival, the future site of Cuzco was a village called Acamama, whose inhabitants produced Killke ceramics. This settlement consisted of four sections: Quinti Cancha, or the District of the Hummingbird; Chumbi Cancha, or the District of the Weavers; Sairi Cancha, or the District of Tobacco; and Yarambuy Cancha, likely a mixed district inhabited by Aymara (Aymara is the indigenous language spoken by people in the southern Andes and particularly in Bolivia) and Quechua speakers. Acamama was also divided into upper (*banan*) and lower (*burin*) halves. The quadripartite and dual spatial divisions (which the Inca appropriated and integrated into their capital and state organization), therefore, were present in the pre-Inca settlement. Concepts of a four-part order as well as binary oppositions and complementarity were part of a pan-Andean thought system, which the Inca shared and manipulated to their political advantage.

There is no consensus as to whether the first seven Inca rulers were actual historical figures or mythological individuals. The chronology implied by the Spanish chroniclers is not confirmed by the archaeological record. The rulers' names are reported as Sinchi Roca, the son of Manco Cápac and the second ruler, followed by Lloque Yupanqui, Mayta Cápac, Cápac Yupanqui, Inca Roca, and Yahuar Huacac. Beginning with the eighth ruler, Viracocha Inca, the records become more extensive. Much of the information relating to Viracocha Inca focuses on military conquests; in fact, it may have been this ruler who changed Inca military strategies from raiding and alliances to territorial expansion.

The notorious CHANCA WARS are widely discussed in the literature. The Chanca were another local *señorío*, with ambitions to enlarge their own territory; their expansionist strategies eventually led to a violent clash with the Incas. The Chanca army vastly outnumbered that of the Inca, which caused Viracocha Inca to abandon Cuzco and flee to his estate at Caquia Xaquixaguana (Juchuy Qosqo). There, he was joined by Inca Urcon, his son and heir, and most of Cuzco's elite. However, his other son, Inca Yupanqui (see PACHACUTI INCA YUPANQUI), decided to remain in Cuzco with a few equally committed men who vowed to defend the city or die trying.

The night before the decisive battle, Inca Yupanqui prayed for assistance and the Creator God appeared to him in a dream and vision, promising additional warriors and final victory. And, so it happened: During the battle, the number of Inca fighters magically increased, as stones transformed into warriors, and they repelled the Chanca assault. Based upon detailed narratives provided in several chronicles, archaeologists engaged in survey work on the plains west of Cuzco believe they may have identified the site of this battle, which took place in 1438.

This remarkable victory was followed by a period of tension between Inca Yupanqui and his father, who remained at Caquia Xaquixaguana. But, eventually, Viracocha Inca traveled to Cuzco, placed the fringe of rulership on Inca Yupanqui's head, and gave his son the title “Pachacuti Ynga Yupanqui Capac Yndichuri,” which means “change of time, King Yupanqui, son of the Sun.” In the end, Pachacuti Inca Yupanqui accepted his father's apologies for past offenses, including a failed assassination attempt, and the two participated in the festivities of Cuzco together until Viracocha Inca's death.

While stories such as the tale of the Chanca wars are popular, and the result of the historical mindset of colonial Spanish chroniclers, systematic archaeological survey work in areas surrounding Cuzco has demonstrated that Inca state formation did not result from the victorious outcome of the Chanca wars. Rather, the Inca state and imperial expansion were based on long-term regional social, political, and economic processes, which included multiple wars with different ethnic groups as well as more peaceful strategies, such as marriage alliances (see WARFARE).



The Inca site of Ollantayambo, Peru. The image shows the terraces and ceremonial sector with the so-called Sun Temple. (Courtesy of Jessica Christie)

Pachacuti Inca Yupanqui's reign is dated to the middle of the 15th century. True to his title, he is credited with transforming the emerging Inca state into an empire; he is also credited with redesigning Cuzco as a capital that would materialize his imperial ambitions.

Of course, Inca settlements soon extended well beyond the city itself. Other significant architectural constructions dotted the closer environs of Cuzco (see ARCHITECTURE). These were the royal estates of individual rulers, many of which lined the Urubamba Valley, a fertile agricultural zone that provided most of the crops for Cuzco's residents. Well-known Inca sites along the Urubamba River, such as Pisac, Ollantaytambo, and MACHU PICCHU, have now been identified as royal estates of Pachacuti. Royal estates were multipurpose architectural complexes maintained by retainers (see *YANA*) of the sovereign: They showcased agricultural terraces, storage buildings, temples, and country palaces where the ruler and his courtiers enjoyed leisure time in settings tightly linked to the natural surroundings. There was no architectural canon for royal estates; each represented a personalized discourse between the ambitions of the royal patron and the natural landscape.

Inca rulers built numerous country estates, in part because of the split-inheritance system. When a sovereign died, his eldest son inherited the highest office; all his material possessions, however, passed on to members of his lineage (*PANAQA*), who administered his properties and maintained the cult of his mummy. The new ruler had to acquire, and that meant conquer, new lands and build new palaces. Thus, the most desirable areas, such as the Urubamba Valley, were quickly taken. HUÁSCAR, the 12th Inca ruler, is said to have become angry with the dead because they owned all the best properties which, he argued, should be given to the living.

In terms of military conquests, Pachacuti and his son, Topa Inca Yupanqui, together accumulated a territory that extended from Cuzco in the center to much of modern Ecuador in the north, and into southern Bolivia to the south. Nevertheless, strips of the central and southern coasts were not yet part of the Inca Empire. Pachacuti's successors continued to focus on territorial expansion. Topa Inca Yupanqui acceded in 1471, and he is widely seen as the conqueror par excellence. He added vast territories to the east into the lowland jungle areas, southeast, and south beyond today's Santiago de Chile and northwestern Argentina. In the north, Topa Inca conquered Quito, and on the central coast, he annexed the area that now includes LIMA. His best-known estate is Chinchero, which was located in the highland zone between Cuzco and the Urubamba Valley.

HUAYNA CÁPAC succeeded Topa Inca in 1493. He was said to have made military expansion and administrative organization equally important priorities. While part of his military campaigns involved securing borders, he also advanced to the north beyond Quito and to the southeast beyond Samaipata, a site known for the largest

rock outcrop sculpted by the Inca. Thus, the Inca Empire reached its widest territorial expansion under Huayna Cápac. He turned Tumipampa in Ecuador into a second imperial capital, where political and military might were focused during his reign. While he was fighting in the north, an epidemic broke out and Huayna Cápac died from it ca. 1527. His heir designate, Ninan Cuyochi, experienced the same fate, which precipitated a conflict over succession.

Following Huayna Cápac's death and that of his heir, HUÁSCAR and ATAHUALPA, two royal sons by different mothers, fought a bitter civil war over the title of rulership; the costly conflict lasted until just before the arrival of the Spaniards in 1532. Initially, it was Huáscar who became emperor in Cuzco, with the consent of the nobility. His half brother Atahualpa may have accepted his rule at first. However, after he had several of Atahualpa's messengers murdered, the latter challenged the emperor's authority from his base of power in the north, now Ecuador, where part of the Inca army was stationed. Huáscar responded with military action. Bloody battles were waged for several years, claiming the lives of thousands and severely weakening Inca power on the eve of the Spaniards' arrival. In the end, Huáscar was captured, and Atahualpa came out of the war victorious. Atahualpa's officials took Huáscar to Cuzco, where he was forced to watch the execution of most of his immediate family and relatives.

Atahualpa himself was still in Cajamarca, waiting for the defeated Huáscar, when he received word that a contingent of strangers had arrived at Tumbes on the north coast. The small Spanish force, under the leadership of FRANCISCO PIZARRO, quickly made its way up into the Andes and arrived at Cajamarca on November 15, 1532 (see CONQUEST). There, in a surprise attack, Atahualpa was taken prisoner; the captured Inca responded by offering an immense ransom of GOLD objects in exchange for his freedom. Eight months later, after the ransom had been paid, Atahualpa was convicted of treason and executed.

The Spaniards then marched on to Cuzco, which they entered unopposed on November 15, 1533. Pizarro gave most of Cuzco's palaces and other buildings to members of his own party, and they set about plundering the Inca capital of its wealth. The most valuable treasures were found in the Coricancha (Temple of the Sun), which was looted despite the loud protests of its priests. In December 1533, following traditional ceremonial protocol, MANCO INCA was installed as the new Inca ruler. Manco Inca, another of Huayna Cápac's sons, had escaped the massacre inflicted by Atahualpa's men. Pizarro believed that Manco would be a compliant puppet through whom he himself could govern.

Manco Inca, however, had higher ambitions. He escaped from Cuzco, assembled an army, and became the leader of a resistance movement. In 1536, his forces laid siege on Cuzco and attacked the newly founded Ciudad de los Reyes (Lima) on the coast. Manco's goal was to expel the Spaniards from the entire Andean region.

During the siege, the Spanish were far outnumbered; they barricaded themselves at Sacsayhuamán, the fortified citadel above Cuzco. In the end, the Spaniards and their allies held the capital, and the attack on Ciudad de los Reyes failed as well. Still, the resistance movement did not give up; instead, it went underground into the eastern lowland jungles. After his initial escape from Cuzco, Manco Inca founded Vilcabamba as his new capital. For the next 36 years, the Inca maintained an independent state at Vilcabamba, where they enjoyed their liberty, fomented plans to regain their lands, and organized campaigns against the invaders. Over that period, Vilcabamba was governed by three rulers: Manco Inca was succeeded by Titu Cusi, who in turn was followed by Túpac Amaru. Vilcabamba has been identified as a large archaeological site near the present village of Espíritu Pampa, in Peru. Ongoing archaeological investigations are revealing that Manco Inca used many of the same architectural and sculptural design features as found in Cuzco.

The Spaniards were thoroughly annoyed by this resistance and sent several expeditions into the forests to subjugate the rebels. These efforts proved of no avail until Viceroy Francisco de Toledo himself led an expedition and conquered Vilcabamba in 1572. The last Inca ruler, Túpac Amaru, was taken to Cuzco and sentenced to death. The imposition of stable Spanish rule was a slow process. The first decades were plagued by civil wars among the conquistadores (see CIVIL WARS IN PERU) and by epidemics of European DISEASES, which wrought devastation on the Andean people. Estimates suggest that within four decades of the invasion, the population had been reduced by half. Beginning in the 1550s, the Spanish Crown dispatched a series of VICEROYS to Peru to establish order and civil administration.

### ADMINISTRATION

The stunning rise and expansion of the Inca Empire began in the early 1400s; in less than a century, the empire covered most of the Andes, from modern Ecuador to southern Chile and northwestern Argentina. This expansion was made possible by a well-organized administrative system, anchored in religious practices that transformed newly conquered territories into ideological landscapes. The primary administrative units were the provinces into which newly acquired territories were shaped and which were ruled by governors. Archaeologists have identified major settlements as the seats of provincial governments, such as Vilcashuamán, Huánuco Pampa, Cajamarca, and Tumipampa in the north and Hatunqolla, Chucuito, and Tambo Colorado south of Cuzco. These provincial centers were state installations and often copied architectural designs and political protocol of the capital. They were physically and administratively very different from the private royal estates of Inca rulers, such as Pisac, Ollantaytambo, and Machu Picchu in the Urubamba Valley, or Topa Inca's estate at Chinchero. The Sapa Inca and his court frequently traveled and

resided at both types of settlements. Throughout the empire, the Incas grouped households into units of 10 to 10,000 who were responsible for civil duties, such as farming, herding, and arts and craft production, as well as military service (see ART). Each unit of 100 or more households was led by a hereditary local chief, called a *KURAKA*. All units were required to send tribute based on their local resources to the state, centered in Cuzco; they were also required to provide rotational LABOR service to the Inca state (see MITA). Another strategy was forced resettlement: Inca officials selected thousands of families and entire communities from each new province to be moved to different locations, often thousands of miles away, to establish enclaves of settlers referred to as *mitimás*. The main goal of this policy was to break up societies that posed security threats to the Inca state; another motive was to create communities of economic specialists whose products were vital to the state. Most significant in arts and craft production controlled by the state were metallurgy, TEXTILES, and ceramics. The most valuable and symbolically charged metals were gold and SILVER, which were associated with the Sun and the Moon and reserved for the ruling family. High-quality *cumbi* textiles were woven from COTTON and wools, and ceramic styles were dominated by flared-rim jars with constricted necks and pointed bottoms, often called *aribalos*, drinking cups or tumblers (*queros*), and large storage jars, all of which generally exhibited geometric black linear designs on a reddish brown ground. Many of these objects were displayed, used, or given away at public events, such as feasts, which helped forge loyalties between the administration and its subjects.

To maintain communication links between Cuzco, the provinces, and the periphery, the Incas developed two highly effective administrative tools: They kept records with knotted-string devices called *QUIPUS*, and they constructed the most far-flung road system in precontact America. A *quipu* consisted of a main cord and a series of attached pendant cords. The pendant strings displayed sets of different knot types at equal intervals, which stood for decimal units. The lower units, ones and tens, were situated farthest away from the main cord, and the higher units were closer to the top. Different string colors may have indicated that different objects were counted. *Quipus* were knotted, read, and stored by *quipu* specialists called *quipucamayocs* and registered statistical information related to census data, tribute collection, and religious service, all of which were vital to the state.

The road system (Cápac Ñan) consisted of two main north-south transportation routes. One route was located in the highlands and the other along the coast, and both were connected by numerous smaller roads. Together, the road system linked roughly 25,000 miles (40,225 km) of roadway. Inca roads were traveled by the *CHASQUI* (runners who disseminated messages), traders, and armies. Further, Inca roads held an important place in state-imposed religious ideology. They connected Cuzco with powerful



pilgrimage sites, such as the Island of the Sun in Lake Titicaca and Pachacamac on the central coast, and they were often marked by rock shrines (see *HUACA*). Roads were also traveled by parties of provincial officials, who brought sacrificial items, including children, to the capital to be sanctified. They then returned to their villages, walking in straight-line paths, and presented the sacrifices to all local *huacas* (see *ZEQUE SYSTEM*). The practice of *capac ucha* was important in building and maintaining links between the state center and its periphery. It cast the road system in the religious context of linking various *huacas*, which may be seen as a large-scale duplicate of local *zeque* systems, thus integrating all Inca territories.

### RELIGION

The Inca worldview did not include the Western subject-object separation; rather, the world was a lived bodily experience in which all objects and features were endowed with a life force. Mountains were personified, caves and water sources provided access to the animated world below, and living humans interacted with dead ancestors. The source of all waters was the Pacific Ocean, from

which water rose in the form of clouds to fertilize the earth as rain; to complete the hydraulic cycle, it collected in rivers and lakes to return to the ocean. Stone was the essence of mountains, and selected boulders and outcrops were sculpted for a number of purposes; they served as seats, offering tables for the earth, counting devices, and trail markers from which visual links with certain mountains could be constructed. Rock outcrops were further integrated into architecture, and the scale and variety of stone modification played out the discourse between the Incas and their natural surroundings; ultimately, stone formulated a specifically Inca political landscape.

Many natural features were perceived as origin places of the Inca dynasty and of individual *AYLLU* (extended lineages defined not only by blood relations but also by land and water rights). The ancestor of an *ayllu* was said to have emerged from a specific cave or water body, and it became the duty of all descendants to maintain this feature as a *huaca*. In case an *ayllu* was relocated by the state, its members carried a piece of the rock or a vessel of the water taken from their origin place (*pacarisca*) and added it to a similar feature at their new settlement to create a new *pacarisca*.



Machu Picchu's Intiwatana stone sculpture served in the observation of the movements of the Sun. (Courtesy of Jessica Christie)

Specific deities manipulated by the state to legitimize the authority of the emperor were Inti, the Sun, and Viracocha, the Creator God. Both played a vital role in Inca origin narratives and were understood by the Incas as the protagonists of creation in the Lake Titicaca region. All large settlements had a temple dedicated to the Sun, where the ruler performed his pivotal role as son of the Sun on earth. The central and richest of these temples was the Coricancha in Cuzco, which housed a golden image of Inti, known as PUNCHAO. Secondary deities populated the landscape; they included the *apus*, or spirits of high mountain peaks; Inti-Illapa, the god of thunder; Mama-Quilla, mother moon; and Pachamama, the earth mother. Inca rulers, assisted by a class of priests, honored these deities through ceremony and sacrifice organized by a ritual calendar that culminated in the Cápac Raymi and Inti Raymi festivals held on the December and June solstices. The main purpose of both events was to honor the Sun, which was done through dancing, feasting, and drinking *CHICHA*, an alcoholic drink made from fermented MAIZE (see ALCOHOL). By doing so, the Incas reinforced social order and cemented loyalties.

Based on Spanish accounts and archaeological data, the Incas were a highly organized society in which the political, religious, social, and economic realms came together to shape a cultural system led by a single sovereign whose ambitions were challenged only by the natural setting of the Andes, which could become his ally or enemy. Inca society functioned until the last ruler, Túpac Amaru, was executed by the Spaniards.

—Jessica Christie

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**Iximché** Founded in the 1470s or 1480s, Iximché was the capital of the expanding highland Kaqchikel MAYA state. Following the Spanish CONQUEST, the site briefly became the first Spanish colonial capital of GUATEMALA. Between the late 1950s and early 1970s, archaeologist George Guillemin excavated and reconstructed architecture in the elite area of the site. Today, Iximché is an important national monument and remains a focus of Kaqchikel religious pilgrimages.

The Kaqchikels were vassals and mercenaries who lived in K'iche' Maya territory until factionalism within the ruling K'iche' lineage forced them to flee. They first settled at present-day Chichicastenango but soon

founded a new city in a defensible location, surrounded on three sides by steep ravines. They made their new location even safer from attack by cutting a ditch through the narrow neck of land that connected the area of elite palaces, temples, and ball courts to rich agricultural fields and commoner households (see AGRICULTURE).

Their efforts to create defensive works were justified, as the Kaqchikels faced military assaults from their old overlords. In addition, an internal revolt by the Tukuché faction convulsed Iximché. The faction's defeat on May 18, 1493, was so significant that all subsequent Kaqchikel history was recorded in relation to that date. During the late 15th and early 16th centuries, rapid Kaqchikel territorial expansion involved aggressive military action against the surrounding K'iche's and other peoples. Deposits of decapitated skulls found during the site's excavation provide physical evidence of both aggressive and defensive WARFARE.

News of the arrival of Europeans to the Caribbean may have reached Iximché as early as 1510, when the Aztec emperor sent reports of their presence in the Antilles. After learning of the Spanish successes in the conquest of MEXICO, and seizing an opportunity to defeat their opponents and expand their own territorial holdings, in 1520, Kaqchikel rulers invited the Spanish into Guatemala.

When the Spaniards arrived in 1524, Kaqchikel warriors initially supported PEDRO DE ALVARADO, his Spanish troops, and indigenous allies from Central Mexico; the combined forces joined to attack the Kaqchikels' enemies. Early in the conquest period, the Kaqchikels and Spaniards enjoyed cordial relations. Alvarado and his troops moved into Iximché and rechristened the settlement Santiago de los Caballeros de Guatemala.

Relations soon deteriorated, however, as the Spanish increased their demands for GOLD and LABOR from their Kaqchikel allies. In response, the Kaqchikels abandoned the city and fled into the surrounding mountains, where they engaged in protracted guerrilla warfare against their former allies. In 1526, while Alvarado was in HONDURAS with HERNANDO CORTÉS, disgruntled Spanish conquistadores rebelled and burned much of Iximché; after the fire, only a small Spanish contingent remained in the city, and Iximché never recovered its former glory. Eventually, the site was abandoned entirely.

—Stephen L. Whittington

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**Jiménez de Quesada, Gonzalo** (b. 1509–d. 1579) *Spanish conquistador in Colombia's eastern highlands and founder of Bogotá* Little is known about the early decades of Gonzalo Jiménez de Quesada's life. Even his place of birth is disputed, although the best evidence suggests that he was born in Granada in 1509. In his early 20s, Jiménez served as a soldier in the Italian campaigns before returning to Granada, Spain, in 1530 to study law. However, after completing his studies he did not remain in Spain for long. In November 1535, Gonzalo Jiménez de Quesada was one of 1,200 passengers who departed from the Canary Islands with Pedro de Fernández de Lugo's fleet. The fleet arrived in Santa Marta, COLOMBIA, in January 1536, where Fernández de Lugo began his appointment as governor. After just a few months in Santa Marta, Lugo appointed Jiménez as his lieutenant governor; he then chose Jiménez to lead an ambitious expedition up the Magdalena River to search for an overland route to PERU, as well as access to the Pacific Ocean. A lawyer by training, Jiménez led a force of 800 Spaniards and scores of indigenous carriers and African slaves up the Magdalena River (see SLAVERY). The expedition proved costly, with nearly three-quarters of his men perishing in the first 12 months; however, the 179 survivors, Jiménez included, successfully crossed into Colombia's eastern highlands, where they initiated the CONQUEST OF MUISCA territory. This three-year expedition proved to be one of the most profitable conquests in the New World. Nevertheless, much to his own dismay, Jiménez never achieved the fame or fortune of HERNANDO CORTÉS or FRANCISCO PIZARRO.

Jiménez and his men remained in Muisca territory for almost two years, during which time they looted

enormous sums of GOLD and EMERALDS. Over that same period, his small force had no contact with other Europeans. In fact, most of Santa Marta's residents believed that Jiménez and his men had all perished. However, in an odd coincidence, two separate Spanish forces, one from VENEZUELA and another from ECUADOR, arrived in Muisca territory in early 1539. The unexpected arrival of competing expeditions forced Jiménez to take actions to legitimize his claim to the region. Before he returned to Spain to petition the Crown, he founded three cities, one of which was Santafé de BOGOTÁ.

When he returned to Spain in 1539, Jiménez faced a series of charges, including fraud, torture, and murder (he had been accused of torturing and killing a Muisca CACIQUE named Sagipa). Moreover, several veterans of the expedition filed suits against him, claiming that they had been promised shares in the spoils. Jiménez successfully defended himself against most charges; however, he did have to pay a series of fines and was forbidden from returning to the lands he had conquered. In fact, it was not until 1548 that Jiménez was granted license to return to the New Kingdom of Granada.

He returned the following year and spent the next few decades in New Granada. Nevertheless, he remained bitter that he had not achieved the same fame or wealth as Cortés or Pizarro. In his *PROBANZA DE MÉRITO* (proof of merit petition) from 1562, Jiménez boasted that neither Cortés nor Pizarro had discovered or settled better or richer provinces than he. His quest for fame and fortune continued to inspire him to even greater conquests. In 1569, Jiménez de Quesada led a disastrous expedition into the Llanos of eastern Colombia; after three years in search of a rich new kingdom to conquer, Jiménez limped back to Bogotá. Most of the men who had joined him

were either killed or had fled. Jiménez himself had lost a great deal of his fortune; he never found his kingdom of gold and died in relative obscurity in Mariquita in 1579.

—J. Michael Francis

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# K

**Kaminaljuyú** Located at 14.63° N latitude, 90.55° W longitude, Kaminaljuyú is the largest early MAYA site in highland GUATEMALA. Most of the visible ruins today are found in the Kaminaljuyú National Archaeological Park, within Guatemala's modern capital, in a mountain valley some 5,000 feet (1,524 m) above sea level. Kaminaljuyú was well situated for regional TRADE, near river headwaters that fed both the Caribbean and the Gulf of Mexico. Significantly, Kaminaljuyú also controlled the nearby OBSIDIAN source at El Chayal.

Human settlement at Kaminaljuyú dates back to between 1200 and 1000 B.C.E., which corresponds to the end of the Early Preclassic period. In the Middle Preclassic (1000–400 B.C.E.), Kaminaljuyú grew considerably in area, as evidenced by earthen monumental ARCHITECTURE and irrigation infrastructure, including a large canal from Lake Miraflores (now dry) southward to farmlands. At this time, the inhabitants of Kaminaljuyú produced carved stone monuments, as found at many Classic-period Maya sites.

Kaminaljuyú continued to grow, and in the Late Preclassic period (400 B.C.E.–200 C.E.) two more high-capacity irrigation canals were constructed. Toward the end of this period, Lake Miraflores dried up, and the irrigation system fell into disuse.

During the Early Classic period (200–400 C.E.), Maya migrants from the highlands to the west established a new order at Kaminaljuyú, thus ending the eight-century-long practice of carving stone monuments to portray rulers, their captives, and royal trappings.

In the next two centuries, Kaminaljuyú was greatly influenced by the city of TEOTIHUACÁN in Central Mexico, exchanging goods and cultural features. Notable is the

use in Kaminaljuyú of the *talud-tablero* architectural style, which is ubiquitous at Teotihuacán. Though populated for another few hundred years, Kaminaljuyú was abandoned prior to the Spanish CONQUEST in the early 16th century.

—Walter R. T. Witschey

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**kuraka** (*curaca*, *quraqa*) A *kuraka* was an ethnic lord or chieftain of an Andean lineage (*AYLLU*). Spaniards often used the Caribbean term *CACIQUE* instead of *kuraka*. The *kurakas* predated Inca imperial expansion (see INCAS). Reciprocal obligations conditioned a *kuraka's* relationship with the *ayllu*. He (nearly all *kurakas* were men) received LABOR tribute from the people. In return, he was expected to defend the *ayllu* against external threats; fairly distribute the land according to families' needs; oversee the storage of FOOD, cloth, and other goods; and ensure the timely and proper performance of religious rituals to garner divine protection and blessing for *ayllu* members (see RELIGION). Much of the *ayllu's* surplus economic production ended up in the *kuraka's* hands through tributary obligations (see ECONOMY). Nonetheless, he reciprocated by feeding members of the *ayllu* and providing raw materials for those involved in the production of TEXTILES.

One of the *kuraka's* most important responsibilities was to supply the food, *CHICHA* (MAIZE beer), and other goods needed for festivals and rituals. A *kuraka* who failed to reciprocate for the labor he demanded might be deposed,

and some were killed. The *kuraka*'s status depended on the number of people he ruled (and thus the amount of labor he controlled) rather than the amount of territory he governed. The typical *ayllu* was divided into an upper (*banan*) and lower (*burin*) half, with a different *kuraka* ruling over each. Although it did not necessarily pass to the eldest son, the *kurakazgo* (chieftainship) was usually hereditary.

As the Inca Empire expanded, local *kurakas* were subordinated to the empire. Those who cooperated with the Incas retained their positions; however, they then also served as intermediaries between the local population and the empire. The Inca ruler became a type of supreme *kuraka*, appropriating part of the *ayllu*'s surplus through labor tribute but also assuming the reciprocal obligations. The Incas also began to introduce a new form of *kurakazgo* based on a base-ten system (with a *kuraka* ruling over 10, 100, or 1,000, etc.), an innovation that challenged traditional practices. The Incas' forced resettlement of peoples to other regions of the empire to break down ethnic solidarity also undercut the *kurakas*' position (see *MITMAQKUNA*).

The Spanish CONQUEST of PERU brought additional changes. Many chieftains initially welcomed the Incas' defeat because it seemed to liberate them. The Spaniards used the *kurakas* to govern the *ayllus* and to mobilize *ENCOMIENDA* labor. In the years immediately after the con-

quest, in fact, the *kuraka*'s role was very similar to what it had been under the Incas: He was an intermediate official who provided labor for the Spaniards and who also retained part of the *ayllu*'s output for himself. But, there were some important differences: The Spaniards assumed no reciprocal obligations for the labor they extracted; moreover, they provided no food for the workers, and in many cases, their demands were so onerous that the *kuraka* had to decide whether to try to protect his people or to cooperate fully with the Europeans. Conditions for *kurakas* worsened when the Spaniards began demanding monetary rather than labor tribute, forcing *kurakas* to provide *MITA* workers for mercury and SILVER mines, and resettling Andeans in *reducciones* that often ignored *ayllu* divisions (see *CONGREGACIÓN*; MINING).

See also *KURAKA* (Vol. II).

—Kendall Brown

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## labor

### THE AMERICAS BEFORE 1492

Labor systems in the Americas prior to 1492 largely reflected the hierarchical societies of many different ethnic groups. Peasants or commoners were taxed in the form of labor paid to the nobility. Conquered peoples were expected to labor as a form of tribute. Another pool of labor was met by slaves (see *SLAVERY*). Slaves occupied the lowest stratum of society and were used as a massive, and oftentimes expendable, labor force. This approach to labor probably has great depth in the annals of the pre-Columbian Americas, but it is only in relation to the capstone civilizations—the *AZTECS*, *INCAS*, and *MAYA*—that scholars have detailed information. Among these civilizations, the salient and lasting achievements—immense road networks, large stone temples, terraced fielding, the construction of *CITIES* that were among the largest in the world—have provenance in the use of forced labor.

Labor was often viewed as a tax, owed to the state, or its nobility. As a tax, commoners were expected to contribute labor to nobles in the form of military service, agricultural labor, so-called “kitchen” labor that entailed grinding *MAIZE* and the like, and spinning and weaving to create cloth (see *AGRICULTURE*; *TEXTILES*; *WARFARE*). This form of labor contribution was regarded as reciprocal—it was provided in exchange for public services and the security offered by the state.

Tribute also played a crucial role in many labor systems. As the Aztec and Inca Empires expanded, the conquered peoples were ordered to pay annual tributes to the state, which came in the form of a certain amount of designated goods, or as a labor tax (see *MITA*). These

tributes were a critical element of state finances. By 1519, the Aztecs were collecting significant amounts of tribute from all the regions they had conquered. Tribute obligations were often a significant burden to those paying them, and throughout the century of Aztec imperial expansion, numerous city-states defied the empire’s demands for the same. The Incas kept strict account of the tribute and labor taxes they exacted from conquered regions, information that they carefully recorded on their *QUIPUS*; the state stored these goods in a vast network of storage systems. State goods were then distributed to local leaders (see *KURAKA*), the vast Inca armies, artisans, bureaucrats, and urban dwellers. Some stores were kept in case of emergencies, such as drought or frost.

Slavery accounted for much of the labor surplus required by the Aztecs, Incas, and Maya. Slaves were often drawn from longstanding enemy groups that were ultimately conquered. Criminals were also made slaves in some instances, and in some cases, citizens could sell themselves into slavery in order to avoid abject poverty. Slave labor was integral to the construction of large public works projects, temples, and cities.

Many American civilizations, especially the Aztecs, Incas, and Maya, controlled large amounts of surplus labor, believing a large labor pool was crucial to the territorial expansion of their civilization. Labor was extracted from citizens, conquered peoples, and slaves, and hence labor systems often featured gradations. The context of the Americas should also be considered. The stringent requirements on human labor was partly the result of prohibitive and undulating terrain and partly a product of an inability to domesticate large animals

to serve as beasts of burden, increasing the demands on human labor. This tradition of massive pools of human labor being harnessed by the state and parsed to reflect the gradations of social hierarchy provided opportunities for Spanish conquistadores to take advantage of internal divisions and disputes (see CONQUEST).

### EARLY COLONIAL LATIN AMERICA

Labor practices in early colonial Latin America drew from Iberian traditions, including African slavery, and were closely linked to developing maritime and mercantile contacts beyond Europe. They also followed patterns of demographic change. During the reconquest of the Iberian Peninsula (Reconquista), Iberian monarchs distributed *ENCOMIENDA* grants of labor or tribute as rewards to military leaders. These *encomiendas* were transplanted first to the Canary Islands and then to the Caribbean. In the Caribbean, Spanish settlers were allocated shares of Native American labor, known as *repartimientos*. Indigenous people labored in the agrarian ECONOMY and in MINING scarce precious metals. Settlers supplemented *encomienda* labor with that of *naborías* (personal servants or dependents of CACIQUES) and slaves captured in warfare.

With epidemic DISEASE and the catastrophic population decline among TAINO and CARIB Indians, who all but disappeared in the 16th century, Spaniards increasingly used enslaved Africans for labor. A similar situation developed in BRAZIL, where the Portuguese initially recruited and enslaved indigenous people to obtain dyewood and then work on SUGAR estates (see DYES AND DYEWOOD). Demographic collapse in the Caribbean inspired opposition to exploitative labor practices by ecclesiastical figures such as the friar BARTOLOMÉ DE LAS CASAS. Moral debates surrounding the treatment of NATIVE AMERICANS lay behind the LAWS OF BURGOS (1512), which sought to regulate the *encomienda* system.

As Spaniards ventured beyond the Caribbean, they extended slavery and *encomienda* systems to mainland areas. Africans participated in the conquests of Mesoamerica and the Andes, as did thousands of Native American allies (see CONQUEST). Following earlier precedents, many conquistadores in Mesoamerica and the Andes received *encomienda* grants. They used thousands of laborers as auxiliaries for exploration and military campaigns. *Encomienda* laborers also generated wealth for Spaniards, especially after the discovery of SILVER. Concerned over the potential of *encomenderos* (recipients of *encomienda* grants) to rival royal authority and seeking to regulate the treatment of Native Americans, the Crown promulgated the NEW LAWS OF 1542, which abolished indigenous slavery and sought to return *encomiendas* to the Crown by restricting inheritance. The New Laws were met with fierce opposition in the Americas, provoking conflict in PERU (see CIVIL WARS IN PERU). Implementation of the New Laws was not always

stringently enforced, and some privately held *encomiendas* survived the entire colonial period. Indian slavery also continued in peripheral areas such as CHILE, where hostile populations resisted conquest.

After the conquest, Spaniards preserved the rotational draft labor systems of the Aztec and Inca Empires, known as *coatequitl* and *mita* in NAHUATL and QUECHUA, respectively. Formalized under the rubric of *repartimiento*, Native American corporate communities such as the ALTEPETL and AYLLO supplied a share of their unskilled laborers to work for limited periods in agriculture and public works projects. *Repartimiento* drafts also recruited skilled workers, often carpenters and masons, who worked in church construction, among other tasks. Before the arrival of Spaniards, Native American artisans had worked in lapidary arts, feather working, textile manufacture, and CERAMICS, among other specialized trades (see ART). Some of these traditions lingered in the postconquest period, supplemented by Spanish craftsmen who brought with them such European trades as blacksmithing. Over time, Spaniards and people of African and mixed ancestries came to dominate the artisan production.

Spaniards sought to consolidate Native American communities that had been depopulated by disease through resettlement programs, known as *congregaciones* (see CONGREGACIÓN). Likewise, in peripheral areas, seminomadic groups were encouraged or forced to reside in mission complexes and forts. The geographical mismatch between *encomiendas* and silver mines in MEXICO meant that Spaniards drafted a significant proportion of labor outside institutional parameters, with Africans and *macebualli* (commoners in Nahua society) playing a significant role in labor allocation (see MACEHUALLI). In the Andes, by contrast, large population centers corresponded with the location of silver deposits, particularly in Potosí, where the *mita* system endured longer. Elsewhere, *repartimiento* became increasingly redundant as employers competed for decreasing supplies of labor to work in mines, textile workshops (*obrajes*), and large landed estates (*haciendas*). Employers increasingly obtained labor by offering wages or through coercive practices such as penal labor, debt service, and slavery.

Atlantic slavery developed from Iberian trade contacts with Africa. The vast majority of slaves came from West and Central Africa. They were supplemented by Native American slaves captured in peripheral areas and a few slaves imported from Asia. Slaves went to work as domestic servants in urban households, artisan shops, and *obrajes*, as well as in sugar and TOBACCO cultivation. The relatively high cost of slaves tended to limit their dispersal through the colonial economy, with the overwhelming majority going to sugar-producing areas, particularly Brazil. Over time, the influx of African slaves contributed to processes of *mestizaje*, or racial mixture, initiated with the conquest,



gradually transforming the demographic composition of the America (see *MESTIZAJE/MESTIZO*).

See also *LABOR* (Vols. III, IV).

—Richard Conway  
Sean H. Goforth

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**ladino** The Spanish term *ladino* originated in Roman times, when it referred to a native of the Iberian Peninsula who could speak the language of the conquering Romans. By early medieval times, *ladino* had come to mean the vernacular Romance language commonly spoken in what would become Spain (excluding Catalonia). The term's meaning shifted again between the 11th and the 13th centuries, after Latin rites adopted by the Christian Council of Burgos in 1080 replaced the Visigothic liturgy, and as Romance-based spellings became more common. Eventually, Christian writers ceased to use the term *ladino* to describe their own Romance vernacular languages. In particular, Castilian Romance developed its own nomenclature as *castellano*. Iberian Jews, however, continued to call their vernacular language, a hybrid of Hebrew and Romance, “ladino.”

In the 16th century, *ladino* could refer not only to the aforementioned language of the Sephardim but also to anyone who spoke Castilian as a second language (“to a Moor or a foreigner,” according to the early linguist Sebastián de Covarrubias in 1611) and/or to a person's wisdom or cleverness. Transferring the notion to the early colonial Americas, it came to refer most basically to bilingualism. Although *ladino* sometimes referred to Spaniards who had learned native Amerindian languages, such as NAHUATL in Mesoamerica or QUECHUA in the Andes, most often *ladino* described a Native American or African who was bilingual in his or her native language and Spanish. Additionally, *ladino* suggested the adoption by non-Spaniards of not only the Spanish language but also Spanish dress, religion, customs, and values.

Despite its many positive connotations, the meanings of *ladino* in the early colonial Americas could be ambivalent or even negative. Spaniards often favored *indios ladinos*, who frequently acted as trusted cultural brokers between Spanish invaders and indigenous communities. Precisely because of their mediating role, some *indios ladinos* were suspected by Spaniards of betrayal or even fomenting rebellion. (The same can be said of Africans, who in some parts of Spanish America would eventually become part of a racialized *ladino* population, along with

deculturated indigenous people and mixed-race peoples.) Likewise, *indios ladinos* often played a powerful role in the defense of native communities but were sometimes resented by their neighbors as coercive agents and enforcers of colonial rule. *Ladino* in early colonial Latin America could therefore be a compliment, an insult, or a mixture of both, used to describe acculturated non-Europeans who occupied an ambiguous place in colonial society.

—Laura Matthew

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**La Navidad** La Navidad was a doomed settlement constructed from the wreckage of the *Santa María*, CHRISTOPHER COLUMBUS's flagship. In the early morning hours of Christmas 1492, just weeks after first reaching the Americas, the *Santa María* ran aground on a sandbar as it skirted the Haitian coast (see *HISPANIOLA*). Columbus ordered the ship's supplies to be hauled to the mainland once he realized the *Santa María* was lost, despite the crew's frantic efforts to save it. With the assistance of the island's chieftain, Guacanagari, the ship's contents were moved ashore, where they were secured. On the basis of Guacanagari's accounts of GOLD, Columbus opted to leave 39 members of the crew on the island while he returned to Spain.

Columbus ordered that the wood from the *Santa María* be used to build a crude fort just along the shore to protect any recovered gold, though his diary reflects his low regard for the native people's ability to muster a threat. He also appointed his mistress's cousin, Diego de Arana, as governor of the settlement. Columbus left the settlers on January 4, 1493, anxious to track down the *Pinta*, which he had not seen for some weeks.

Columbus's second voyage returned him to the island in November 1494, where he expected to find his marooned settlers operating a viable outpost. Instead, the corpses of 11 of his men were strewn along the beachfront, and the fort was destroyed. The TAÍNO Indians reported that the Spanish settlers had harassed and abused the local indigenous people, who eventually killed them in retaliation. The area of La Navidad was lost to history for the next 500 years, until a local farmer introduced an archaeologist to the site in 1977.

—Sean H. Goforth

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The *Santa María*, a *nao*, was the largest of the three vessels in Christopher Columbus's 1492 voyage. While the precise dimensions of the *Santa María* are unknown, the ship's measurements likely did not exceed 19.2 feet (5.85 m) in width, 38.5 feet (11.73 m) in length along the keel, and 57.7 feet (15.79 m) on the lower of the two decks. The *Santa María* ran aground on the island of Hispaniola on Christmas Day, 1492. (Courtesy of J. Michael Francis)

**Landa, Diego de** (b. 1524–d. 1579) *Franciscan friar and bishop of Yucatán* Born in 1524 in the Spanish town of Cifuentes, Diego de Landa entered the Franciscan monastery (see RELIGIOUS ORDERS) in Toledo when he was 16. Nine years later, at the age of 25, Landa committed himself to the missionary challenge of Spain's new Mexican colonies, arriving in Yucatán just seven years after the 1542 founding of the provincial capital of Mérida (see MEXICO). Assigned to pastoral duties at the new monastery at Izamal, Landa soon revealed his ambitions; he quickly learned Yucatec Mayan and wrote religious guides and other works. He also traveled extensively throughout the peninsula, preaching to MAYA communities and destroying their "idols."

In 1558, Landa was elected custodian of the Franciscan order in the colony, and three years later became provincial head of the order. As custodian, he became involved in a legal dispute between the church and one of the colony's founding conquistadores, Francisco Hernández; Landa harried Hernández mercilessly for years, until at last, lying mortally ill, Hernández confessed his "crimes" against the ecclesiastical authorities. Other conquistador

families would not forget Landa's role in this affair, which symbolizes well the difficult relationship between colonists and clerics that persisted throughout the colonial period in Yucatán. Ironically, Landa's fall from power and exile to Spain in the 1560s was not a result of his confrontation with local colonists. Rather, it stemmed from a dispute with another Franciscan (Francisco de Toral) and Landa's brutal persecution of the Maya.

In 1560, Fray Francisco de Toral became the province's first resident bishop; however, he did not arrive until August 1562, by which time Landa had already begun investigating the alleged "return to their ancient and evil customs" (including HUMAN SACRIFICE—by crucifixion) by dozens of Maya communities. Their leaders and others, mostly nobles, were arrested under accusation of practicing idolatry (see DIABOLISM IN THE NEW WORLD). Some 4,500 Maya, including WOMEN, were tortured (nearly 200 to death). Landa held *autos de fe* (acts of faith) in Maní, Sotuta, and Hocaba-Homun, at which Maya "heretics" who had survived torture were whipped and publicly chastised; moreover, Landa oversaw the destruction of more than 5,000 "idols" and 27 hieroglyphic books.

This act caused the Maya much grief, as Landa himself acknowledged. In response, Bishop Toral immediately began to dispute the legality of Landa's use of violence and the veracity of the confessions thereby extracted. Many of the colonists agreed with him.

In 1563, Landa returned to Spain to defend himself in court. There, he wrote his great *Recopilación*, a pioneering ethnographic study of Yucatán, its people, and its history before and after the CONQUEST. The only surviving portion of this work is an excerpt copied in the 18th century and entitled *Account of the Things of Yucatán* (*Relación de las cosas de Yucatán*). Drawn from the friar's own observations and from his conversations with two Maya informants, Nachi Cocom and Gaspar Antonio Chi, the *Relación* is unique to Yucatán and one of the most important such manuscripts to have survived colonial Mexico. Perhaps, if viewed as conducted in the spirit of care and concern for the Maya, Landa's inquisition and their suffering at his hands can be reconciled with the book's veritable celebration of the Yucatec people.

In exile, Landa also worked for his political rehabilitation with typical fervor and tenacity; when Toral died in 1571, Landa himself was appointed Yucatán's bishop. He returned in 1573, older but vindicated and no less determined to uproot Maya "idolatry." Despite the opposition of both colonists and Maya leaders, Landa promoted the authority of the CATHOLIC CHURCH with an iron hand until his death in 1579; he was buried in the Franciscan monastery at Mérida. As a defender of the Franciscan order and ecclesiastical authority, Landa was no doubt "a great friar," as his colleagues wrote in 1570. But, as a man who compiled knowledge about the Maya yet burned books that were sources for the same subjects and who strove to protect indigenous people from Spanish settlers yet campaigned for the brutal torture of their leaders, he offers a fascinating and tantalizing window on Mexico's colonial experience.

See also *AUTO DE FÉ* (Vol. II); *FRANCISCANS* (Vol. II).

—Matthew Restall

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**Las Casas, Bartolomé de** (b. 1484–d. 1566) *Dominican friar and "protector and defender of the Indians"* The Dominican friar Bartolomé de Las Casas, named "protector and defender of the Indians," was an early reformer of Spanish colonial enterprises (see *DEFENSOR DE LOS INDIOS*; *RELIGIOUS ORDERS*). A critic of the actions of Spanish settlers in the New World, Las Casas argued that the indigenous people were rational and civilized

and, therefore, deserving of Christian conversion. His most notable work, *Brevísima relación de la destrucción de las Indias* (*A Very Brief Account of the Destruction of the Indies*), became a principal source on the brutality of colonialism and moved Las Casas into mythical status.

Born to a merchant family in Seville, Spain, in 1484, Las Casas embodied the contradictions of early colonial enterprises. After postponing his training in letters under the grammarian Antonio de Nebrija, Las Casas immigrated to HISPANIOLA in 1502 invested with a modest *ENCOMIENDA*, which proved to be a financial failure. During the next decade, Las Casas witnessed the dramatic collapse of the island's native population. By his own account, his life's trajectory turned in 1511 after hearing Fray ANTONIO DE MONTESINOS describe the mortal sin of exploiting the indigenous. In 1514, Las Casas renounced his own *encomienda* and began his campaign for an imperial agenda that did not exploit the native populations. In 1516, he was appointed *protector y defensor de los indios*. However, in 1522, following the failure of his settlement at Cumaná, VENEZUELA, Las Casas abandoned his political post and entered the Dominican order.

Over the next two decades, Las Casas navigated the religious-political bureaucracy of the Spanish colonies, working with important figures such as Bishop Juan de Zumárraga and Viceroy ANTONIO DE MENDOZA to create protective colonial legislative policies (see *CATHOLIC CHURCH*; *VICEROY/VICEROYALTY*). No stranger to the royal court, in 1531, Las Casas argued before the king that all Amerindians should be subject to the same rights and burdens as Spanish citizens. Following that logic, Las Casas drafted a confessional manual in which he characterized indigenous people as humble neophytes and Spaniards as vain sinners; he would continue this argument in *A Very Brief Account of the Destruction of the Indies*. As the vicar of GUATEMALA and later the bishop of Chiapa (Chiapas), Las Casas circulated his notorious manual, which was a clear act of defiance against colonial authorities. In 1547, Las Casas returned to Spain to answer charges of treason levied by the famous humanist JUAN GINÉS DE SEPÚLVEDA. In Valladolid, from 1550 to 1551, the two figures debated the nature of Indian humanity before high royal officials and learned scholars. Building on Thomist-humanist philosophy, which emphasized the divine rationality of people, Las Casas condemned the brutality of the conquistadores and the cruelty of settlers, an argument that he articulated in *Apologética historia* (ca. 1552).

Cleared of the charges, Las Casas wrote two major works following the debate in Valladolid. *A Very Brief Account of the Destruction of the Indies* was (published in 1552). In it, Las Casas described natives as Christian neophytes who were savagely attacked by Spanish settlers. This description quickly circulated throughout Europe, and this work became the source of the "Black Legend" of the brutality of Spanish colonialism. In his *Historia de las Indias* (*History of the Indies*; completed in 1559 and published in 1875), Las Casas provided an ethnology of

native civilizations. In 1566, at the age of 82, Las Casas died in Madrid, Spain.

See also DOMINICANS (Vol. II).

—R. A. Kashanipour

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**Las Salinas, Battle of** (April 6, 1538) Fought near the city of CUZCO in 1538, the Battle of Las Salinas pitted Spaniard against Spaniard, as the forces of DIEGO DE ALMAGRO and those of the Pizarro brothers fought to dominate PERU. FRANCISCO PIZARRO and Almagro had formed a partnership to undertake the CONQUEST of Peru. Following the capture and execution of the Inca ruler ATAHUALPA and the Spanish occupation of the Inca capital at Cuzco, however, Pizarro claimed much of the territory for himself (see INCAS). A disgruntled Almagro led a fruitless expedition into the deserts of northern CHILE, returning in 1537 to find Cuzco under siege in MANCO INCA'S Great Rebellion. Almagro relieved the siege but arrested GONZALO PIZARRO and HERNANDO PIZARRO, who opposed his occupation of Cuzco. Meanwhile, Francisco Pizarro was in LIMA on the coast.

As a result of his negotiations with the Pizarro faction, Almagro freed the Pizarro brothers. The two sides, however, were unable to resolve their contention. Seeking revenge, Hernando Pizarro led an army of 700 Spaniards from Lima to Cuzco. Almagro rejected his Inca ally Paullu's suggestion that they ambush Pizarro's force in a narrow mountain valley. Reluctant to make war on his fellow Spaniards, Almagro decided instead to defend Cuzco.

With Almagro incapacitated by syphilis, Rodrigo Orgóñez led the Almagro army. He chose a site a few miles south of Cuzco near some salt leaches (*salinas*) to fight the Pizarrists. On the morning of April 6, 1538 (not April 26, as some historians have written), the two forces engaged. Almagro's smaller army, weakened by desertion and abandoned by the Inca supporter Paullu, succumbed after two hours of fighting. Only 50 or so Spaniards died during the battle, but reprisals afterward claimed many more. Orgóñez was wounded and executed on the field. The Pizarrists captured Almagro, tried him for treason, and executed him.

Although minor in terms of its military importance and the number of casualties, the Battle of Las Salinas was a chief factor in Charles I's decision to send a VICE-

ROY to Peru to take power from the conquistadores and establish order in the colony.

—Kendall Brown

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**Laws of Burgos** (1512) The Laws of Burgos, promulgated in 1512, were the first Spanish laws created to govern the Indies and regulate relations between Spaniards and the indigenous peoples of the New World. From the beginning of Spanish colonization in the New World, the basic laws and ordinances of the Kingdom of Castile were assumed to serve also in the governance of the Indies. Castilian law, as opposed to the legal codes of Aragon or other Spanish kingdoms, constituted the basic form of civil and criminal law in the new colonies. Nevertheless, the administrative distance, as well as the new peoples and lands discovered, were so different that events in the Indies quickly mitigated the creation of new laws to meet the special conditions there.

As early as 1499, when initial instructions concerning the proper treatment of the indigenous peoples were issued to GOVERNOR FRANCISCO DE BOBADILLA (CHRISTOPHER COLUMBUS'S replacement as governor of the colony of HISPANIOLA), the Crown realized that new regulations were needed, especially in terms of regulating the relations between Spaniards and the indigenous peoples of the Caribbean. One of the most important proponents of new legislation was the Dominican friar ANTONIO DE MONTESINOS, who in 1511 not only complained and sermonized about Spanish abuses of the Indians but also wrote a lengthy report about these to the Crown.

In response to Montesinos's complaints and other reports, in 1512, King Ferdinand convened a theological and academic council at the city of Burgos to look into the legal questions concerning Spain's rights over the dominion of the Indies. The Ordinances for the Treatment of the Indians (*Ordenanzas para el tratamiento de los indios*), more commonly called the Laws of Burgos (1512), were the legislative fruit of the council's findings. These ordinances reflected the council's formal conclusions, which established a series of legislative principals that would inform and shape all subsequent royal laws related to the Indies.

The Junta de Burgos concluded that first, the Indians were, indeed, free vassals of the Crown. Second, the Catholic monarchs were the natural lords of the Indians, due to their subdelegated duty from the pope in Rome to evangelize and convert the native people to Christianity (see RELIGION). In order to accomplish the goals of conversion and colonization, the council also stated that the Indians could be obliged to work for the Spaniards but

only if the LABOR was tolerable and was compensated with a just salary or payment. In a more negative tone, the Junta de Burgos also stated that war against the native people and their enslavement was justified if they refused to accept Christianity (see CONQUEST; SLAVERY; WARFARE). In order to alert the Indians of their rights and obligations to the Crown, the Laws of Burgos authored an official *REQUERIMIENTO*, or legal “requirement,” which had to be read to the indigenous people before any “just war” could be waged against them.

These Laws of Burgos were issued officially by King Ferdinand on December 27, 1512, and they officially regulated the relations between Spaniards and the conquered peoples of the New World. The ultimate goals were to ensure the spiritual and material welfare of the Amerindians, who were often mistreated by their Spanish conquerors.

Among the many legacies of the Laws of Burgos of 1512 was the first official use of the Castilian legal term *ENCOMIENDA*, with its medieval reciprocal duties for both conqueror and conquered. The transplantation of the medieval concept of the *encomienda* system, both a duty and a privilege, was meant to replace the more arbitrary and abusive division of the NATIVE AMERICANS in the early *repartamientos*, or forced labor divisions granted to Spanish conquerors.

Although many of the various aspects of the Laws of Burgos had good intentions, the laws were largely unenforceable. Regardless of their enforceability, however, the laws represent Spain’s first attempt to limit the abuse of the indigenous peoples of the New World by the Spanish.

—John F. Chuchiak IV

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**Lima** Located at 12° S latitude and 77° W longitude, the city of Lima emerged after the CONQUEST as the capital of Spanish PERU. The Spanish conquistador FRANCISCO PIZARRO founded the city in 1535.

Lima is situated in the Rimac river valley, one of many such valleys on the desertlike Pacific coast of Peru. The Humboldt Current and Andean rain shadow control the climate and weather in the region. Lima has moderate summers, with the temperature averaging 80° Fahrenheit (26.6°C) from December to March, and humid overcast winters, with temperatures averaging between 55° Fahrenheit (12.7°C) and 60°F (15.5°C).

The region has considerable prequest time depth, known archaeologically from Inca and pre-Inca sites in the

urban area, the Rimac Valley, and the surrounding region (see INCAS). The first settlers were descendants of the Asian population that had crossed the Bering land bridge or sailed along the Pacific Rim. The evidence of the first settlers in Peru is from secondary archaeological sites that date to 5,000–10,000 years ago; the primary Pacific shore sites of these early inhabitants were destroyed by rising sea levels.

Early hunter-gatherers began to settle near Lima in about 4500 B.C.E., taking advantage of the rich seafood harvest. Settlements at Paloma and Chilca grew in size and cultivated COTTON, from which they made fishing nets and lines, as well as TEXTILES.

By 2000 B.C.E., construction had begun at El Paraíso, about 70 miles north of Lima; El Paraíso is considered the largest preceramic monument in the Western Hemisphere (see CERAMICS). Nine masonry multiroom palaces contain 100,000 tons of quarried stone. El Paraíso initiated an architectural tradition of large courtyards within U-shaped structures; the style lasted for some 3,500 years (see ARCHITECTURE).

In 200 C.E., in the Rimac Valley, a distinctive cultural pattern of buildings and residential patterns began and endured for several centuries. The remains of this “Lima culture” are buried under modern Lima.

The huge oracle site of Pachacamac was constructed early in the first millennium at a prominent coastal site 20 miles (32 km) south of Lima. Pachacamac was an active pilgrimage site for centuries, ultimately being taken over by the Incas shortly before the Spanish conquest.

By the 1400s, the Inca Empire, with complex taxation and statecraft and a road system that extended some 15,000 miles (24,140 km), dominated both the Andes and the coast, including the Lima region. This domination came under threat even before the arrival of Pizarro and his men, however; six years before the Spanish conquest, European-borne smallpox swept into South America, killing the Inca ruler HUAYNA CAPÁC (see DISEASE).

Huayna Cápac’s death sparked a violent dynastic dispute, leading to civil war. Pizarro arrived on the north coast of Peru during the civil disruption that followed, then marched inland to Cajamarca, and in a remarkably short time captured, ransomed, and killed the Inca emperor ATAHUALPA. He then marched to and seized the Inca capital, CUZCO.

Following the conquest, the Spaniards found the 11,500-foot (3,505-m) altitude of Cuzco, though rich in GOLD, to be intolerable. Europeans were ill adapted to cope with hypoxia, edema, and the high rate of spontaneous abortions and, instead, chose to settle on the Pacific coast in 1535. Their port of Callao, founded by Pizarro for shipping Inca gold to Spain, is now part of the modern metropolis of Lima and the largest port in Peru.

The founding of Lima was centered at the Plaza Mayor (Plaza de Armas), which is dominated by the cathedral (begun by Pizarro on January 18, 1535, and dedicated in 1540) and the adjacent archbishop’s palace on the east side, the presidential palace on the north,

and the city hall on the west. Thus, with the conquest of the Inca Empire, the center of power in South America shifted from the high Andes to the coast at Lima.

See also CALLAO (Vol. II); LIMA (Vols. II, III, IV).

—Walter R. T. Witschey

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## literature

### MESOAMERICA

Mesoamerican literature probably originated in the oral traditions that predate the New World MIGRATIONS. The earliest Mesoamerican literature appeared in the second half of the first millennium B.C.E., when pictographic, ideographic, and phonetic glyphic writings were developed by the ZAPOTECs and other groups. Although such short inscriptions cannot be fully considered “literature,” these ruler names, toponyms, dates, and complex symbolic images were often accompanied by oral interpretations and performances, which would breathe life into the symbols; this practice continued throughout the pre-Hispanic and early colonial period.

The Mesoamericans’ literary subject matter was diverse. It included the origins of the physical and spiritual worlds and the place of humans within them, the mythical deeds of deities, politics and the ECONOMY, local and imperial histories and genealogies, and astronomy and mathematics. For the most part, these subjects were not mutually exclusive, with several commonly being found in the same document. Literacy was limited to the nobility, thus most literature was produced by the ruling elite and government officials, as well as priests and priestesses. At the same time, the schematized pictographic style would have been comprehensible to the majority of the population and even to those who spoke different languages. Except for a few cases among the MAYA, we do not know the names of any early authors, although they were most likely from the elite.

One of the earliest and most enduring Mesoamerican literary genres is the “territorial narrative” through which rulers legitimized their territorial charters by means of historical and mythical stories; an early example can be found in the first-century C.E. CONQUEST slabs at MONTE ALBÁN. Shortly thereafter, several cultures began to record their historical and political literature in more detail. Much early Mesoamerican literature was written on screenfold CODICES. Fragmentary evidence suggests that these books appeared as early as 600 C.E., although Classic-period narratives have survived until today only on nonperishable stone stelae, murals, lintels, and portable items such as ceramic vases and figurines (see CERAMICS).

The Maya, who created the most complex writing and calendrical systems in Mesoamerica, left extensive

inscriptions that delineated the accomplishments and genealogies of their kings and queens. Like all political and dynastic histories, these contained their share of implicit and explicit propaganda aimed at elites and commoners alike; a fine example is the Hieroglyphic Stairway at the Maya site of COPÁN, in HONDURAS, which is the longest carved inscription found anywhere in the Americas.

Codices appeared during the Postclassic period; the few preserved examples come from the Mixtec and Maya peoples (see MIXTECS). The still unprovenanced Borgia group are the only surviving codices of a vast religious literature that might have been in possession of high priests and priestesses in the Mixteca-Puebla area (see RELIGION). Since these documents were often edited and expanded over various generations, different themes are found in the same document; for example, one side of the Mixtec Codex Vindobonensis is dedicated to the mythological creation of the Mixtec cosmos, while the other, added much later, provides genealogical information. Other Mixtec codices tell the “epic saga” of the 11th-century lord Eight Deer; this tale uses historical events as well mythical beings and locations. The Maya Codex Dresden contains complex astronomical calculations, which, although certainly motivated by the Maya’s own curiosity about the heavenly bodies, were nevertheless devised as an attempt to predict the actions of divine entities.

By the time the Spanish landed in Mesoamerica in the early 16th century, there were numerous literary genres within indigenous society, each with its own document type. The AZTECS, for example, distinguished between *teomoxli* and *teotlahuolli* books, dedicated to religious and mythological prose, respectively; *tonalamatl*, for determining individual destinies by the sacred calendar; *buehuehlahuolli*, which were speeches from parents to their children and rulers to their subjects, as well as philosophical, ethical, and religious teachings; *tequihuamatl*, in which tribute records and census lists were recorded; and *cuicamatl*, or books of songs (many that survived are attributed to Nezahualcoyotl, the 15th-century Texcocan king). Mesoamerican authors employed various literary devices in their compositions, such as parallel sentences and couplets for symbolic expressions and complex metaphors of the kind also employed in the earliest Mesoamerican inscriptions.

Although the Spanish often commented on the abundance of indigenous literature in their own chronicles, much of it was destroyed during the early years of the conquest, when codices and complete libraries were put to the torch as works of the devil (see CHRONICLERS). Nevertheless, numerous codices were hidden, and literary works continued to be transmitted orally. The codex tradition itself was altered to suit the new colonial reality by focusing on such “secular” themes as history, tribute, and territory, and overall, more than 500 Aztec and other codices survive from the early colonial period. Among the most common genres produced in the Valley of

MEXICO were the sequential year-count “annals,” such as the Codex Aubin, which narrates a selected Mexica history from 1168 to 1608.

The encounter of the Mesoamerican and European traditions created new literary forms, such as the “ethnographic codices” produced mostly by the indigenous for European eyes. One of the most famous examples is the Codex Mendoza, which narrates in pictorials and glosses the history of the Mexica rulers. It also provides a catalog of conquered places and the tribute they paid to the empire and deals with the daily life of Aztec commoners (see *MACEHUAL*). Even more impressive in its amount of pictorial and written detail is the FLORENTINE CODEX, an encyclopedic manuscript composed between 1540 and 1580 by Friar BERNARDINO DE SAHAGÚN together with Aztec scribes. Its 12 volumes include both pictorials and alphabetic texts in Spanish and NAHUATL and contain the most complete description of indigenous society before the Spanish conquest. This work also relates the fateful clash of cultures from the native perspective.

At the same time, indigenous nobles began to learn how to write in the Roman alphabet in order to reaffirm their elite status under the new Spanish administration. This resulting corpus of alphabetic documents in indigenous languages is only starting to be explored but has already revolutionized our understanding of indigenous literature before and after the Spanish conquest. One such scholar was Fernando de Alva Ixtlilxóchitl, a descendant of Nezahualcoyotl and the Aztec emperor Cuitláhuac, who wrote a history of his people based on earlier documents and oral traditions still available to him. At least in part, some of these manuscripts are postconquest transcriptions of pre-Columbian codices, such as the Mayan *POPOL VUH* (Council Book), in which the K’iche’ (Quiché) people recorded their mythology, history, genealogies, and religion. This last is also our main source of information for understanding the pre-Columbian epic of the “Hero Twins,” which appeared in Maya iconography as early as 100 B.C.E. Other important early colonial Maya literature includes the books of Chilam Balam, which was written by Yucatec Maya priests and includes prophecies and historical narratives starting from the seventh century C.E., and the Ritual of the Bacabs, which contains esoteric knowledge and medical incantations. Documents known as “community histories,” a subgenre of the pre-Columbian territorial narratives, flourished during the early colonial period. These often focus on the original migration to the land, the conquest wars and settlement of the indigenous polity, and the ruling dynasty, such as that depicted in the Historia Tolteca-Chichimeca from the Valley of Puebla. These pictorial and/or alphabetic documents were created either to solidify communal identity or for the purpose of land litigations in Spanish courts, mostly against other indigenous communities. Several were composed for the purpose of requesting privileges from the Spanish king on the basis of actual or alleged loyal service during

the conquest. Other documents in indigenous languages and Spanish were created within the community and included wills and testaments, personal letters, and land transactions.

The Spanish produced their own literature in their “new world.” “Conquest narratives,” such as those written by both HERNANDO CORTÉS and his men, recorded the events that brought about the downfall of empires, in this case the Aztec Empire. Other conquistadores recorded their adventures in other parts of Mesoamerica. Many of these chronicles, such as that by BERNAL DÍAZ DEL CASTILLO, were written in response to a growing body of literature that criticized the Spaniards’ cruelty toward the Indians, criticisms perhaps best exemplified in the works of the 16th-century Dominican friar BARTOLOMÉ DE LAS CASAS.

Other early writings were produced by ecclesiastical authorities, commonly in the form of catechisms and dictionaries. Several Spanish priests even began adapting the pictorial system to their own ends in order to convert with greater success the indigenous population to Christianity. In the 1560s, DIEGO DE LANDA, a Franciscan friar and later bishop of Yucatán, wrote a detailed account on the Maya way of life; nevertheless, he burned dozens of their religious codices. The establishment of the Spanish Crown in New Spain also resulted in a wealth of bureaucratic literature, which often provides important details about the lives of both the Spanish and indigenous in early colonial society. The *Relaciones geográficas* were compiled around 1580 as a survey for the Spanish king Phillip II; ironically, this geographical questionnaire produced the largest-known collection of indigenous MAPS, many of which followed the traditional pictorial traditions of territorial narratives.

## THE ANDES

It is likely that pre-Columbian oral literature was as rich in the Andean region as it was in Mesoamerica, as seen in the pictorial narratives on MOCHE ceramics or the *tocapu* designs on TEXTILES and cups. Still, South American cultures apparently did not develop phonetic writing systems. In the Andes, the most intricate apparatus to record complex information before the Spanish conquest was the *QUIPU*, used extensively by the INCAS and other cultures in the region before them. According to the 16th-century chroniclers, *quipucamayoc* specialists were able to record and then recount information concerning tribute, censuses, ritual, laws, political organization, calendars, genealogies, and the official history of the empire. However, scholars are still debating whether the *quipu* is indeed a decipherable writing system or merely a mute mnemonic device; this issue cannot be resolved from the examples found thus far.

Therefore, unlike Mesoamerica, for the Andean region, we currently lack direct literary continuity from the pre-Columbian to the early colonial period, when much of the surviving historical information was narrated

from *quipus* and then recorded alphabetically by the early chroniclers. Not by chance, much of this early indigenous literature came from the Inca Empire, and more specifically, was narrated by the ruling families of Cuzco.

Among the earliest literature produced in the Andes were the Spaniards' conquest narratives, which for the most part attempted to undermine the Incas' autochthonous achievements and questioned the legitimacy of their rule. Among the writers were FRANCISCO DE XEREZ, FRANCISCO PIZARRO's personal secretary, who in 1534 published an official version of the conquest of PERU; Miguel de Estete, who wrote his firsthand experiences on his travels and conquests with Pizarro; and Dominican friar Gaspar de Carvajal, who chronicled the first Spanish expedition to the AMAZON River in 1542. A more observant and "ethnographic" account of the Andean people is contained in the soldier PEDRO DE CIEZA DE LEÓN's four volumes about the Spanish conquest and first decades of European hegemony in the central Andes.

Other important early Spanish chroniclers were Cristóbal de Molina, who recorded numerous Incaic traditions; and Sarmiento de Gamboa, who attempted to produce a unified historical narrative for the Inca Empire but became frustrated by the multiple "partisan histories" of the competing factions. Juan de Betanzos, a Spaniard who married an Inca princess and mastered the QUECHUA language, recorded in much detail one of the provincial histories from his wife's indigenous family and compiled a short Spanish-Quechua dictionary. In addition to ecclesiastical and legal documents, Spanish officials produced a large corpus of records about land ownership and resources, most notably the *visitas*, formal inspections undertaken in the first decades after the conquest, which provide detailed historical and political information on groups outside the Inca imperial core.

As in Mesoamerica, the Andean indigenous elite similarly adopted the Roman alphabet for their purposes and composed documents, mostly in Spanish, Quechua, and Aymara, in an attempt to validate their royal status and property rights through noble pedigrees. A few indigenous chroniclers from royal bloodlines wrote more lengthy descriptions of their people. Among the most exceptional was Guamán Poma de Ayala, whose detailed narrative is accompanied by 400 drawings of Andean mythological and historical subjects before and after the Spanish conquest, as well as a critique on the

harsh colonial rule in Peru directed to the Spanish king. Other comprehensive accounts include those of Titu Cusi Yupanqui and Santa Cruz Pachacuti, and that of the mestizo Garcilaso de la Vega, who idealizes life under the Incas. Although these texts were written a few decades after the conquest and show strong Christian worldviews mixed with the indigenous, these "insider" perspectives strongly challenge the official histories of the Spanish conquistadores.

Much 16th-century Andean literature written by both indigenous and Spaniards consists of sequential histories of individual Inca kings from accession to death, along with the story of the patrilineal descent group founded by each one. According to Garcilaso de la Vega, *AMAUTAS* were responsible for structuring these historical events into short stories, while the *barauicus* wrote them down as poems. The chroniclers occasionally refer to these epic praise-poems telling of war, victories, and other memorable events in the Inca Empire, which were sung and accompanied by music and dance in elaborate ceremonies and funerals. Oral recitations used literary devices and poetic conventions such as metaphors, rhythm, and patterned repetition as memory aids and might have first been recorded on *quipus*. The cosmogonic literature consisted of two distinct mythic cycles, one emphasizing Lake Titicaca, where the god Viracocha created the Sun, Moon, and humans; and the other, the emergence of the Inca ancestors from a cave in Pacariqtambo. An important early document is the *Huarochiri Manuscript*, which consists of tales and legends in Quechua collected from indigenous informants and edited by the priest Francisco de Avila; it opens a window on 16th-century Andean indigenous religious practices.

See also GARCILASO DE LA VEGA (Vol. II); LITERATURE (Vols. II, III, IV); PRINTING PRESS (Vol. II).

—Danny Zborover

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# M

**macehual** One of the most important features of Nahua society was the hereditary division between nobles and commoners (see AZTECS). This social reality quickly became familiar to colonizing Spaniards. As a consequence, the NAHUATL term *macehualli* (plural, *macehualtin*), or “commoner,” soon passed into Mexican Spanish as *macehual* (plural, *macehuales*). At times, the hispanized term was extended beyond the Nahuatl-speaking areas to describe the majority of the settled working population in other regions of Mesoamerica, which was made up of MIXTECS, MAYA, and other groups.

Broadly speaking, the *macehualtin* were those who raised crops and animals, rendered tribute goods to the ALTEPETL and its TLATOANI, performed the hard physical LABOR required for community projects under the traditional *coatequitl* (rotary labor draft), occupied themselves in various crafts, and engaged in local and long-distance TRADE. Before the enforced peace brought by colonization, the *macehualtin* also made up the bulk of the fighting forces that an *altepetl* dispatched against another. Being a commoner did not always imply straitened circumstances; indeed, some specialized craftsmen and long-distance merchants (POCHTECAS) acquired as much wealth as many nobles.

A special aspect of *macehualli* was its meaning in the possessive form as someone’s “subject” or “vassal.” Since the nobles were formally subjects of the *altepetl*’s leader, the *tlatoani*, they, too, were sometimes described as *macehualtin*. In yet another sense, since the typical inhabitant of an *altepetl* was a *macehualli*, the term (perhaps its primary original meaning) could mean “human being” or “person.” This might explain why by 1600 it started to become the Nahuatl equivalent of *indio*, or “Indian,” in Spanish.

Nahua society before and after the CONQUEST occasionally allowed for social mobility. A prime example from the early colonial period is Antonio Valeriano. Born a *macehualli*, he became the most renowned Nahua Latinist of his time: Valeriano married into MONTEZUMA’S FAMILY and was governor of MEXICO CITY for 26 years.

—Barry D. Sell

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**Machu Picchu** Machu Picchu was established as a royal estate by the Inca emperor PACHACUTI INCA YUPANQUI in the mid-15th century (see INCAS). Situated on a mountain ridge above the Urubamba River, it is lower in elevation and milder in climate than the Inca capital of CUZCO. Like many royal estates, it contained housing for the Inca emperor, his retinue, and a multitude of servants who maintained the estate in his absence, as well as numerous shrines for religious activities. The terraced fields that existed just below the site, as well as the rich agricultural fields in the valley farther down, were also in royal possession. Royal estates would pass to the AYLLU of the Inca ruler when he died. These royal *ayllus* were called PANAQAS. The *panaqa* would then manage



One of the world's most magnificent archaeological sites, Machu Picchu was likely built as a royal estate for the Inca ruler Pachacuti Inca Yupanqui (r. 1438–63). (Courtesy of J. Michael Francis)

the estate, providing income from its surrounding lands to sustain the dead king's FAMILY and funding ceremonies and rituals in his memory. A dead ruler was considered a powerful ancestor with influence in the spirit world; thus, honoring him and maintaining ties with his family was of practical importance.

Machu Picchu is made from shaped stones, fitted tightly against each other without mortar, and was roofed with thatch. High-status buildings featured stones that were highly smoothed and of a more regular shape (see ARCHITECTURE). Stones were spiritually important to the Incas, who believed that they had the power to turn into humans. Structures at the site emphasize important aspects of royal Inca life and symbolic power. These include a building that marks the June solstice, a large rock whose shape resembles a nearby mountain, and ritual fountains and baths throughout the site, symbolically demonstrating Inca power over earth and water and the elite's relationship with the heavens.

—Sarah E. M. Scher

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**Magellan, Ferdinand (Fernão de Magalhães)** (b. ca. 1480–d. 1521) *Portuguese navigator and explorer* Born in Villa de Sabroza in northern Portugal to a family of minor nobility, Ferdinand Magellan gained experience as a navigator and military man while participating in expeditions to India, the East Indies, and North Africa. In 1513, Magellan approached King Manuel of Portugal to request leadership of a voyage that would sail west to the Spice Islands. After being denied twice, Magellan took his request to King Charles I of Spain. The Spanish Crown granted Magellan's request and agreed to provide him with five ships and the majority of the funds required to outfit the expedition. On September 20, 1519, Magellan left Sanlúcar de Barrameda with a crew of 250 men.

The expedition sailed first to the Canary Islands, then to Cape Verde and south down the African coast to Sierra Leone before eventually sailing west across the Atlantic to BRAZIL. The expedition remained in Brazil for roughly two weeks before heading south to what is now ARGENTINA. Magellan decided to remain there for five months in order to repair damage to the ships. During this time, many of his crew members grew restless, and a dispute arose between Magellan and the Spanish captains. This developed into a mutiny, which was thwarted by Magellan and his supporters. During the mutiny, one of Magellan's ships deserted and returned to Spain; another vessel was sunk.

The three remaining ships continued the expedition and eventually passed through the strait that now bears Magellan's name and into the South Sea, which Magellan renamed the Pacific. The expedition headed north along the coast of CHILE, before sailing west across the Pacific. In March of 1521, Magellan reached Guam in the Marianas. The expedition continued on until it arrived at Cebu, in what is now the Philippines. In an attempt to forge an alliance with the indigenous people of Cebu, Magellan agreed to attack their enemies who resided nearby at Matan. This decision proved to be disastrous, and Magellan was killed in battle. The surviving members of the expedition could man only two ships and decided to burn the third. The ships sailed on to the Moluccas Islands, where they took various spices on board. One of the ships, the *Trinidad*, then headed east in an attempt to sail back across the Pacific; the other, the *Victoria*, commanded by Sebastián del Cano, continued west and eventually rounded the Cape of Good Hope and arrived back in Sanlúcar de Barrameda on September 1, 1522, thus completing the first circumnavigation of the globe.

See also MAGELLAN, STRAIT OF (Vol. II); SANLÚCAR DE BARRAMEDA (Vol. II).

—Justin Blanton

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Hugh Thomas. *Rivers of Gold: The Rise of the Spanish Empire from Columbus to Magellan* (New York: Random House, 2003).

**maize** Before the arrival of Europeans in the Americas, domesticated maize (*Zea mays*) was a staple crop of cultures from the St. Lawrence Valley (Canada) to CHILE (see AGRICULTURE). Through the process of selective breeding, the caloric yield of the maize plant increased immensely, and its physical characteristics underwent radical transformations. The rows of large kernels of domesticated maize are tightly packed on a cob that is surrounded by a tough husk; because the kernels cannot scatter, the plant is no longer capable of reproducing without human intervention. Maize was such an important staple that it became integrated into religious beliefs and myths wherever it was grown (see RELIGION). Characteristics of gods and goddesses were based on maize's physical characteristics and life cycle. Because of its centrality to ancient cultures in the Americas and, after the CONQUEST, to cultures throughout the world, archaeologists and geneticists have searched diligently for its wild ancestor and place of origin.



Several varieties of maize on display in the Peruvian Andes near Cuzco (Courtesy of J. Michael Francis)

Three primary hypotheses have been offered for the ancestry of maize. According to the tripartite hypothesis, domesticated maize arose from a now-extinct wild pod-popcorn ancestor. The second theory, known as the teosinte hypothesis, postulates that maize is descended from teosinte, a tassel-bearing wild grass. Lastly, the *tripsacum-diploperennis* hypothesis suggests that maize resulted from a cross between teosinte (*Zea diploperennis*) and *Tripsacum*, genus of tassel-bearing wild grass.

Archaeologist Richard S. MacNeish focused his search for the origin of maize on dry caves in the highlands of MEXICO; plant materials are generally better preserved at such sites. According to MacNeish, genetic evidence indicated that the ancestor of maize was a highland grass; pollen evidence showed it originated somewhere between MEXICO CITY and Chiapas. Excavations between 1961 and 1964 in the Tehuacán Valley also revealed many remains of maize. MacNeish argued that some recovered cobs were 7,000 years old, came from the wild ancestor of maize, and supported the tripartite hypothesis. Domesticated maize appeared around 5000 B.C.E. in Mesoamerica, a conclusion based on uncalibrated conventional radiocarbon dating of charcoal associated with maize remains. MacNeish believed the Tehuacán Valley was not necessarily the earliest place where maize cultivation occurred.

MacNeish's work, however, did not settle all matters concerning the ancestry and origins of maize. A "lowland model" proposed that maize arose from mutations to teosinte growing in the Río Balsas drainage of Guerrero, Mexico. Accelerator mass spectrometry (AMS) radiocarbon dates obtained directly from cobs excavated by MacNeish in the Tehuacán Valley are almost all considerably younger than the conventional dates originally reported. A group of biologists and geneticists has declared that biological evidence of the teosinte hypothesis is overwhelming; reports of a successful *Tripsacum*-teosinte hybrid are not credible, and evidence is lacking that the maize genome is a mixture of the *Zea diploperennis* and *Tripsacum* genomes. Currently, the earliest widely accepted evidence of domesticated maize is two calibrated AMS dates (4355–4065 B.C.E.) on cobs of primitive maize that show strong influence from teosinte in its ancestry; this evidence was obtained from excavations at Guilá Naquitz Cave in Oaxaca, Mexico.

Although maize provides essential dietary calories, it lacks important nutrients. Mesoamericans discovered that maize prepared by soaking the kernels in a water-lime mixture (known as *nixtamal*) and then grinding the blend on stones (called *manos* or *metates*) resulted in better human health than maize prepared in other ways. Despite this innovation, a diet that included beans and squash provided better nutrition than one based exclusively in maize.

See also MAIZE (Vols. II, III).

—Stephen L. Whittington

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**Malinche, La (Malintzin, Malinalli, Marina)** (b. ca. 1500–d. 1541?) *Nahua woman who served as Hernando Cortés's translator in the conquest of Mexico* La Malinche, or simply Malinche, also referred to as doña Marina, Malintzin, Malinalli, La Chingada, or La Llorona, is one of the most intriguing protagonists of the Spanish CONQUEST OF MEXICO. *Malinche* is a Spanish corruption of her indigenous name, *Malintzin*, or *Malinalli*, which probably derived from her sacred calendar birthday sign. Born into a noble Nahua family in the Coatzacoalcos region, she was sold into SLAVERY by her stepfather and ended up as a servant in a MAYA noble family in Potonchán, Tabasco. On March 15, 1519, she was offered as a gift to HERNANDO CORTÉS, who after baptizing and renaming her *doña Marina*, gave her to his lieutenant Alonso Hernández Puertocarrero. To communicate with these Maya nobles, Cortés had used GERÓNIMO DE AGUILAR, a Spaniard who had been shipwrecked on the Yucatán shore and had learned the language in captivity. But, Cortés soon realized that Malinche was bilingual not only in Maya and NAHUATL but also in both the colloquial and noble vernaculars, so she was promptly employed to complement Aguilar in communicating with the emissaries of the TRIPLE ALLIANCE (see AZTECS). By virtue of her position as Cortés's personal interpreter, Malinche soon learned to speak Spanish; she also developed an intimate relationship with Cortés. She was instrumental in Cortés's first meeting with MONTEZUMA on November 9, 1519, in TENOCHTITLÁN, during the events of the Noche Triste (night of sorrows) through to the subsequent defeat of CUAUHTÉMOC.

Beyond her linguistic skills, Malinche possessed an extensive knowledge of indigenous culture and society and thus became a key adviser to Cortés. In fact, the two were so inseparable that the Mexica referred to Cortés also as "Malinche." Malintzin may not have objected to the notion of the foreign conquest and, in fact, might have deliberately manipulated the interaction between indigenous and conquistadores for her own political and personal ends, as might have been the case in the notorious Cholula massacre. Perhaps as a result, Malintzin was further known by her Nahuatl nickname, *Tenepal*, or "vigorous speaker," although this might have been given to her after the conquest.

In 1522, Malinche bore a son to Cortés, named Martín, who is often considered New Spain's first mestizo (a person of mixed indigenous and European blood). Between 1524 and 1526, she accompanied Cortés on his military expedition to HONDURAS, and she interpreted Cuauhtémoc's last confessions. This is also where she was

formally married to Juan Jaramillo, one of Cortés's lieutenants, and was awarded an *ENCOMIENDA* near Coatzacoalcos as a dowry from Cortés. Malinche later gave birth to Jaramillo's daughter, named María. In 1537, she still served as Cortés's interpreter in MEXICO CITY, where she might have died from smallpox as late as 1541.

Although the Spanish chronicles mostly underemphasize her role in the conquest of Mexico (Cortés rarely mentions her in his letters to the king), in indigenous documents such as the *Lienzo de Tlaxcala* and the FLORENTINE CODEX she is depicted as nearly an equal to Cortés. At the same time, much of her background story is told by the Spanish conquistador BERNAL DÍAZ DEL CASTILLO and also by Cortés's secretary, Francisco López de Gómara, who portrayed Malinche as a model of those indigenous who had willingly accepted the political and social transformation of Mesoamerica. Today, the concept of "La Malinche" has been used in different and often contradictory contexts, such as the image of the deceived Indian, the traitor, or as the "mother" of modern Mexican identity (see *MESTIZAJE/MESTIZO*).

—Danny Zborover

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Camilla Townsend. *Malintzin's Choices: An Indian Woman in the Conquest of Mexico* (Albuquerque: University of New Mexico Press, 2006).

**Manco Inca** (b. ca. 1513–d. 1544) *Inca emperor installed by the Spanish and founder of neo-Inca rebel state* Manco Inca was a son of the Inca ruler HUAYNA CÁPAC, whose death touched off a civil war within the Inca Empire between two of Manco's half brothers, ATAHUALPA and HUÁSCAR. The Spaniards exploited the turmoil to conquer PERU (see CONQUEST). Seeking a puppet ruler to oversee the empire, the conquistadores installed Manco as the new emperor in December 1533. At the time, he was about 20 years old.

Given his youth and his Spanish backing, Manco struggled to win the support of his people. They knew the Spaniards controlled him, and some wondered if another of Huayna Cápac's sons might better defend the people. A few conspired against him, and Manco persuaded DIEGO DE ALMAGRO, one of the Spanish leaders, to have these murdered. Manco resented the Spaniards' abuse of the Indians and particularly their mistreatment of his royal person. As a consequence, he conspired to overthrow and expel the Spaniards; on April 18, 1536, he escaped from Cuzco and raised a huge army. The army besieged Cuzco and ambushed Spanish relief expeditions sent from LIMA.

Although Manco nearly captured Cuzco, the siege ultimately failed, and his army disintegrated. He withdrew with several thousand followers northwest of Cuzco

to Vilcabamba, where he established a new Inca state. A civil war among the Spaniards temporarily relieved pressure on Manco, but he lacked the power to control the Inca nobles who had joined him at Vilcabamba (see CIVIL WARS IN PERU). He executed those whom he distrusted or whom he perceived as rivals to his authority, but this only handicapped further resistance against the Spaniards. On occasion, Manco negotiated with the Spaniards; he even allowed several Spaniards to take refuge at Vilcabamba after they murdered FRANCISCO PIZARRO in revenge for the execution of Almagro. In 1544, hoping to please the new Spanish VICEROY, Blasco Núñez de Vela, the Almagrists murdered Manco while he was playing quoits. Vilcabamba survived another quarter century until it was destroyed by the Spaniards in 1572.

—Kendall Brown

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John Hemming. *The Conquest of the Incas* (San Diego, Calif.: Harcourt, 1970).

**manioc (cassava, yucca)** Manioc (*Manihot esculenta*) was the most important cultivated crop of the AMAZON lowlands (see AGRICULTURE). It was also important on the Pacific and Caribbean coasts. Most manioc varieties are adapted to seasonally dry regions; however, others are grown in the Amazon rain forest, where manioc is the principal and most reliable source of calories of any food, though it is low in protein and other nutrients. Manioc is highly productive and can flourish in poor soils. It was first domesticated in south-central BRAZIL at the beginning of the Holocene period (roughly 8000 B.C.E.) in areas of dry open forest, to which it had adapted by storing starch in enlarged roots. Manioc is grown under cultivation from stem cuttings. It is eaten boiled or taken as a fermented beer (*masato*) (see ALCOHOL). Later in the history of manioc cultivation, farmers in central and eastern Brazil began to cultivate bitter varieties, which were high in toxins that had to be removed before eating. After processing it into a coarse meal, manioc is usually baked in cakes on a griddle or dried and ground into flour (*farinha*). *Farinha* is light and easily transported and can be stored for a year. This innovation created a surplus, which could support larger populations.

—Patricia J. Netherly

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**maps** It is likely that before the Spanish CONQUEST the indigenous people of the Americas used diverse cartographic expressions to orient themselves in the terrestrial,

celestial, or mythological landscapes; in fact, the surviving evidence suggests that for them space and time were closely interrelated. The earliest known maps date to the Formative period, when the OLMECS, the MAYA, and the Izapán represented their cosmos on public monuments so that their rulers could symbolically position themselves at the center of the universe. These cosmic maps continued in use up to the Late Postclassic period; horizontal depictions of the cosmos are shown in the Central Mexico Codex Fejérváry-Mayer and the Mayan Codex Madrid. In addition, maps of the heavens and constellations are sometimes found on carved stones or painted in CODICES. Since these cosmological representations were intimately linked to indigenous RELIGION, they soon disappeared as a result of the Spanish spiritual conquest.

At the same time, terrestrial maps are one of the most enduring graphic expressions in Mesoamerica. Indigenous rulers were clearly concerned with recording their territorial extent from early on in their history. Many Mesoamerican groups recorded place-names in logographic and phonetic fashion; the earliest known example is found at MONTE ALBÁN, where a series of stone slabs symbolize the towns conquered by this Zapotec state during the first century C.E. (see ZAPOTECOS). Similar territorial charters appeared later in the Mixtec codices from the Late Postclassic period, where complex iconic representations of the Mixtec landscape serve as backdrops in depictions of elite marriages and rituals (see MIXTECOS).

This ancient tradition of graphic territorial narratives is probably best exemplified by the “community maps,” usually painted on a single sheet of paper (*mapas*) or canvas (*lienzo*). Although early eyewitness accounts ascertain that this is a pre-Columbian tradition, all the surviving examples postdate the Spanish conquest. It seems that this cartographic genre was restricted mainly to the area between Hidalgo, Michoacán, and Oaxaca, with only a few examples from the Maya region. For the most part, they are highly idealized depictions of indigenous kingdoms’ boundaries and territorial extent and include prominent geographical features such as rivers and roads, as well as the centrally located head town and subject and/or antagonistic towns.

In the Mesoamerican fashion of melding space and time, the accompanying pictorial narrative is often concerned with the original MIGRATION to the land, the conquest wars, the settlement of the kingdom, and the genealogy of the ruling family. These pictorial narratives often served to legitimate the territorial claims of a ruler in the face of competing demands or land disputes and to fortify communal identity. Indeed, after the Spanish conquest, they served as valuable evidence in Spanish courts of law. A fine early 16th-century example of this tradition is the Lienzo de Teczcitlan y Téquatepec, which depicts an alliance between the Chontal people of Oaxaca and a powerful indigenous headtown on the Pacific coast. Other examples include maps of long-distance migrations, such as the Aztec peregrinations from Aztlán in the

Mapa Sigüenza and the Tolteca-Chichimeca “itinerary histories” in the Cuauhtinchan maps. These early maps do not seem to demonstrate any conventionalized scale or orientation, although east is commonly at the top. Furthermore, scale often decreases as the observer moves away from the central community. Due to the “circular” distribution of pictorial elements and narratives in many of the maps, it appears that they were occasionally meant to be appreciated horizontally, so that viewers could walk around the document.

More localized maps are known from the Valley of MEXICO, where Aztec bureaucracy demanded the creation of cadastral land plots. These maps include the exact area of the property, the owner’s name, and even the property’s soil type (see AZTECS). Other maps are known from CHRONICLERS’ descriptions, but no examples of these have survived. The Aztecs apparently used detailed maps for way-finding (similar to road maps), and MONTEZUMA even gave such a map to HERNANDO CORTÉS on his expedition to the Coatzacoalcos River. The POCHTECA traders were said to have used their capacity as spies to draw maps of distant towns, which the Aztec armies would later use to conquer them. The closest surviving example of a city map is that of the Aztec capital, TENOCHTITLÁN, in the Codex Mendoza, though it is very emblematic and metaphorical.

After the Spanish conquest, indigenous and European cartographic traditions often merged. The largest corpus of these hybrid maps is found in the *Relaciones geográficas* of 1580, painted by indigenous people as a response to a detailed Spanish questionnaire designed to gather information about Spain’s colonial possessions. One such map from the town of Teozacoalco helped scholars to place the pre-Columbian Mixtec codices in the geographical and historical context of the Mixtec people. It seems that both scale and orientation were standardized in these later maps, probably through the influence of European cartographers, who aimed to record their newly conquered land as accurately as possible. These maps usually do not contain indigenous mythical narratives or indigenous historical content.

Pre-Columbian mapping in the Andes is harder to identify than in Mesoamerica; likely there are landscapes represented on TEXTILES and rock ART, and models of houses were commonly expressed in CERAMICS and stones. However, all surviving examples are highly iconic and might not have functioned as maps per se. The INCAS also carved complex landscapes on large boulders, such as the Sayhuite and the Quinku stones near CUZCO; nevertheless, these carvings do not seem to be associated with the actual geography. Perhaps better examples of maps are the large ground drawings of Nazca, which might have been used to guide pilgrims across the featureless desert (see NAZCA LINES). The later ZEQUE system of the Incas served a similar purpose in addition to dividing the physical landscape into territories pertaining to certain social groups. It has been suggested that geographical information linked to the organization of the *zeque* system, such as the relative location of the HUACAS and the

distance between them, could have been recorded on *QUIPUS*, which thus functioned as maps.

After the Spanish conquest, several indigenous chroniclers drew maps to accompany their manuscripts. Santa Cruz Pachacuti sketched a celestial map that was once represented on the wall of the Coricancha (sun temple) in Cuzco, and Guamán Poma de Ayala drew several maps that integrated Andean worldviews with European cartographic conventions, including one of the Inca Empire and the “pontifical world.” The evidence for pre-Columbian mapping in lowlands South America is even more scant but might have included numerous petroglyphs that represented both geographical and celestial landscapes. Their configuration, however, is for the most part highly abstract, and interpretations are often drawn from ethnographic analogies with the Amazonian tribes (see *AMAZON*).

—Danny Zborover

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**marriage** See *FAMILY*.

**Maya** The Maya are a group of peoples speaking related languages who occupy a large contiguous area of eastern Mesoamerica. The Maya region consists of the eastern parts of the Mexican states of Tabasco and Chiapas and all of the states of Yucatán, Campeche, and Quintana Roo (see *MEXICO*). It also includes all of *GUATEMALA* and *BELIZE* and the western portions of *EL SALVADOR* and *HONDURAS*. Although Maya culture varied throughout this large region, the native peoples shared basic cultural patterns including languages, elements of social structure and *RELIGION*, and basic subsistence practices. The archaeological evidence suggests that the Maya have lived in the same area for several thousand years.

A small outpost of Maya people also stands at the opposite end of Mesoamerica, in northern Veracruz and adjacent parts of the neighboring states. These people, known as the Huastecs, speak a language distantly related to the main branch of the language family.

### GEOGRAPHY

The main Maya region is physiographically and environmentally diverse. Elevation slowly increases from north to south, until the mountains in the south descend abruptly to the Pacific. Rainfall increases from the northwest to the southeast. The northwest corner of the Yucatán Peninsula is a virtual desert, while parts of the southern and southeastern lowlands receive 100 inches (2,540 mm) or more of rain each year.

Thus, the northern lowlands, which include most of the Yucatán Peninsula, are relatively hot, flat, and dry. The peninsula is composed of limestone strata, which encouraged underground drainage and mitigated against the development of rivers. Except for a small number of lakes, the only sources of water are sinkholes, or cenotes. Soils in the north tend to be shallow and stony, limiting their agricultural potential (see *AGRICULTURE*). The highest vegetation consists of low thorn forest, although the trees become taller as one travels south.

The southern lowlands, also known as the Central Maya area, grow hillier as one travels south. Extensive seasonal swamps, known as *bajos*, meander among the hills and ridges. There are more rivers in the south than in the north. Several slow, winding rivers drain the eastern part of the southern lowlands through Belize into the Caribbean. Much of the western part of the area drains into the Usumacinta River, a major artery for transportation and commerce. The highest vegetation in the southern lowlands is tropical forest.

The Maya highlands, also known as the Southern area or southern highlands, consist of tall, folded, and dissected mountain ranges that run roughly parallel with the Pacific. The mountains extend from Chiapas across the base of the Maya region into Honduras. They reach their highest elevations in Guatemala. The highlands are marked by deeply incised rivers, extensive valleys, and picturesque lakes. Soils are deep in many parts of the highlands and include fertile volcanic and alluvial sediments.

### LANGUAGES

The 30 or so Mayan languages make up a language family, meaning that they descended from a common ancestral language, known as Proto-Mayan. While Mayan languages are still spoken by millions of people today, some are on the verge of passing entirely out of use.

The most divergent of the Maya languages are Huastec and Chicomuceltec. The linguistic evidence suggests that the Huastec languages split off from the main branch several thousand years ago. In the broad northern lowlands, the four closely related Yucatecan languages are Yucatec, Lacandón, Itzá, and Mopán. Yucatec, the most widely spoken, is actually called “Maya” in the native tongue. It seems almost certain that the glyphic script of the Maya *CODICES* was recorded in the Yucatec language. It is also likely that many, perhaps all, of the stone inscriptions of the northern lowlands were written in Yucatec.

The southern lowlands were largely depopulated at the end of the Classic period, but it is generally believed that the inhabitants spoke Cholan Maya languages, which consist of Choltí (now extinct), Chortí, Chol, and Maya Chontal. Many scholars believe that the extensive glyphic inscriptions carved on stone monuments in the southern lowlands were written in an ancestral form of the Cholan languages, and while this assumption seems logical and credible, it has been difficult to prove, and other hypotheses remain in contention. The Cholan languages are





closely related to the Tzeltalan languages of highland Chiapas, which borders the southern lowlands.

The Maya highlands possess the greatest linguistic diversity of the region. The large numbers of distinct languages there may be partly attributable to the difficulty of communication across this rugged terrain and also to the complex political history of the area. The highland languages are commonly divided, based on their degree of historical relationship, into Eastern and Western groups, and then into smaller categories.

Because of their speakers' long tradition of interaction and communication, Mayan languages also form a language area distinguished by loans and shared elements that have diffused across the area.

### CHRONOLOGY

The origins of the Maya people remain shrouded in mystery. Some Archaic sites of hunter-gatherers have been found in the Maya area, but their connection to the later Maya agriculturalists is unclear (see **AGRICULTURE**). In the southern lowlands, there is paleoecological evidence of extensive forest clearance around 2000 B.C.E., presumably related to the initial expansion of agriculture settlement; nevertheless, evidence of corresponding settlements has not been found. The earliest archaeological remains of agriculturalists in the region are found on the coast of Guatemala and Chiapas. This Ocós culture dates from 1800 to 1400 B.C.E., but the people are not thought to have been Maya.

The earliest archaeological remains in the lowlands that are clearly related to the later Maya are found at sites such as Cuello, Belize, and EL MIRADOR, Guatemala, and date from around 1000 B.C.E. In the Middle and Late Preclassic periods, populations increased dramatically, large sites emerged, and, during the Late Preclassic (ca. 400 B.C.E.–250 C.E.), all the characteristics of complex, state-level societies emerged, with social stratification, political centralization, economic specialization, elaborate ART and ARCHITECTURE, long-distance TRADE, and glyphic writing (see **ECONOMY**; **LITERATURE**).

The Classic period (250–900) saw the development of many large sites with substantial populations that engaged in complex political and economic interactions, including WARFARE. At this time, the population of the Maya lowlands was in the millions, which is much larger than it is today. The subsistence system needed to support these populations combined arboriculture, pisciculture, horticulture, and intensive agriculture. The economy included diverse specialization and mass production, as well as extensive trade. The social structure evidently was founded on extended families forming lineages (see **FAMILY**). It is generally believed that the lineages were defined on patrilineal principles, but it is also possible that some Maya peoples were bilineal (having both matrilineages and patrilineages). Populations, social complexity, art, and architecture all achieved a peak in the Late Classic (600–900).

At the end of the Classic period, the population collapsed in the southern lowlands and in parts of the northern lowlands. The causes for this are a matter of debate. There is evidence for drought, environmental degradation, overpopulation, and chronic internecine warfare in different places and times. No one theory adequately explains all the evidence. The collapse seems to have come about through a complex series of events spread over at least two centuries, rather than a single event.

Around the end of the Classic period, the Puuc Hills region of Yucatán experienced a final, remarkable flourish. Many large sites were built or expanded at this time, such as Uxmal, Sayil, Kabah, and Nohpat. It is possible that this region, which enjoys unusual agricultural potential but lacks sources of drinking water, received immigrants from elsewhere in the lowlands.

At about the same time, at the end of the Classic and the beginning of the Postclassic period (ca. 1000), CHICHÉN ITZÁ grew into the most important political capital of the northern lowlands. The influences apparent at Chichén are cosmopolitan and eclectic. Central Mexico contacts are obvious, but whether these came from the **TOLTECS** proper is a matter of debate. Many think that Chichén had a novel form of government called a “joint government,” or *mul tepal* in Maya, which was apparently a kind of confederacy of lineages. This differed from the Classic-period governments, which were based on a cult of divine kingship.

In the Late Postclassic period (ca. 1200–1542), the largest city in the Maya area was MAYAPÁN, in Yucatán. Mayapán was, according to colonial-period records, the seat of a *mul tepal*, which eventually fell in a bloody internecine conflict. The art and architecture exhibit some Mexican influences, mixed with the revitalization of some Maya traditions, such as the erection of stelae. At the same time, the southern Maya lowlands were largely unoccupied except for smaller settlements along the Caribbean coast and in the lake region of the central area. The Maya highlands increased in population in the Postclassic period, and groups such as the K'iche' (Quiché), Mam, and Kaqchiquel all developed small but powerful states that fought bitter battles against the Spanish (see **CONQUEST**).

### GLYPHIC WRITING

The Mayan glyphic writing system, or script, was used throughout the Maya-occupied lowlands of the Yucatán Peninsula, Tabasco, Chiapas, Guatemala, and northern Honduras from as early as the Late Preclassic period (400 B.C.E.–250 C.E.) and, at least in some areas, continued through Spanish contact and well into the colonial period. Currently, the earliest known instances of lowland Mayan writing consist of painted wall fragments at the site of San Bartolo, Guatemala, that probably date to the third through first centuries B.C.E. What was probably a very similar writing system was used in the southern highlands of Guatemala and El Salvador during the Late Preclassic

period, at sites such as Kaminaljuyú and Takalik Abaj. The nature of the relationship between the Mayan writing system and the contemporary Isthmian script used in places just to the west of the Maya area, such as Veracruz, remains unclear. Although many of the early Mayan texts remain poorly understood, their content appears to be somewhat similar to that of later periods.

Examples of Mayan writing from the Classic and Late Classic periods (250–1000 c.e.) are more numerous and widespread, and better understood. Although changes in the script did occur, the classic writing system itself remained remarkably standard in form, despite being used over such a wide area for more than eight centuries. Even though several different Mayan languages were probably spoken across this area, the writing system seems to record a rather uniform language, probably most closely related to the Eastern Cholan subgroup of Mayan languages. It is thought that this language may have been a high “courtly” language used for important official communications by Maya rulers, the nobility, and palace officials, much as French was a prestigious language throughout much of Europe during particularly the 12th and 13th centuries. The Maya

scribes and sculptors who produced written texts appear to have been predominantly elite courtesans (including sons of rulers) trained in sophisticated scribal and artistic traditions. Certainly, the content of the vast majority of existing Mayan texts is related to predominantly elite activities and concerns. This elite-oriented subject matter and the lack of examples of writing from low-status households may imply that literacy was a privilege of the upper echelon of Maya society, although commoners may have been able to recognize calendrical information and the names of rulers.

Mayan writing has been found on a wide variety of objects made from a number of different materials. Whether carved in stone or wood, sculpted in plaster or stucco, or painted on fig bark paper or clay vessels or plastered walls, the glyphs themselves are often executed in a style firmly rooted in the flowing lines of calligraphy. In fact, the Maya term *tz’ibb* designates both “painting” and “writing,” which accords well with the painterly calligraphic writing style and the frequent association of text and image. Many texts were carved or incised on free-standing stone monuments, such as stela (large, upright monoliths), tablets, thrones, and circular “altars.” Texts are also found



Copán's Stela A, with entrance to cache below. Copán's stelae were unique in the Maya world for their elaborate subterranean vaults for offerings. (Courtesy of Janice Van Cleve)



The back of Copán's Stela A documents a ritual performed on the bones of Waxaklajuun Ub'aah K'awiil's grandfather. The side of this remarkable stela records that the rulers of Tikal, Calakmul, and Palenque were present to witness the event. (Courtesy of Janice Van Cleve)

carved on architectural features such as stone or wood lintels over doorways, as well as stone door jambs, wall panels, building cornices, stairways, and stuccoed facades. Some architectural texts are very long, such as the 1,300-glyph block inscription on the Hieroglyphic Stairway of Temple 10L-26 at COPÁN, Honduras, or the three large interior wall panels of the Temple of the Inscriptions at Palenque, Chiapas. Most glyphic texts are intricately linked with pictorial or iconographic images, such as in the famous painted murals of Bonampak, Chiapas.

Texts such as these commonly start with a standardized formula, noting the date as well as astronomical and other cyclical information, such as the lunar position and other nine- and seven-day cycles. Much of the content focuses on historical events pertaining to rulers and, to a lesser extent, to other nobility and high-status officeholders. These events included births, childhood rituals, taking-of-office ceremonies, wars, captive taking, and deaths. Particularly important were records of the erection of stelae and rituals performed by the reigning ruler at the end of certain calendrical periods. Other important content included records of founding events, conjuring of deities and ancestors, and the ruler's royal genealogy and venerated names and titles. These records, which included dates according to the 260-day ritual calendar, apparently served a legitimizing function for rulers, whose activities or ancestry were sometimes linked to events and deities in the mythic past (such as the creation of the world) or the distant future. WOMEN were often the subjects of monumental texts, whether they were the daughters of rulers sent to other locales in marriage alliances, the mothers or wives of rulers, and/or acting monarchs in their own right.

The Maya also carved, painted, or inscribed texts on small, portable ceremonial objects or elite personal items, including wooden or stone boxes, wooden mirror backs, and small sculptures, often identifying their owners. Such "name tagging" has been found on bone awls and weaving pins, greenstone celts and earflares, and shell implements such as inkpots and trumpets (see MUSIC). Several scribes and sculptors "signed" their ceramic or monumental works by using a similar format to identify themselves as the artists responsible. Stone features such as stela, lintels, and stairways could also be "tagged." A large number of ceramic vessels were inscribed around the rim with a standardized formula identifying the type and function of vessel (plate, cup, "drinking vessel"), its contents (varieties of chocolate, corn gruel, tamales), and the owner's name and titles. The main body of ceramic vessels often included writing as well, often identifying painted figures and sometimes even representing their speech. Painted texts have also been found on the walls of caves; they often record the ceremonies undertaken in these sacred ritual locales and perceived entrances to the underworld (see XIBALBÁ).

Other than a limited number of texts mentioning tribute items and bundles of chocolate beans, few examples of economic record-keeping are known, although these may have been recorded on perishable materials such as palm

leaves, wooden tablets, or in paper books. It is possible that such perishable media may also have been used to record such things as legends and myths, poetry, and songs. Only four examples of Maya painted fig-bark-paper books, or CODICES, are known to exist (the authenticity of one is still debated). Although these were painted in the Postclassic period (1000–1517), some content may have been copied from Classic-period texts. The codices include records of astronomical tables (including tracking of, and perhaps corrections to, the cyclic stations of Venus and lunar and solar eclipses), mythic events associated with the creation of time periods and the cosmos, and divinatory almanacs (probably used to record days considered auspicious for particular ceremonies and activities).

Clearly dated inscriptions in stone from the southern lowlands date to as late as the beginning of the 10th century; however, glyphs continued to be inscribed on stone monuments and other objects at sites in the northern Yucatán Peninsula for at least another century. The practice of carving glyphic texts in stone diminished drastically during the Postclassic period, with only a handful of stelae known from sites such as Mayapán, Yucatán, and possibly Flores, Guatemala. Although few examples remain today, the painting of texts in murals and in books did continue throughout the lowlands. Mayan writing was still in use after the conquest, and some friars were said to have learned how to read and write in the glyphic system. The 16th-century Franciscan friar DIEGO DE LANDA's writings contain a brief description of a set of glyphic syllables and their sound values (mistakenly thought to be an "alphabet"). Subtle clues found in colonial indigenous works written in Mayan languages, yet using the Latin alphabet, suggest that literacy in the glyphic writing system persisted in both the lowlands and highlands at least into the early part of the colonial period, despite Spanish missionaries' efforts to repress it.

Given that it was Friar Landa who orchestrated public burnings of Maya books in 16th-century Yucatán, it is ironic that it was his recorded "alphabet" that set the stage in the mid-20th century for a major breakthrough in the long process of deciphering the Mayan glyphic writing system. Previously, generally only the number system, chronological framework, and astronomical cycles were well understood due to the efforts in the 19th and early 20th centuries by researchers from Germany, Britain, France, the Yucatán, and the United States. In fact, some scholars had felt that the inscriptions dealt only with calendrical matters, with individual glyphs representing ideas rather than designating sounds. However, in the 1950s, Russian scholar Yuri Knorosov showed, using the sound values provided by Landa and by relating images to their corresponding hieroglyphs in the Maya codices, that phonetic syllables were used to spell words. In the 1960s, the Russian-born researcher Tatiana Proskouriakoff demonstrated the historical nature of some texts, correctly identifying births and deaths of depicted individuals. Work in the 1970s and 1980s allowed scholars to recognize

verbs, translate entire phrases, decipher additional syllables, and read lists of Classic-period kings.

It is now clear that the Mayan writing system could adequately express anything that the language would require, including grammatical elements such as verb endings. This was accomplished by using a mix of phonetic syllables (consisting of consonant and vowel) along with logograms (glyphs that represent the stem of a word, usually in the form of consonant-vowel-consonant). Research in recent decades has greatly expanded the number of syllables and logograms able to be read, although many continue to elude decipherment, and a certain number occur too rarely to ever be read. The general gist of the large majority of extant Mayan texts is understood, while many are now able to be read in full. Over the last two decades, indigenous Maya researchers have begun to investigate and reuse their ancient script, even adapting it for use with modern highland Guatemalan languages.

### THE BALL GAME

The ritual ball game is one of the defining traits of Mesoamerican civilizations. Ball courts are prominent architectural features at most large archaeological sites throughout Mesoamerica, including the Maya area. Specific features of the game, including the manner of scoring, number of players on each team, size of the court, equipment used, and outcome for the winners and losers, varied

between cultures and cities, as did the purpose of playing. Extant records indicate that games could be played between two individuals as a means of predicting the future, based on the outcome, or between multiplayer teams for entertainment and gambling. Some records suggest that losers might have been killed, while others state that winners lost their lives. Certain types of goals were rare enough that the team that scored one had the right to chase spectators and take whatever they were carrying or wearing.

The Maya ball court usually had a playing surface in the shape of an I. Sloping benches or vertical walls designed to keep the ball within bounds ran along the long sides of the court. Single or multiple markers along the sides or in the center of the court functioned as goals. At Copán, the main ball court has three markers on each side, one in the center and one on each end of sloping side benches, and each is shaped like the head of a macaw. Three carved markers are also inset into the playing surface. At Chichén Itzá, one stone ring decorated with intertwined serpents is set high on each side wall. At Copán, players had to hit the markers to score, while at Chichén Itzá they attempted to hit the ball through the rings.

The game involved a solid rubber ball about the size of a softball or soccer ball. Players were allowed to hit it with their hips or torso and were supposed to keep it in the air. A solid ball that would bounce energetically off



A rubber ball used to play the ball game that was ubiquitous throughout Mesoamerica. This ball is on display at Mexico City's National Museum of Anthropology and History. (Courtesy of J. Michael Francis)

stone or plaster playing surfaces would be dangerously heavy and hard against the body. Healed broken bones of an elite male buried in the acropolis area of Copán may represent injuries from the ball game.

Ball players wore heavy padding around their hips and chests to absorb the shock of the ball's impact. Hip protectors, known as yokes, were probably made of wood, hide, and fiber stuffing. Other ball game equipment included *hachas*, *palmas*, and *yugitos*, probably also made of perishable materials. Ceramic figurines and wall friezes show flat carved *hachas* and phallic *palmas* mounted on the front of yokes; players wore *yugitos* to protect their elbows and knees during diving saves. Players sometimes carried hand stones (*manoplas*) to support themselves when leaning close to the playing surface or possibly to hit the ball in some variations of the game. Archaeologists have excavated stone yokes and *hachas* at

numerous Maya sites. These heavy objects might have been used as trophies, handicaps for good players, or markers for temporary ball courts.

The ball game had many religious connotations and associations with warfare and HUMAN SACRIFICE. The ball's flight through the air above the playing surface represented the Sun's passage across the sky during the day. In the K'iche' *POPOL VUH*, a creation story written down in the 16th century, much action revolves around ball courts and games involving supernatural beings on earth and in the underworld (Xibalbá). Losers are often decapitated or otherwise put to death. This was also true of games played on actual courts. *Hachas* frequently were carved to represent skulls or skeletons. Ball court friezes at Chichén Itzá show the fate of a defeated player: His head is in the hand of the victor and his kneeling body spouts serpents from the neck. A carved ball on one frieze



La Esperanza ball court marker from the Maya site of Chinkultic, in Chiapas, Mexico. The stone is slightly more than 21.5 inches (54.6 cm) in diameter and 5.5 inches (14 cm) thick. The center features a ball player in action, dressed in full regalia. The marker indicates that the ball court had a dedication Long Count date of 9.7.17.12.14 (591 c.e.) and is on display at Mexico City's National Museum of Anthropology and History. (Courtesy of J. Michael Francis)



This carved limestone panel shows two Maya ball players. The figure on the left is the Maya ruler of Toniná, K'inich B'aaknal Chaak. In the center, the glyphs above the ball record the date, which corresponds either to November 12, 675, or October 30, 727. The identity of the figure on the right is less clear, but it might be the ruler of Calakmul, Yuknoom Took' K'awiil. (Courtesy of J. Michael Francis)

contains a skull. Scenes of ball games at Yaxchilán and Tikal show that losers were rolled down steep flights of stairs with their arms and legs tied tightly behind them. To make the connection between losing and death absolutely clear, the trussed bodies appear within balls.

In portraits, Maya rulers are often depicted wearing ball game paraphernalia. Playing the game was a requirement for royal males, and game imagery was integral to the ideology that supported the ruling elite. Leading warriors into battle against other cities was a dangerous activity for elite males, as they particularly were targeted for death or capture. The blood of nobles and members of the royalty was highly potent as an offering to the gods. Elite captives stripped of their finery were forced to play the game against opponents from the victorious city before being sacrificed.

Despite strong associations with death, the Maya ball game also was symbolically connected with rebirth. In the *Popul Vuh*, One Hunahpu lost his life while playing ball against underworld gods, was buried beneath a ball court, and eventually was resurrected. The story of One Hunahpu, whom scholars equate with the Maize God, parallels the life cycle of MAIZE, where buried seeds give rise to plants whose heads are removed to permit the continuation of existence.

### CALENDARS

Maya calendars were the most complex calendars developed in Mesoamerica. Some elements probably originated as a farmer's almanac and divinatory tool in the Zapotec area and reached the Maya via the OLMECS and other peoples on the western and southwestern margins of Maya territory (see ZAPOTECs). Observations of astro-

nomical events such as equinoxes and solstices formed the basis of Mesoamerican calendars. Some buildings, such as the Caracol at Chichén Itzá and Group E at Uaxactún, were carefully oriented and positioned to permit the observation of the rising and setting of celestial bodies at the horizon. The Maya conceptualized time primarily as cyclical, with past and present events linked by similar locations within long and short time cycles, but also as linear for counting the eternally repeating cycles of days.

The Sacred Round, or Tzolk'in, was a cycle of 260 days, composed of the numbers 1 to 13 and 20 day signs. A bar represented 5 and a dot was 1 in writing numbers. An example of a sequence of days is 1 Imix, 2 Ik', 3 Ak'bal through 13 Ben, then continuing from 1 Ix through the remaining day symbols. The day 1 Imix recurs only after completion of a 260-day cycle. Date of birth became part of one's name, though Classic rulers did not follow this practice. A supernatural being associated with each day symbol determined the personality and fate of people born on that day, and prediction tables in codices listed positive or negative features of each day symbol. The number in front of the day symbol modified its effect, so there were 260 different possible forecasts. The Sacred Round also influenced communal activities, such as religious festivals.

The Haab' (Vague, or Common, Year) lasted 365 days, a complete agricultural cycle. It consisted of 18 months of 20 days each and a period of five unlucky unnamed days at the end of the cycle, the Wayeb'. Each month had a supernatural patron or protector. A "zero" day, described during the Classic as the "seating" of the new month, introduced the patron who would influence the next 19 days. An example of a sequence of Haab' days is Seating (0) Pop, 1 Pop, 2 Pop through 19 Pop.

Since the Haab' was about six hours shorter than the tropical solar year, the two quickly got out of alignment. It is not known whether the Maya periodically inserted extra days to make corrections, so it is unclear if the Haab' always began in mid-July, as it did in the 16th century. According to Friar Landa, the new year festival was the most important: People swept out their houses, replaced old utensils with new ones, and put new covers on bundles of relics and images of gods and goddesses.

The Calendar Round was a period of 18,980 days (52 years) that resulted from the combination of the Sacred Round and Haab' cycles. A particular date, such as 3 Ak'bal 2 Pop, would not recur until an entire Calendar Round had passed. Dates in inscriptions were most commonly recorded using this form. The Haab' new year could only begin on one of four Tzolk'in day symbols, each of which was associated with a particular color, direction, and prophecies that influenced the entire year. A Bakab, a supernatural being who held up a corner of the sky, was "year-bearer" for each of these day symbols.

The Long Count was a place notational system for recording longer progressions of days. It appeared in the last century B.C.E. in chiefdoms on the Pacific coastal plain of GUATEMALA and Chiapas. The earliest use anywhere in the world of a symbol to represent the number 0, usually a shell, occurs in a Long Count.

Scholars define the beginning of the Classic period as 292 C.E., the first date on a Maya monument that is contemporary and not retrospective. Long Count dates on monuments generally begin with an introductory glyph that has a central variable element representing the patron of the appropriate Haab' month, followed by periods of time in decreasing order. A *bak'tun* was a period of 144,000 days, or 20 *k'atun*; a *k'atun* was 7,200 days, or 20 *tun*; a *tun* or *haab'* consisted of 360 days or 18 *winal*; a *winal* was equivalent to 20 days, or *k'in*; a *k'in* was one day. Long Count dates are transcribed so that larger units are on the left and smaller ones are on the right, separated by decimal points: 9.8.10.12.1. The Maya had a vigesimal (base-20) numbering system, based on the number of human fingers and toes, and the Long Count corresponds to this system, except for the *tun*, which was modified to correspond more closely to the length of a solar year. *Tun* also means "stone," probably related to the custom of erecting stone monuments at the end of certain calendrical cycles.

Long Count units higher than the *bak'tun* are known. The base date for the Long Count, the date of the creation of the world, is 4 Ajaw 8 K'umk'u, or September 8, 3114 B.C.E. in the Julian calendar, which was used in Europe until 1582. The world's creation was not the beginning of time, however, and Long Count dates much earlier than the base date help to place the creation within a larger context.

The initial series is a Long Count date that often appears first in inscriptions and reaches a day and month in the Calendar Round. Distance numbers, or secondary series, ordered lists of *k'in*, *winal*, and other units, appear

after the initial series and count forward or backward from it. The initial series is itself a distance number from the base date. Some distance numbers mark *tun* anniversaries or the end of Long Count periods.

The supplementary, or lunar, series is a group of glyphs often appearing between the day and month glyphs of the initial series that provides information about the Moon for that particular day. The lunar series involves Moon cycles, including one based on a sequence of nine glyphs for the Lords of the Night, or deities ruling over the night.

The Maya also observed and recorded other cycles. They made tables of an 819-day cycle based on the product of the magic numbers 7 (Earth), 9 (the heavens), and 13 (the underworld). This cycle was important for Classic ceremonies concerning world directions and colors and the god K'awiil; it often appears in association with the birthday or accession of a ruler. The date of creation occurred on the third day of one of these cycles, which was associated with east and red and was propitious for the creation of the world and life. Finally, the Maya developed tables of solar and lunar eclipses, the 584-day cycle of Venus, bringer of misfortune and war, and 13 constellations of the zodiac.

The Sacred Round was still being used at the time of the conquest and is used in highland Guatemala today. Determining the relationship between Long Count dates and the European calendar is challenging because the Maya did not record the Long Count during the last few centuries before contact. Most scholars favor a correlation of 9.15.10.0.0 with June 30, 741. The current Long Count will end in December of 2012.

## RELIGION

The Maya cosmos was composed of three realms, the upper world (heavens), the middle world (world of humans), and the underworld (Xibalbá). Nine levels, stacked in a sort of pyramid, made up the upper world. A two-headed reptile represented the path of the Sun, Moon, and other celestial bodies. The middle world was the back of a crocodile or turtle floating in a pool with water lilies. The underworld was a watery place of nine levels resembling an inverted pyramid. Different supernatural or mortal beings inhabited each realm.

The middle world was divided into quadrants that resemble the cardinal directions. Each quadrant was related to the Sun's daily journey and associated with a particular color, tree, animal, bird, and other characteristics. The east was the "emerging Sun," and its color was red. The west, whose color was black, was the "entering Sun." "Left hand of the Sun" was the direction that corresponded with the white north and was associated with the Sun's zenith. Opposite was the "right hand of the Sun," the yellow south associated with Xibalbá.

In the center of the middle world was the World Tree (Wakah-Chan), represented by a giant ceiba, whose roots descended into the underworld and branches reached into the heavens. The World Tree was a path by which inhabitants of the various worlds could travel and communicate.

The color of the center was blue-green (the Maya did not distinguish between those colors). Maya codices and modern religious practices among living Maya demonstrate that the pathway used in the ritual cycle started in the east and then passed to the north, west, south, and, finally, center.

Numerous deities with characteristics of males, females, or animals inhabited the three worlds. Some belonged to pairs or triads of gods or goddesses, while others were avatars of other deities. Itsamnaaj was the supreme creator deity, inventor of writing, and patron of learning and sciences, who inhabited the starry sky with his wife, Chak Chel, goddess of weaving, childbirth, MEDICINE, and the waning Moon. Together, they were the progenitors of the other gods and goddesses. A nubile version of Chak Chel (Ix Chel or Ix Ch'up) was the young Moon Goddess, who dallied with other gods. Associated with the east, the Sun God (K'inich Ajaw) may have been an aspect of Itsamnaaj. Venus was associated with the west and brought misfortune and WARFARE.

The underworld was inhabited by ugly, smelly, and terrifying supernatural beings. These included the Lord of Death (Yum Kimil) and the old God L, god of destruction. Gods associated with the center were the Maize God (Hun-Nal-Ye) and K'awiil, deity of divine lineages and regent of the quadrants of the cosmos. In the middle world, Pawahtuun was the patron of scribes and painters; he also presided over the Wayeb', the five unlucky days that follow the end of the 360-day solar calendar. Pawahtuun also held up the four corners of the cosmos as four beings, each equivalent to a Bakab who held up a corner of the sky. Chaak, the god of rain, was another deity associated with the center when he was singular, and with each quadrant of the cosmos when he was quadripartite.

After the Sun God disappeared beneath the western horizon each evening, he became the Jaguar God of the underworld, passing through Xibalbá before rising triumphantly in the east the next morning. Humans provided the Sun God with sacrificial offerings so that he could complete his dangerous nighttime journey. The most appropriate offering was human blood, whose potency increased with the social rank of the source. Royal personages were expected to draw blood through autosacrificial rites. Men pierced the foreskin of the penis, and women drew a thorn-studded cord through the tongue to produce blood that they dripped onto paper and then burned.

Kings and nobles participated in warfare by leading troops into battle. One of the purposes of warfare was to take enemy captives, particularly kings and nobles. Captives were marched back to the victors' city, where they were made to play the ritual ball game, tortured to produce quantities of blood, and ultimately killed. The passage of the rubber ball through the air during the game symbolized the passage of the Sun through the sky.

The Popol Vuh, or Council Book, based on oral tradition written down in the 16th century by a former K'iche' nobleman, is the source of much information about ancient Maya religion. The book summarizes various creations

and destructions of the world but focuses on the current (fourth) creation and the rise of the K'iche'. According to the Popul Vuh, the gods tried to fashion humans out of various substances, including mud and wood; however, these efforts failed and the gods were not satisfied with the result until they used maize. In the story, One Hunahpu and his brother Seven Hunahpu offended the gods of the underworld with their noisy ball playing. The gods invited the brothers to play in Xibalbá, where they were defeated and killed. Hanged in a calabash tree, the decapitated One Hunahpu's head spat into the hand of a daughter of one of the underworld gods, impregnating her; this act led to the birth of the Hero Twins, Hunahpu and Xbalanque. The Hero Twins followed in the footsteps of their father and uncle but used their wiles to defeat the underworld gods and resurrect their father. Thus the world was made safe for humans. Scholars equate One Hunahpu with the Maize God, Hunahpu with Venus, and Xbalanque with the Sun.

The Maya believed that each person had multiple souls, one of which could continue its existence in an afterlife. A king hoped his soul's journey after it was swallowed by the Maw (cave) of the underworld would emulate the Maize God's, passing through the travails of Xibalbá to rise to the heavens, where it would join the souls of venerated ancestors. Mourners brought food and drinks for the soul's journey through the afterlife; these offerings were placed in ceramic vessels decorated with painted or inscribed images that often paralleled scenes in the Popul Vuh. These probably functioned as road maps for the soul, showing it how the Hero Twins defeated the underworld gods. Nevertheless, not all treatment of the dead was meant to help the soul's journey. Mass graves and defleshing the face of decapitated persons may have been designed to destroy or suspend the journey of an enemy's soul.

The Maya used various means to enter altered states for religious purposes. Blood loss during autosacrificial rituals allowed participants to conjure the Vision Serpent and communicate with ancestors. Strong native TOBACCO induced visions when smoked or used as an enema. Glands in the skin of a large toad (*Bufo marinus*) produced poisonous and hallucinogenic substances that were mixed with tobacco or used in enemas. Fermented alcoholic beverages taken orally or anally also provided access to alternate realities (see ALCOHOL). Sleeping and dreaming permitted interaction with or transformation into one's *way*, an animal spirit companion of each person, ancestor, or god or goddess.

Aspects of Maya religion, such as belief in resurrection and the use of crosses (the foliated cross represented maize), paralleled aspects of Christianity. Religious SYNCRETISM developed during the colonial period and continues in present practices such as veneration of Maximón in highland Guatemala.

—Jeff Buechler  
Clifford T. Brown  
Stephen L. Whittington



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**Mayapán** Mayapán is a large MAYA archaeological site located in the state of Yucatán, MEXICO, in a hot, dry, flat thorn forest. It is known to have been the political capital of a large state that controlled most of the northern peninsula. It is a late site, dating to 1200–1450, in the Late Postclassic period. A few earlier artifacts from the Preclassic (before 250 c.e.) and Classic periods (250–900) have also been found at the site, but all the structures investigated by archaeologists date from the Late Postclassic. The site measures more than 1.5 square miles (3.9 km<sup>2</sup>) and is surrounded by a substantial defensive wall, more than five miles (8 km) long. Within the wall, more than 4,000 pre-Hispanic structures have been mapped. Outside the wall, a narrow belt of additional residential settlement occupies a fringe of land. Mayapán was by far the largest Maya site of the Late Postclassic period and has been the subject of several significant archaeological investigations.

Several Spanish colonial-period texts chronicle Mayapán's history, both in Spanish and in the native Yucatec Mayan language. In the 16th century, the Spanish bishop DIEGO DE LANDA recounted that Kukulcán, the Maya version of the hero-god QUETZALCÓATL (Plumed Serpent), founded Mayapán after the fall of CHICHÉN ITZÁ. He unified the Yucatecan nobility, and under his leadership, they built Mayapán and divided the towns and provinces among themselves. After Kukulcán left, the nobles chose the head of the Cocom lineage as ruler. The Cocom rulers eventually became repressive, sustaining their regime by introducing Aztec mercenaries (see AZTECS). Finally, the Xiu lineage, which had settled earlier in the hill country south of Mayapán, joined the other nobles to overthrow the Cocom tyranny. As a result, Mayapán burned and was abandoned in the mid-1400s.

The story told in the Yucatec language chronicles is different in emphasis. It focuses on an ethnic group called the Itzá, apparently a group of “Mexicanized” Maya. The Cocom were probably an Itzá lineage. The Maya texts mention a “joint government” (*mul tepal*) at Mayapán but

also discuss a ruler named Hunac Ceel. He was implicated in treachery and witchcraft: A love potion and an abducted bride caused the city's overthrow by Chichén Itzá and Izamal.

THE ART AND ARCHITECTURE of Mayapán have a Mexican flavor. For example, flat beam-and-mortar roofs, a Mexican trait, are the norm, while Maya corbel vaults are rare. Round temples, a Mexican form, are also common at Mayapán. Balustrades, serpent columns, and colonnades are other significant Mexican traits. Murals and stuccos uncovered in excavations reflect the Mixtec-Puebla style of Central Mexico. The only well-preserved stela at the site exhibits carving suggestive of the Mixtec-Puebla style. Nevertheless, the presence of stelae suggests the persistence of an earlier Maya tradition, as does the use of glyphs.

Overall, Mayapán exhibits an eclectic mix of Maya and Mexican traditions. It was probably a multiethnic city that played an important role in long-distance TRADE. The fruitful and complicated blend of cultures was undoubtedly the result of the complex political and economic dynamics of the region and period.

—Clifford T. Brown

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**medicine** Early colonial medicine in Latin America developed as an amalgamation of indigenous and European ideas and practices. Building on the mass of indigenous knowledge of the natural environment, colonial healing systems incorporated indigenous medicines into European ideas about DISEASE and the body.

Pre-Columbian concepts of health and sickness varied as widely as native societies themselves. Among the small-scale cultures of the Sonoran Desert, for example, disease was believed to be tied to the natural environment. For many of the urban societies of Mesoamerica, individual health correlated to the overall order of society. In this context, ailments could indicate violations of individuals as well as ruptures in the norms and organization of the community. Native societies maintained a variety of healing specialists. For the MAYA of the Yucatán, professional healers, including midwives, surgeons, herbalists, and bone setters, treated specific ailments and conditions.

Since Spanish and indigenous interaction took place mainly in the Valley of MEXICO, Nahuatl concepts and practices were critical to early colonial medicine (see AZTECS). The Nahuatl believed that illness was the product of individual and social disequilibrium. In this context, sickness was caused by many factors, including religious impropriety, sexual transgressions, extreme emotions, and physical stress (see RELIGION). The heart and soul, called *teyolia* in NAHUATL, were believed to be intertwined and

the keys to controlling individual disease and healing. Sexual activity with someone of a different social class, for example, could thrust a person into a phlegm-ridden illness. Transgressions of this sort threatened the broader social order, and not surprisingly, recovery involved restoring harmony through sacrifice and penance.

Another important concept in the Nahua ideology of disease involved the disembodied life forces called *tonalli*, which were represented as spirit or animal companions that individuals had to appease. The spiritual essences of the *tonalli* were believed to reside in supernatural and natural spaces; disturbances to these spaces resulted in illnesses that correlated to specific sites on the human body. Finally, human life was thought to emanate from luminous gases called *ibiyotl*; these gases could cause illness, as well as heal. Individuals who maintained social and individual balance were thought to give off beneficial emanations, while the ill gave mal airs. Curing the infirmed, therefore, often involved pungent remedies.

After the CONQUEST, Nahua medical practices and ideas found favor among Spaniards. While the colonizers often disparaged indigenous religious practices, they praised the Nahuas' emphasis on social order and individual responsibility. Indigenous concepts of penance and sacrifice were equated with Christian notions of sin and redemption. Spaniards also saw disease as a reflection of metaphysical disorder and disharmony and drew parallels between the indigenous emphasis on blood with European ideas of the humors, which identified blood, phlegm, black bile, and yellow bile as the sources of sickness. In this context, Spaniards believed that sickness was caused by imbalances in the body's fluids, and healing therefore involved returning the body to a state of balance. Furthermore, Spaniards were anxious to learn about the natural world from knowledgeable sources. Indigenous elites and medical practitioners served as repositories of information on the region's flora and fauna. Early colonial medicines, then, evolved through the cross-pollination of diverse medical traditions.

Remedies involved treating both the specific ailment and the moral condition of the infirmed. BERNARDINO DE SAHAGÚN, a Franciscan friar with a keen interest in indigenous culture, described the conjuncture of religion and medicine, writing "preachers and confessors are physicians of the soul . . . [and] it is appropriate that they have practical knowledge of medicine and of spiritual illnesses." Indigenous midwives commonly treated infirm newborns with a blessing of water believed to cleanse the heart/soul (see WOMEN). Noncertified local healers, or *curanderos*, specialized in herbal remedies and prayers for ailments that involved physical and psychological distress.

European interest in indigenous medicine began early in the colonial period. The priest Ramón Pane recorded TAINO remedies and practices in the Caribbean during CHRISTOPHER COLUMBUS's second voyage of 1493. In the 1550s, Sahagún interviewed Nahuatl-speaking nobles and began compiling a massive 12-volume descrip-

tion of indigenous religion and culture, which contained 225 descriptions of healing herbs. During the same period, a native healer and professor of medicine from MEXICO CITY, Martín de la Cruz, prepared a description of local medicinal herbs. Given as a gift to King Charles I, the manuscript was not held in public view until the 20th century. In 1565, the Spanish physician Nicolás Monardes published an account that incorporated useful American remedies into European Galenic medicine.

In 1570, King Philip II named the well-known Spanish physician Francisco Hernández as the chief medical officer of the Indies, or *protomédico general*. Although charged with regulating medical knowledge and investigating all things related to natural history throughout the Spanish colonies, Hernández spent the entirety of his six-year tenure surveying healing plants in the Valley of Mexico. While in Mexico, Hernández witnessed the massive 1576 outbreak of *cocolitzli*, which killed scores of the region's indigenous inhabitants; he also witnessed the devastation caused by European diseases at the Hospital Real de los Naturales (Royal Hospital for Indians). He summed up his own feeling of helplessness, both personally and professionally, in poetic hexameters:

*What do I say? Why did it fall to me to test the medicinal plants on myself?*

*And at the same time put my life at great risk?*

*Or those diseases, which caused me such excess fatigue, with which I am still afflicted, and which will affect me for the rest of my life. . . .*

The Spanish Crown attempted to regulate and control medical information and practices through Hernández's appointment and the subsequent creation of a governing board of physicians, the Protomedicato. Government and religious officials regularly complained of illicit practices in curing. Clerics, for example, frequently charged indigenous female healers with invoking WITCHCRAFT in their remedies. The Protomedicato established certifying examinations for physicians, surgeons, apothecaries, and midwives. Despite these attempts to regulate and control medical practices, healing largely remained a local and unregulated affair. Both apothecaries and indigenous healers thrived through their use and knowledge of healing herbs.

See also MEDICINE (Vol. III).

—R. A. Kashanipour

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**Mendoza, Antonio de** (b. 1495–d. 1552) *first viceroy of New Spain and viceroy of Peru* Antonio de Mendoza was the first VICEROY of New Spain (MEXICO), appointed by Charles I in 1535. He governed until 1550, when he was appointed viceroy of PERU. Mendoza came from one of the most powerful clans within the Spanish nobility. His father, the count of Tendilla, had been an important figure in the conquest of Granada. Mendoza was a younger son in the family and, thus, did not fall in line of succession for the title. His appointment initiated a pattern whereby viceroys would be chosen from among the titled nobles or bishops and archbishops. It also established a pattern whereby many viceroys would serve first in New Spain, then later in Peru. The viceroy's major obligation was to provide the colony with a physical embodiment of the king, a "vice-king," to act as a counter to the high court, or *AUDIENCIA*, which had already been established.

During his term of office in Mexico, Mendoza oversaw the expedition of FRANCISCO VÁSQUEZ DE CORONADO to the U.S. Southwest and expeditions up the Pacific coast to modern-day San Francisco and witnessed an indigenous uprising in the west known as the MIXTÓN WAR. He also supervised the creation of the first MINING codes, issued the first important land grants, developed regulations for the cattle industry, and supervised the major construction projects that would characterize MEXICO CITY (see ARCHITECTURE). He is also known for his handling of the promulgation of the NEW LAWS OF 1542. These laws mandated the eventual abolition of the *ENCOMIENDA* system under which indigenous people paid tribute to and labored for Spanish settlers and conquistadores. Mendoza invoked the traditional right of a governor to refuse to enforce parts of the laws, saying "*Obedezco pero no cumplo*" ("I obey, but do not comply"). This recognized both the monarch's right to issue the law and a governor's right to enforce it as necessary.

—John F. Schwaller

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**Mendoza, Pedro de** (b. ca. 1487–d. 1537) *Spanish conquistador and founder of Buenos Aires* Born to a noble family in the Grenadine town of Gaudix, Mendoza grew up in the inner circle of Spanish politics. In 1529, he offered to explore the southern half of South America at his own expense. A few years later, this offer was accepted by King Charles I of Spain (Holy Roman Emperor Charles V)

largely through the influence of Pedro's mother, María de Mendoza. Mendoza set sail in 1534 with considerable forces at his side and an even more generous grant from Charles: He was appointed *adelantado* of New Andalusia, granted a license to conquer as much land as he wanted (up to 600 miles north of New Toledo), provided 2,000 ducats for undertaking the expedition, with another 2,000 contingent on developing the region within two years, and promised half the treasure of the local tribal leaders he killed and 90 percent of the ransom paid for kidnapping them.

Mendoza departed Spain with an impressive fleet, but his aspirations quickly foundered. Storms struck the fleet along the Brazilian coast, spreading his forces. His second-in-command was assassinated soon thereafter, possibly on the orders of Mendoza, who suspected him of disloyalty. By 1535, Mendoza was making his way up the mouth of the Río de la Plata (see ARGENTINA). He founded the city of BUENOS AIRES on February 2, 1536. Conditions worsened as the local Querandí people became hostile and DISEASE broke out among Mendoza's men. Diego de Mendoza, Pedro's brother, led an attack against allied tribes at the Battle of Luján River; as a result, Diego and more than three-quarters of his men were killed. Later that year, another brother, Gonzalo de Mendoza, arrived with fresh forces and successfully founded the city of Asunción, capital of PARAGUAY. Pedro embarked for Spain in 1537, dejected and in ill health. He died on the voyage.

—Sean H. Goforth

**mestizaje/mestizo** The CONQUEST and settlement of the Americas brought together human groups that had previously had little or no contact. As Europeans entered the Americas, they found themselves face to face with a whole new hemisphere of humanity. From the Spanish point of view, the new social order that developed from their conquests contained three types of people: Spaniards, initially referred to as "Christians" or "Castilians"; *indios* (Indians), subdivided into different ethnic groups; and *negros*, or "blacks" (both free Africans and slaves), who were sometimes differentiated by ethnic group.

*Mestizaje* describes the process by which these three founding groups formed formal and informal unions, which in turn engendered offspring of mixed ancestry. While inseparable from Spanish colonialism, the term *mestizaje* was not used by early colonial Spaniards. In the 16th century, Spaniards did not have a racial conception of human groups. Although they did not envision race in the modern sense, they did construct differences between themselves and others. These differences were often grounded in the complex intersection of RELIGION, culture, and physical difference.

Among the three founding groups, Spaniards perceived themselves to be superior. Much of this superiority was based in the belief that their success in conquering the Americas derived from divine provenance as a reward for

having completed the reconquest of the Iberian Peninsula, the Reconquista. Their success in conquest and the subsequent decline in the indigenous population also reinforced a belief in the physical inferiority of native peoples, who came to be seen as frail and sickly. Resistance to conversion and continued idolatry after conversion convinced many Spaniards that the indigenous were stubborn and dim witted. While Spaniards viewed African slaves as physically superior to both *indios* and themselves, Africans were disparaged as the most savage and intellectually inferior group. This view derived from both environmental and cultural conceptions. Spaniards, and other Europeans, believed that the heat and climate of sub-Saharan Africa led to Africans' dark skin, physical robustness, and simple-mindedness. At the same time, frequent internecine warfare and the associated practice of interethnic slavery led Spaniards to view Africans as violent and savage.

The Spanish sought to differentiate those of mixed ancestry in the New World. This desire stemmed from the belief that individuals would inherit the traits of both parents; moreover, it was thought that the creation of new categories would help maintain order and control. The term *mestizaje* shares its root with the most privileged category of mixed ancestry, namely *mestizo*. Meaning “mixed,” this word was used to describe an individual born to a Spaniard and an Indian, or someone of equal parts Spanish and indigenous ancestry. During the 16th century, mestizos were often the illegitimate or unrecognized children of Spanish men and indigenous women, although the reverse did occur more frequently over time. In general, mestizos were considered stronger than *indios*, both physically and mentally; however, they were often accused of being undependable and prone to vice. If not attached to a Spanish patron, they could be accused of being vagabonds and wastrels. The application of this category could depend on the status of the Spanish parent. Very often, biologically mestizo children born to and recognized by elite Spaniards were not labeled *mestizo*. In the immediate postconquest period, publicly recognized offspring, legitimate or not, between indigenous nobility and Spanish conquistadores were never labeled *mestizos* and were considered *españoles*, or Spaniards.

Originating in 15th-century Iberia, the term *MULATO* was used to describe the child of an African and a Spaniard. This term derived from the word *mula*, or “mule,” the cross between a horse and a donkey. In Spanish America, *mulatos* were more highly regarded than Africans, slave or free, but were seen as more dangerous and less governable than mestizos. Their African ancestry led to a presumption of inherent aggressiveness; however, Spanish ancestry implied a greater intellectual capacity. Together, the perceptions that *mulatos* were both stronger and more violent than Spaniards but more intelligent than Africans led to fears that *mulatos* were more capable and more apt to revolt than African slaves or *indios*. Despite these prejudices, free *mulatos* did generally aspire to higher-status occupations than free Africans or indigenous people.

Technically, the term *zambaigo* described an individual of African-indigenous ancestry. Most frequently, this term appeared in laws and ordinances issued by colonial authorities; however, quotidian documentation, such as baptismal records, criminal cases, and petitions, rarely used *zambaigo* to describe Afro-indigenous individuals. Common usage labeled anyone of mixed African ancestry as a *mulato*. Many Afro-indigenous *mulatos* were raised in close proximity to indigenous culture and could move fluidly in both indigenous and Hispanic society. This helped these individuals form mixed unions with other groups and further the process of *mestizaje*.

*Mestizaje* began as soon as Europeans and Africans entered the Americas and accelerated over time. In general, European-indigenous unions were more common during the period of initial conquest and settlement. As the number of African slaves in the Americas increased, so too did mixed unions with Africans. Although demographic data is scarce, the evidence suggests that where indigenous populations survived in large numbers, Afro-indigenous *mulatos* came to outnumber Afro-European *mulatos*. In areas where indigenous populations disappeared or declined dramatically, such as in the Caribbean, BRAZIL, and parts of northern South America, Afro-European *mulatos* predominated. These demographic differences across the Americas have led to vastly different legacies of *mestizaje* in modern Latin American nations.

See also *CASTAS* (Vol. II); *MAMELUCO* (Vol. II); *MESTIZAJE/MESTIZO* (Vol. II); *PARDO* (Vol. II); *zambo* (Vol. II).

—Robert Schwaller

**metate** A *metate* was a carved grinding stone used in FOOD preparation to crush seeds, grain, chilies, and CACAO. The term *metate* is derived from the NAHUATL word *metlatl*, which means “grinding stone.” *Metates* varied in size, but typically they were carved from porous volcanic rock. The *mano*, a smooth handheld stone used to grind the food, was cut from the same stone.

*Metates* have been discovered in archaeological sites throughout the Americas, but especially in the southwest United States and in Mesoamerica. In the pre-Columbian period, *metates* were used by WOMEN to grind MAIZE (corn) into a powder form. Mesoamerican cultures used processed maize in various ways, such as to make corn tortillas, tamales, and *atole* (a hot corn beverage). *Metates* were also used to grind other grains and seeds such as acorns, cacao, chili peppers, coarse rock salt, spices, and vegetable foods.

—Stephanie Lozano

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A metate and mano from Guatemala (Courtesy of J. Michael Francis)

## Mexicas See AZTECS.

**Mexico** When HERNANDO CORTÉS and his fellow conquistadores arrived in what is now Mexico in 1519, they encountered a large number of distinct indigenous groups who spoke hundreds of different languages and represented a broad spectrum of sociopolitical complexity. Some indigenous groups were nomadic, some lived in small villages, and still others had organized themselves into complex states and empires that represented some of the world's most advanced civilizations at the time.

The first inhabitants of Mexico arrived during the last ice age, some 11,500 years ago, and lived as nomadic hunters and gatherers. By 1800 B.C.E., however, Mesoamericans had become more adept farmers and small villages had begun to form (see AGRICULTURE). By 1200 B.C.E., some of these villages had grown substantially both in size and political complexity. The OLMECS of Mexico's southern Gulf coast flourished between 1200 and 500 B.C.E. during the Preclassic period (1800 B.C.E.–200 C.E.). Their stone monuments, which include large carved heads and altars, make them unique among Mesoamerican civilizations of the period. While little is known about the Olmecs, the archaeological evidence suggests that their society was highly stratified and ruled

by a powerful elite and that they practiced a widespread state RELIGION.

As the Olmecs declined around 500 B.C.E., another civilization in Mexico rose in power. In the Valley of Oaxaca, about 250 miles (400 km) south of MEXICO CITY, the Zapotec-speaking peoples founded their capital at MONTE ALBÁN (see ZAPOTEC). Monte Albán is believed to have been the first urban state polity in Mesoamerica (see CITIES). It began as a union of several smaller political “chiefdoms” in the Oaxaca valley that grew over time to govern nearly all of the Zapotec speakers and even some non-Zapotec groups in the area. Because of this political expansion, Monte Albán might also have been the first imperial state in Mesoamerica. The civilization at Monte Albán is credited with the creation of the region's first glyphic writing system and sacred calendar. Evidence of this early writing endures in carved stone monuments; the glyphs are composed both of elements that visually depict meaning and of elements that represent phonetic sounds.

By 200 C.E., or the beginning of what scholars call the Classic period (200–900) of Mesoamerican history, the Zapotec “empire” had grown to its largest size. Between 600 and 900, Monte Albán's political dominance was increasingly weakened by challenges from smaller urban centers in the region. Cities such as Lambityeco and Suchilquitongo asserted themselves as independent polities, free from Monte Albán's control; moreover,

these sites began to rule over parts of the region that Monte Albán once governed. Additionally, non-Zapotec groups began to encroach into Zapotec territory. By the time the Spaniards arrived in the 16th century, virtually all the Zapotec sites were dominated by outsiders.

Just as Monte Albán reached its peak in the Valley of Oaxaca around 200 C.E., a second large Classic-period civilization rose to prominence to the north. This civilization was located at TEOTIHUACÁN in Mexico's central high plateau; by around 200, Teotihuacán had come to dominate all of Central Mexico; over the next 300 years, the city grew to become perhaps the largest urban center in Mesoamerica. The city's population likely exceeded 150,000 inhabitants. The city covered eight square miles (20.7 km<sup>2</sup>) and was dominated by sacred monuments. The most famous of these monuments today are the large pyramids at the site, the so-called Pyramids of the Sun and the Moon. These names are misleading, however; the Pyramid of the Sun was probably built to honor, not the Sun, but the rain god, to whom Teotihuacán's residents were particularly devoted.

Teotihuacán's power was not limited to its ability to build large and impressive monuments (see ARCHITECTURE). In fact, Teotihuacán maintained extensive long-distance TRADE and built frontier defenses to protect its traders and political boundaries. Among Teotihuacán's most important commodities were fine OBSIDIAN (volcanic glass) products. Teotihuacán was located close to major obsidian mines, and the city's skilled obsidian craftsmen turned the rock into knives, blades, arrowheads, and other sharp instruments (see MINING). The obsidian trade helped fuel the local ECONOMY and attracted people from other ethnic groups, such as the Zapotecs and those from Gulf coast cultures, who settled in Teotihuacán. Around 650, a portion of Teotihuacán society revolted, and the center of the city was set on fire. As a result, many of Teotihuacán's residents abandoned the city, and by 900, nearly all of the city's residents had found new homes away from the urban center.

A third important Classic-period civilization in Mexico was that of the MAYA. The Maya are perhaps the most studied of Mesoamerica's pre-Hispanic peoples; they were remarkably advanced in ART, architecture, astronomy, writing, and agriculture. The Maya lived (and continue to live) in an area that now includes eastern Mexico (the Yucatán Peninsula and Chiapas), GUATEMALA, BELIZE, and parts of HONDURAS and EL SALVADOR. The landscape varies widely across this region, which led to significant cultural and linguistic diversity among the Maya. Indeed, there are more than 30 distinct Mayan languages.

The most emblematic of the various Maya groups are perhaps those who occupied the lowlands of the Yucatán Peninsula, Chiapas, Guatemala, and Belize. In fact, the term *Classic period* originally referred to the period in which the lowland Maya reached the height of their cultural complexity and production.

The Maya were never as politically or demographically centralized as, for example, the civilizations based

at the cities of Monte Albán and Teotihuacán. Rather, the Maya had several centers of power that, over time, engaged in both alliances and conflict. In the Classic period, these centers included southern lowland sites at CALAKMUL, TIKAL, CARACOL, COPÁN, and Palenque, which have long impressed scholars with the richness of their culture. The most visually impressive aspect of this culture is the large stone stelae (tall inscribed slabs) and altars that the Maya erected to commemorate important events in their history. These stelae and altars are covered with Maya glyphic writing, which was more developed than its Zapotec counterpart.

The end of the Classic period is characterized by the decline of these important southern lowland Maya sites. Scholars have not been able to agree on why these centers—and the Classic-period culture that they propagated—ceased to thrive. Most believe that problems arose as a result of population growth and social instability. Whatever the reason, many of the southern sites were abandoned, and the center of Maya civilization during the Postclassic period (900–1520) shifted to the northern Maya lowlands.

Postclassic-period Maya culture was characterized by increasing urbanization and the concentration of power. In the Early Postclassic period, the site of CHICHÉN ITZÁ in the Yucatán Peninsula dominated the Maya world. By the 13th century, Chichén Itzá had fallen, and the city of MAYAPÁN had replaced it as the most important Maya center. Both of these Postclassic cities differed from their Classic-period predecessors; their art and architecture reflected greater contact with civilizations from the Central Mexico highlands, particularly that of TULA in modern-day Hidalgo State.

The civilization at Tula, also called Tollan, is poorly understood and heavily debated among scholars. Tula's past is clouded, in part, because it figures prominently in legendary accounts written by Central Mexico peoples soon after the Spanish CONQUEST. In fact, the term *Toltec* (someone from Tula) also had the more general meaning of a “wise” or “cultured person” (see TOLTECS). Nevertheless, there is evidence of a complex civilization at Tula from around 900 to 1200.

The city of Tula itself seems to have represented a combination of several Mesoamerican cultural traditions. The most important of these related to the MIGRATION of peoples from the north. These migrants are often called the “Chichimeca” or “Tolteca-Chichimeca” in colonial-period sources and were probably the first NAHUATL speakers of Central Mexico (Nahuatl was the language spoken by the AZTECS when the Spaniards arrived). The Tolteca-Chichimeca were a powerful political force. At the height of Tula's power, Toltec influence and control could be felt throughout Central Mexico, the Gulf Coast, Yucatán, and Chiapas. The most visually recognizable feature of this influence is the spread of religious devotion to the feathered, or plumed, serpent deity, QUETZALCÓATL. The rep-

### Basin of Mexico on the Eve of the Spanish Conquest, ca. 1519



resentation of this Toltec god is particularly strong in the Maya city of Chichén Itzá in the Yucatán Peninsula.

Though the city of Tula declined and was abandoned in the 13th century, its cultural traditions persisted in Central Mexico. Many of the leaders of Central Mexico polities at the time of conquest legitimized their rule by emphasizing their Toltec ancestry. In the 14th century, however, still more migrants arrived in Central Mexico from the north; their arrival transformed regional politics and the balance of power. These late arrivals were the Mexicas, or Aztecs.

The Mexicas were but one of the ethnic groups that constituted the Nahuas, or speakers of the Nahuatl language, in Central Mexico. Their arrival brought an end to the rule of another Nahua group, the Tēpanecs. In the early 15th century, the Mexica overthrew the Tēpanecs with the help of neighboring Nahua groups; the victors then formed what scholars have called the “TRIPLE ALLIANCE,” a military and economic accord between the Mexica and the Nahuas from Texcoco and Tlacopan. This alliance brought much of the surrounding area under its control. Neighboring polities were compelled to either submit to the Triple Alliance and pay tribute to it or be subjugated by force.

The Triple Alliance was still expanding when the Spaniards appeared off the Gulf coast in 1519. In the Mexica capital city of TENOCHTITLÁN, the famed MONTEZUMA held the position of TLATOANI, or ruler. Cacama ruled in Texcoco. These two, together with the regent in Tlacopan, exacted money and loyalty from the Gulf of Mexico to the Pacific Ocean.

Nonetheless, the Spaniards, led by Cortés, were able to exploit the prevailing political situation in Central Mexico to their advantage. Many of the indigenous groups that had been forced to pay tribute to the Triple Alliance were easily persuaded to join the Spanish. By the time he arrived at the Mexica capital from the coast, Cortés had amassed a large number of indigenous allies. Initially, the Triple Alliance mounted a successful defense of their capital, despite the number of Cortés’s supporters. As a result, the Spaniards were forced to flee the city, in what they later called the “Noche Triste,” or “night of sorrows.” Cortés was undeterred, however, and made preparations for another attack. As he did so, the first waves of European DISEASES swept through the indigenous population. The Indians had no natural resistance to diseases such as smallpox, and as a result many thousands died. Cortés used this to his military advantage and successfully defeated the Triple Alliance in 1521.

The Spaniards continued their campaign in the rest of Mexico and were eventually able to bring other groups under their political control in areas such as the Valley of Oaxaca, the Gulf Coast, and the Yucatán Peninsula (though only after protracted conflict in this last region). Political defeat, however, did not signal the end of indigenous society and civilization. Although the Spanish replaced indigenous leaders at the highest levels of government, native patterns of social and political organization often remained intact (see ALTEPETL; CAH).

In fact, the Spanish Crown was often obliged to rely on pre-Hispanic systems of taxation and LABOR draft in order to govern effectively. Additionally, indigenous languages continued to be used, even within the Spanish court system and bureaucracy. Many of these languages and cultures continue to flourish in Mexico today.

See also MEXICO (Vols. III, IV); MEXICO, INDEPENDENCE IN (Vol. II); MEXICO CITY (Vols. II, III, IV); NEW SPAIN, VICEROYALTY OF (Vol. II).

—Bradley Thomas Benton

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**Mexico City** At first glance, in November 1519, HERNANDO CORTÉS and his men were astonished by the grandeur of Aztec capital city of TENOCHTITLÁN (see AZTECS). They claimed it as their own, nonetheless, in the name of the king of Spain. On July 1, 1520, less than nine months after their historical encounter with the Aztec ruler MONTEZUMA, the Spaniards were ferociously chased out of the city during the tragic events of the Noche Triste (Night of Sorrows). The Spanish left behind a ruined city, its nobility nearly all massacred, and hundreds of soldiers dead on both sides. In the year that followed, the Spaniards made several failed attempts to conquer the island, first facing the Aztec king Cuitláhuac and later the persistent CUAUHTÉMOC. After a siege of 75 days during which Tenochtitlán’s water and FOOD supplies were cut off, Cuauhtémoc finally surrendered himself and the city on August 13, 1521 (see CONQUEST). The swift downfall of the strongest Mesoamerican city by a relatively small force of Spanish conquistadores was only possible thanks to the tens of thousands of indigenous allies (primarily the Tlaxcalans), Spanish firearms and metal swords, and, perhaps most important, European DISEASES, which already had devastated the besieged population (see TLAXCALA).

The restructuring of the city began in 1522, and according to one chronicler, more than 400,000 indigenous workers were employed for the task. The Catholic cathedral was built in front on the main temple complex, the Templo Mayor (in fact, the church was built with stones dismantled from the ruins of the latter), while Aztec deities were replaced by Christian saints. Although built by native hands, houses for the Spaniards took on a European appearance, and the city was slowly adapted to





This photo shows the ruins of the Templo Mayor, with Mexico City's cathedral in the background. (Courtesy of J. Michael Francis)

a grid pattern. Cortés claimed the palace of the defeated Montezuma; however, in 1560, the building passed to New Spain's colonial government and today is the site of the National Palace.

Similarly, the Aztec "pleasure palace" in Chapultepec, a garden complex the indigenous nobility used for retreat and feasting, became the property of the New Spain's VICEROYS. The four *calpultin* neighborhoods were largely maintained in their original form and size, although their function as military units was abolished (see *CALPULLI*). Tribute was still collected as before, and LABOR, required. Specialized crafts were allowed to continue, though in a modified fashion; for example, featherwork previously used for Aztec shields and war costumes was now employed to depict Christian motifs. The Aztec *calmecac* and *telpochcalli* schools were replaced by Catholic religious schools, and the Colegio de Santa Cruz (College of the Holy Cross), the first college for noble Aztec boys, was established in Tlatelolco in 1536. While many classes were still given in NAHUATL, students were also taught to speak Spanish; the glyphic writing of the preconquest period was largely replaced by the Latin alphabet.

Spanish officials and institutions took over from their Aztec counterparts, with the establishment of the royal AUDIENCIA (high court) in 1527 and the appointment of the first viceroy, ANTONIO DE MENDOZA, in 1535.

Despite the introduction of Spanish institutions, the native political organization below that level was kept relatively intact. Even if the fall of Tenochtitlán marked the end of Aztec hegemony in Mesoamerica, in political and economic terms, much survived well into Spanish rule; native leaders continued to exercise control over the indigenous population of New Spain from the newly established capital of Mexico City.

See also MEXICO (Vols. III, IV); MEXICO CITY (Vols. II, III, IV).

—Danny Zborover

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**migration** The land bridge theory, also known as the Bering Strait theory, is the most commonly accepted explanation of the first human migrations to the Americas. It contends that hunters and gathers from Siberia traveled over the Bering land bridge and into Alaska in pursuit of big-game animals between 50,000 B.C.E. and ca. 9000 B.C.E. After crossing the land bridge, they migrated south and eventually reached South America through the Panamanian isthmus. Another theory suggests that humans migrated along the Asian coast by boat or canoe

and traveled across ice blocks to reach the Americas. A further possibility is put forward in the Pacific coast theory, which says that at some point during the southward migration from Alaska, some migrants traveled by boat or canoe along the Pacific coast. However, both of the coastal theories have substantially less evidence than the land bridge theory to support their claims.

It is unclear exactly how the earliest migrants spread out once they reached South America. Early settlement sites have been discovered along the lowlands of both sides of the landmass, suggesting that some groups traveled down the Pacific side, while others crossed to the Caribbean and Atlantic coasts. Although the specific routes and dates of migration are unclear, the evidence of movement is not. Scholars have uncovered evidence of human life in MONTE VERDE, CHILE, and Taima Taima, VENEZUELA, dating back to at least 12,500 B.C.E.; from the southernmost tip of Tierra del Fuego dating to 11,000 B.C.E.; and in ECUADOR and PERU dating to 10,800–10,000 B.C.E.

These sites are highly diverse in terms of environment and FOOD sources, both of which would have determined the migrants' length of stay in any given location. In some regions, available resources were limited, so multiple migrations took place; this occurred, for example, in the arid deserts and grasslands of Chile, Peru, BRAZIL, and ARGENTINA. By contrast, in places such as the Andean lowlands, food sources were more abundant and diversified throughout the seasons; this allowed groups of people to remain in one place for longer, which provided opportunities for exploration and, eventually, settlement in the areas most conducive to their skills. Temperate and tropical forests as well as wetlands also provided subsistence options and did not require specialization in a particular resource.

South American Arawaks first began migrating to the Caribbean along the Orinoco River as far back as 1500 B.C.E. This migration continued for hundreds of years. The three major indigenous groups of the Caribbean—the Ciboney, TAINO Arawak, and CARIB—all descended from the successive migration waves of South American Arawaks. The Ciboney were the earliest to arrive in the Caribbean and settled primarily in CUBA and other islands of the Greater Antilles. The Taino inhabited the Bahamas, Greater Antilles, and the northern islands of the Lesser Antilles. They were seafarers who traveled extensively throughout the islands on trading expeditions (see TRADE). The expansion of the Taino kingdoms displaced the Ciboney to the western side of the island of HISPANIOLA; by the early 16th century, the Taino had largely absorbed the Ciboney. The Caribs were the last migrant group to settle in the Caribbean, and they dominated the Lesser Antilles. Throughout most of the 15th century, the Taino were driven northeast as a result of raids by the Caribs to the south.

The largest pre-Columbian civilization was that of the INCAS, which emerged in the early 13th century in the highlands of Peru. Inca imperial expansion was rampant in the 14th and 15th centuries; by the end of the latter, the empire extended from the capital in Cuzco as far north as

southern COLOMBIA, and well into Chile to the south. At its height, the population of the empire was 6–13 million. The Incas displaced many groups in areas where land was ripe for the cultivation of MAIZE; they also moved large numbers of peoples from regions that were susceptible to rebellion. The state then resettled the areas with people loyal to the empire, moving troublesome subjects closer to Cuzco.

Despite the remarkable reach of the empire, most of South America never fell under Inca rule. Hundreds of other ethnic groups inhabited the region. For example, the Guaycurus lived in the mountains of the Gran Chaco; their territories extended on both sides of the Paraguay River into the north and northwestern PARAGUAY frontiers and into the province of Matto Grosso, Brazil. The nomadic fishing and foraging Charrúa inhabited parts of modern URUGUAY, northeastern Argentina, and Brazil. The seminomadic communities of Tupí and GUARANÍ moved mainly within Brazil (see TUPINAMBÁ). The Mapuche inhabited southern Chile and southern Argentina and were able to resist both Inca and Spanish attempts to subjugate them. The Ona lived in Patagonia and are believed to have migrated from the mainland across the Strait of Magellan by canoe. Farther south, the nomadic Yahgans traveled the southernmost islands, where they sustained themselves by collecting shellfish and hunting sea lions.

In Mesoamerica, the Classic-period MAYA emerged beginning ca. 250 C.E. Classic Maya sites covered a broad territory, including the Yucatán Peninsula, Tabasco, Chiapas, GUATEMALA, BELIZE, and parts of HONDURAS. Between the eighth and ninth centuries, the southern Maya lowlands experienced sharp population decline; soon after, many of the large urban centers there were abandoned. The causes for this remain unclear; the many theories include resource depletion, long-term drought, endemic WARFARE, overpopulation, and environmental degradation. Whatever the causes, it appears that large numbers of Maya fled north to the northern lowlands of the Yucatán Peninsula. That region flourished well past the ninth century and maintained a large population until the arrival of Europeans in the 16th century.

One of the most fascinating migration stories concerns the Mexicas, or AZTECS. They are said to have originated in 1168 on an island called Chicomoztoc, meaning “seven caves,” in the middle of a lake in northern MEXICO. They were commanded by their patron god Huitzilopochtli to undergo a long migration to Central Mexico in search of the site to build their great city; according to Huitzilopochtli, the Mexicas would know where to settle by the appearance of an eagle perched atop a cactus, with a snake in its beak. The Aztecs arrived in the Valley of Mexico in 1248 and by the early 14th century had begun to build the city of TENOCHTITLÁN on an island on Lake Texcoco. Between the 14th and 16th centuries, the Aztecs dominated much of Mesoamerica. They accomplished this through warfare and CONQUEST, expanding the empire far beyond its origins in the Valley of Mexico. At its height, the Aztec Empire stretched from

the northern part of Guatemala to Central Mexico and from the Pacific Ocean to the Gulf of Mexico.

The population of the New World prior to 1492 is still debated, with estimates ranging from 8 million to 112 million people. Most scholars accept that there were approximately 54 million people living in the entire Western Hemisphere before 1492. The New World inhabitants were concentrated mainly in Mexico, where the population reached 17.2 million; the Andes in South America likely supported a population that exceeded 12 million. Some have suggested that the other regions of South America (that is, outside the Inca Empire) supported a population of some 8.6 million; however, recent archaeological findings in the AMAZON regions of Brazil and Peru are beginning to challenge such claims. Central America was inhabited by 5.6 million people, a population two-thirds smaller than in Mexico and Andes. The Caribbean had the smallest number of inhabitants in the New World, with slightly more than 3 million spread across the islands.

The arrival of CHRISTOPHER COLUMBUS launched a period of unprecedented migration, both within the New World and from outside. Waves of migrants arrived from Europe, and it was not long before the new settlers began to import large numbers of African slaves. During the conquest and early colonial period, large numbers of Amerindians moved as well.

In the following two decades, Spaniards from southern Spain (Andalusia) represented the largest single group of migrants, accounting for 60 percent of the migration flow to the New World between 1493 and 1508. These Andalusian migrants, both men and women, were predominately from the large urban center of Seville. This migration pattern occurred for several reasons. Andalusia was home to the most populated cities in Spain, with the greatest population density in Seville. Seville's proximity to ports exposed the population to influential travelers and accessible opportunities to emigrate on the ships departing for the New World. Thus, from 1493 to 1520, one out of every six migrants was from the city of Seville, one out of five was from the province of Seville, and one out of three colonists was from the Andalusia.

Following HERNANDO CORTÉS's expedition to Mexico in 1519 and the conquest of the Aztec Empire in 1521, news of untold wealth in the Americas reached the Old World and the origins of emigrants began to diversify. While Seville remained a predominate source of outward migration from 1520 to 1540, half of the total number of immigrants to the New World came from six Spanish provinces: Seville, Badajoz, Caceres, Toledo, Salamanca, and Valladolid. Additionally, the New World now witnessed the arrival of migrants from Portugal, Italy, and France, among 35 other countries. Their destinies varied widely. Spanish migrants from the Castile region settled in higher numbers than Andalusians in PUERTO RICO and on the mainland. Castilians were predominant in Colombia and Venezuela and had a significant popula-

tion in NICARAGUA. The Río de la Plata region had the highest number of non-Spaniard migrants, at 12 percent. The migrants were primarily Portuguese and had been members of expeditions rather than individual travelers.

With the colonization of Mexico and Peru, the Caribbean islands' foreign populations declined dramatically. From 1520 to 1530, only 11 percent of migrants settled in Santo Domingo on the island of Hispaniola; by contrast, Peru became home to 10.8 percent of the migrant population. Mexico received an estimated 32.4 percent of the total migration flow from the Old World and 50 percent of Old World migrants who went to mainland America. In this same period, Europeans migrated to various other destinations throughout the Americas: 8.8 percent of migrants settled in the Río de la Plata region; 7.7 percent in PANAMA; 7.3 percent in New Granada; 3.7 percent in Guatemala; 2.8 percent in Venezuela; 1.6 percent in Cuba; 1.1 percent in Nicaragua; 0.9 percent in Puerto Rico; and 0.6 percent in Honduras. Of course, these figures are problematic, as they are based on the destinations listed in the official passenger manifests. Once they reached the New World, migrants often moved from one place to another, making it virtually impossible to quantify specific population figures in any one region.

European migration also spurred large-scale migrations of both the Amerindian and African populations. Indigenous populations throughout the New World experienced migration, often by means of enslavement, conscripted LABOR, and/or displacement (see SLAVERY). In addition to forced movement, their populations declined dramatically through disease, labor exploitation, warfare, and starvation. On the island of Hispaniola, for example, the indigenous population dropped from an estimated 1 million to 600,000 between 1492 and 1510; in the following 30 years, it fell to a mere 5,000, which represents a 98 percent rate of decline in a matter of decades. Devastating population loss occurred virtually everywhere in the New World, as Old World diseases spread through populations that had no immunity.

As the indigenous populations declined, Europeans turned to Africa to replenish their falling labor pool. A 1511 report to the Spanish king Ferdinand II suggested that one black slave's labor was equal to that of four Indians. From 1510 to 1530, nearly 35,000 African slaves, most of whom were already enslaved in Europe, were sent to the New World; their numbers were soon augmented by slaves brought directly from Africa. In 1530, the Spanish Crown began to issue licenses for the direct importation of African slaves to the New World (see *ASIENTO*). This was done to compete with Portugal's burgeoning slave trade to Brazil. Between 1521 and 1550, an estimated 15,000 slaves arrived in the Americas.

See also IMMIGRATION (Vol. II); MIGRATION (Vols. II, III, IV); POPULATION (Vol. II).

—Kathryn Plummer

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**milpa** *Milpa*, also known as “swidden,” “slash and burn,” or “shifting,” is an agricultural method that necessitates the slashing, cutting, felling, and burning of forested areas for the planting of garden plots or agricultural fields, also called *milpas*. It is often associated with patterns of shifting cultivation, in which soil exhaustion or weed intrusion requires plot rotation and fallow cycles. Tropical soils are fragile, thus AGRICULTURE in the tropics tends to deplete soil-based nutrients rapidly, resulting in decreasing yields after just a few seasons. In order to stimulate the regeneration of soil nutrients through the growth and decay of tropical vegetation, *milpa* agriculturalists typically abandon plots for as many as 25 years. These cycles of field preparation, cultivation, and fallow, and the need to shift cultivation to new fields on a cyclical basis, play an important role in the social, economic, and political configurations of peoples who practice *milpa* agriculture.

It is common practice for a FAMILY to have several small plots (*milpas*) under cultivation. At any one time, the fields are scattered among various landforms, soil types, or hydrological settings in order to maximize production and minimize the risk brought on by unpredictable climate changes. Though requiring extensive land, *milpa* cultivation is highly LABOR efficient and has been widely practiced in areas of high vegetation and seasonal rainfall patterns. In Mesoamerica, the typical plot was planted with MAIZE, supplemented by beans and squash.

Swidden cultivation systems can be intensified by a number of strategies beyond shortening the fallow cycle. Increasing the diversity of crops planted in individual plots can extend the growing season, make maximum use of horizontal space, and increase their resistance to insects. Tree crops can be planted and succession species managed to maintain the productivity of the plot while it is fallow. Agricultural production under rain-fed cultivation systems was intensified in ancient times through a number of field-surface management strategies that modified soil conditions, moisture availability, and microclimate in order to promote crop growth. Ridging and mounding of soils is a common cultivation technique. *Milpa* is a relatively efficient and ecologically sound system of agricultural production, especially com-

pared to the labor- and resource-intensive permanent and irrigation-based system that dominates the modern nation states.

—John M. Weeks

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**mining** The conquistador HERNANDO CORTÉS was said to have told the Aztec emperor MONTEZUMA that he suffered from an ailment of the heart for which GOLD was the only specific (see AZTECS). The first Inca subjects to greet FRANCISCO PIZARRO along the coast of PERU were said to have wondered if Spanish horses ate gold, so desperate were their masters to lay their hands on it (see INCAS). True or false, these legends from the era of contact betray the *aurum sacra fames*, or “sacred hunger for gold,” that engulfed Europe, and particularly Spain, following the voyages of CHRISTOPHER COLUMBUS. What economic historians term the early modern *bullion famine* in fact encompassed most of Eurasia (see ECONOMY).

As depicted in early MAPS and writings, America was from the start both a figurative and a literal gold mine. With the discovery of the “Rich Hill” of POTOSÍ in present-day BOLIVIA and similarly rich sites in MEXICO in the mid-1540s, the Americas became the richest source of SILVER the world had yet known. In the first decades after discovery, European, African, and indigenous mining and refining techniques were combined so that by 1560, Spanish merchants and officials shipped tons of raw gold and silver, mined and processed mainly by forced indigenous workers and enslaved Africans, across the Atlantic each year (see SLAVERY). By the 1570s, tons of Spanish American silver went annually across the Pacific to the Philippines and China. Nevertheless, mining in the Americas was not new.

Prior to the arrival of Europeans in the Americas in 1492, Amerindian societies, including the great empires of the Aztecs and Incas, were lithic in that they relied mostly on stone rather than metal tools and weapons. The archaeological record is replete with stone axes, hammers, scrapers, projectiles, and points. Metals, where found, were used primarily for ritual and display, being universally regarded as divine residues that naturally attached to and enhanced chiefly or kingly power. Iron was known only in its meteoric form, although its oxides hematite and magnetite were used as pigments. Cinnabar, or mercury sulfide, was similarly used and collected from surface deposits, if not mined. Decorative stones such as nephrite, turquoise, EMERALDS, and quartz were also associated with divinity and often appeared in shamanic divination and

healing kits, even among nonsedentary forest dwellers (see RELIGION). Prospecting, mining, and quarrying were marginal activities in most of the Western Hemisphere prior to 1492, and metallurgy even more so.

There were, however, some spectacular exceptions. Copper mining and metallurgy date to remote times in both North and South America, and gold mining and refining are probably at least as old, if not older. Sheet-metalworking in copper and gold dates to at least 1500 B.C.E. in the southern Andes, the oldest of the Americas' several ancient metal-smithing centers. The development of silverworking, along with the smelting of complex copper-based alloys, was in evidence in Andean South America at least 2,000 years ago, as was the world's only known premodern use of platinum. The Andes was also known for its deposits of tin and arsenic, both of which enabled experimentation with utilitarian alloys, and bronze and arsenical bronze tools and weapons were common by 1000 C.E. The Incas claimed the invention and spread of bronze as imperial legacies, but both clearly predated them. More localized and small-scale bronze production appears to have developed independently in Michoacán, Mexico, a few hundred years before the arrival of the Spanish in 1519 (see CONQUEST).

All these advances in metallurgy spurred mining activity to a greater or lesser degree, depending on the demands of chiefs and other rulers, merchants, and ordinary consumers. Copper axes from Peru and CHILE were traded to coast, mountain, and AMAZON rain forest peoples, sometimes in exchange for gold dust panned from streams (see TRADE). Copper "axe money" soon followed, although its ritual-versus-monetary functions remain uncertain. Turquoise mined near Santa Fe, New Mexico, was traded as far south as GUATEMALA, and copper mined in Mexico was sent north in return, usually in the form of bells and tweezers. Such items abound in ancestral Pueblo graves. Emeralds from COLOMBIA were combined with local gold in PANAMA and ECUADOR, and nephrite from Guatemala was sent to COSTA RICA in exchange for copper-gold alloys. The long-distance trade in mined or quarried flint and OBSIDIAN is older still, stretching back to the era of the great mammoth hunters. Quarrying for building stone was also ancient but was more commonly restricted to sedentary urbanites. Far more ancient and widespread, and frequently undertaken by WOMEN, quarrying for clay suitable for pottery making can also be considered a type of mining (see CERAMICS).

### COPPER

Relatively abundant and malleable, though not easy to melt (at 1,981° Fahrenheit, or 1,083°C), copper has long drawn the attention of humans. In the Americas, deposits of native copper in the Great Lakes region of eastern North America, southern Arizona, Mexico's Sierra Madre ranges, and various sites in the central and southern Andes enabled early prospectors to gather workable metal with-

out much digging. Copper was also found and worked in Colombia and Costa Rica, but deposits were much more scarce. Short of finding pure native copper, even the richest ores required development of high-temperature furnaces. Bellows appear never to have been used, but copper, like gold and silver, can be melted with blowpipes on charcoal. It was then poured into clay molds or hammered into various shapes with stone hammers.

While copper mining and surface collecting were clearly ancient practices in the Americas, it is an extraordinary find in Chile that stands out as a landmark in global mining history. In 1899, prospectors in Chuquicamata, in the Atacama Desert, found a naturally mummified sixth-century C.E. miner apparently killed in a cave-in. His tools included a shovel, stone hammer, and ore basket. Archaeologists have since identified ancient copper mines and associated tools in northwest ARGENTINA and at Batán Grande, in north coastal Peru. All these known ancient mines were excavated with hafted stone tools. Much later copper-silver mines in southwestern Mexico show signs of fire splitting, or the use of fires to help make ores more friable, a practice common in the Old World. Substantial copper deposits were also found in northwestern HISPANIOLA and southeastern CUBA, although it is difficult to know how extensively they were worked prior to the arrival of the Spanish.

### GOLD

Though far less abundant than copper, gold does not readily oxidize and therefore can be found in its native state in many places, particularly where ancient mountain ranges were eroded by rivers and streams. Most pre-Columbian gold mining, or "placering," was undertaken with wooden gold pans and digging sticks in and along the stream banks from Mexico to Chile. Not all gold deposits were worked, however. The extensive placers of the Brazilian highlands and Amazon Basin appear to have been entirely unexploited in pre-Columbian times (see BRAZIL). The same was true of nearly all North American placers outside Mexico.

Few pre-Columbian gold mines went underground, as far as is known, although there were exceptions in northwestern Colombia, in the department of Antioquia, where miners dug pits and shafts with staves. These underground tunnels were made possible thanks to highly oxidized and therefore friable quartz veins. Extracted ores were easily milled with harder stones, and the resulting sands were washed in the wooden pans for free gold. No mercury amalgamation was practiced. If early Spanish CHRONICLERS can be trusted, the Colombian diggings were dozens of feet deep, a considerable achievement given the lack of iron or bronze excavation tools.

### SILVER

Unlike gold and even copper, silver rarely occurs in its native state. It is highly susceptible to oxidation and other forms of chemical bonding and thus has to be separated

from its host material through crushing, smelting, and other refining processes. Despite the existence of massive silver deposits in the mountains of Mexico and HONDURAS, it was only in the Andes that silver mining and metallurgy were substantially developed in pre-Columbian times. There, in places such as Porco, Bolivia, and Huantajaya, Chile, indigenous miners using hafted stone hammers followed rich veins of ore. Stone furnaces known as *huayras* (from Quechua *wayra*, or “wind”) were built on ridges where breezes could stoke their llama-dung fires. Silver was smelted in this way in the hills around Potosí even after the Spanish conquest. Copper-silver alloys appear to have been mined and worked in western Mexico, but silver was not apparently separated and treated in isolation.

### PLATINUM AND ALLOYS

Platinum, a hard, brittle metal with a high melting point (3,225° Fahrenheit, or 1,773.8°C), is also rarely found in its native state. Indeed, it is rarely found at all. The first significant discovery of platinum in the world was in the Pacific lowlands of Colombia, where it appears alongside gold dust in many river basins. While its density and resistance to oxidation make it similar to gold, it is far harder to manipulate. The name platinum comes from the Spanish *platina*, or “silver-like,” and only with the advent of modern chemistry in the 18th century was it identified as an element, hailed in the scientific world around 1750 as the “eighth metal.” Attempts to smelt and work Colombian platinum, which was freely supplied to scientists by the Spanish Crown, were mostly unsuccessful until just before 1800.

Amazingly, pre-Columbian metalworkers living along the Pacific shore of northwest South America developed techniques for working with platinum using only charcoal pits and blowpipes some 2,000 years ago or earlier. Workshop evidence and artifacts from the La Tolita-Tumaco culture of the Ecuador-Colombia border region have shown that locally mined platinum was combined with small amounts of gold and welded into workable ingots. These were beaten and burnished with hard stones into plates, nose rings, and earplugs, among other items. Platinum artifacts appear not to have been widely traded, and the techniques for making them were lost with the decline of the La Tolita-Tumaco chiefdoms by ca. 350 C.E.

### PRECIOUS STONES

While jadelike nephrite was quarried from shallow outcrops in Guatemala in ancient times, what would today be regarded as mining of precious stones was limited to Colombian emeralds. Emeralds, a species of beryl, were found on the eastern and western slopes of the Eastern Cordillera, just north of BOGOTÁ. The stones were closely associated with chiefly power among the ruling MUISCA of the region, and at the time of Spanish invasion in the late 1530s, large-scale emerald mines were worked in the region now known as Chivor. Under the

control of a chief named Somondoco at the time, the emerald mines were said to have been worked by hundreds of people using wooden digging sticks and substantial dams and canals. Hydraulic mining, or hushing, was particularly well suited to the recovery of emeralds, which are neither dense nor easily discovered amid the friable black shales in which they occur. In contrast, the celebrated emeralds, diamonds, topazes, and aquamarines of Brazil went undiscovered until late colonial and even modern times.

### MINING TECHNIQUES

From the 1490s to 1510s, Spanish-run gold mines on the island of Hispaniola appear to have been placer operations of a fairly simple type, with no significant innovations other than iron tools for excavation and processing and bellows furnaces for smelting gold dust into ingots. The famous diggings of the Cibao Mountains in the island’s northern interior were probably as dependent on indigenous and African techniques of canal and irrigation management as they were on Spanish or other European mining practices. By 1505, enslaved African miners, some of whom may have had experience with gold washing and perhaps smelting, were present in the diggings. According to the chronicler Gonzalo Fernández de Oviedo and other eyewitnesses, many of the earliest mineworkers, especially panners, were women. Men handled excavation, canal construction, and furnace operations. This gendered division of LABOR was continued on a lesser scale in Cuba and PUERTO RICO and was also seen in Panama and at locations on the mainland.

According to archaeologists, the Spanish-run copper mines at the western end of Hispaniola near modern-day Cap Haitien entailed the excavation of shallow underground mines and smelting of raw ore rather than medium-grade ore, but even this was not a particularly capital-intensive business. The early SUGAR industry, which incidentally consumed copper kettles and other hardware, probably had much higher entry costs. Copper mining on Hispaniola partly justified the minting of copper *maravedí* coins, the only ones produced in the Americas.

Only when gold miners in what is today Colombia and Ecuador went underground in pursuit of low-grade ores after about 1550 did gold mining become as capital intensive as it was labor intensive. The newly discovered silver mines of Bolivia and Mexico required even more capital and technological innovation to be profitable, conditions that were offset by their richness and the burgeoning world demand for the white metal. Creditors to Charles I included the Welser and Fugger families of Augsburg, both of whom had mining interests in the silver districts of central Europe. Through these and other connections, German milling and refining technologies flowed through Spain to its overseas colonies. German miners and millwrights were present in the Sultepec silver district of Mexico by the 1530s and throughout the Andes by at least 1550.

But it was a Spanish merchant from Seville, Bartolomé de Medina, who arguably had the greatest impact on the future of precious metals mining in the Americas. By 1554, Medina had developed a process to amalgamate silver ores that was workable on a large scale with minimal inputs of fuel and water. By 1556, he had patented his process, which made use of a variety of salts as reagents. Prior to discovery of mercury deposits in highland Peru at Huancavelica in 1564, the necessary quicksilver came from the mines of Almadén, near Ciudad Real in south-central Spain. The Fuggers of Augsburg were major investors in these, mostly convict-staffed mines. Although they had no need of Medina's formula, hard-rock gold miners in Colombia and Ecuador also used mercury amalgamation from the 1550s.

By 1560, mining in the Americas was the most significant producer of both public and private revenue, most of it in silver but still including significant quantities of gold. Precious metals far exceeded sugar, TOBACCO, hides, dyestuffs, and other products in export ledgers (see DYES AND DYEWOOD). Mining towns were the motors of the colonial ECONOMY, giving rise to long-distance commerce and many secondary supply sectors, some of them proto-industrial in character. The search for new deposits, meanwhile, remained the primary factor behind territorial expansion. Expanding mining frontiers in turn spurred the demand for labor, most of it forced. By the 1550s, the dangerous and onerous work of underground mining and mercury-based refining were performed by armies of forced indigenous draft workers and enslaved Africans, although a trend toward specialization and even wage work was evident before 1600. For reasons unknown, locally produced gunpowder was not used in Spanish-American mining until the later 17th century.

Gunpowder production required sulfur and saltpeter, the former mined from volcanic deposits or recovered after burning pyrite, or iron sulfide, and the latter either mined from natural deposits or distilled from uric acid. Ordinary salt, or sodium chloride, was mined extensively from seaside saltpans and inland springs and deposits. Some was used in silver refining. Most colonial sources of salt, such as the massive Colombian deposits of Zipaquirá, near Bogotá, had been exploited since remote pre-Columbian times. Tar pits, such as those at Lake Maracaibo, VENEZUELA, and Ecuador's Santa Elena Peninsula, were also valuable to the colonial economy. Once refined, petroleum tar was used for shipbuilding and to seal WINE jugs. Calcium carbonate in the form of lime was also widely manufactured from quarried stone for building purposes. A vast corpus of mining laws was quickly developed to regulate all aspects of this burgeoning industry.

Colonial miners exploited copper deposits in Cuba, Mexico, and Chile, along with some tin in Bolivia; however, the colonial failure to mine and forge iron from local deposits remains something of a conundrum. In short, it was the power of Seville's merchant guild, or Consulado, which needed as many European export

products as possible to send to the colonies in exchange for ever greater amounts of silver and gold, that killed any hope of an indigenous iron industry. Iron and steel from the Basque Country of northern Spain, Habsburg Bohemia, Sweden, and other parts of Europe would thus continue to flow to the Americas until the end of colonial times. It arrived in the form of tools, weapons, bars, and rods. One variety was known as early as the 16th century as *hierro platino*, or "silvery iron." True platinum, when first discovered, was discarded as useless.

See also COPPER (Vol. III); GOLD (Vols. II, III); HUANCVELICA (Vol. II); MERCURY (Vol. II); MINING (Vols. II, III, IV); SILVER (Vols. II, III); ZACATECAS (Vol. II).

—Kris E. Lane

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**mita** (*mit'a*) The *mita* was a pre-Columbian LABOR system in the Andes, adopted and expanded by the INCAS, in which all able-bodied citizens provided tribute in the form of work to their community. It began at the local, or *AYLLU*, level as a reciprocal form of exchange called *ayni*, in which members of the *ayllu* would lend their labor according to their abilities on a rotating basis. The work shifts were tied to the annual, seasonal cycles of AGRICULTURE and animal husbandry, and the workers were, as the word *mittaruna* signifies, "those that take their turn." The local *mita* helped Andeans achieve self-sufficiency and maintain kinship and ethnic bonds.

As the Inca state expanded, so, too, did the *mita*; eventually, this labor system formed the basis for the payment of most tribute in the empire, from military service to MINING, to transcontinental road building. The Incas became remarkably efficient at organizing work projects, keeping detailed records on their *QUIPUS*, and using the system in their political expansion and the incorporation of rival ethnic groups. Once an unincorporated ethnic group submitted to Inca dominion, that group would provide labor services and receive benefits in the reciprocal exchange of the *mita*. Inca leaders would also assign *mitas* to care for their agricultural lands and mines. Surpluses produced on state lands were stored and redistributed to the people in times of need, thus strengthening

the imperial ideology of reciprocity between Inca and commoner and between the state and local *ayllus*.

*Mita* also provided the structure for forming religious ties between the Andean people and their deities (see RELIGION). Records show that *HUACAS*, local Andean religious shrines, were sustained through *mita* labor. Community members gave a certain amount of work to maintain the shrine and related ceremonial and symbolic elements, such as the *ZEQUES*, or sacred lines that marked the ceremonial landscape in the Andes. In return, Andeans hoped to receive benefits from their deities in the form of bountiful crops and fertile animals. The Inca state religion, appropriating this same model, dedicated agricultural lands to the Sun and the Moon, whose productivity depended on the *mittaruna*. As conquered peoples were incorporated into the Inca Empire, so were their deities, who were serviced through *mita* as part of the process the Incas used to extend broader reciprocal relationships and maintain their hegemony.

After the Spanish CONQUEST, the conquistadores and *encomenderos* took advantage of the elaborate pre-Columbian *mita* system by continuing the practice of mandatory work projects, often in cooperation with local *KURAKAS* and in conjunction with Spanish colonial officials (see ENCOMIENDA). Viceroy Francisco de Toledo is credited with reorganizing the colonial ECONOMY beginning in 1569, when he expanded *reducciones* of Indians into Spanish settlements and centralized the state organization of forced labor (see CONGREGACIÓN). The colonial *mita*, organized through the *repartimiento* system, became a major source of labor for mining, farming, *obrajes*, public works projects, and the construction of buildings and churches. It also contributed to the further degradation of indigenous society by forcing Indian laborers into virtual debt peonage, separating families for long periods of time, and exposing *mita* workers to widespread abuse and dangerous work environments.

See also MITA (Vol. II); REPARTO (Vol. II); TRIBUTE (Vol. II).

—Michael J. Horswell

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**mitmaqkuna** The *mitmaqkuna* (singular, *mitmaq*), or “persons living away from their homeland,” were male heads of household and their families who had been sent away from their native place and group either by their *KURAKA* (ethnic lord) or by the Sapa Inca (see INCAS). The institution was pre-Inca in nature, grounded in the needs of local and regional polities, but taken over and transformed to meet the needs of the Inca state. The *mitmaqkuna* did not provide personal service directly to their *kuraka* or the Inca, and they continued to be counted in

their group of origin. Before the Inca, *mitmaqkuna* were sent away from their core territory to carry out specialized tasks, such as growing COCA, chilies, or COTTON at lower, warmer altitudes; herding at high altitudes above the crop line; or MINING and smelting. They were assigned lands to cultivate for their own support. It appears that only a few families were involved from each group; however, different social divisions or even different ethnic groups might send families to the same special resource zone.

With imperial expansion, the Incas used this institution initially to gain access to LABOR for state fields and private holdings of the Inca and his close relatives. As the state expanded, the *mitmaqkuna* became part of a geopolitical strategy of control. *Mitmaqkuna* from the coast, who knew how to make rafts from gourd floats, were moved to strategic river crossings. New lands for MAIZE or coca production were created through terracing and irrigation by bringing in groups who knew these technologies. The Incas established many new hilltop fortresses, or *pukara*, and brought in *mitmaqkuna* from other areas to man them. In these cases, groups of 50 or 100 households from the same core group could be moved.

In order to secure newly conquered areas and control potentially resistant populations, massive numbers of people were moved as *mitmaqkuna* both out of and into these regions. In some cases, as much as half the original population was moved out of their home area. The *mitmaqkuna* were granted lands for cultivation in their new home, which may have been those held by groups that had been moved out. The *mitmaqkuna*, particularly those from the CUZCO region, were accorded high status, so in addition to giving up lands and population, the Incas adjusted the rank order of the *AYLLUS* in the *hanan/hurin* moieties so that the *mitmaqkuna* had higher rank than the autochthonous groups.

Under the last Incas, thousands of *mitmaqkuna* were used to cultivate maize and coca for state use; this produce went into the state storehouses to maintain the Inca armies and state institutions. These *mitmaqkuna* were drawn from different ethnic polities and cultivated fields or portions of fields assigned by their group of origin, all in a complex system that equalized the area and quality of land assigned to each. The lands given to the *mitmaqkuna* for their subsistence lay outside the Inca fields. The Inca need for TEXTILES, CERAMICS, fine masonry, and articles of stone, wood, and metal became so great that artisans were also moved away from their groups of origin as *mitmaqkuna* too (see ART). Some received lands for cultivation, while others may have been maintained from state storehouses. At this level, the *mitmaqkuna* had become industrial-scale producers in a preindustrial state.

—Patricia J. Netherly

**Mixtecs** The term *Mixtec*, literally meaning “people of the cloud place,” is a NAHUATL appellation for one of the major ethnic groups in MEXICO. They called themselves the



Tay Ñudzahui. The Mixtecs inhabit the modern Mexican states of Oaxaca, Puebla, and Guerrero, which are geographically subdivided into the Alta, Baja, Coast, and Valley regions. Small groups of Mixtec agriculturists settled in this area as far back as 1500 B.C.E., when they diverged from other Otomanguan groups such as the ZAPOTECs. During the Classic period (250–1000 C.E.), the Mixtec population and settlements grew in size and complexity. Many sites were located on defensive hilltops, indicating local conflicts. In the Postclassic period (1000–1519), settlements were relocated to valley floors, while the old sites continued to be used for ceremonial purposes. Prior to the Spanish CONQUEST, several Mixtec towns had fallen under the influence of the TRIPLE ALLIANCE and were required to pay tribute to the Aztec Empire (see AZTECS).

The Mixtec subsistence economy was based largely on the unique *lama-bordo* agricultural terracing technique, which supported the growing population (see AGRICULTURE). By the time of the Spanish conquest, 500,000 people lived in the Mixteca region, making it one of the most densely occupied regions in Mesoamerica. The Mixtecs further developed a system of “vertical integration,” in which agricultural produce and other specialized goods were exchanged between diverse ecological zones, and periodically congregated in large markets between major towns.

At the head of the Mixtec social structure were the ruling elite and hereditary nobility who resided in central towns, while the majority of commoners lived in the surrounding subject villages. The small kingdoms thus formed were interconnected through endogamous marital alliances among the royal lineages. The Mixtecs also created a network of political and economic ties that extended far beyond the Mixteca. In the late 11th century, the Mixtec lord Eight Deer forged a vast kingdom on the Pacific coast. He founded and named his new capital Tututepec, which grew to be one of the largest Mesoamerican cities during the Postclassic period.

Mixtec RELIGION was based on a pantheon of supernatural beings (*ñuhu*), the most important of whom was Dzahui, the Rain God. In fact, the Mixtecs’ autodesignation of Tay Ñudzahui meant “people of the rain place.” Although the Mixtecs did not construct monumental temples like the Zapotecs and the MAYA, they were known for their sacred ARTWORK, executed most notably in GOLD, bone, and stone, such as was found in a tomb of a Mixtec noble in MONTE ALBÁN. One of the most widely distributed polychrome ceramic traditions during the Postclassic, the Mixteca-Puebla style, was produced in part by the Mixtecs (see CERAMICS).

The ancient Mixtecs are probably best known today for their eight surviving pictorial CODICES, produced during and after the Postclassic period. Their writing system is among the most important and influential scripts in Mesoamerica and can be found on vessels, murals, and in early colonial documents such as *lienzos*. The codices are archaeologists’ main source for understanding Mixtec mythology, religion, genealogies, chronology, and geography. They refer to a

place called Apoala from which the primordial couple and kingdom are believed to have emerged. After the Spanish conquest, Mixtec society underwent major changes but retained some of its social structure and ancestral lands, which the Mixtec people continue to occupy.

—Danny Zborover

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**Mixtón War** (1540–1542) The culmination of a decade of violence and disorder that followed NUÑO DE GUZMÁN’s conquest of New Galicia (western MEXICO), the indigenous-Spanish conflict now known as the Mixtón War began in the fall of 1540 in the area north of Guadalajara. The indigenous communities of New Galicia were ethnically diverse, relatively small, autonomous entities on which the Spaniards had attempted to impose their demands for tribute, LABOR, and personal service. Fierce resentment of these demands coupled with the apparent opportunity offered by the departure of Governor FRANCISCO VÁSQUEZ DE CORONADO for the “New Land” (New Mexico) led local people to fortify and supply strongholds, known as *peñoles*. Following scattered attacks on Spanish *encomenderos* and their personnel and property, Spaniards discovered these centers of revolt, which eventually attracted large numbers of adherents (see ENCOMIENDA). The VICEROY, ANTONIO DE MENDOZA, sent aid, but during the first year of the conflict, the Spaniards experienced a series of defeats. PEDRO DE ALVARADO died after a disastrous retreat from Nochistlán. Soon after the Spaniards had fended off a concerted attack on Guadalajara, the viceroy arrived from MEXICO CITY with a large force of Spanish horsemen and infantry, as well as thousands of indigenous troops from Central Mexico. In the fall of 1541, they succeeded in turning the tide of the war. The viceroy’s forces overwhelmed the *peñoles*, and hostilities ended in 1542. Thousands of people died or were taken captive and enslaved, while others fled to the mountains or were relocated, indelibly altering the ethnic map of New Galicia.

—Ida Altman

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**Moche** The Moche people occupied the northern coast of modern-day PERU from approximately 50 to 800 C.E. Centered on the Moche river valley, their culture expanded north and south over the centuries in a loose affiliation of polities. The Moche elite oversaw



An in situ reconstruction of the lavish tomb of the lord of Sipán. He was buried with a large array of luxury items, such as jewelry and headdresses, which reflected his political and religious importance in Moche society. (Courtesy of Sarahh E. M. Scher)

the building of large adobe-brick structures, such as the Pyramids of the Moon and the Sun (see ARCHITECTURE). Some of these structures hosted elaborate ceremonies that included HUMAN SACRIFICE intended to ensure agricultural success in the difficult, mostly desert coastal environment (see AGRICULTURE). The Moche were prolific craftspeople and artists, excelling especially in CERAMICS and metalwork (see ART). Their ceramic vessels are highly naturalistic and depict many aspects of Moche life, including animals, plants, people, and supernatural beings in both two and three dimensions. Some vessels portray individual men from young adulthood to old age. Moche metalworkers created elaborate items from GOLD and SILVER alloys. Many of these metal pieces were part of the ritual costume worn by the elite during religious ceremonies (see RELIGION). Ear and nose ornaments, necklaces, and elaborate headdresses have been found in Moche graves, along with large caches of ceramic vessels. The most famous of these graves were excavated at Sipán, in the Lambayeque river valley.

The Moche political structure seems to have been in crisis by the 700s, and by 800, it appears that the culture had collapsed. The causes for this are subject to debate but include the possibility that the El Niño weather event caused such massive flooding that irrigation canals were destroyed. Without an irrigation system, and along with the other destruction caused by the flooding, the Moche people would have been unable to produce adequate food. It is speculated that this led to the breakdown of Moche political power, and the people broke into smaller, more sustainable groups, in which they remained until the advent of the Lambayeque culture and CHIMÚ Empire several centuries later.

—Sarah E. M. Scher

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**Moctezuma** See MONTEZUMA.

**monarchs of Portugal** Portugal's second ruling dynasty, the House of Avis, governed the kingdom of Portugal from 1385 to 1580. During this period, the interests and ambitions of the Crown were intertwined with the early history of the Portuguese Empire. The history of the Avis dynasty and its role in Portuguese expansion is distinct from what was seen in Spain. Unlike

the Kingdoms of Castile and Aragon, which were not effectively united under a single head until the early 16th century, Portugal—a single kingdom—had established its borders nearly 250 years earlier as part of its own Christian reconquest (to remove the Moors from Iberia). Together with other factors, including the increasingly commercial role of Lisbon and the concomitant growth of a Portuguese merchant class, the political stability of the House of Avis created an ideal environment for the pursuit of Portugal's overseas ambitions in the early 15th century. Accordingly, although the voyages of CHRISTOPHER COLUMBUS and Vasco da Gama were separated by only a few years, the origin of Portugal's Atlantic empire began nearly a century before, with the invasion of Ceuta (near modern-day Morocco) in 1415.

Today, scholars often cite religious, economic, and political motives to explain Portugal's conquest of Ceuta. But, the ultimate decision by Portugal's first Avis monarch was also personal in nature, being in no small part due to the influence of his third son Henrique, who looked to Africa for personal glory, riches, and knowledge. Known more commonly today in English as Prince Henry the Navigator (1394–1460), he went on to become a patron of subsequent Portuguese voyages and discoveries. He encouraged the development of the caravel, the first ship that was reliable on the high seas; he also fostered the creation of navigational technology and detailed MAPS of Africa and the Atlantic. Under Henry's patronage, the Portuguese went on to establish factories, or trading posts, along the coasts of western Africa (see TRADE). They also discovered and colonized various islands in the Atlantic, including Madeira, the Azores, and the Cape Verdes. These early discoveries, during the early to mid-15th century, established patterns of settlement that the Portuguese would later use in BRAZIL, including fortified trading posts, the establishment of SUGAR plantations, and the use of African SLAVERY.

Although the Portuguese Empire initially grew on account of the patronage of its monarchs, country and Crown also suffered important losses. Indeed, the end of the Avis dynasty is traced in large part to the decision of King Sebastian to invade northern Africa once again. Fighting at Alcácer-Quibir (in northwest Morocco) in 1578, Sebastian's forces were decisively defeated, and he himself was killed (along with nearly all of Portugal's nobility). A relatively young monarch without heirs, Sebastian's death set off a dynastic crisis that was not resolved until 1581, when Philip II, a Spanish Habsburg, took possession of the Portuguese throne (see HABSBURGS).

See also AVIS DYNASTY (Vol. II); JOHN VI (Vol. II); PEDRO I (Vol. III); PEDRO II (Vol. III).

—Erik Myrup

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**monarchs of Spain** The marriage of Isabella of Castile (b. 1451–d. 1504) to Ferdinand of Aragon (b. 1452–d. 1516) in October 1469 laid the foundation for the union of Spain’s Christian kingdoms. Their conquest of the kingdom of Granada in the southern part of the Iberian Peninsula in 1492 eliminated the final remnants of Muslim political power and marked the end of the Reconquista (see MORISCO). In the same year, Isabella’s backing of CHRISTOPHER COLUMBUS resulted in the discovery of the New World. The two monarchs ruled their kingdoms separately, but when Ferdinand died in 1516 (Isabella had died in 1504), their grandson Charles I inherited the combined thrones of Aragon and Castile. He was also heir, through his father, to the Habsburg territories of central Europe, and ruled the Holy Roman Empire as Charles V (see HABSBERGS). All this made the Spanish monarchy 16th-century Europe’s foremost power.

Mid-15th century Castile was a kingdom torn by struggles between the nobility and the reigning monarch, Henry IV, Isabella’s half brother. The aristocratic faction accused Henry of, among other things, Muslim sympathies, homosexuality, and sexual impotence. They demanded that he name his younger half brother Alfonso his heir, and when the boy died, they forced Henry to accept Isabella as his successor. She had already married Ferdinand of Aragon against Henry’s wishes, in part to protect her interests in Castile but also because of what seems to have been a genuine romantic attraction between the two. When Henry died in 1474, the Castilian nobles prevented his daughter Juana from taking the throne and gave it instead to Isabella. Ferdinand succeeded to Aragon’s crown in 1479. Although the couple ruled Christian Spain, their individual kingdoms retained their legal and fiscal traditions, with no institutional or legal unification.

The “Catholic Kings,” as they became known, laid the foundations for Spain’s Golden Age. Through military might and social and economic concessions, they managed to win the nobility’s political support. They established the Inquisition in 1480 to deal with the problem of *conversos* (Jewish converts to Christianity) who still practiced Judaism, although the tribunal became a tool of tremendous abuse and persecution. Convinced that the *conversos* would never become true Christians while living with Jews, Ferdinand and Isabella ordered the expulsion of all Jews in 1492. Ferdinand intervened diplomatically and militarily in Italy, a traditional Aragonese sphere of interest, but it was Isabella’s funding of Columbus’s first voyage that forced Castile, and thus Spain, to look westward. Pope Alexander VI awarded the discovered lands to Castile, along with the responsibility of converting their inhabitants to Christianity, a task that the devout Isabella took seriously (see RELIGION). Nevertheless, despite the long-term importance of the American discoveries, the Catholic Kings undoubtedly considered the conquest of Granada, the last Muslim stronghold in the peninsula, as their greatest achievement. It brought an end to the reconquest and almost eight centuries of Muslim political power in Iberia. As a sign of the

importance they accorded Granada, they chose to be buried there in the royal chapel of the city’s cathedral.

Despite their other achievements, Ferdinand and Isabella were less successful in providing an heir to their kingdoms. As it turned out, their daughter Juana, married to the Habsburg Philip I of Burgundy (Philip the Fair), inherited not only the throne but also a strain of insanity from Isabella’s Portuguese mother. With Philip’s death in 1506 and Juana’s madness (she is known to history as Juana la Loca, or Joanna the Mad), Ferdinand governed Castile as regent until his death in 1516. A critical influence during that period and earlier was Francisco Ximénez de Cisneros, religious reformer, clerical leader, and Renaissance scholar. Cardinal Ximénez had been Isabella’s confessor and adviser, and after her death, he continued to serve Ferdinand.

Following Ferdinand’s death, Cardinal Ximénez governed until the teenager Charles (b. 1500–d. 1558) arrived in 1517 to rule his grandparents’ kingdoms. In his person, Spain was united, although he did not sweep away the individual kingdoms’ laws and fiscal privileges but agreed to rule each as a separate jurisdiction. Elected Holy Roman emperor in 1519, Charles was irresistibly drawn to protect Habsburg interests in central Europe. The Protestant Reformation began at almost the same time as Charles became emperor. He confronted Martin Luther at Worms but the German cleric refused to back down. In part from religious commitment and in part to assert their independence of Habsburg authority, many German princes rebelled and formed the Schmalkaldic League, which fought Charles to a standstill. Charles finally recognized that he was unable to defeat the German Protestants and agreed to the Peace of Augsburg (1555), which stipulated that each ruler could determine the religion of his people. Meanwhile, he continued the traditional Spanish and Habsburg rivalry with France, particularly over control of northern Italy. There, Charles was more successful. He defeated and captured Francis I at the Battle of Pavia (1525). He also married his son and heir, Philip, to Mary Tudor in an attempt to win English support for the anti-French struggle. France’s own Wars of Religion, however, so convulsed that monarchy that it did not constitute a major threat to Spanish imperialism for the remainder of the century.

Still, the Habsburg territories that conferred such grandeur on Charles and Spain proved a tremendous burden. He squandered Spanish resources on futile attempts to roll back the tide of Protestantism, to shore up his territories in the Low Countries and Germany, and to thwart the expansion of the Turks. Nonetheless, his domains stretched around the globe, and with the CONQUEST OF MEXICO and PERU, significant quantities of American GOLD and SILVER found their way into the royal treasury; unfortunately, Charles’s European wars left him bankrupt by the time he abdicated and turned Spain over to his son, Philip II, who ruled from 1556 to 1598. Both father and son were energetic, intelligent rulers. They were the most powerful monarchs of their time, largely due to Spanish

resources, but their pro-Habsburg and anti-Protestant policies proved in the long run detrimental to Spain.

See also CHARLES I (Vol. II); CHARLES II (Vol. II); CHARLES III (Vol. II); CHARLES IV (Vol. II); FERDINAND VI (Vol. II); FERDINAND VII (Vol. II); HABSBURGS (Vol. II); PATRONATO REAL (Vol. II); PHILIP II (Vol. II); PHILIP III (Vol. II); PHILIP IV (Vol. II); PHILIP V (Vol. II).

—Kendall Brown

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**Monte Albán** Among the most important archaeological sites in MEXICO, Monte Albán rises about 1,000 feet (305 m) above the Valley of Oaxaca. Founded in 500 B.C.E. by a confederacy of Zapotec chiefdoms on an uninhabited hilltop, the site slowly grew in size and population to become one of the first urban centers of Mesoamerica, covering an area of about eight square miles (21 km<sup>2</sup>) (see ZAPOTECs). Its strategic central location allowed Monte Albán's rulers to coordinate local

TRADE and exchange and thus establish a new political order in the valley and beyond. Between 500 and 100 B.C.E., members of the Zapotec elite at Monte Albán oversaw the building of monumental temples, palaces, patios, and public buildings around a main plaza carved out of the artificially leveled hilltop. The lower classes lived on hundreds of residential terraces surrounding the site's core, mostly in single-family dwellings.

Apart from its remarkable location, Monte Albán is exceptional for the discovery of more than 300 carved stone slabs, each depicting a slain war captive (originally misidentified and labeled as Danzantes, or “dancers,” due to their grotesque positions). Many of the slabs include glyphs in Zapotec dating to about the first century C.E., making them among the earliest examples of writing in the Americas. Later (100 B.C.E.–350 C.E.), other stone slabs were carved with the places and rulers conquered by the expanding state of Monte Albán. During the same period, an arrow-shaped structure was constructed in the main plaza; it was carefully oriented to important astronomical events. From about 200 to 350 C.E., Monte Albán's rulers started to interact with the powerful elite of TEOTIHUACÁN in the Valley of Mexico. By 600, Monte Albán had reached its peak population of about 25,000 inhabitants.

For reasons not entirely understood, major construction activity stopped around 800, and the population left for other cities in the valley. During the Postclassic



The hilltop Zapotec capital of Monte Albán, view from the South Platform toward the main plaza and the North Platform. The arrow-shaped Building J is seen in the foreground. (Courtesy of Danny Zborover)

period (800–1521), the now-deserted urban core continued to be used sporadically as a ceremonial center and a fortress and as burial grounds for numerous groups. In 1932, the Mexican archaeologist Alfonso Caso discovered a spectacular burial chamber, which contained GOLD and other precious artifacts left by the MIXTECS.

—Danny Zborover

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Joyce Marcus and Kent Flannery. *Zapotec Civilization: How Urban Society Evolved in Mexico's Oaxaca Valley* (London: Thames & Hudson, 1996).

**Montejo, Francisco de** (b. ca. 1479–d. 1553) *Spanish conquistador and adelantado in Yucatán, Tabasco, and Honduras* A native of the town of Salamanca, Spain, Francisco de Montejo was born ca. 1479 to Juan de Montejo and Catalina Álvarez de Tejeda, apparently members of the local lesser nobility. Before he left for the Indies, Montejo had an illegitimate son, baptized Francisco, with a prominent woman from Seville named Ana de León.

Montejo made his way to the West Indies and quickly came to serve as a member of several major Spanish CONQUEST expeditions. Arriving in CUBA early in 1514, he participated in the organization of an expedition under PEDRO ARIAS DE ÁVILA to conquer the region known as Darién on the isthmus of PANAMA. Based on his experience in logistics and his organizational skills, the Spanish explorer JUAN DE GRIJALVA similarly selected him to serve as one of the captains in his 1518 expedition to explore the newly found coasts of mainland MEXICO. Montejo went on to serve again as one of the captains of the 1519 expedition led by HERNANDO CORTÉS.

In one of his most important missions, Cortés sent Montejo, along with Alonso Portocarrero, to escort the king's royal fifth (*quinto real*) of treasure from Mexico back to Spain. From his arrival in Spain until late in 1522, Montejo served Cortés's interests at the Spanish Court. In reward for his services, Cortés granted Montejo an ENCOMIENDA in the city-state of Azcapotzalco, to the north of the new capital of MEXICO CITY. Enjoying his prosperity for only a few years, Montejo was again selected by Cortés and the municipal council of the new colony of New Spain in 1524 to serve as their representative at Court.

By 1526, a wealthy man in his own right, Montejo sought to win royal favor to launch his own expedition of conquest. On November 19, 1526, he presented his initial plans to conquer and colonize the Yucatán Peninsula to King Charles I and his councilors. The king and the COUNCIL OF THE INDIES quickly accepted his plan, and on December 8, 1526, Montejo received the royal charter, or *capitulación*, giving him the right to begin the conquest and colonization of Yucatán. As a reward for his services, Montejo was awarded the title of *adelantado* of Yucatán, to be held by himself and his heirs in perpetuity; he was

also given the offices of governor and captain general of the province for the term of his natural life. During this same time, Montejo met and married the wealthy widow, Beatriz de Herrera from Salamanca, who gave Montejo much of the funding required to outfit his expedition.

Although his first expedition to Yucatán (1527–29) was a failure, Montejo did not give up on his plans. Instead, in order to create a supply line for his subsequent expeditions of conquest to the region, he conquered and pacified the regions of Tabasco, HONDURAS, and Chiapas. Although only moderately successful in these conquests, Montejo did come to have effective political control over most of these regions by 1539.

Although Montejo never again personally led military expeditions of conquest in Yucatán, he entrusted the leadership of new expeditions to his son, Francisco “el Mozo” (the Younger), and his nephew, also named Francisco de Montejo. Together, son and nephew triumphed in the final conquest of Yucatán with the creation of the first permanent Spanish capital at the MAYA site of Tihó, which the Spaniards named *Mérida* on January 6, 1542.

The elder Montejo returned to govern the province of Yucatán from 1546 to 1548, but his authoritarian rule was resented by many of the major conquistadores, who felt Montejo kept too many of the spoils for himself. Fearing that his vassal was growing too strong, the Spanish king listened to the criticisms of the conquistadores and colonists in Yucatán and removed Montejo from government. In 1550, an official *residencia* trial of his conduct in office was held, and the negative charges and subsequent removal of many of his powers and privileges forced Montejo to return to the Spanish Court to defend himself in a countersuit with the Council of the Indies. Montejo did not live to see the end of his case. Before the suit was concluded, the *adelantado* died of a fever in Salamanca on September 8, 1553.

—John F. Chuchiak IV

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**Montesinos, Antonio de** (d. ca. 1530) *Dominican friar and advocate for the indigenous* Antonio de Montesinos was a Dominican friar who won lasting fame as the first advocate of human rights for the indigenous peoples of the Caribbean. Almost nothing is known about his early life, but he was one of the first Dominicans to arrive in the New World after CHRISTOPHER COLUMBUS first discovered it (see RELIGIOUS ORDERS). Appalled by the Spaniards' abuse of the islanders, in 1511, Montesinos and some of his fellow Dominicans decided to chastise their countrymen. The Dominicans chose Montesinos, who was known for his stern and energetic sermons, to give the sermon on the Sunday before Christmas in 1511; in it, Montesinos publicly criticized the Spaniards' treatment

of the Amerindians. Another Dominican, BARTOLOMÉ DE LAS CASAS, preserved the content of the sermon, for which Montesinos took as his text, “I am a voice crying in the wilderness” of this island. He asserted the basic humanity of the NATIVE AMERICANS and denounced Spanish cruelties. He told his listeners, who included the islands’ elite and Governor Diego Columbus, that they had no more hope of salvation than did the infidel Muslims.

His sermon outraged those in attendance, who insisted that he retract his accusations. Nevertheless, in a second sermon delivered the following Sunday, the Dominican laid out further arguments in support of his original position. Montesinos’s opponents persuaded King Ferdinand in 1512 to order the friar to keep silent about their treatment of the Indians. Montesinos returned to Spain and advocated his cause at Court. He then returned to the New World, evangelizing for some time in PUERTO RICO and then in VENEZUELA, where he reportedly died around 1530.

Montesinos apparently had a hand in the conversion of Las Casas, arguably the greatest Spanish exponent of indigenous rights. Las Casas gave up his ENCOMIENDA in part because of Montesinos’s urging.

See also DOMINICANS (Vol. II).

—Kendall Brown

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**Monte Verde** Monte Verde is an archaeological site located along the low mountains of the sub-Antarctic region of CHILE, about 500 miles (805 km) south of Santiago. Discovered by a veterinary student in 1975, early research suggested the site was more than 14,000 years old. This claim stirred tremendous controversy in the 1970s and 1980s. If indeed the site was that old, it would predate—by a millennium—what was widely believed to be the earliest known site of human existence in the Americas, at Clovis, New Mexico (see CLOVIS CULTURE). Since the 1990s, scientists have moved toward consensus that Monte Verde is, in fact, the earliest human settlement in the Americas. As a consequence, a new model of human MIGRATION from Siberia along the western coasts of the Americas has been developed.

Researchers believe that Monte Verde was occupied by a small number of people, perhaps 20 to 30, between 12,800 and 11,800 B.C.E. The settlers erected a 20-foot-long (6 m) tentlike structure, with two hearths, that was probably for communal use. Remnants of stone tools were found, as well as series of mastodon bones, a human footprint, fossilized dung, and nearly four dozen different plant, seed, or berry remains were found at the site. Many of the items consumed at Monte Verde originated from well over 100 miles (161 km) away, suggesting that Monte Verde’s residents had established a TRADE network. This

challenges the widely held belief that the first settlers in the region were nomadic foragers. The preservation of the site’s artifacts is credited to a turf blanket created by a swamp that enveloped the area after its occupancy. In 2008, new radiocarbon tests performed on algae and seaweed found on the upper layer of the site, known as Monte Verde II, reconfirmed the site’s age.

—Sean H. Goforth

**Montezuma (Moctezuma Xocoyotzin, Montezuma II)** (b. ca. 1466–d. 1520) ruler of Aztec Empire at the time of the arrival of the Cortés expedition This ill-fated figure was born ca. 1466 and died in 1520, apparently stoned to death by his own people. He is enshrined in the popular imagination as the cowardly loser to HERNANDO CORTÉS. His name carries such a heavy charge of defeat that the U.S. Marine Corps celebrates its martial triumphs by opening its hymn with the words “From the halls of Montezuma. . . .”

Montezuma’s early years did not presage such an unfortunate destiny. Nahuatl-language accounts usually list him as either *Moteucōma Xocoyotl*, or more formally with the reverential suffix *-tzin*, as in *Moteucōmatzīn Xocoyotzīn* (in MEXICO, his name is rendered *Moctezuma Xocoyotzin*). The second element of his name means “Younger,” in reference to the earlier Montezuma (Moteucōma Huehuetzin), who ruled 1440–69. Both headed the ALTEPETL of TENOCHTILÁN, capital of the Mexicas (AZTECS). Montezuma I allied with the nearby cities of Texcoco and Tlacopan to successfully extend the Aztec Empire’s reach east and south (see TRIPLE ALLIANCE). Montezuma II ruled from 1502 to 1520. Before Cortés’s arrival, Montezuma II was feared by friend and foe alike; indeed, the name he shared with his predecessor speaks to his initial fearsome reputation: “He frowns angrily in a lordly manner.”

Montezuma II ruled over the Aztec Empire for almost two decades. During that time, he struggled to consolidate the empire. The number of military campaigns under his rule was unprecedented, even if the empire did not grow significantly. Montezuma also continued the long-standing efforts to conquer TLAXCALA, which, like his predecessors, he did not succeed in. Had the Spaniards not arrived in 1519, it is likely that Montezuma would have continued with his imperial ambitions. He had implemented a series of reforms designed to increase his own power and that of the Mexica nobility. Nevertheless, Cortés’s arrival initiated the fall of the empire, as the Aztecs’ enemies allied with the newcomers to topple it.

It is curious that Montezuma himself is often blamed for the empire’s collapse. The most-cited evidence of his submissiveness is his supposedly fawning speech to Cortés as the Spanish conquistadores entered Tenochtitlán on November 8, 1519. In reality, he gave the Nahuatl equivalent of the Spanish *mi casa es su casa* (“my house is your house”), a polite phrase hardly to be taken literally. The notion that Montezuma was responsible for the Spanish

CONQUEST began early, with many on the losing side finding it convenient to make him a scapegoat.

The conquistadores' successes have more plausible explanations. The help of numerous indigenous allies, such as the Tlaxcalans, was critical. European military technology such as steel weapons, their horses, and unfamiliar military tactics were also important factors. In addition, DISEASES such as smallpox wiped out and demoralized many indigenous people both during and after the conquest.

—Barry D. Sell

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**Morisco** In early modern Spain, the term *Morisco* was applied to Christian converts from Islam. While some Iberian Muslims had converted voluntarily during the medieval period, many were forcibly baptized at the beginning of the 16th century. Following the 1492 conquest of the Kingdom of Granada by the Catholic monarchs Ferdinand and Isabella, the Muslim population was protected under surrender treaties. Nevertheless, by 1499, increasing persecution and pressure to convert under the cardinal Francisco Ximénez de Cisneros led to the first Alpujarras uprising, as the Granadan Muslims protested the breach of the treaties' terms. Once the uprising had been suppressed, the Granadan Muslims were forced to choose between baptism and exile from Spain. Upon accepting baptism, they fell under inquisitorial scrutiny.

Tensions mounted on the peninsula as Spanish authorities became increasingly concerned that the Moriscos were neither good Christians nor loyal subjects. In 1526, Charles I granted the Granadan Moriscos a three-year "period of grace" during which they were to receive instruction in Catholicism but not be subject to the Inquisition. Additionally, the Moriscos faced prohibitions on wearing traditional dress, speaking in the Arabic dialect, and giving their children Muslim names. By the mid-16th century, inquisitorial persecution of Moriscos increased, as ecclesiastical authorities feared that they continued to practice Islam clandestinely.

Geographic differences within Spain meant that the label *Morisco* could refer to peoples holding beliefs that ranged from Islam to Catholicism. In Aragon and Valencia, the Moriscos' proximity to Muslims in the Mediterranean and the presence of Muslim religious leaders (*alfaquíes*) suggests that they were able to maintain some of their practices. In Castile, many Moriscos had been Christians for several generations, and some even claimed "old Christian" status in the courts. The Granadan noble families of Morisco descent similarly claimed to have converted before the forced baptisms and to have partici-

pated in the Christian reconquest (Reconquista). Members of these elite families were not subject to the legislative restrictions on the majority of Granadan Moriscos and thus could bear arms, join military orders, and acquire prestigious offices. They were also exempt from restrictions on travel to Spanish America. Nevertheless, after the second Alpujarras uprising in 1568–72, the expulsion of the Granadan Moriscos, and their forced resettlement across Spain, Moriscos on the peninsula were labeled as rebels by jurists who favored their expulsion. In 1609–14, the Crown expelled the Moriscos from Spain.

Due to concerns that they would influence indigenous religiosity, royal decrees prohibited Moriscos from immigrating to Spanish America. Nonetheless, some obtained false licenses and traveled there. Morisco and North African Muslim slaves were also prohibited from traveling to Spanish America, yet royal decrees suggest that they were taken there as well, some of them serving on the Spanish galleys that skirted the Caribbean coast (see SLAVERY). In the Americas, Moriscos faced accusations similar to those they had encountered in Spain. Inquisitors tried Moriscos suspected of praying in Arabic, invoking Muhammad, and behaving inappropriately during Mass. Free Morisco immigrants held a range of occupations, such as artisans, medical practitioners, and laborers. Some, who achieved high status following their exploits during the conquest, became *encomenderos* (see ENCOMIENDA). By the late 16th century, Morisco descent was invoked in disputes over offices and *encomiendas*. If proven to be a Morisco, an individual could lose his or her social standing and possessions and be deported to Spain.

See also *CONVERSOS* (Vol. II).

—Karoline P. Cook

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**Motolinía** See BENAVENTE, TORIBIO DE.

**Muisca** The Muisca (Chibcha) Indians inhabited the fertile mountain plains of COLOMBIA's eastern highlands. Muisca territory corresponded roughly to the modern Colombian departments of Cundinamarca and Boyacá and covered a territory of more than 1,000 square miles (2,590 km<sup>2</sup>). When the first Spanish conquistadores reached Muisca territory in 1537, the region supported a population that exceeded 500,000.

Despite the fact that the eastern highlands were settled as early as 12,500 B.C.E., the earliest signs of Muisca culture did not appear until thousands of years later. The Early Muisca period is quite recent, dating to 800–1200 C.E.; these early Muisca were perhaps Chibcha-speaking migrants



from northern Colombia or VENEZUELA. The Early Muisca period saw the emergence of ceremonial centers, a dramatic growth in interregional TRADE, an intensification in WARFARE, and the introduction of GOLD work and mummification.

The Late Muisca period (1200–1537) witnessed further population growth, an increase in long distance trade, and a proliferation of different forms of pottery (see CERAMICS). It was also characterized by a dramatic growth in village size, as well as the emergence of centers of political power.

According to the 17th-century Spanish chronicler Fray Pedro Simón, the term *Muisca* derived from the Chibcha word *muexca*, meaning “man” or “person” (see CHRONICLERS). However, it should be noted that the term itself is a European imposition. The Indians never referred to themselves as “Muisca,” but rather by the name of the various chiefdoms in which they resided. Some scholars have suggested that when the first Spanish expedition arrived in 1537, Muisca territory was divided into two separate kingdoms, one ruled by the Zipas of BOGOTÁ and the other governed by the Zaques of Tunja (see CONQUEST). However, more recent studies suggest that Muisca territory was far more decentralized.

In addition to staple crops such as MAIZE and POTATO, the Muisca cultivated a variety of tubers, beans, and chilies (see FOOD). They also grew several types of nuts and an impressive variety of fruits and vegetables. Highland lakes and rivers were stocked with an abundance of fish, and the Muisca exploited a series of rich salt beds. Moreover, they cultivated COTTON, COCA, and TOBACCO; collected honey, wax, and turpentine; and used *cabuya* to make rope and cords. All of these goods circulated through a well-developed system of regional markets, through which products from different ecological zones circulated within Muisca territory and throughout much of Colombia.

The Spanish conquest ushered in a series of important and often devastating changes for the Muisca population. While the conquest itself followed a much less violent path than that of the conquests of MEXICO or PERU, the long-term effects on the Muisca proved disastrous. Within a century, the combined effects of European DISEASE, miscegenation, exploitation, and outward MIGRATION saw the Muisca population fall by as much as 80 percent.

—J. Michael Francis

***mulato* (mulatto)** Beginning in the 15th century, Portuguese traders began to transport slaves from sub-Saharan Africa to Europe (see SLAVERY). In Iberia, the offspring of these African slaves and Europeans were called *mulatos*. This term derived from the word *mula*, or “mule,” the cross between a horse and a donkey. In Iberia, the term *loro*, referencing the color of dried laurel leaves, was also used to denote an individual of mixed African-European ancestry. Once transported to the Americas, the term *mulato* came to include the children of Africans and NATIVE AMERICANS. Occasionally, royal

and other official documentation used the term *zambo* or *zambaigo* to describe an Afro-indigenous person; however, this term never entered popular usage.

Most 16th-century observers, including VICEROYS and CHRONICLERS, noted that the majority of *mulatos* born in the Americas were Afro-indigenous, not Afro-European. The growth of these *mulato* populations occurred despite consistent attempts to prevent African-native interaction. Generally, the children of *mulatos* inherited the label *mulato*, even if they had a non-*mulato* parent. This tendency broadened the label further, and by the mid-16th century, this term was used to describe anyone of mixed ancestry who was believed to have some African forebears.

See also *MULATO* (Vol. II); *Zambo* (Vol. II).

—Robert Schwaller

## music

### THE AMERICAS BEFORE 1492

The indigenous peoples of South America, the Caribbean, and Mesoamerica possessed rich musical cultures. Music was integrated into their daily lives and their understanding of the world. Singing or chanting in a raised voice was associated with the creation of the world in stories such as the Mayan POPOL VUH.

The archaeological record includes a large array of indigenous musical instruments and confirms that their use was widespread. Bone, cane, and clay flutes, some more than 3,000 years old, have been found over a large area: *Ocarinas* were most common in Central and South America; *antaras*, or panpipes, were a key feature of the music of the Paracas of PERU. Whistles were used to produce several different pitches and were often made of clay and shaped, then baked, into human or animal forms. The shape of the whistle—whether lizard, frog, turtle, bird, snake, coyote, or human—affected its volume and pitch. Clay flutes had between two and five holes, and reed flutes were also common. The *quena*, an end-blown flute of reed or bone, was widely used in the music of the MOCHE and then INCAS.

Some aerophones had interlocking parts and produced several pitches, demonstrating an advanced knowledge of acoustics. Trumpets were often associated with creation, rain, and the sea. Clay and conch shell trumpets were used to call groups together and in rituals directed to the gods and goddesses. Shell trumpets sometimes had mouthpieces made of clay or bone. Percussion instruments were abundant. These were made of items from the natural environment. Dried gourds containing seeds and/or pebbles served as rattles, and animal bones and sticks as rasps. Dancers often wore bracelets or ankle adornments made of nutshells, metal disks, or dried fruits, which jingled as they moved. Drums of different varieties were used for communication and ceremonial dances. The Aztec *teponaztli*, a horizontal, wooden slit drum played with sticks or animal bones, produced two tones and was elaborately carved (see AZTECS). The *huebuetl*, a vertical drum of varying sizes, was

made of a hollowed-out log, over which animal skin was stretched. The Aztecs considered the *teponaztli* and *buebueltl* to be sacred and thus used them in important ceremonies. The MAYA crafted a *timbal*, a small, U-shaped clay drum to accompany ceremonies. Stringed instruments were rare, although a few groups possessed a musical bow.

Music served many functions in pre-Columbian communities. It was intimately involved in communication with deities. Singers, dancers, and musicians made supplications to the gods for rain, plentiful harvests, and victory in WARFARE. In central Mesoamerica, drumming and singing were part of ceremonies for ritual sacrifices. These performances helped solidify Mexica (Aztec) control over the peoples that made up the Aztec Empire. Song and ceremony were also used to combat illness. Shamans intoned music as part of their rituals to heal the sick (see MEDICINE). Music also served important civic functions in indigenous life. An excavated Maya mural at Bonampak shows a procession of musicians playing rattles, tortoise shells, and drums. Two men playing wooden trumpets also appear in this mural, which depicts a ceremony honoring the ascension of a youth to power. The accession of a new ruler, victory over rival groups, and success in hunting were all celebrated in song. Daily tasks, such as grinding MAIZE, tending to children, and preparing meals were also accompanied by song. BARTOLOMÉ DE LAS CASAS described large groups of TAINO WOMEN singing as they shredded MANIOC for cassava bread.

It is difficult to overestimate the importance of song and dance in the ritual lives of indigenous groups. CODICES from Mesoamerican societies contain lyrics, depictions of dances, and images of musicians. Epic songs recounted the history of military conquests and important leaders and events. Singing was involved in Incan ancestor worship, and songs, such as the *cantares históricos*, preserved the memory of a ruler's deeds and exploits. Early Spanish observers were often stunned by the number of musicians and the length of ritual performances. According to CHRONICLERS, an elaborate Inca ceremony commemorating the maize harvest in 1535 involved a double choir intoning songs in harmony from sunrise until sunset for more than a week.

Dances were performed before and after military expeditions, at planting and harvesting times, and to honor individual gods and goddesses and political leaders. Much of this music was made in groups and involved rhythmic stamping accompanied by rattles, rasps, aerophones, and unison song. Another key feature of precontact indigenous music was the wide variations in regional and ethnic forms of song and dance.

Musicians performed important roles in precontact indigenous societies and were highly esteemed and carefully taught. Aztec musicians were trained in the *calmecac*, or school for noble youth. There, young men learned to play instruments and perform songs that told the history of Aztec military success or honored the gods. Maya musical leaders, or *holpops*, held a prestigious place in their communities. Among the diverse groups of the northern deserts and mountains, musicians were specialists in ritu-

als; they could heal, converse with the deities, and prepare for war or the harvest through song and dance.

### THE EARLY COLONIAL PERIOD TO 1560

As early as CHRISTOPHER COLUMBUS's first voyage to the Caribbean, members of Spanish expeditions gave thanks for safe journeys by chanting antiphons such as the "Salve Regina." Missionaries accompanied conquering forces and chanted mass. Drums, flutes, and handheld harps provided entertainment and military music. Chroniclers of the Spanish expeditions described dances and loud songs performed by indigenous peoples upon their first encounters.

Because of the important place it occupied in both Spanish and indigenous societies, music soon became one of the most important tools in the spiritual conquest of indigenous peoples (see RELIGION). Fray Pedro de Gante, a Flemish Franciscan who arrived in New Spain (Mexico) shortly after the fall of TENOCHTITLÁN, helped establish schools at Texcoco and the Convento de San Francisco, where Nahua boys were taught to read, write, and sing. Motolinía (TORIBIO DE BENAVENTE), among others, wrote enthusiastically about the success of music as an aid in teaching doctrine and attracting NATIVE AMERICANS to the church. Other than schools where music was taught, cathedrals became centers of musical production in early colonial Latin America. The cathedrals at MEXICO CITY and LIMA hired students of prominent composers of the Spanish cathedrals to direct musical programs. Soon, cathedrals in Puebla (Mexico), GUATEMALA City, and BOGOTÁ (COLOMBIA) were also known for their elaborate music.

Indigenous peoples responded positively to the introduction of European-style music. Working as a musician was far more attractive than other forms of LABOR, and in some areas, musicians were exempt from tribute payments. Orchestras and choirs were filled with recent converts; some were able to rise to prominent positions; for example, ATAHUALPA's son Diego Lobato became chapmaster of the Quito cathedral.

Music served political as well as religious purposes. Elaborate ceremonies marked the installation of a new VICEROY, the visits of important officials to rural areas, and events in the lives of the royal families (see FAMILY). After the death of Charles I in 1559, the chapel master at the cathedral in Mexico City orchestrated a massive procession, followed by a performance of newly composed music by a double choir.

Spaniards not only introduced liturgical and civic music but also brought stringed instruments such as the guitar and harp, as well as the bowed stringed instruments of the viol family. Indigenous peoples learned to play these instruments and also became expert craftsmen. Furthermore, musical notation, the heptatonic scale, and European harmonies were spread through convent schools and mission choirs. While the oldest music book printed in the Americas was a chant book printed in Mexico in 1556, much early music spread by ear. Juan de Torquemada wrote that indigenous teachers spread Spanish polyphonic



Both European and indigenous instruments, such as these preserved in the Iglesia de Santo Domingo de Guzmán in Oaxaca, were used in the evangelization of the Americas. (Courtesy of Kristin Dutcher Mann)

*villancicos*, or religious hymns, into even remote settlements. Secular songs introduced by settlers, including romance ballads and sung poetry such as the *décima*, reflected the rich and multiethnic culture of Renaissance Spain. Dances such as the *moros y cristianos*, which re-created the defeat of the Moors in southern Spain, were fused with indigenous dances and themes (see *MORISCO*).

From the first decade of the 16th century, Africans began arriving in the Americas (see *SLAVERY*). Thereafter, African instruments, such as the marimba, and rhythms, tunes, and call-and-response patterns combined with European and indigenous music. In the Caribbean, rhythmic songs accompanied repetitive work tasks such as planting, harvesting, or hauling heavy materials.

A recurring theme in the early musical encounters between Spanish officials, missionaries, and indigenous and African peoples was the attempt to control cultural practices deemed offensive, threatening, or pagan. The First Mexican Provincial Council of 1555 ruled that music could be used for evangelization purposes, but that indigenous songs in the vernacular must reflect Christian doctrine. Dancing was permitted only during daylight hours outside of church buildings, and no instruments other than the organ were suitable for use during litur-

gical services in the churches. Rules such as these, and the fear that new converts would return to indigenous practices, resulted in the destruction of some indigenous instruments and a prohibition on native dances. A second set of restrictions was issued in 1565, indicating that the Spanish church authorities were still concerned with controlling musical content, form, and performances.

In the period after 1560, the struggle to define appropriate music intensified as the church engaged in prolonged attempts to extirpate idolatrous practices. Indigenous groups adjusted their musical practices in order to maintain their cultural identity in the face of colonial pressures. In the larger towns, composers were heavily influenced by the baroque music of Spain, while missionaries continued to rely on music as an important tool of conversion.

See also *MUSIC* (Vols. II, III, IV); *THEATER* (Vol. II).

—Kristin Dutcher Mann

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# N

**Nahuas** See AZTECS.

**Nahuatl** Nahuatl is the language spoken by the Nahuas, including the Mexica (AZTECS). *Nabuatl* was the name designated by its pre-Columbian speakers. Many contemporary Nahuas now use the term *mexicano* for their language, the thrust in this case being “the language of the Mexicans.” In early colonial documents, the word appears most often in such compounds as *nahuatlātōlli* (the Nahuatl language) and *nahuatlato* (interpreter, or expert in Nahuatl). It literally means “clear, intelligible, agreeable sound.” The notion that one’s native tongue is pleasingly comprehensible is often accompanied by the feeling that other tongues are opaque gibberish. Hence, the Nahuatl accounts of the Spanish CONQUEST OF MEXICO contained in the FLORENTINE CODEX include the observation that Spaniards spoke in a “babbling tongue.”

Nahuatl belongs to the Uto-Aztecan family of languages. It covers an area whose northernmost reaches include Ute speakers in Utah and continues through Mexico and as far south and east in Central America to speakers of Pipil in NICARAGUA. For much of this area, Nahuatl was the lingua franca.

By the late 1530s, Nahua scribes began switching from pictographs and ideographs in *ALTEPETL* recordkeeping (see CODICES) to the Roman alphabet. Thousands of pages of alphabetical records are still extant, providing a rich source of information about early Nahuatl and Nahuas.

Nahuatl continues to be a presence in Mesoamerica and beyond. The names of two colonial regions that are now countries are Nahuatl: Mexico (“Place of the Mexica”) and GUATEMALA (from hispanized *Quaubtemallan*, “Place of

the Woodpile”). It has also contributed words to Mexican Spanish that have made their way into English and other languages, such as coyote, tomato, and chocolate. Nahuatl is still spoken by as many as 2 million people.

—Barry D. Sell

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**Narváez, Pánfilo de** (b. 1470–d. 1528) *Spanish conquistador who led a failed expedition to Florida* Pánfilo de Narváez was born a Castilian duke in 1470. In 1509, he participated in the CONQUEST OF JAMAICA. In 1512, he went to CUBA to support DIEGO VELÁZQUEZ DE CUÉLLAR’s conquest. While there, he led expeditions to the eastern end of the island, accompanied by BARTOLOMÉ DE LAS CASAS. Then, in 1520, under Velázquez’s orders, Narváez left Cuba for MEXICO in order to arrest HERNANDO CORTÉS and bring him back to Cuba. Despite his sizable force, Narváez’s efforts were frustrated by attacks from indigenous groups and then defections of his men to Cortés. On May 24, 1520, Narváez was defeated by Cortés at Veracruz. Narváez, having lost an eye in the battle, was taken prisoner, only to be released by Cortés to return to Spain in 1521.

In 1526, Narváez was issued a royal grant by King Charles I to colonize FLORIDA. He left Spain in June 1527, commanding five ships carrying 600 passengers

(some of whom were wives, slaves, and servants). The expedition first landed in HISPANIOLA, where about 100 of Narváez's forces deserted. Narváez then sailed to Cuba, before diverting two of his ships to Trinidad, where they were destroyed by a hurricane. The remaining ships suffered continued setbacks in Cuba before finally reaching present-day Tampa Bay, Florida, in mid-April 1528.

On May 1, despite the protest of his second-in-command, ÁLVAR NÚÑEZ CABEZA DE VACA, Narváez decided to send 300 of his men north in search of riches, while the remainder would sail up the coast to meet them. First one ship, then the remaining three, sailed to Cuba to pick up the expedition's fifth ship. They would never see Narváez's land forces. Instead, Narváez's contingency was harassed and attacked by Apalachee Indians throughout much of the summer, devastating his forces. By September 1528, only 242 men remained alive. An attempt to build boats and sail back to sea resulted in a horrific voyage across the Gulf of Mexico. Narváez likely perished when his ship capsized in the Gulf. Approximately 80 survivors made it to the Texan coast; the others died of thirst or as a result of a second hurricane. From Texas, the group meandered through much of the present-day U.S. Southwest, their numbers constantly dwindling. In July 1536, the expedition's only survivors, Cabeza de Vaca, two other Spaniards, and a Moorish slave, encountered a Spanish slave-taking patrol, ending the journey eight years after the group had reached Florida.

—Sean H. Goforth

## Native Americans

### CARIBBEAN BEFORE 1492

Archaeologists have identified the oldest human settlement in the Caribbean islands at Banwari Trace, in Trinidad. The site is associated with the Preceramic or Mesoindian period, which dates from 7,900 to 2,000 years ago. A small animal-hunting and shellfish-gathering culture, this Archaic group is thought to have settled in Trinidad about 7,000 years ago and, over time, to have migrated up to the Greater Antilles until about 2,000 years ago. Surviving cultural items for this time period include a variety of shell implements and stone tools such as pestles, grooved axes, celts, chipped flint and bone projectile points, fishing spears, and bone needles.

Like most of the archaeological record for the region, the proposed migration up to the Greater Antilles is speculative and a source of heated debate. While scholars have identified Mesoindian sites in the Greater Antilles similar to that at Banwari, evidence suggests that smaller islands may have been bypassed and the larger islands settled first. However, because of changes in sea level, as well as modern regional development, many early sites could have been destroyed.

The islands of CUBA, HISPANIOLA, and PUERTO RICO are noted for the greatest concentration of Mesoindian

sites. The Mesoindian period in the Greater Antilles had two distinct subseries, the Ortoiroid and the Casimiroid (6,900 to 4,500 years ago). These Preceramic cultures are generally associated with hunter-gatherer groups.

The Ortoiroid culture originated in South America, with intermittent artifact discoveries up to the Virgin Islands through Puerto Rico to the Mona Passage. Said to be the product of multiple MIGRATIONS and cultural interactions, the diverse Casimiroid culture is associated with cultures from the Yucatán or Central America. Archaeologists assume that migrants to the mainland came by sea to western Cuba via a now-submerged chain of islands. A people called the Ciboney who were said to inhabit parts of Cuba and Hispaniola at the time of European contact are often associated with Casimiroid culture. These sites are noted for lithic artifacts, including core tools, blades, burins, awls, scrapers, anvils, and hammerstones. The Casimiroid are further subdivided into the Courian subseries of Cuba, Haiti, Puerto Rico, and the Virgin Islands and the Redondan subseries of Cuba.

Many of these “open camp” Mesoindian sites consist of small shell middens found on or near the coast, with faunal material consisting of the remains of fresh- and salt water shellfish, fish, and sea and land animals. There was seemingly a heavier reliance on land-based hunting resources in the earlier part of the Mesoindian period than in the latter part.

Ever the cultural melting pot, from about 2,000 years ago to the first European contact more than 500 years ago, the Caribbean region seems to have experienced several waves of migrations by distinct cultures. Significant changes in cultural manifestations such as CERAMICS, the increased importance of AGRICULTURE and TRADE, and sedentism can be traced through the archaeological record. This period is often referred to as the Ceramic, or Neindian, period.

As a result of trace materials and stylistic continuities, archaeologists suggest that a significant migration into the Antilles took place approximately 2,000 to 1,400 years ago, dominated by a culture identified as the Saladoid. It is generally accepted that this culture originated in the lower Orinoco river valley; these migrants brought with them horticulture that featured MANIOC and MAIZE. Early settlers seemed to favor flat coastal plains and alluvial valleys, while the later Saladoid period saw expansion into the mountainous island interiors. Debate continues as to whether these groups pushed the Mesoindian populations out or transculturation occurred over time. A growing body of evidence supports the latter view.

One of the characteristics of Saladoid pottery is white paint used on a red background; this style can be found in modern-day VENEZUELA. The Saladoid also decorated jars, bowls, trays, platters, and bell-shaped vessels with polychrome designs in white on red, white on red with orange slip, black paint, and negative-painted designs.

On Puerto Rico and the Virgin Islands, the Saladoid fashioned pendants from exotic materials such as jasper-

chalcedony, amethyst, crystal quartz, fossilized wood, greenstones, carnelian, lapis lazuli, turquoise, garnet, epidote, and possibly OBSIDIAN. Although production of these artifacts seems to have faded about 1,400 years ago, their wide Antillean–South American distribution is evidence of extensive trading in raw and manufactured goods.

Archaeologists further contend that from approximately 1,400 to 1,200 years ago, either another wave of emigrants came out of the Orinoco area and spread throughout the Antilles or the Saladoid evolved into a culture identified as Ostionoid. The ceramic style of this culture focused on incised decoration rather than painting. Another important cultural manifestation attributed to the Ostionoid phase is the development of large, complex communities and multifunctional ceremonial centers, which included ball courts or plazas, called *bateys*. During this phase, the indigenous population increased in the highlands of Puerto Rico, Hispaniola, and Cuba, while Jamaica and the Bahamas were beginning to be settled. Reports also indicate a marked loss of cultural continuity between the islands and South America during this time period, evidenced by a lack of exotic trade goods.

Scholars have identified later elaborations of the Ostionoid as Elenoid and Chicoid, which appeared from about 1,200 to 850 years ago and 850 to approximately 500 years, respectively. Another very different Ostionoid variant is identified as Melliacan or Mellacoide. Mellacoide ceramics appeared in Cuba around this time. Defined by the distribution of specific ceramic styles, it is these people that scholars suggest were called the Arawak or TAINO by the Spaniards during the early stages of colonization.

Scholars suggest that the Taino–Arawak culture in the Greater Antilles reached its peak shortly before the arrival of Europeans. The Taino established complex societies, with communities ranging from about 1,000 to 5,000 residents. While Taino settlements extended throughout the Greater Antilles, the Bahamas, and even southern Bimini, the most elaborate political systems and expressive culture were seen at Puerto Rico and Hispaniola. Organized into *iukaieke* (chiefdoms) where the *kasike* (CACIQUE) held hereditary political power based on “matrilines,” these communities sustained themselves through agricultural production, supplemental hunting, trade, fishing, and shellfish gathering. Socioreligious manifestations included petroglyphs and the development of *cemíes* (spirit effigies), which were associated with ceremonial practices. *Cemíes* could be carved from stone, wood, bone, or shell or created from clay. Consistent with the Ostionoid subseries, petaloid stone celts were also made during this period. Although Taino craftspeople excelled in stone and hard wood working, their pottery varied and evolved throughout the region, from polychrome to an incised style, which often featured rim “lugs,” or “*adornos*,” in the form of human, animal, or spirit heads on the rims.

While major manifestations of Taino culture—both material and linguistic—can find their origin and parallels

in South America and other circum-Caribbean cultures, many aspects of Taino culture are unique. Ball courts, for example, are found in Central and South America, the lower United States, and Mesoamerica; however, their central role in Taino sociopolitical life is as distinctive as the ball game’s cultural associations.

That the Taino world was culturally and linguistically diverse is evidenced by the existence of various ethnic groups (such as the Ciboney and Macorix) and several recorded languages or dialects. The Taino from Cuba were said to be able to communicate well with peoples in the Campeche region of Yucatán. At least three languages were spoken on Hispaniola alone. Two of these were quite different, while one was known as the island’s universal language. Ethnic differences also appear to have been greater on Hispaniola than on other islands, even though archaeologists generally consider all or most of these peoples Taino.

One of the most notable cases that supports a cultural synthesis of Saladoid and Archaic cultures is based on a careful examination of Mellacoide assemblages. Melliacan pottery currently has no precedents on Hispaniola or in the Antilles or South America. Thus, it has been proposed that Mellacoide ceramics resulted from a lithic migration that fused this style with the Ostionoid medium. The relationship between Ostionan and its variants Melliacan and Chican is not sequential; rather, they existed at the same time in various locations on Hispaniola and continued until the time of European colonization. Thus, from this multicultural past, a complex Taino society emerged, which at times displayed marked differences but also retained many similarities across a vast land area.

Just a few hundred years prior to contact, other indigenous peoples identified as CARIB are believed to have migrated to the Caribbean, again from the Orinoco river valley region. Historically, it has been suggested that this group “displaced” the Arawak populations and “controlled” the Lesser Antilles up to the Virgin Islands. It is also argued that the so-called Carib migration was brought to a halt when it reached the island of Puerto Rico.

Whether the group that apparently made its way up the Lesser Antilles was of true Carib, or Karina, stock has been long debated. As a result, these peoples are often referred to as Island Caribs in order to highlight their difference from mainland communities. While some cultural differences did exist between the Greater and Lesser Antillean groups, including population density, a separation of men’s and women’s houses, and arrow tip styles, other cultural aspects were not dissimilar. Manioc production, petroglyphs, *cemí* stones, and pelatoid celts are all found in the Lesser Antilles, although with less frequency. Like the Taino, the so-called Island Carib language is classified as Arawakan. It contains many words in common with the Taino language.

Despite more than 500 years of colonization, indigenous peoples of the region have important insights into Caribbean “prehistory.” From contemporary Yucatán MAYA accounts relating that the Caribbean islands were a

trade route and “bridge” to South America, to the oral tradition of the Unishido Lokono Arawak clan of Venezuela, which states that the Taino were one of five ancient clans that moved into the islands, these accounts complement academic assertions of pre-Hispanic Caribbean multiculturalism. The Kalinago of Dominica maintain an oral tradition that within their ancestral memory, groups of men came from South America and integrated with local communities. This integration and exchange resulted, not from WARFARE, but from trade and local alliances. Local oral tradition in Puerto Rico maintains that such alliances were made with groups coming from Vieques. These arrangements allowed visitors among the mainland communities for trade.

Perhaps the most poignant indigenous version of Caribbean prehistory is the Taino emergence story from Kasibahagua, which states that the Taino were born of the islands themselves. This same oral tradition recognizes the existence of other peoples, highlighting a culturally diverse awareness. Unlike the Kalinago, the Taino do not recount any migration memory, indicating a very long presence in the islands.

The Caribbean has always been an area where cultures interacted, adapted, and, in the case of the Great Antilles, synthesized to evolve into unique and complex cultures. Viewed through this lens, the Caribbean provides a rare instance where two versions of history, indigenous and nonindigenous, are complementary.

### MESOAMERICA

The origins and subsequent development of Mesoamerica’s indigenous peoples are best understood as part of broader cultural processes that took place on the continent. While most scholars agree that Mesoamerican indigenous peoples developed independently from the Old World civilizations up until Spanish contact in the early 16th century (the 11th-century Viking colony in Newfoundland apparently had no impact on Mesoamerica), others maintain that cultural similarities might be the result of incidental or intentional transoceanic contact. At the same time, countless regional variations have always existed in Mesoamerica, and apart from occasional phenomena that affected all of its inhabitants, such as drastic climatic change, each culture developed unique characteristics and changed at a different rate. Our current understanding of Mesoamerican native cultures is still limited to those areas that have been explored archaeologically, and while significant discoveries are constantly shaping the picture, many pieces of the puzzle are still missing.

#### Paleoindian Period (40,000?–8000 B.C.E.)

Humans did not evolve on the American continent but rather populated it as fully modern humans during the Late Pleistocene Ice Age and the Early Holocene period. Scholars mostly agree that there were one or more migrations from northeast Asia (Siberia) across the now

submerged Bering Straits and south to the Americas through terrestrial corridors cleared of ice fields and by boat along the coastlines. The date of the initial migration, however, is still debated. There is clear evidence that humans were living in South and North America from at least 13,000 B.C.E., though some argue that the date could be as early as 40,000 B.C.E. At present, the most secure evidence for early human presence in Mesoamerica comes from the site of Iztapán, in the Basin of MEXICO, where hunter-gatherers hunted the now extinct mammoth some 10,000 years ago using projectiles with Clovis points (see CLOVIS CULTURE). Small groups of hunter-gatherers, who pursued big game and inhabited caves and rock shelters, spread from there throughout North and Central America. As the population increased, smaller groups started to break away and occupy the diverse ecological niches. Through time, this continuous process resulted in the linguistic and ethnic diversity that characterizes Mesoamerica to this day.

#### Archaic Period (8000–2500 B.C.E.)

Around 8000 B.C.E., the warmer climate of the Early Holocene allowed most of these early egalitarian groups to establish in a relatively defined territory, although they still moved each season. The remaining Pleistocene megafauna such as mammoths, mastodons, and wild horses were all hunted to extinction, and the hunters started to follow smaller game, such as deer, rabbits, birds, and iguanas. However, it was the plant gatherers (possibly WOMEN) who were responsible for one of the most important cultural revolutions in the Americas, that being the development of agriculture. This began with simple experiments in domesticating plants such as teosinte (wild maize), and it is possible that the cultigens thus produced were used initially for ritualistic purposes rather than as sources of FOOD.

The charred remains of plants and grinding stones found in Early Archaic caves in Tamaulipas, the Tehuacán Valley, and Oaxaca indicate that by 5000 B.C.E. the intentional cultivation of domesticates such as beans, squash, chilies, avocado, tomato, amaranth, and, most important, maize was well under way. The domestication of animals soon followed, and dogs and turkeys were bred as sources of food. Macrobands started to establish semisedentary camps next to these predictable and relatively secure sources of food, which in turn led to a gradual rise in population. By 3500 B.C.E. permanent settlements had appeared throughout the Gulf Coast and Central Mexico; pit houses dating to the end of the Archaic period have been discovered in this region. Other groups along the Pacific coast exploited the swampy coastal environment and built large shell mounds, which are among the earliest monumental constructions in Mesoamerica. The changes in settlement patterns and mobility also saw the beginnings of the Mesoamerican spiritual life, which included complex burial ceremonies and HUMAN SACRIFICE.

### Formative (or Preclassic) Period (2500 B.C.E.–300 C.E.)

Many of the archetypical “building blocks” that would distinguish Mesoamerica from the cultural areas of North, Central, and South America were developed during the Formative period. By 2500 B.C.E., the majority of the population of Central Mexico (and probably other regions) was gathered in horticultural villages but continued to practice hunting and gathering. Around this time the first pottery, a revolutionary technology that might have been adopted from non-Mesoamerican groups farther to the south, appeared along the western Pacific coast, then later in the Tehuacán Valley. Fired clay vessels largely replaced containers made from gourds and woven baskets; figurines for ritual purposes also began to be produced.

The transformation from dispersed villages to nucleated centers intensified, and settled life brought about faster community integration and the need to create communal spaces, such as a house dedicated for public gatherings and the ball court at the coastal site of Paso de la Amada. At the same time, people’s different access to natural resources and the resulting accumulation of wealth heralded the onset of social stratification. There are clear signs that a ruling elite emerged in the Soconusco area and at San José Mogote in the Valley of Oaxaca around 1500 B.C.E.; these people’s achieved or ascribed status and association with the divine realms allowed them to assume control over the majority of the population. Powerful elites lived in large houses built on raised platform mounds, controlled small chiefdoms of two or three-tiered settlement hierarchy, and exchanged luxury goods with rulers from other villages and regions. The Valley of Mexico also underwent major social transformation around 1200 B.C.E.; the pottery-laden burial sites at Tlatilco’s cemetery attest to the spiritual and technological sophistication of this region’s culture.

These Early Formative societies led to the development of the Olmec culture. The OLMECS inhabited the tropical Gulf coast of Veracruz and Tabasco from around 1200 to 500 B.C.E. Even if theirs was not the all-inventive Mesoamerican “mother culture” as previously thought, the Olmecs still stood above all others with their extensive settlements, such as San Lorenzo and La Venta, where they erected monumental pyramids and colossal sculptures dedicated to their rulers. The Olmecs also participated in an interregional trading network, and their religious symbols circulated on decorated ceramic vessels and carved greenstone celts. One chiefdom with which the Olmec interacted was located at Chalcatzingo in Morelos, where the Gulf Coast and Central Mexico cultures had blended.

As the Olmec culture began to decline around 500 B.C.E. (for reasons still unknown), the Maya culture emerged in the lowlands of GUATEMALA and northern BELIZE. Ruler-priests in cities such as Cuellingo and Nakbé took the lead, while massive pyramids adorned with stucco masks representing deities or rulers were erected in Late Formative cities such as Cerros and EL MIRADOR.

To support the growing population around these civic-ceremonial centers, the Maya developed a sophisticated agricultural intensification system of raised fields.

The ZAPOTECs, in the Valley of Oaxaca, invented the first known writing system and sacred calendar in the Americas around 600 B.C.E. and shortly thereafter established the first imperial state, which originated at MONTE ALBÁN. At the same time, the Valley of Mexico saw the emergence of warring city-states, but these were soon overshadowed by the rise of the powerful theocratic state of TEOTIHUACÁN after its rival city, Cuicuilco, was destroyed by a volcanic eruption around 100 B.C.E.

### The Classic Period (300–900 C.E.)

The cultural elements developed during the Formative period were formalized during the Classic period. Between 300 and 600 C.E., Teotihuacán grew to be one of the most influential religious and political centers in ancient Mesoamerica and one of the largest CITIES in the world. Its inhabitants exported fine green obsidian along with their military-religious ideology as far as Oaxaca and Guatemala; evidence of their presence can be found in the ARCHITECTURE and inscriptions of Monte Albán, KAMINALJUYÚ, and TIKAL. At the same time, Zapotecs and Maya formed artisan neighborhoods in Teotihuacán. Early in the Classic period, Cholula similarly emerged as an important religious center; it combined elements of the Gulf Coast, Maya, and Central Mexico cultures.

The Classic period is perhaps best known for the florescence of the lowland Maya people, who created the most complex writing system and calendar known in the Americas, the recent decipherment of which has revolutionized our understanding of Maya culture. Although once considered as the apogee of Mesoamerican civilizations in terms of ART, architecture, mathematics, and astronomy, it is now also known that the Classic Maya practiced intense interpolity WARFARE and human sacrifice. In this period of shifting dominance and alliances between the numerous Maya city-states, the antagonistic cities of Tikal and CALAKMUL emerged as “super-states” in the Petén region. Powerful royal lineages emerged in other important Maya cities such as COPÁN and Palenque, both of which extended their political influence through conquest and marital alliances.

The cultural and natural landscape started to change notably around 500 C.E., when the overpopulation of Mesoamerican cities led to disease, malnutrition, and high mortality rates. At the same time, the overexploited environments called for a redistribution of food products from the hinterland to the nonproducing urban sectors. Additionally, a period of severe drought began at about this time and lasted until the 11th century. Teotihuacán was among the first great cities to be affected; the ceremonial center was attacked and burned by 600 and then left mostly abandoned. Monte Albán held up until 800, when construction stopped and its inhabitants left for other centers in the Valley of Oaxaca.



In the Maya lowlands, the fragile ecosystem rapidly reached its maximum carrying capacity; warfare between city-states in search of new resources became endemic and only added to the friction between the ruling elite and commoners. Around 800, the lowland Maya centers began to collapse; glyphic inscriptions stop at about 900. Although some Maya kingdoms in Belize and elsewhere seem to have remained fairly intact, the majority of the lowland Petén cities were completely abandoned, with many people migrating north to the Yucatán Peninsula. Still, in the two centuries following the fall of Teotihuacán, other cities grew. The numerous ball courts at El Tajín on the Gulf coast, for example, attest to that city's religious and political importance during this transitional period.

### The Postclassic Period (900–1521 C.E.)

Following the Classic-period abandonment of major cities, the Postclassic period began with large migrations of people across the landscape and the reorganization of the political structure. Independent polities started to interact through a shared market economy and religious ideology, each with well-defined territory and specialized economic activities. Trade was commercialized and long-distance *POCHTECA* merchants moved obsidian, pottery, salt, *CACAO*, and cloth to the farthest reaches of Mesoamerica (see *TEXTILES*).

Maritime trade networks developed along the coastlines of Mesoamerica and lower Central America, probably as far as South America. Luxury goods previously procurable only by the elite gradually became available to most commoners in the open market economy. Although warfare between city-states was still endemic, a new “international” style of religious symbols developed, integrating the different ethnic groups in Mesoamerica into a single “world system.” This might have involved the introduction of a unified Mesoamerican religion surrounding the cult of *QUETZALCÓATL*, the Feathered Serpent deity, whose major religious center was located at the Great Pyramid of Cholula.

At about 900, the *TOLTECS* stepped up to fill the political and economic vacuum left by the fall of Teotihuacán; they soon controlled Central Mexico from their capital in Tollan (see *TŪLA*). Similar to their predecessors, Toltec military conquests and religious ideology reached far and wide, mainly through a long-distance exchange network encompassing the U.S. Southwest to *HONDURAS*. The Maya royal lineages reemerged around Lake Petén-Itzá, the highland regions of Guatemala, and the Yucatán Peninsula, where the inhabitants of the dominant city of *CHICHÉN ITZÁ* interacted closely with the Toltecs; Chichén Itzá itself showed a close resemblance to Tollan. In the Mixtec area, a large unified kingdom was created during the 11th century by Lord Eight Deer “Jaguar Claw” from his vast city of Tututepec; he, too, might have legitimized his rule through the Toltecs. The expansion of the *MIXTECS* was also notable in the Valley of Oaxaca, where lavishly decorated cities such as Mitla demonstrate a mixture of Zapotec and Mixtec cultural traditions.

Yet another major shift occurred in Mesoamerica around 1200, when these and other centers declined for reasons that might be linked with climatic change. Around the same time, migrant groups from the northern deserts entered the Valley of Mexico; among these newcomers was the small Mexica tribe that would later form the mighty Aztec Empire (see *AZTECS*). The previous “international” style had transformed into the geometric and highly standardized Mixteca-Puebla iconographic style, which was expressed on polychrome ceramics, *CODICES*, and murals. This religious-ideological set of symbols was less dependent on phonetic components than the Formative- and Classic-period writing systems and thus was shared between numerous linguistic groups, from northern Mexico to *NICARAGUA*.

In Yucatán, the city of *MAYAPÁN* replaced Chichén Itzá as the regional capital, the massive defensive wall surrounding the former indicating a period of unrest and large-scale warfare. Soon after the violent collapse of Mayapán in 1441, Postclassic Maya society again fragmented into smaller city-states, while in the Guatemalan highlands the K'iche' (Quiché) Maya from the Gulf of Mexico established their capital at Uatlán; they, too, claimed Toltec ancestry. In the late 15th century, the Zapotecs of Oaxaca broadened their influence to the Isthmus of Tehuantepec, where they established a powerful kingdom. The Tarascans of Tzintzuntzán also succeeded in establishing a large conquest empire in western Mexico and developed techniques for working copper and bronze.

Overshadowing all these Late Postclassic developments was the emergence of the most powerful indigenous group in Mesoamerican history, the Aztecs. In less than 150 years, these late migrants to Central Mexico had formed an enormous empire that extended over much of present-day Mexico and ruled over hundreds of indigenous communities. The Aztec Empire was dominated by a *TRIPLE ALLIANCE* between the cities of *Tēxcoco*, *Tlacopan*, and *TENOCHTITLÁN*; nevertheless, it was the warlike Mexica people of Tenochtitlán who soon took the lead. In addition to a powerful conquering army, the Aztecs extended their control through a complex web of marital alliances throughout Mesoamerica and traded with groups that did not form part of their empire, such as the Tarascans and the Tlaxcalans (see *TLAXCALA*).

Agricultural intensification and urbanization in the Valley of Mexico triggered rapid population increase, and by the late 15th century there were about 1.6 million people living in the valley alone. The empire came to an abrupt end, however, when in 1521 a handful of Spaniards and tens of thousands of indigenous auxiliaries conquered Tenochtitlán and took over the empire (see *CONQUEST*). This year is often regarded as the end of the pre-Columbian era in Mesoamerica and the beginning of the colonial period. Still, despite the alarming mortality rate among the indigenous from exploitation and *DISEASES* during the first decades of the conquest, Mesoamerican people prevailed by adapting to drastic

change and assimilating the Old World into their millenary cultures.

### SOUTH AMERICA

Human occupation of the Americas resulted from the migration of nomadic groups across the Bering Strait by means of a temporary land bridge at least 14,000 years ago. It was once widely thought that North America was the site of the first human settlement; however, more recent archaeological deductions indicate that migration down the Andean spine of South America may have facilitated some of the earliest human settlements. For instance, evidence from around MONTE VERDE, CHILE, which hosted some two dozen settlers between 12,800–11,800 B.C.E., has swayed scholarly opinion in favor of a migratory pattern in a much more southward trajectory. Other than the Paleoindian tribes in Monte Verde and El Abra in COLOMBIA, scant evidence exists of the Americas' earliest peoples, hunter-gatherers at the end of the last ice age. Over the successive millennia several dozen Native American civilizations staked out a distinctive identity before European contact. From what is known, these societies' level of sophistication depended largely on the discoveries of previous civilizations. The comingling and success of various Native American groups over time eventually produced some impressive results. At the time of the Spaniards' arrival, the Inca Empire was highly accomplished, as indicated by their mathematics, agricultural and farming techniques, and overland trade networks (see INCAS).

The Norte Chico culture is widely believed to have been the first large-scale civilization to emerge in South America, around 3000 B.C.E. Some 30 well-populated hubs of the Norte Chico flourished in northern PERU, before the civilization collapsed around 1800 B.C.E. At roughly the same time, the Valdivia culture emerged near the modern-day town of Valdivia, ECUADOR. The Valdivian people grew maize, beans, and other vegetables. They also created ceramics, which became increasingly elaborate over the centuries. The CHAVÍN culture followed the Valdivia and the Norte Chico, populating coastal Peru and influencing a much larger swath of the littoral Andes from roughly 900 to 200 B.C.E. Existing at about the same time as the ancient Egyptians, the Chavín employed advanced metallurgical techniques, wove textiles to make cloth, practiced agriculture, and had an extensive trade network. These achievements, coupled with the domestication of the llama, helped lay the foundation for successive advances of Native American cultures in South America.

The MOCHE culture occupied the northern coast of Peru between 100 and 800 C.E. The civilization was in many respects fragmented, as it did not feature a centralized political authority and operated mainly as a loose affiliation of communities that were notable for their creation of mold technology, painted ceramics, gold crafts, and extensive irrigation systems. The Huaca del Sol, an

enormous pyramid-shaped adobe, is believed by many to be the largest pre-Columbian structure in Peru, though it was heavily damaged by the first Spanish arrivals.

The WARI (Huari) people populated the highlands and coast of southern Peru, from 500 to 900 C.E. The Wari capital was just north of modern-day Ayacucho, though the society's most well-preserved ruins are near Quinua and the town of Pikillaqta, a short distance southeast of Cuzco en route to Lake Titicaca. Scholars believe the Wari developed an advanced sociopolitical hierarchy, with different administrative divisions between the main poles of the civilization. The Wari utilized terraced fielding techniques and an extensive road network that was a significant legacy for the Incas when they began to expand in the area several centuries later.

The MUISCA confederation dominated the eastern highlands of Colombia in the century before Spanish contact in 1537. The Muisca inhabited an area equivalent in size to modern-day Switzerland and spoke a language known as Chibcha, believed by linguists to be older than Aramaic. The confederation seems to have been efficiently administered, and the governance of the Muisca was notable because it neither featured a monarch nor sought territorial expansion or the subjugation of other tribes. The Muisca economy was vibrant, centering on local and long-distance trade, the MINING of EMERALDS, coal, copper, salt, and GOLD; these commodities immediately spurred Spanish interest and provided the primary evidence for the mythological city of EL DORADO.

The Inca Empire was the largest civilization in the Americas at the time of European contact. It arose in the Peruvian Andes in the 13th century, with the Incas quickly coopting or conquering other ethnic groups and vast swaths of South America, especially along the Andes. From 1483 through about 1533, the Inca Empire swelled to include parts of modern-day ARGENTINA, BOLIVIA, Chile, Colombia, Ecuador, and Peru. The empire (called Tawantinsuyu) was governed under a federal system partitioned into four quadrants, with the capital located in Cuzco. The chief language of the Incas was QUECHUA, though literally dozens, if not hundreds, of local languages were spoken in the empire.

Under the governance of PACHACUTI INCA YUPANQUI, who reigned from 1438 to 1471, the size of the Inca kingdom grew extensively. Pachacuti shrewdly reconnoitered the lands of neighboring civilizations and often made overtures to the royal classes. In many cases, he offered to induct them into the royal hierarchy of the Incas and promised increased wealth for the entire society if they came under the cloak of the Sapa Inca. Recognizing the hegemony of the Incas, most acceded to their demands, swelling the ranks of the noble class and coopting other domains under the Inca umbrella.

The Incas created a large, smooth-running economy based on exchange and taxation of certain goods. Much scholarship on the Inca economy indicated that the civilization adopted a form of socialism to ensure that the basic

needs of all were met; however, more recent research on the topic complicates the matter, and the degree to which socialism was practiced seems to have varied. Regardless, studies indicate that the Incas enjoyed an extensive trade network, which was impressive given both the vastness of the empire and the ruggedness of the terrain in the Andean highlands, that ensured a free flow of goods throughout Inca lands and the specialization of goods by producers.

Inca society featured many refinements and notable innovations in the fields of architecture, agriculture, engineering, and mathematics. Various terraced fielding techniques, developed by previous civilizations and used widely by the Incas, ensured that agricultural staples were grown in the mountainous terrain that was naturally ill suited to sustainable food production. They also adapted irrigation techniques to improve the production of maize, squash, tomatoes, peanuts, chilies, melons, COTTON, and POTATOES.

Architecture was viewed as the highest form of art by the Incas, whose large-scale stone works resulted in the creation of MACHU PICCHU and other sites, which had enormous stone temples. Beyond temples and housing, the sophisticated understanding of construction led to the creation of two enormous road systems, one through the highlands running essentially the length of Peru for more than 3,200 miles (5,150 km) and a coastal road that ran some 2,500 miles (4,023 km). This made communication and TRANSPORTATION very rapid; messengers could be expected to travel some 150 miles (241 km) a day (see CHASQUI). When the Spanish first encountered the Incas in 1536, their appetite for conquest was peaked by the immense achievements of the Incas and the enormous reach of their empire, spanning more than 15,000 square miles (38,850 km<sup>2</sup>) and including 9–14 million inhabitants.

See also ARAUCANIANS (Vol. II); CHICHIMECAS (Vol. II); NATIVE AMERICANS (Vols. II, III, IV).

—Roberto Múráko Borrero  
Sean H. Goforth  
Danny Zborover

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**Nazca lines** The Nazca lines are immense ground drawings, also called “geoglyphs,” which cover approximately 400 square miles (1,036 km<sup>2</sup>) of the Nazca desert on the southern coast of PERU. This archaeological mystery had been studied since the lines were first brought to scholarly attention during the 1920s. By far, the most common are the 762 extremely straight lines, often several kilometers long, which radiate from 62 central points called “ray centers.” Others geoglyphs include 227 geometric and abstract designs, such as zigzags, spirals, triangles, and trapezoids, one of which is as long as 10 football fields. Additionally, there are several human figures positioned on hillsides, and over 50 zoomorphic and botanical geoglyphs, such as flowers, birds, fish, a monkey, and a spider; the largest is the figure of a cormorant, which is about 985 feet (300 m) long.

The majority of the geoglyphs were created between 200 B.C.E. and 600 C.E. by the local Nazca people. They used a simple method of creating the lines by clearing and rearranging stones and the sun-baked dark topsoil, thus exposing the lighter subsurface. Still, the Nazca lines are the result of hundreds of years of continuous practice, and many are superimposed by later ones. While the human figures might have been created first, the lines and geometric designs are clearly later than the animals, which might have been created between 600 and 1000 C.E., or as late as the 15th century.

Although archaeologists now better understand how, when, and who created the geoglyphs, the reason why still baffles those who study them. Their monumental size, along with the fact that they can be best seen from higher elevations, has attracted some wild theories, including spaceships, and suggestions that the Nazca used some kind of hot-air balloons. Recent experiments have shown that the process of creating the large figures was in fact quite straightforward and could have been accomplished by a small group of people using simple instruments.

Some scholars have attempted to understand the phenomenon in its cultural context and immediate natural surroundings. One of the earliest interpretations was that the lines served as a giant agricultural calendar, with the lines directed toward celestial events such as sunsets and rising stars; however, more recent studies have demonstrated that only some of the lines could have had astronomical significance, while others probably functioned as ceremonial pathways for pilgrims in a fashion similar to today’s pilgrimages common among indigenous Andean people. In addition to the lines, several archaeological sites of the Nazca culture have been excavated (such as the pilgrimage center of Cahuachi), and their polychrome CERAMICS have been collected from along the lines. It has been further demonstrated that the ray centers were located adjacent to streambeds and foothills, while trapezoids were closely associated with water flow and might have served in rituals to summon water to the arid land. Similar theories link the animal geoglyphs to fertility cults and the worship of mountains

as the creators of water and to the humid tropical forest iconography that appears on Nazcan ceramics and **TEXTILES**. Thus, the Nazca lines might have been a precursor to the Inca **ZEQUE** system, which combined all of these elements, though on a much smaller scale.

—Danny Zborover

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## New Granada See COLOMBIA.

**New Laws of 1542** The New Laws of 1542 were a series of laws designed at the request of Fray **BARTOLOMÉ DE LAS CASAS**, which aimed to prevent the brutal exploitation of the indigenous peoples under the repressive **ENCOMIENDA** system. Meant to replace the 1512 **LAW OF BURGOS** and eventually eliminate the *encomienda* system, the 1542 laws were met with fierce resistance in the New World, forcing the Crown ultimately to rescind many of them, at least in part.

As the **CONQUEST** of the New World progressed, there were many complaints from clergymen about the conquistadores' and settlers' abuses of the indigenous peoples. Chief among the critics of the Spanish regime in the New World, the Dominican friar Las Casas incessantly petitioned the Crown to do something to correct the abuses of the *encomienda* system. These New Laws, as they came to be called, were issued as the result of a reform movement begun in Spain to correct the abuses and failures of the old laws of Burgos and thus ensure the protection and freedom of Amerindians, especially those living in the newly conquered mainland colonies. Las Casas's ultimate goal was the eradication of the *encomienda* system, which forced the indigenous peoples into almost slavlike tribute and **LABOR** relations with their Spanish conquerors.

The New Laws were passed in 1542 and amended in 1543. They contained regulations that addressed the reform and restriction of the *encomienda* system; among the most important of these was the strict prohibition against Indian **SLAVERY**. Other provisions limited *encomienda* grants to one's lifetime; however, this provision was later amended to permit the renewal for a second lifetime only. These provisions, if enforced, would have led to the gradual abolition of the *encomienda* system in the New World within a generation or two. The New Laws also prohibited the forced labor of indigenous peoples on plantations and in the mines (see **MINING**). They also required that all indigenous labor be paid a fair wage, and that Indian tribute payments and taxes be assessed fairly and moderately.

The reaction to the promulgation of the New Laws in the Spanish colonies was violent and swift. In **PERU**, **GONZALO PIZARRO** and other supporters rose up in revolt against the Spanish Crown, and this eventually led to the overthrow of the royal official (**VICEROY**) sent to govern the region of Peru, Blasco Núñez Vela, who attempted to enforce the laws. The viceroy in New Spain (**MEXICO**), **ANTONIO DE MENDOZA**, more wisely decided to mitigate against a possible revolt by suppressing the New Laws and their enforcement. Applying the informal right to "obey but not comply" (*obedezco pero no cumplo*), Viceroy Mendoza averted what could have been a disastrous rebellion in New Spain.

Alarmed by the negative reaction of the colonists in the New World, on October 20, 1545, King Charles I reluctantly decided to suppress more than 30 of the New Laws' most disputed regulations. With the repeal of these regulations, the *encomienda* system and the quasi-legal exploitation of the indigenous people of the New World continued. Nevertheless, some of the more lasting reforms, such as the prohibition against Indian slavery, were strictly enforced, which limited some of the most notorious abuses of the Spanish colonial system. In the end, the New Laws had mixed results; though not strictly enforced, they did tend to mitigate the most flagrant abuses of indigenous rights during the remainder of the colonial period.

—John F. Chuchiak IV

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## New Spain See MEXICO.

**Nicaragua** Nicaragua is aptly nicknamed the "land of lakes and volcanoes." Two great lakes partly fill the Nicaragua Depression: the vast Lake Nicaragua (known in ancient times as Cocibolca) and the smaller Lake Managua (once known as Xolotlán). The depression stretches diagonally across the entire country, from the Gulf of Fonseca, past the lakes, and down the Río San Juan to the Caribbean. Tectonic forces also created the extraordinary chain of volcanoes that stretches across the country along the depression.

Nicaragua divides naturally into several major physiographic zones. The Pacific coastal lowlands, including the area around the lakes, are hot and humid with deep fertile soil; this region carried the largest human populations in prehistory. The central highlands consist of rugged volcanic mountains interspersed with lush, fertile valleys. The wide Atlantic coastal lowlands are watered

by broad meandering rivers that run down from the rain forest-clad hills to the sandy coastal lagoons covered by scrub pine.

Culturally and archaeologically, Nicaragua combines multiple varieties of Mesoamerican, South American, and other indigenous traditions. The Spanish left several chronicles describing the native peoples of Nicaragua (see **CHRONICLERS**). Colonial chronicles say that the peoples of the Pacific lowlands were emigrants from Mesoamerica. The Chorotegas apparently moved in from Central MEXICO after 700 C.E. Chorotega is an Otomanguan language, one of a diverse group of languages in Mesoamerica. The Subtiabas, who lived near modern León, spoke a language closely related to Tlapanec, another Otomanguan language that is still spoken in the Mexican state of Guerrero. The most recent immigrants were NAHUATL-speaking peoples related to the AZTECS. They immigrated during the Postclassic period (1000–1519), displacing some of the earlier migrants. All these peoples brought Mesoamerican cultural traits with them and interacted with other Mesoamerican peoples.

The peoples of the central highlands and Atlantic slope were culturally distinctive. Their languages belong to the Misumalpan and the Chibchan families. The former includes Matagalpan, Miskito, and Sumu. The Matagalpas occupied a large part of the north-central highlands. The Miskitos and Sumus still live in north-eastern Nicaragua. The Chibchan speakers included the Ramas, who still live in small numbers on the east-central Atlantic coast. The indigenous cultures of central and eastern Nicaragua possess a complex mix of autochthonous traits and Costa Rican and Panamanian cultural patterns (see **COSTA RICA**; **PANAMA**).

The outline of Nicaraguan prehistory is incomplete. Virtually nothing is known of the Paleoindian and Archaic periods. The wide Caribbean lowlands have for the most part not been explored by archaeologists. Most research has been undertaken in the Pacific coastal lowlands, especially around Rivas, Masaya, and Granada and on the islands of Lake Nicaragua. For example, on Ometepe Island in Lake Nicaragua a ceramic sequence extending deep into the Formative period has been recovered (see **CERAMICS**). The earliest pieces appear to be related to the early ceramic complexes of the Pacific coast of GUATEMALA and Chiapas. Later Formative materials include **TRADE** goods typical of southern Mesoamerica. The ceramics corresponding to the Mesoamerican Classic period (250–1000) include a wide variety of well-made and iconographically complex polychrome types. The iconographic motifs and symbolism become progressively more Mesoamerican in character with time. The Postclassic materials share

decorative patterns with the widespread Mixteca-Puebla style of the Mesoamerican Late Postclassic period, although overall technique, forms, composition, and execution remain indigenous.

Mound complexes were common in the Pacific lowlands and the north-central highlands in later prehistory. The most famous sites in the country are ceremonial complexes that include elaborately carved monumental standing stones. The carvings from the great lakes region usually include a main anthropomorphic figure with an associated animal, often interpreted as a familiar spirit or alter-ego. The most famous of these sites are those on Zapatera Island in Lake Nicaragua.

See also **NICARAGUA** (Vols. II, III, IV).

—Clifford T. Brown

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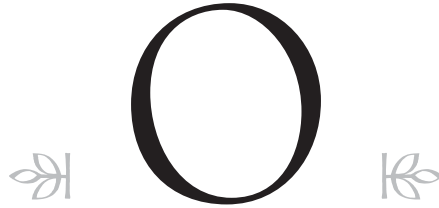
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**Nicuesa, Diego de** (b. ca. 1464–d. 1511) *Spanish conquistador and first governor of Castilla del Oro* Diego de Nicuesa was a Spanish conquistador with close ties to the Spanish Crown. He was intent on colonizing the area known as the Tierra Firme on the northern tip of South America. This same area was nicknamed “Castilla del Oro,” a name given to the region based on CHRISTOPHER COLUMBUS’s claims of rich GOLD deposits.

The Spanish Crown decided that the Tierra Firme would be governed by two men: Diego de Nicuesa was granted the province of Castilla del Oro, and ALONSO DE OJEDA was awarded New Andalusia. However, the king failed to specify the precise demarcation line between the two territories.

On arrival in the New World, Nicuesa turned out to be a disastrous navigator whose arrogance prevented him from recognizing his mistakes, even in the face of his crews’ pleas. Stranded on the Panamanian coast, Nicuesa and his crew were nearly destroyed by starvation and Amerindian attacks (see **PANAMA**). Eventually, a rescue fleet retrieved them, and from then on, Nicuesa governed his colony with an iron fist. Nevertheless, the settlement eventually failed. The Spanish Crown then ordered Nicuesa to govern Ojeda’s former colony, Nueva Antigua. When the residents of the struggling society heard of Nicuesa’s merciless and arrogant ways, they trapped him and sent him back to HISPANIOLA in 1511. However, the ship never reached the island, and Nicuesa was never heard from or seen again.

—Christina Hawkins



**obsidian** Obsidian, or fine black or gray volcanic glass, was among the most prized goods in pre-Columbian Mesoamerica. Obsidian is largely silicon dioxide, sometimes streaked with green or brown by the presence of iron or magnesium, and is used by modern eye surgeons for its ability to form a sharp edge.

In pre-Columbian Mesoamerica, pieces of obsidian of six to eight inches (15–20 cm) in size were typically reduced by hammering to a “core.” From the core, pressure flaking with wood, bone, or antler produced long (eight-inch [20.3 cm]) blades of a thin cross-section, which had two sharp edges, like a double-edge razor. These obsidian blades may have been sharper than steel, since pressure flaking produces edges to a thinness of a few molecules.

Obsidian blades were widely used for cutting and dressing meat. Likewise, they were embedded in the heads of wooden war clubs (see WARFARE). Members of the elite used larger pieces of obsidian as mirrors. MAYA elites also used obsidian blades during ritual bloodletting ceremonies.

Obsidian was prized among the pre-Columbian indigenous peoples of Mesoamerica and was traded throughout the area (see TRADE). Control of obsidian sources became a powerful source of economic wealth for CITIES such as KAMINALJUYÚ and TEOTIHUACÁN (see ECONOMY). The most important known ancient obsidian sources were the highland GUATEMALA volcanoes El Chayal, near Guatemala City; Ixtepeque, in eastern Guatemala; and San Martín Jilotepeque, in western Guatemala.

Obsidian sources show a unique chemistry that links the obsidian to the particular volcano in which it formed. Laboratory tests can determine the chemical makeup of

obsidian by neutron activation analysis, allowing archaeologists not only to determine its source but also to highlight trade routes and trading partners.

—Walter R. T. Witschey

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**Ojeda, Alonso de** (b. ca. 1465–d. 1515) *Spanish conquistador and first governor of New Andalusia* Born ca. 1465 into a family of the minor nobility, Alonso de Ojeda made a name for himself by accompanying CHRISTOPHER COLUMBUS on his second journey to the New World in 1493. As a teenager, Ojeda had worked his way up the ranks in the home of the duke of Medinaceli. By establishing influential contacts, Ojeda earned his passage on the voyage with Columbus. He returned to Spain in 1496; however, three years later, in 1499, Ojeda journeyed back to the New World. This time, he had his own mission with Juan de la Cosa, an important ally to the Crown and Ojeda’s close friend.

Once settled in the New Granada area (which corresponded roughly to what is now the Colombian city of Cartagena), Ojeda’s men attempted to subjugate and convert the indigenous population to Christianity. Their efforts met with fierce resistance, with the Indians mounting a series of counterattacks. Almost all of Ojeda’s men were killed, including de la Cosa. While in a sorry state of defeat, Ojeda was spotted by a Spanish force offshore, led by his competitor, DIEGO DE NICUESA; Nicuesa

sent aid to the struggling settlement. Ojeda subsequently avenged the murder of de la Cosa by leading a massacre against the Amerindians.

Over time, the settlement of New Andalusia came under several indigenous attacks by warriors armed with poisonous arrows. The settlers also suffered from starvation and other hardships. Eventually, Ojeda lost control of the colony and was replaced by Martín Fernández de Enciso.

—Christina Hawkins

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**Olmecs** The Olmec culture thrived along the tropical southern Gulf coast and on the floodplains of Veracruz and Tabasco from about 1200 to 500 B.C.E. The term *Olmec* is also used broadly to refer to a widespread style of ART found at archaeological sites from the Basin of MEXICO and Guerrero on the Pacific to GUATEMALA and EL SALVADOR. Its early florescence and distinct style had previously established the Olmec culture as the Mesoamerican “Mother Culture,” although more recent theories have linked these developments to large-scale processes that occurred during the Formative period (1500 B.C.E.–250 C.E.).

The archaeological record suggests that Olmec society was organized into chiefdoms and that the Olmecs’ diet consisted of MAIZE, beans, squash, fish, dogs, deer, rabbits, and iguanas. The Olmecs might have been the first to erect stone monuments in Mesoamerica. Due to the humid lowland conditions and the accumulation of sediments, small Olmec villages with no monumental ARCHITECTURE are extremely hard to locate, and archaeologists’ knowledge is limited to only a handful of sites, the largest being San Lorenzo and La Venta. San Lorenzo was built on an artificially modified hill and was occupied from 1150 to 900 B.C.E. Archaeologists have found large houses dedicated to public gatherings erected on low platforms there. La Venta flourished later (900–500 B.C.E.), and there, archaeologists have found pyramids and monumental structures, plazas, stone mosaic pavements, tombs with jadeite caches, and tabletop thrones. These sites also had subsurface stone conduits through which freshwater was distributed to the elite.

Recent discoveries of epi-Olmec glyphic texts from the region suggest that the Olmec language was related to the Mixe-Zoquean group of linguistic families. While *Olmec* is a late NAHUATL term meaning “people of the rubber land,” it is still not known what Olmecs called themselves. Regardless, the area is true to its Nahuatl name; the Olmecs exploited the rich rubber sap, which they traded throughout the region (see TRADE). Rubber balls found at the Olmec site of El Manatí provide the earliest evidence for the practice of the Mesoamerican

ball game (see MAYA). The Olmecs also produced some of Mesoamerica’s first and finest ART, including small jadeite statues, fine CERAMICS, and carved stone stelae, as well as the famous colossal stone heads. The last are larger-than-life portraits of Olmec rulers wearing their typical headgear. The basalt for these multiton sculptures was extracted from the distant Tuxtla Mountains, although how it was transported remains unknown.

Olmec religious iconography deals with zoomorphic and anthropomorphic representations, such as feline motifs, a crocodilian earth deity, and a water deity represented by a sharklike monster (see RELIGION). Among the most curious are the widespread “baby face” figurines, some carved out of wood, as those found at the El Manatí bog as ceremonial offerings. Olmec ritualistic and mythical imagery are often found in caves or on natural rock faces. The reasons for the eventual decline of Olmec culture around 500 B.C.E. are still uncertain, although it seems that the later Classic Maya elite were influenced by their Olmec predecessors.

—Danny Zborover

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**Orellana, Francisco de** (b. 1511–d. 1546) *Spanish conquistador, first European to navigate the Amazon River, and founder of Guayaquil* Born in Trujillo, Spain, in 1511, Francisco de Orellana was a childhood friend and, by some accounts, a distant cousin of FRANCISCO PIZARRO. In 1527, at the age of 17, Orellana left Spain and sailed to the Indies. In 1533, he joined Pizarro’s forces in PERU and quickly distinguished himself by helping quell the revolt of DIEGO DE ALMAGRO (see CIVIL WARS IN PERU). After Pizarro defeated Almagro’s forces, Orellana was appointed governor of La Caluta and successfully reestablished the port city of Guayaquil, ECUADOR, which had twice been sacked by native peoples.

In 1541, Orellana was appointed one of GONZALO PIZARRO’s lieutenants on a voyage east of Quito, into the South American hinterland in search of EL DORADO, the mythic City of Gold, as well as the Land of Cinnamon. Orellana’s mandate was to scout the Coca River, but his men threatened to mutiny if he did not proceed farther. In response, Orellana ordered the construction of a larger sailing vessel, and the expedition soon followed the Coca River into the Napo River, then into the Negro River on June 3, 1542. From there the force continued, sailing into the Amazon River. Orellana bestowed the name AMAZON because of the repeated attacks on the expedition by female warriors reminiscent of the mythological Amazons (see AMAZON WOMEN). Despite improbable odds, Orellana managed to navigate the length of the Amazon, reaching the river’s mouth on August 24, 1542.



A small tributary of the Amazon River in Peru (Courtesy of J. Michael Francis)

Soon thereafter, Orellana returned to Europe. He landed first in Portugal, where the Portuguese king tried to persuade him to return to the Americas as the leader of a Portuguese expedition. Balking at the idea, Orellana made his way to Spain. Orellana's discoveries highlighted one of the primary tensions of the era—territorial claims in the Americas by both Spain and Portugal, which the TREATY OF TORDESILLAS had only partially resolved. The Spanish king, Charles I, appointed Orellana as governor of the Amazonian region, which was dubbed New Andalusia, and chartered another expedition to the area for settlement by 300 men and 100 horses, with the objective of founding two cities. Orellana's new fleet of

four vessels set sail on May 11, 1545, only making it to BRAZIL in December after a harrowing journey. Once there, the following year was marked by intermittent attempts to explore the Amazon Delta, although the harsh conditions devastated the expedition. Of the 300 men who started out, only 44 survived to be rescued by a Spanish ship the following year; Orellana had died sometime in November 1546.

—Sean H. Goforth

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**Pachacuti Inca Yupanqui** (d. 1471) *Inca emperor* Pachacuti Inca Yupanqui acceded to rulership after his victory over the Chanca in 1438 and remained in power until 1471. The most notable project Pachacuti undertook as Sapa Inca was the rebuilding of the city of Cuzco. The Spanish writer Juan de Betanzos offers a vivid account of this, depicting Pachacuti as a far-sighted urban planner and effective organizer of LABOR. Pachacuti first outlined the city and made a clay model to show how he wanted it built. He then mobilized a crew of 50,000 workers, who labored for 20 years, from the first improvements of channeling the Tullumayo and Saphy Rivers that flow through Cuzco until the completion of the building program. When the city was finished, Pachacuti held a town meeting and assigned houses and lots to members of Cuzco's nobility and to all other residents. He had people of lower social rank settle between the Temple of the Sun (Coricancha) and the point where the two rivers joined. Pachacuti named this section of his city Hurin Cuzco (lower Cuzco); the far end was called Pumachupa, which means "lion's tail." The area from the Temple of the Sun on up, between the two rivers to the hill of Sacsayhuamán, he distributed among the prominent lords of his lineage and his own direct descendants. This section became Hanan Cuzco (upper Cuzco). Based on this description, Cuzco's new layout is understood as visualizing the body of a puma, with its tail at Pumachupa and its head at Sacsayhuamán.

Pachacuti's other significant accomplishments were early territorial expansions to the southeast and northwest, as well as the formulation of a political landscape and sacred geography. Pachacuti commissioned the con-

struction of various royal estates in the Urubamba Valley, the most famous of which is MACHU PICCHU.

—Jessica Christie

**pajé** The shamans of the indigenous peoples of Amazonia and neighboring regions were known as *pajés* (from the Tupí-GUARANÍ word for "spiritual leader"). *Pajés* were the repositories of special knowledge about the world and were intermediaries between the human and supernatural worlds. The peoples of the tropical forest, despite their different cultures, languages, and ethnicity, generally considered the natural environment to be inhabited by spirits that interacted not only with humans but also with plants, animals, rivers, and other elements of the landscape (see AMAZON). *Pajés* were highly regarded by their societies and respected for their ability to heal; as a result, they were often rewarded with political authority and material wealth. Since in many cultures it was believed that sickness was caused by enemy sorcerers or witches, *pajés* also led military expeditions against the groups they claimed were responsible (see WITCHCRAFT).

*Pajés* underwent years of apprenticeship with established shamans, often secluded from the rest of the community. This training likely included the mastery of a large volume of information, from memorizing creation myths to the elaboration of herbal remedies.

Renowned for their knowledge of medicinal plants, including hallucinogenic plants such as the ayahuasca vine that was used both for healing and to communicate with the spirit world, *pajés* are still an important element

of folk MEDICINE among both indigenous and non-Indian communities in modern Latin America.

—Francisco J. González

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**Panama** For centuries, Panama has served as a land bridge, allowing the exchange of plants, animals, people, goods, and technologies between North and South America (see MIGRATION). Archaeological, linguistic, and genetic data demonstrate that Panama has been occupied continuously since the initial colonization of the Americas. Although animal bones found at La Trinadita date to 45,000 B.C.E., no associated Paleoindian tools have been found. The earliest evidence for human occupation comes from pollen and Joboid tools collected at La Yeguada and Lake Alajuela and dates to around 9500 B.C.E. Two lithic bifacial stone tool traditions and pollen remains are the only evidence of later human occupation. These are associated with the North American Clovis and South American fishtail projectile heads used by hunter-gather populations who inhabited the region around 9000 B.C.E. (see CLOVIS CULTURE). The tools have been found in open sites and rock shelters on the central Pacific coast, at locations such as La Mula-West, Nieto, and Vampiros.

During the Preceramic period, around 7000 to 5000 B.C.E., humans inhabited coastal sites and rock shelters along the central Pacific coast. They used bifacial stone tools and milling stones called “edge-ground cobbles” to prepare a variety of foodstuffs, including rodents, shellfish, freshwater turtles, estuarine fish, and plants. There is evidence of early AGRICULTURE during this time. Slash-and-burn cultivation was practiced to grow crops such as arrowroot, MAIZE, and squash, all of which were originally domesticated outside Panama.

After 5000 B.C.E., the use of unifacial stone tools became more common. Early inhabitants continued to use animal and plant resources. MANIOC, sweet potatoes, and yams were added to the diet, and agriculture continued to expand (see POTATO). In western Panama, between 4000 and 2500 B.C.E., human groups living in small camps and rock shelters used stone tools that differed from those used in central Panama. Bifacial wedges and axlike tools of basalt and andesite were used for woodworking. These people collected palm nuts and tree fruits; cultivated maize, manioc, and arrowroot; and probably hunted peccary, deer, and small game.

Pottery was developed in central Panama around 3000 B.C.E. at coastal and inland sites such as Monagrillo (where it was first identified), Zapotal, Corona, Río Cobre, Calavera, and Ladrones (see CERAMICS). In central Pacific Panama, there was an intensification of agricul-

ture, particularly in the drier foothills, but otherwise, most cultural patterns continued from the preceding Preceramic period. Throughout Panama, material culture became more diverse during this period, and three distinct cultural regions emerged in western, central, and eastern Panama.

By the first millennium B.C.E. until 300 C.E., Panama experienced relatively rapid cultural development and agricultural intensification. Regional pottery styles developed in western Panama (Concepción complex style), central Panama (La Mula style), and eastern Panama (zoned linear incised). The growing population began settling in nucleated agricultural villages. In central Panama, people settled along the alluvial plains of the main rivers in the lowlands, at sites such as La Mula–Sarigua, Sitio Sierra, Natá, Cerro Juan Díaz, Búcaro, La India, Cañazas, El Indio, and El Cafetal; similar processes occurred at La Pitahaya and Cerro Brujo in western Panama. New technologies were introduced. In central Panama, sites from this period indicate the broad usage of legless slab METATES (grinding stones), *manos*, and polished axes, all typically associated with maize cultivation, a staple FOOD in the region. In addition to maize, people consumed white-tail deer, fish, crabs, and shellfish.

The period between 400 and 800 C.E. saw the establishment of stratified societies and settlement hierarchies. Elite individuals controlled and displayed luxury goods made of stone, shell, ivory, and GOLD and mobilized LABOR for the construction of cemeteries, mounds, stone sculptures, stone pavements, and buildings. Evidence of this can be found at sites such as Sitio Conte, Barriles, La Pitahaya, Sitio Pitti-Gonzalez, Miraflores, Rancho Sancho, Cerro Juan Díaz, and El Caño.

After 800, the production of maize, hunting of game, and exploitation of marine resources intensified. Politics consolidated in regional centers such as Cerro Cerrezuela and El Hatillo, and populations increased along the river valleys. Tools, pottery, and other commodities were produced mainly by craft specialists, and burials reflect increased social stratification.

When the Spanish arrived in 1501, Panama had a variety of settlement types of different sizes. Communities were stratified and spoke diverse Chibcha languages in central and western Panama and the Cueva language in eastern Panama. There is also evidence of long-distance TRADE between polities, as well as WARFARE. In eastern Panama, Cueva speakers were organized in dispersed villages ruled by a local chief. Their ECONOMY was based on hunting, gathering, and agricultural activities. Spanish CHRONICLERS described stratified communities ruled by paramount chiefs in central Panama. These nucleated villages were located in major river valleys, surrounded by a wide variety of habitats from which the inhabitants obtained abundant game and fish; they also cultivated maize, manioc, sweet potatoes, and squash. In western Panama at the time of the CONQUEST, groups such as the

Catebas, Guaymis, Dolegas, and Dorasques lived in dispersed hamlets surrounded by agricultural fields.

See also PANAMA (Vols. II, III, IV).

—Diana Rocío Carvajal Contreras

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***panaqa* (*panaka*, *panaca*)** The term *panaqa* is a QUECHUA word referring to a royal kin group (see *AYLLU*) of Inca elites based in the imperial capital of CUZCO, PERU (see INCAS). Each sovereign in the conventional list of Inca emperors was revered as the founder of a royal kin group; at the time of the Spanish CONQUEST, there were 10 royal kin groups based in Cuzco. Like an *ayllu*, a *panaqa* was organized around shared kinship, landholdings and ritual-ceremonial groupings. This royal kin grouping was further divided, according to the principle of dual corporate organization, into upper (*banan*) and lower (*burin*) divisions. Reflecting Inca social organization, which integrated *ayllus* into a single, hierarchical society, *panaqas* were bounded and ranked according to factors such as ritual status, mythohistorical tradition, and the founder mythologies of the kin groups.

The *panaqa* as a kin unit played important political, economic, and ritual roles in Inca society. *Panaqas* inherited the estates of their kin group founders and managed these lands with the resources developed by the deceased ruler during his lifetime. These estates were located across varied ecological zones so that a wide range of resources could be exploited as a source of wealth for the monarch and his descendants. The resources provided by the estates of royal kin groups allowed them to underwrite political and ceremonial activities that were crucial to the maintenance of royal power and, perhaps most important, to support the privileged obligation the *panaqa* held of maintaining ancestral mummies, a practice critical in Inca and, more broadly, Andean religious practice (see RELIGION).

—Tien-Ann Shih

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**Paraguay** Paraguay is a republic located in the middle of South America. It takes its name from the river that bisects it, the word *Paraguay* originating from the GUARANÍ terms for “river” and “place.” Modern Paraguay is landlocked but is bordered in the southwest and south-

east by major rivers—the Paraná and Pilcomayo—that separate it from URUGUAY and ARGENTINA. Paraguay shares borders with BOLIVIA and BRAZIL to the north.

Before the Spanish CONQUEST, Paraguayan territory was occupied mainly by the Guaraní, who occupied the southern Paraná Delta, where Asunción sits. They lived in patrilineal communal homes, with up to 60 families in the same building. Their diet consisted primarily of fish, MAIZE, and calabashes. The Guaraní suffered frequent raids from nomadic tribes of the Chaco such as the Guaycurú, Toba, Payaguá, Pilagá, and Lengua. These persistent assaults eventually convinced the Guaraní to establish an alliance with Spanish settlers. Guaraní communities were organized by lineage, each lineage governed by its own chief. There appeared to be no formal head of state, and little if any ceremony surrounded the death of a ruler. Nevertheless, there was some degree of hierarchy in Guaraní society; one’s status was often based on inherited class membership. In the case of shamans or healers, status and power often had more to do with an individual’s charisma.

The Spanish appeared in Paraguay after abandoning attempts to settle nearer to the Atlantic coast. Juan Díaz de Solís discovered the mouth of the Río de la Plata (River Plate) in 1516, but Querandí Indians killed him and all his men shortly after landfall. Sebastian Cabot explored the Atlantic coast in 1527 before founding Sancti Spiritus along the Paraná River. Sancti Spiritus was soon abandoned, but Cabot returned safely to Spain, where Charles I decided to fund an impressive force of 1,600 to accompany PEDRO DE MENDOZA’s expedition to settle the Río de la Plata. Mendoza founded BUENOS AIRES in 1536, but such a large contingent proved difficult to feed. The Spaniards’ lack of FOOD and supplies provoked new hostilities with the Querandí, and Mendoza soon abandoned his men; he later died on his way back to Spain. In the meantime, Mendoza’s subordinates had followed the Paraná upriver and founded Asunción in 1537.

From Asunción, the Spanish initiated their quest to find indigenous kingdoms said to hold incredible wealth. Mendoza had named Juan de Ayolas to lead an expedition to find such a kingdom, but Ayolas disappeared while crossing the rugged Chaco wilderness. With Mendoza dead and the mythical kingdoms nowhere to be found, Spanish colonists in Asunción dramatically changed their strategy and sought an alliance with the Guaraní.

In 1542, ÁLVAR NÚÑEZ CABEZA DE VACA was appointed governor of Paraguay. However, instead of reestablishing royal authority, his arrival touched off a conflict between “old” and “new” conquerors. Cabeza de Vaca appropriated 3,000 palm tree trunks that had been designated to finish the “old” conquerors’ settlement and had them used in part to build his residence, the houses of the “new” conquerors, and horse stables. This act angered many of the city’s old residents. Nevertheless, Cabeza de Vaca made some strides in solidifying the Spanish-Guaraní alliance but later permanently damaged the colonists’ relationship with the Agace

peoples who controlled the strategically important confluence of the Paraguay and Paraná Rivers. As time passed, the governor rapidly lost allies; his popularity was further damaged when a catastrophic fire charred more than half of Asunción, including vast quantities of stored food. After an unsuccessful 1544 expedition to the Chaco, during which many Spanish were killed or became ill, Cabeza de Vaca was arrested and sent back to Spain in irons.

As a result of the instability following Cabeza de Vaca's arrest, the Agace and Guaraní joined forces and launched an attack on Asunción in 1545. The new governor, Domingo de Irala, was able to drive the attackers back; he then turned his attention to seeking reinforcements from Spain. After two years of waiting for imperial support, Irala decided to lead an expedition to PERU. On arrival, he discovered that the region had already been settled by the Spanish. Stopping short of LIMA, in the province of Chiquitos, Irala sent word to Peru's governor, PEDRO DE LA GASCA of his wishes to meet with him. Fearing a power struggle, Gasca prohibited Irala from staying in Peru. Irala's only option was to return to Asunción.

In Asunción, Francisco de Mendoza had in the meantime tried to have himself elected governor. Irala's allies had Mendoza arrested, and he was sentenced to death and executed. Once Irala had reestablished the peace for the second time in five years, he began an expansion of Paraguayan territory in an attempt to create easier access to the sea. This expansion was moving toward Brazil and the Río de la Plata in 1552 when Irala received a message from Charles I that confirmed his status as governor but also prohibited further expansion. This turn of events prompted Irala to ignore the royal ban on issuing *ENCOMIENDA* grants, which the governor began to institute as a source of labor for Paraguay's Spanish settlers. With no hope of trade with Spain nor a union with Peru, Irala set out to create a successful ECONOMY based on the exploitation of Guaraní labor.

The establishment of *encomiendas* marked the beginning of the "transition phase" in Paraguay's colonial history. In this phase, wealth would not be gained through the accumulation of GOLD and SILVER (which were scarce in Paraguay) but through the exploitation of indigenous labor primarily in AGRICULTURE.

See also ASUNCIÓN (Vol. II); PARAGUAY (Vols. II, III, IV).

—Eugene C. Berger

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**Pedrarias** See ARIAS DE ÁVILA, PEDRO.

**Peru** Peru, a large nation in South America, is oriented north-south along the Pacific coast, with ECUADOR to the north, CHILE to the south, and BOLIVIA and BRAZIL to the east. In terms of its geography, Peru boasts three major environmental regions: The first is a narrow coastal desert that runs along the Pacific shore, interrupted by 40 rivers flowing generally westward from the Andes mountains. The central region is dominated by the Andes Mountains. To the east of the Andes, Peru is dominated by the rain forest of the AMAZON. In all, modern Peru covers an area of approximately 500,000 square miles (1.29 million km<sup>2</sup>).

This varied environmental complex is largely responsible for major aspects of Peru's rich pre-Columbian history, with people attracted to the bountiful seafood harvest of the Pacific, the lush river valleys that run from the Andes to the coast, and the high mountain valleys in the Andes. Moreover, at various points in its history, cultural groups extended beyond the borders of modern Peru. For example, the Inca Empire extended into regions of modern Chile, Bolivia, ARGENTINA, Ecuador, and COLOMBIA (see INCAS).

Peru's pre-Columbian past is both highly diverse and remarkably complex. In terms of historical time, Peruvian prehistory initially is divided into "periods"; however, beginning about 400 B.C.E., scholars separate periods by "horizons."

### Periods in Peruvian Prehistory

PERIOD OR HORIZON	DATES
Lithic period	Settlement to 3000 B.C.E.
Preceramic period	3000–2000 B.C.E.
Initial period	2000–400 B.C.E.
Early Horizon	400 B.C.E.–1 C.E.
Early Intermediate period	1–600 C.E.
Middle Horizon	600–1000 C.E.
Late Intermediate	1000–1450 C.E.
Late Horizon	1450–1533 C.E.

Knowledge of Peru's first inhabitants is sparse; two lines of evidence, however, place the earliest arrivals by 11,500 years ago. Early human occupation sites elsewhere and blood typing of indigenous Peruvians confirm that the first arrivals were from Asia, crossing into the Americas via the broad Bering land bridge that linked Asia and North America during a time of low sea levels.

MONTE VERDE, Chile, a 15,000-year-old campsite south of Santiago, documents a sophisticated level of cultural activity, including framed hide huts, sewing, harvesting numerous wild plants, obtaining seafood, and killing mammoths. These people mostly likely arrived via a multigenerational MIGRATION down the west coast of Peru. It is reasonable to assume the existence of similar sites along the Peruvian coast, now inundated by rising sea levels.

Blood typing and genetic studies suggest that the New World was populated by three or four waves of migrants, only one of which was significant in populating South America. The “founder effect” postulates that as the small original populations crossed into South America, they gave rise to peoples among whom blood type O predominates, type A is rare, and type B is altogether absent.

Peru’s early inhabitants (after about 10,000 years ago) began to confront the varied challenges of the regions’s diverse environment and left suites of stone tools. In the northwest, homes were small, consisting of huts roughly six feet (1.8 m) in diameter. Tools were primarily choppers, scrapers, and flakes, used to craft other tools and wooden projectiles.

Needlelike projectile points used for spearing fish date back 12,000–7,000 years ago; these points distinguish the Paján tradition along the north coast. Again, rising sea levels likely inundated their primary seaside sites. In the Andean north, early settlers relied extensively on game hunting.

By the end of the Lithic period (ca. 3000 B.C.E.), the Chinchorro coastal culture, which straddled the Peru-Chile border, became the first group in the world to mummify human remains. Their complex mummification process consisted of removing flesh and organs, treating the skin, and reassembling the skeleton with wood supports. A final coat of mud plaster preserved the mummy until burial at some later date.

The first evidence of plant domestication in the New World, evidenced at the Guitarrero Cave and Tres Ventanas Cave, date back to the Lithic period 10,000 years ago. While there is evidence of cultivated crops such as beans and chili peppers, there is even greater evidence for the domestication of plants used to produce woven and knotted goods; these sites reflect the early beginnings of a long textile-production tradition in Peru (see TEXTILES).

The Preceramic period (3000 B.C.E.–2000 B.C.E.) in Peru initiated a precocious process of social complexity and organization. Significant monumental sites emerged during this period, including Caral, the “oldest city in the New World” (see CITIES). At Caral, the ARCHITECTURE reflects a tradition of building sunken circular courtyards, known as *plazas hundidas*, with diametrically opposed entry stairways. This practice began during this period and continued for centuries. Knotted and woven textiles are frequently found at Preceramic sites, bearing intricate portrayals of double-headed serpents, condors, and other figures. In addition to the Chinchorro region to the south, major cultural remains have been found along the Pacific coast from LIMA (the Rimac Valley) northward in nearly every river valley up to the Moche and Chicama Rivers.

Beginning during the Preceramic period, the Kotosh religious tradition demonstrates cultural vigor in the Andes and its Amazon tributaries. Excavations at Kotosh, the cultural type-site, in two large solid platform mounds, revealed 10 construction phases, the two earliest without CERAMICS. La Galgada, located 50 miles (80.5 km) from the coast,

reveals clear evidence that goods flowed from the coast to the highlands and into the Amazon: Tombs at La Galgada contained both Pacific shell and Amazon bird feathers.

In an interesting variation on the Neolithic revolution, numerous Preceramic groups of sites along the Río Supe, including Caral, seem to have chosen either fishing or farming as their primary ECONOMY, with active exchange of foodstuffs and other goods the norm. In this era, foodstuffs included arrowroot, sweet potatoes, squash, beans, pacaya, guava, jicama, MANIOC, MAIZE, oca, ulluco, white POTATOES, shellfish, kelp, and anchovies (see FOOD).

The Initial period is marked by three major changes: the spread of ceramics southward from their early appearance in Ecuador in the Valdivia culture, the widespread construction of U-shaped platforms along the coast north of Lima, and the extensive use of irrigation AGRICULTURE. At numerous coastal rivers, local populations constructed canals to support irrigated crops at higher river elevations; these canals then fan out from the river to their fields as the elevation drops. This technological innovation greatly increased the amount of available arable land along the coastal desert region. Moreover, increased rainfall during the Initial period fostered the growth of local traditions there.

The construction of U-shaped platforms followed the earlier tradition of placing baskets of earth fill, complete with the basket, in place to carefully account for LABOR. Later, this tradition included marking adobe bricks to account for the labor contribution of individual villages. U-shaped platforms may have had their origins at El Paraíso; however, the largest, most complex examples are found at Sechín Alto and Huaca Los Reyes.

As devastating drought brought the collapse of most coastal sites and U-shaped platform complexes, a new tradition, CHAVÍN, emerged at a major 10,000-foot (3,050-m) high Andean site, Chavín de Huántar. The dramatic spread of Chavín influence to coastal Ica by 400 B.C.E. marked the beginning of the Early Horizon.

Chavín de Huántar, unlike its earthen counterparts on the coast, was finely crafted with masonry and riddled with rooms and passages. The first “old temple” construction is C-shaped, with a central *plaza hundida*. Within the lower labyrinth where passageways cross, archaeologists found a 15-foot (4.5-m) stela, the Lanzón, configured as a point-down knife blade, with a carved “Smiling God” deity. A removable stone in the passage above the Lanzón permitted Chavín’s priests to bring voice to the stela. Imagery at Chavín de Huántar also includes raptors, anthropomorphic figures with hallucinogenic cacti, and crocodiles from the Amazon.

Prosperity gave way to drought, and the Chavín influence gave way to more regional cultures in the Early Intermediate period. Of particular importance were the Moche on the north coast, the Lima culture of the central coast, and the Nazca culture on the south coast, famed for its large desert geoglyphs of gigantic geometric figures and outlines of birds, fish, and other animals, all

etched on the desert landscape (see NAZCA LINES). At this time, isolated Andean groups formed small pockets in the highlands, while to the south, the TIWANAKU culture formed around Lake Titicaca.

Two large adobe constructions, the Huaca del Sol and the Huaca de la Luna dominated the Moche capital, Cerro Blanco; however, over time looters have ravaged the site. After the CONQUEST, Spanish looting of the extensive rich tombs within them was achieved by “hydraulic mining,” or the manual diversion of the Moche River in order to wash away the adobe structures and expose the interred GOLD within. The remains of the Huaca del Sol, now less than half its original size, are still 1,100 feet (355 m) long, 520 feet (158.5 m) wide, and 130 feet (40 m) tall.

Nevertheless, the Moche left one of the richest artistic legacies in pre-Columbian Peru. Creative Moche ceramic and textile arts depict animals, mythical figures, real-life portraits, and religious themes, including the caste of the warrior priest, who sacrifices captives taken in battle. The iconography of the warrior priest matches with high accuracy the details of the tomb of the Lord of Sipán in the Lambayeque Valley, which rivals the tomb of the Egyptian pharaoh Tutankhamen in the richness of its grave goods (see ART).

Environmental disaster brought enormous changes to Peruvian cultures at the end of the Early Intermediate. Earthquakes damaged and dislocated irrigation canal segments. At least eight major El Niño events, beginning in 511 c.e., triggered drought conditions between 562 and 594; during the period, rainfall dropped by one-third. Flooding also destroyed a major section of the Moche capital.

During the Middle Horizon, a period characterized by widespread societal disruption, the Andean WARI culture began to spread through north and central Peru. The Wari relied on high-mountain terraced fields and tribute collections from distant groups that fell under Wari control. Both these elements were precursors of later Inca statecraft and agriculture.

To the south, the Tiwanaku culture of Lake Titicaca flourished, refining earlier lakeside irrigation farming techniques to substantially improve agricultural production. Canalized fields covering 250,000 acres relied on irrigation water in a process that warmed the water during the day to mitigate frost effects at night. Around 1100, an extraordinary drought dropped the water level of Lake Titicaca by 40 feet (12 m), rendering much of the irrigated land unusable and bringing an end to the Middle Horizon.

During the Late Intermediate, Peruvian peoples were once again isolated into smaller regional polities. Coastal river valleys supported a series of independent ethnic groups, which dominated relatively small territories. From north to south, these cultures included the CHIMÚ, Sicán, Chancay, Ica, and Chiribaya. Despite their size, some of their constructions were truly monumental, including the large Chimú capital at CHAN CHAN and the Sicán city of Batán Grande.

In the Andes, the Wanka occupied the region east of Lima, the Aymara kingdoms occupied the Lake Titicaca region, and the Incas first emerged in the Lucre Valley. Out of the drought conditions of the Late Intermediate, the Incas emerged as masters of the environment and of neighboring peoples. Knowledge of the Incas and Late Horizon times is both archaeological and historical, based on accounts of the Spanish CHRONICLERS.

Radiating outward from what would become their capital city of CUZCO, the Incas, led by their ruler PACHACUTI INCA YUPANQUI, pursued conquest of their neighbors; these campaigns continued through 1463, and under Pachacuti’s leadership, the Incas refined their statecraft. They introduced a broad taxation system, applied to agricultural production, textiles, and community labor. Goods were stored in a vast network of state warehouses, reprising the earlier approach introduced by the Wari.

Pachacuti’s successor, Topa Inca, extended the empire to the north and south, spanning 2,500 miles (4,023 km) from central Ecuador to central Chile. Topa Inca’s heir, HUAYNA CÁPAC, assumed the throne in 1493, a time of marked unrest. The domination and assimilation of cultures conquered by Topa Inca were far from solidified. Efforts to relocate entire villages, as well as attempts to force the spread of the QUECHUA language, characterized this era of great unrest.

Huayna Cápac campaigned in Ecuador and established a second northern capital at Tumibamba; however, the empire soon erupted in civil unrest. Six years before FRANCISCO PIZARRO and his men set foot in Peru, the first agent of conquest, namely smallpox, struck Inca territory. Both Huayna Cápac and his chosen heir are believed to have succumbed to the DISEASE, and their deaths sparked a bitter internal war. This bloody conflict not only threatened the empire from within; it also facilitated the process of the Spanish conquest.

Five years of civil war raged as a tug-of-war developed between HUÁSCAR, who claimed the Inca throne from Cuzco, and ATAHUALPA, who advanced his claim from Tumibamba. In 1532, a military encounter in Ecuador led to Huáscar’s defeat and capture. Following the capture of Huáscar, Atahualpa began to march his victorious forces toward Cuzco.

While on this fateful journey in 1533, the conquistador Francisco Pizarro, sailing along the coast, learned of these circumstances and marched inland toward Cajamarca; there, in a surprise attack, he captured Atahualpa and held him ransom; with the ransom paid, Pizarro accused Atahualpa of plotting an uprising against the Spaniards, and after a brief trial, he ordered Atahualpa’s execution. Pizarro continued his march to Cuzco, defeated the capital, and ultimately retired to the coast where he founded Lima in 1535.

See also CALLAO (Vol. II); LIMA (Vols. II, III, IV); PERU (Vols. II, III, IV); PERU, VICEROYALTY OF (Vol. II).

—Walter R. T. Witschey

**Further reading:**

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**pipiltin** This NAHUATL term for “nobles” (singular, *pilli*) referred to the hereditary elite of preconquest and early colonial Nahuatl society (see AZTECS). The majority of Nahuas were *MACEHUALES*, or commoners. Social convention dictated that the unmodified term referred either to men or both men and women. When referring specifically to women, it became *cibuapipiltin* (singular, *cibuapilli*), or “noblewomen.” Nahuas shared the noble/commoner distinction with other Mesoamerican peoples, such as the MIXTECS, ZAPOTECs, and MAYA.

Broadly speaking, Nahuatl nobles took the lead in administering the resources of the *ALTEPETL* (city-state). They also conducted important religious ceremonies and directed TRADE relations (see RELIGION). They stood out from commoners by such features as dress. Whereas before the Spanish CONQUEST they might wear rare feathers and earplugs as evidence of their noble status, after the conquest they increasingly took to wearing European-style clothes and carried swords and muskets.

There were also clear distinctions within the nobility itself. At the highest level was the ruler, or *TLATOANI*, of the *altepetl*, who was drawn from a select group known as *teteuctin* (plural of *teuctli*, or “lord”); both offices were then followed by ordinary *pipiltin*. Wealth did not automatically lead to higher status. Some commoners involved in crafts and trade were just as wealthy as many nobles but never achieved noble status.

Noble status could be earned, nevertheless. Before the conquest and colonization imposed peace on warring *altepetl*, an outstanding warrior who was a *macehual* might become a *quaubpilli*, literally “eagle noble” and less literally “nobleman through merit.” Marriage provided another avenue for social advancement. The renowned Nahuatl Latinist Antonio Valeriano was born a *macehual* but married into the MONTEZUMA family and became a member of the highest Nahuatl nobility.

—Barry D. Sell

**Further reading:**

James Lockhart. *The Nahuas after the Conquest: A Social and Cultural History of the Indians of Central Mexico, Sixteenth through Eighteenth Centuries* (Stanford, Calif.: Stanford University Press, 1992).

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**pirates and piracy** A pirate is defined as someone who robs or plunders ships at sea or attacks settlements without a legitimate commission from a recognized king

or queen. The actions, depredations, and plunder of these sea raiders are known as piracy. In the Caribbean region, the bulk of piracy was directed against the Spanish. Shortly after CHRISTOPHER COLUMBUS’s last voyage to the New World in 1504, the Caribbean became a booming source of mineral wealth and TRADE for Spain. Eager to protect its new possessions from foreign interlopers and possible competition from Portugal, in 1493, Spain negotiated the TREATY OF TORDESILLAS, which effectively divided the entire non-European world between Spain and Portugal. A north to south line, which began 270 leagues (approximately 932 miles [1,500 km]) west of the Cape Verde Islands, was drawn along the globe. The treaty granted all the territory to the east of this imaginary line to Portugal, while all lands to the west went to Spain.

Of course, the other European monarchs were not consulted on the issue, and many of them resented Spain’s claim to dominance in the New World. Sending out semilegal sanctioned pirates, called “privateers,” and sponsoring or condoning outright acts of piracy and plunder against Spain quickly resulted. The French king Francis I reportedly issued the following sarcastic comment on the Treaty of Tordesillas: “The sun shines for me as for the others, I would like to see the clause in Adam’s will that writes me out of my share of this New World.”

As early as the 1520s, Spanish shipments of GOLD and SILVER bullion from the New World began to attract pirates from rival European nations such as France, England, and the Netherlands. Acts of piracy occurred both in the Caribbean and throughout the greater Atlantic world, making the route from the Indies to Spain ever more dangerous and the likelihood of pirate attack an omnipresent danger.

As early as 1522, the French pirate Jean Fleury attacked and seized three Spanish ships loaded with Aztec treasure taken by HERNANDO CORTÉS on their way back to Spain (see AZTECS; CONQUEST). Fleury was the first of a long series of French pirates who conducted raids and other acts of piracy against Spanish shipping and settlements throughout the 16th century. Bolder acts of piracy were to come. In 1544, French Huguenot pirates captured and burned the city of Cartagena. Ten years later, in 1554, the French pirate François Le Clerc captured Santiago, CUBA, and the next year his associate and fellow Protestant pirate Jacques de Sores captured and sacked the city of Havana. In 1564, while looking for a safe place to develop a new colony to serve as a base for future piracy against Spain, the French established the first non-Spanish colony in the New World at Fort Caroline in FLORIDA. Although the Spanish destroyed this pirate colony in 1565, Spain’s exclusive rights to colonization in the New World had ended.

Similarly, from the 1540s forward, England entered into the race for plunder and colonization. English pirates (technically privateers who either held letters of marque or had informal permission from Queen Elizabeth) sacked Spanish shipping and port cities from

the 1560s to the 1590s. In fact, England's best sailors and explorers almost always engaged in acts of piracy against Spain's possessions in the Indies; these infamous pirates included Sir John Hawkins, Sir Francis Drake, John Davis, and many others. Sir Francis Drake, England's most successful pirate (or privateer), echoed the general English disdain for Spanish claims to the territories outlined in the Treaty of Tordesillas when he swore to his queen, "We will give the Spanish no peace beyond the line!" Living up to his oath, Drake successfully raided and conducted piracy against Spanish settlements, sacking and plundering the cities of Nombre de Dios, PANAMA (1572); Valparaiso, CHILE (1579); Santo Domingo, HISPANIOLA (1586); Cartagena, COLOMBIA (1586); St. Augustine, Florida (1586); and, finally once again, Nombre de Dios (1595).

In order to protect its New World empire from these growing foreign incursions, the Spanish established key settlements on the largest of the Caribbean islands and throughout the Caribbean coasts of Central and South America; this region came to be known as the Spanish Main. After repeated pirate attacks against these key settlements, Spain was forced to build expensive walled cities and defensive works in towns in Cuba, Hispaniola, the isthmus of Panama, as well as Veracruz and Campeche along the coasts of MEXICO, and Cartagena and Maracaibo, VENEZUELA on the South American coast.

Moreover, to offset the danger to its treasure fleets, in the 1560s the Spanish CASA DE CONTRATACIÓN (Board of Trade) and the COUNCIL OF THE INDIES created the treasure fleet system. This system limited the number of FLEETS sent each year, concentrating them into two rotating fleets that sailed in convoys escorted by heavily armed warships. This new system created the need for another Pacific fleet and a silver train system, the latter designed to transport the vast quantities of silver from PERU and BOLIVIA overland across the Isthmus of Panama for transshipment to Spain on the *Tierra Firme* treasure fleet. Although meant to protect Spain's TRADE with the Indies, these new treasure fleets and the silver train system provided new targets for pirates and thus were victims of acts of piracy throughout the 17th century.

In terms of control over the Caribbean and mainland Central and South America, the Spanish could not afford a sufficient military presence to control such a vast territory and thus eliminate piracy. Weaker regions of Spanish control quickly fell to new attempts at Caribbean colonization by England, France, and the Netherlands. The result was that whenever a war was declared in Europe against Spain, acts of piracy occurred throughout the Caribbean. The ultimate success of these pirate expeditions eventually led to the establishment of new non-Spanish European colonies in the New World, especially on the islands of the Lesser Antilles.

See also HAWKINS, JOHN (Vol. II).

### Further reading:

Kris Lane. *Pillaging the Empire: Piracy in the Americas, 1500–1750* (Armonk, N.Y.: M. E. Sharpe, 1998).

**Pizarro, Francisco** (b. ca. 1478–d. 1541) *Spanish conquistador of Peru* Francisco Pizarro, the legendary conquistador of PERU, was born in the late 1470s in Trujillo, capital of Spain's Extremadura Province; his exact birth date is not known. Francisco was the illegitimate eldest son of Gonzalo Pizarro Rodríguez de Aguilar (1446–1522), a hidalgo with a limited estate in Trujillo and a royal infantry captain in the War of Granada and the War of Navarre, in which he died serving King Charles I. Francisco's mother was Francisca Gonzáles, from a family of peasants known as the Roperos for their probable relationship with the local convent of San Francisco as keepers of the wardrobe and where Francisca worked as a servant. Francisco, second cousin to HERNANDO CORTÉS on his father's side, most likely spent his childhood between the two households, though he seems not to have received the education that his younger brothers did.

Pizarro left for the Indies in 1502 as part of the fleet led by Nicolás de Ovando, governor of HISPANIOLA. There are few details of his early years in the Caribbean; however, through his military feats in expeditions against the indigenous peoples of the islands and eventually in PANAMA, Pizarro won the favor of Governor PEDRO ARIAS DE ÁVILA, known as Pedrarias. He participated in the Spanish "discovery" of the Pacific Ocean under the command of VASCO NÚÑEZ DE BALBOA, and in 1519, Pedrarias named him *REGIDOR* of the city of Our Lady of Assumption of Panama, where he became one of the most important *encomenderos* (see *ENCOMIENDA*). It was from this economic and political base that Pizarro, then one of the richest and most powerful men in Panama, launched his expeditions to South America (see *CONQUEST*).

After Pascual de Andagoya returned incapacitated from the first expedition of exploration along the Pacific coast in 1522, Pedrarias authorized Pizarro and his two partners, DIEGO DE ALMAGRO and Hernando de Luque, to continue the venture, which became known as the *Compañía del Levante* (Levant Company). The new partners were inspired by Andagoya's reports of a fabulously wealthy empire to the south, mistakenly understood to be named *Virú* or *Birú*; this region soon came to be called "Peru." Pizarro's first expedition, financed by an array of investors-adventurers in Panama, set sail in November 1524. It ended in failure, however. Pizarro and company (80 men and 40 horses) advanced no farther than Pueblo Quemado (on the Colombian coast) where a skirmish with Amerindians, in addition to FOOD shortages, forced them back to Panama (see *COLOMBIA*).

Pizarro and the Levant Company's second expedition sailed in November 1526; it consisted of two ships, 160 men, and a few horses. While Pizarro established a camp



at the San Juan River, his pilot, Bartolomé Ruiz, sailed farther south, crossing the equator for the first time in the Pacific. Ruiz also glimpsed the rumored riches of Peru when his ships crossed paths with an ocean-going balsa raft off the coast of Manta, ECUADOR. The raft, believed to be on a trading mission with the INCAS farther south, was laden with SILVER, GOLD, precious stones, and elaborate TEXTILES, as well as other ornate objects indicative of an advanced civilization. Ruiz captured three Indians from the raft to train as interpreters for future expeditions. He then rejoined Pizarro, and together they continued south, reaching the Isla del Gallo, where their men began dying at alarming rates from hunger and DISEASE. Many wished to return to Panama, where the new governor, Pedro de los Ríos, had decided to recall the Levant Company.

This recall led Pizarro to deliver his famous speech, during which he drew a line in the sand and declared “There lies Peru with its riches; here, Panama and its poverty. Choose, each man, what best becomes a brave Castilian.” Thirteen men, the renowned “Thirteen of Fame,” chose to stay with Pizarro and continue the expedition. They were rewarded the following year when they reached, first, the Gulf of Guayaquil and then made it as far south as the Peruvian river Santa. These explorations and landings revealed the first Inca city encountered by

Europeans, Tumbes, and other signs of the vast, unknown empire of riches that awaited the conquistadores. In Tumbes, Pizarro gathered various samples of the region’s wealth and curiosities, such as llamas; significantly, before he returned to Panama, he also acquired his famed interpreter, Felipillo.

Once back in Panama, Pizarro was unable to secure permission from Governor de los Ríos for a third expedition; he therefore decided to go directly to Spain for royal assent. This astute move both reduced the risks from rival conquistadores in the Indies and secured wider financial backing. His visit to King Charles I’s court coincided with his cousin Hernando Cortés’s return to Spain with tales of his marvelous exploits of the conquest of MEXICO. Not only did this coincidence inspire the Court’s confidence in Pizarro’s proposals, but it aided in his recruitment of adventurers, many of whom were from his native Trujillo. On July 26, 1529, Queen Isabella, in Charles I’s absence, signed the *Capitulación* of Toledo, which authorized Pizarro, Almagro, and Luque to discover and conquer the territory known as Peru. Pizarro was named governor, captain general, and *adelantado* of Peru, while Almagro was appointed commandant of Tumbes; Luque was named protector of the Indians and future bishop of Tumbes. This unequal distribution of power among the three led to Almagro’s



This 20th-century sculpture of a mounted Francisco Pizarro sits in the Plaza Mayor of Trujillo, Spain, Pizarro’s hometown. The sculpture is the work of the American artist Charles Rumsey. (Courtesy of J. Michael Francis)

eventual disagreements with Pizarro and the infamous civil wars following the conquest of Peru (see CIVIL WARS IN PERU).

After recruiting his half brothers JUAN PIZARRO, GONZALO PIZARRO, and HERNANDO PIZARRO from Trujillo, along with other soldiers, and procuring provisions and horses, Francisco returned to Panama. Then, on December 27, 1530, Pizarro launched his third expedition to Peru. Following several difficult months exploring the Ecuadorean coast, the company reached Tumbes to find the city in ruins, reportedly due to a civil war between rival Inca leaders and half brothers, HUÁSCAR and ATAHUALPA. The ensuing months were spent exploring the northwest arid region of Peru, until Pizarro founded the first Spanish city in Peru, San Miguel de Piura. From there, Pizarro marched southeast, into the sierra, toward the heart of the Inca Empire. He reached Cajamarca on November 15, 1532. There, he found Atahualpa resting and fasting after his victory over his half brother, Huáscar. Pizarro led a surprise attack against the Sapa Inca and his retinue of hundreds of high officials, capturing Atahualpa and effectively destroying the leadership structure of the Inca Empire. After collecting a remarkable ransom for Atahualpa's release, and in fear of an impending counter-attack by Atahualpa's general Rumiñahui, Pizarro executed Atahualpa on July 26, 1533. Pizarro then turned his sights on the Inca capital, Cuzco. After winning four decisive battles on the road from Cajamarca, Pizarro and his men entered Cuzco unchallenged on November 15, 1533.

Pizarro dedicated the remainder of his life to the establishment of the colonial administration of Peru, his expansive business interests, fighting Inca resistance and rebellions, and managing the internal political intrigues that ultimately led to his demise. He first founded his capital at Jauja but later decided it more advantageous to locate the capital on the coast, where he established LIMA, the "City of Kings," on January 18, 1535. He became fabulously wealthy from the numerous *encomiendas*, silver mines, and estates he controlled. In recognition of his success, Charles I granted him a marquisate, along with a new coat of arms. Pizarro fathered four children: Francisca and Gonzalo by the Inca princess Inés Huaylas and Francisco and Juan by the Inca princess Añas, or Angelina Añas Yupanqui. The rivalry with his partner of more than 20 years, Almagro, led to ever-greater disputes over the spoils of the conquest, especially over jurisdictions of territory Almagro claimed were granted to him. After saving Cuzco from MANCO INCA's siege, Almagro claimed the city as part of his territory, a claim that was disputed by the Pizarro brothers; ultimately, the Pizarros defeated Almagro's army at the BATTLE OF LAS SALINAS in 1538 and executed Almagro. The bad blood between the Almagristas and the Pizarros continued until Almagro's son's followers murdered Pizarro on the night of June 26, 1541. Pizarro's remains, confirmed to be legitimate in 1977, rest in Lima's cathedral.

—Michael J. Horswell

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James Lockhart. *The Men of Cajamarca: A Social and Biographical Study of the First Conquerors of Peru* (Austin: University of Texas Press, 1972).

Rafael Varón Gabai. *Francisco Pizarro and His Brothers: The Illusion of Power in Sixteenth Century Peru* (Norman: University of Oklahoma Press, 1997).

**Pizarro, Gonzalo** (b. ca. 1502–d. 1548) *Spanish conquistador, governor of Quito, and leader of rebellion against the Spanish Crown* Born in Trujillo, Spain, Gonzalo Pizarro was the fourth son of a father of the same name. Pizarro had already dedicated himself to a military career when he accompanied his half brother FRANCISCO PIZARRO to the Americas in 1530 with the intention of conquering PERU. Gonzalo Pizarro served as a lieutenant in the first war against the INCAS and was rewarded handsomely for his service with a portion of ATAHUALPA's treasure, as well as a coveted *repartimiento*. Pizarro distinguished himself as a military leader throughout the 1530s by pacifying indigenous rebellions and helping put down a challenge from his brother Francisco's former partner, DIEGO DE ALMAGRO. After this war between the rival Spanish forces, Francisco rewarded Gonzalo with the governorship of Quito (see CIVIL WARS IN PERU).

Envisioning still greater conquests, Pizarro led a 1541 expedition east from Quito into the AMAZON Basin, hoping to discover the legendary Lands of Cinnamon. A lack of supplies, combined with a general ignorance of the harsh territory, led to the deaths of the vast majority of the 200 Europeans and almost 4,000 indigenous people who accompanied him. When Pizarro returned to Quito the following year with his few surviving companions, he learned of the assassination of Francisco by supporters loyal to Almagro (the Almagristas).

Francisco's death left Gonzalo as the only Pizarro brother in Peru (see HERNANDO PIZARRO; JUAN PIZARRO). He expected to inherit his brother's position as governor but was disappointed upon the appointment of a royal official who had not taken part in the conquest. He was further alienated upon the promulgation of the NEW LAWS OF 1542, which limited the authority of *encomenderos* in Spanish America (see ENCOMIENDA). By the time Viceroy Blasco Núñez Vela arrived in Peru in 1544 charged with the implementation of the New Laws, Pizarro had established himself as the leader of a strong resistance prepared to defend *encomendero* privileges, by arms if necessary (see VICEROY/VICEROYALTY).

Núñez Vela showed himself unwilling to compromise. His royalist forces met Pizarro's rebel army for the decisive battle outside Quito in 1546. The rebels routed the loyalists, killing the viceroy in battle. Unwilling to endure such insubordination in his kingdoms, Charles I appointed PEDRO DE LA GASCA president of Peru and empowered him to restore order by any means necessary.

Pizarro, meanwhile, moved to consolidate his authority in Peru in order to prevent royal reprisals.

Gasca sailed for Peru in 1546. He would demonstrate a conciliatory tendency that his predecessor lacked. Gasca promised pardons to Pizarro's supporters in exchange for their assistance in putting down the rebellion. He bided his time and continued to win allies until 1548, when he led his army from LIMA to confront Pizarro outside CUZCO. Even as the sides lined up in battle formation, many of Pizarro's forces sensed defeat and deserted to join Gasca. Pizarro was taken prisoner in the battle and was beheaded the following day.

—Jonathan Scholl

### Further reading:

Rafael Varón Gabai. *Francisco Pizarro and His Brothers: The Illusion of Power in Sixteenth Century Peru* (Norman: University of Oklahoma Press, 1997).

**Pizarro, Hernando** (b. ca. 1501–d. 1578) *Spanish conquistador* Hernando Pizarro, FRANCISCO PIZARRO's half brother, was born in the capital of Spain's Extremadura province, Trujillo, in approximately 1501. Hernando Pizarro

was the legitimate son of Gonzalo Pizarro Rodríguez de Aguilar (1446–1522). His mother was Isabel de Vargas. He was Gonzalo's only legitimate son, was educated and highly literate, experienced as a captain of infantry in Spain's military campaigns in Navarre, and had contacts at the court of Charles I. Hernando traveled to the Indies with Francisco in 1530 to take part in the third expedition to PERU. He became one of Francisco's most influential collaborators and one of the most important protagonists in the CONQUEST of the Inca Empire (see INCAS), enriching himself and improving his family's stature in Trujillo (which seemed to be his priority, rather than governing Peru, like his half brothers FRANCISCO and GONZALO PIZARRO).

After participating in the capture of the Inca ruler ATAHUALPA, Hernando was sent back to Spain to represent Francisco's interests at Court and to ensure the Pizarros' privileged position in the new colonial government of Peru, especially in light of DIEGO DE ALMAGRO's political moves to obtain greater benefits. Hernando wrote an informative, if not self-aggrandizing report, which he sent to the High Court of Santo Domingo; the account offered testimony to his participation in the first years of the conquest of Peru (see AUDIENCIA). Highlighted among his deeds were his interview with Atahualpa, as well as the exploration of Pachacamac, a coastal pre-Inca oracle that



The Palace of the Conquest dominates the main square in Trujillo, Spain, ancestral hometown of the Pizarro family. (Courtesy of J. Michael Francis)

the Incas had incorporated into their pantheon of deities (see RELIGION). In his letter, Pizarro described the temple complex and its idol, which he destroyed. He was also responsible for capturing the Inca general Chalcuchima, one of the most powerful of Atahualpa's military cohorts, who commanded a large army.

After returning from Spain, Pizarro joined his half brothers Gonzalo and JUAN PIZARRO in the governing of Cuzco and led the city's defense during MANCO INCA's rebellion and siege. In 1537, Almagro returned from CHILE to take Cuzco under his control, imprisoning both Hernando and Gonzalo. Hernando was eventually released; later, he returned to Cuzco, along with Gonzalo, to retake the city after defeating Almagro and his men in the BATTLE OF LAS SALINAS. Following Almagro's execution, in 1538, which he ordered, Hernando was again sent to Spain to intervene on behalf of his brother Francisco's administration and to increase his financial and political standing. This time, however, his entreaties were met with official reproach, and he was sentenced to prison for 20 years at La Mota in Medina del Campo, Spain.

Although in prison, he enjoyed the comforts afforded to him by the revenues of his Peruvian investments, especially the SILVER mines of Porco, second in production only to the nearby POTOSÍ (see MINING). In 1552,

Hernando married his niece, Francisca Pizarro, the daughter of Francisco Pizarro and the Inca princess Inés Huaylas. Francisca had inherited her father's fortune, making her a most attractive marriage partner for the aging patriarch of the Pizarro clan, whose objective was to keep the Pizarro estates, mines, and ENCOMIENDAS in the family. They had five children, three of whom lived to adulthood. Hernando was released from prison in 1561 and returned with Francisca to Trujillo, where they built the Palacio de la Conquista (Palace of the Conquest) on the main square. Hernando spent the rest of his life consolidating the family's wealth and contesting the Crown's and other adversaries' challenges to his family's legacy.

—Michael J. Horswell

#### Further reading:

James Lockhart. *The Men of Cajamarca: A Social and Biographical Study of the First Conquerors of Peru* (Austin: University of Texas Press, 1972).

**Pizarro, Juan** (b. ca. 1510–d. 1536) *Spanish conquistador* Juan Pizarro, FRANCISCO PIZARRO's half brother, was born in the capital of Spain's Extremadura Province,



A view of the monumental architectural complex of Sacsayhuamán, located in the hills above the Inca capital of Cuzco (Courtesy of J. Michael Francis)

Trujillo, in approximately 1510. Like Francisco, Juan was the illegitimate son of Gonzalo Pizarro Rodríguez de Aguilar (1446–1522). His mother was María Alonso, which made him a full brother of GONZALO PIZARRO. Unlike Francisco, Juan Pizarro seems to have been raised in the manner befitting a member of the lesser nobility. He grew up under the tutelage of his half brother HERNANDO PIZARRO and his aunt, the matriarch of the Pizarro family in Trujillo, Estefanía de Vargas.

In 1530, Pizarro sailed to the Indies with his brothers and quickly assumed positions of responsibility in the CONQUEST of PERU. Reported to be affable and well liked among the Spaniards, in contrast with his half brother Hernando, Juan rose to the rank of captain and was effectively put in charge of the family's interests in the city of Cuzco. He served on the founding CABILDO (town council) of the city and later was named its CORREGIDOR. Juan died from wounds sustained in a heroic charge he led to retake the fortress of Sacsayhuamán during MANCO INCA's 1536 siege of Cuzco. He left his entire inheritance to his brother Gonzalo and never recognized a mestiza daughter he had fathered with an Inca noblewoman in Cuzco (see MESTIZAJE/MESTIZO).

—Michael J. Horswell

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James Lockhart. *The Men of Cajamarca: A Social and Biographical Study of the First Conquerors of Peru* (Austin: University of Texas Press, 1972).

**pochteca** Constituting a long-distance merchant class within Aztec society, the *pochtecas* were organized hierarchically into 12 guildlike groups (see AZTECS). Originally based in the city of Tlatelolco, the *pochtecas* resided in closed neighborhoods with internal laws, practiced intermarriage, and celebrated private feasts and performed rituals to their patron god Yahcateuctli. The *pochteca* title was hereditary, though outsiders were occasionally admitted to the group.

These specialized merchants operated in the open mercantile economy of the Late Postclassic Aztec Empire (1400–1520), which established long-distance exchange networks between the Valley of MEXICO and highly specialized production areas (see ECONOMY; TRADE). In the absence of draft animals, the *pochtecas* traveled lengthy intervals on foot, carrying raw materials and finished items on their backs or with the aid of porter caravans. Among the trade items that moved to and from the empire's center were TEXTILES, jaguar pelts, feathers, CERAMICS, shells, OBSIDIAN, precious stones, bronze, GOLD, salt, CACAO beans, and slaves (see SLAVERY). Some of the imported utilitarian goods were sold to commoners in the markets of Tlatelolco and TENOCHTITLÁN.

The *pochteca* trading expeditions were commonly sponsored by the Mexica (Aztec) nobility, who required exotic

goods to enhance their prestige and status. Since they were not considered nobility, the *pochtecas* could not normally keep their luxury merchandise. Nevertheless, the Aztec rulers granted them special privileges and generous rewards, and many *pochtecas* became as wealthy as the nobles who hired them. Their unique position as merchants for the elite gave the *pochtecas* the right to travel freely throughout the Aztec Empire and beyond, and they often acted as ambassadors to foreign rulers. This made them the eyes and ears of the emperor; they gathered news, created MAPS, and frequently spied on politically unstable regions. Occasionally, when a *pochteca* trader was murdered by a hostile group, the Aztecs retaliated with brute military force.

After the Spanish CONQUEST, the *pochtecas* started to compete with European merchants and merchandise; however, they were severely restricted by the colonial bureaucracy, and soon after the conquest, the organized guild was dissolved.

—Danny Zborover

#### Further reading:

Ross Hassig. *Trade, Tribute, and Transportation: The Sixteenth Century Political Economy of the Valley of Mexico* (Norman: University of Oklahoma Press, 1985).

**Ponce de León, Juan** (b. ca. 1460–d. 1521) *Spanish explorer, conquistador, and governor of Puerto Rico* Juan Ponce de León was born in Santervás de Campos near Valladolid sometime around 1460. Prior to the discovery of the Americas, he served the MONARCHS OF SPAIN Ferdinand and Isabella in their campaign against the Muslim kingdom of Granada. After its CONQUEST, Ponce de León ventured to the Americas in 1493 on CHRISTOPHER COLUMBUS's second voyage. He participated in the conquest and early government of HISPANIOLA. In 1508, Ponce de León received royal permission to conquer the nearby island of Borikén. He renamed the island San Juan de PUERTO RICO and founded the first Spanish settlement there, Caparra. In 1509, Ponce de León was named governor of the island. His tenure as governor was brief; he was removed from his position when Diego Columbus was granted privileges that had been taken from his father.

In 1513, Ponce de León sought to improve his position by engaging in a new conquest. Outfitting several ships, he ventured north where he claimed the “island” of La FLORIDA. After traveling along most of Florida's Atlantic coast, his ships passed around the Florida Keys and entered into the Gulf of MEXICO. On this journey, he discovered the Gulf Stream Current, which would become invaluable to transatlantic navigation. Ponce de León also searched for the “Fountain of Youth.” According to Spanish CHRONICLERS of the time, this myth had been recounted to him by the TAINO Indians in Puerto Rico.

In 1521, Ponce de León organized a second expedition of two ships and approximately 200 men to conquer

Florida. His men faced strong resistance by the Calusa Indians, and Ponce de León himself was seriously wounded. After retreating to Cuba, he died from his wounds.

—Robert Schwaller

**Popol Vuh** Literally meaning “Council Book,” the Popol Vuh is a valuable source of information on the history, genealogy, religion, mythology, and social organization of the K’iche’ (Quiché) MAYA people of GUATEMALA. Its known history began as a K’iche’ alphabetic transliteration of a pictorial document, most likely a pre-Columbian codex, composed by members of three noble lineages between 1554 and 1558 in the colonial town of Santa Cruz Quiché (see CODICES). At the beginning of the 18th century, the manuscript was discovered in the town of Chichicastenango by Fray Francisco Ximénez, who translated it into Spanish. The document was brought to scholarly attention soon after Guatemalan independence in 1821 and is currently held in the Newberry Library in Chicago. As one of the most complete and detailed indigenous texts of Mesoamerica, the Popol Vuh has provided scholars with a wealth of information regarding Maya religious iconography, which appears to record a Maya history that dates back to as early as 100 B.C.E., as seen for example on the San Bartolo murals (see RELIGION).

The Popol Vuh begins by recounting the Maya gods’ creation of the physical world and the humans who inhabit it, the latter succeeding only after four attempts, when humans were made out of MAIZE. Their descendants eventually became the founders of the K’iche’ lineages, who wandered the land to establish kingdoms and eventually settled in Guatemala’s central highlands. They received their ruling legitimacy first from a powerful city in the east and later from a great ruler in the lowlands somewhere off the Yucatán shore. These K’iche’ nobles returned to their kingdoms with items of rulership, among which was the original pictorial document that would later be translated and named the Popol Vuh.

At the heart of the narrative is another story concerning Hun Hunahpu and Vucub Hunahpu, the sons of the first calendar diviners. The firstborn twin sons of Hun Hunahpu were to become the patrons of writing and the arts. Although Hun Hunahpu and Vucub Hunahpu were later sacrificed by the lords of the underworld, Hun Hunahpu miraculously fathered a second pair of twin sons, Hunahpu and Xbalanque, with the daughter of an underworld lord. The narrative then focuses on the adventures of these later Hero Twins—both on earth and in XIBALBÁ, the underworld, where they overcome trials posed by the lords therein. Eventually, they allow themselves to be burned to ashes, only to be resurrected in the disguise of magicians who can raise the dead. They perform their miraculous act on the lords of death, but after sacrificing them, they do not revive them. After avenging their father’s and uncle’s

deaths and paying a visit to their burial place, the Hero Twins then rise to heaven as celestial bodies. These protagonists’ movements between the surface and the underworld probably represent those of the Sun, Moon, planets, and stars through the sky, thus the Popol Vuh should be read as an allegorical tale similar to the Greek and other great mythologies of the world.

—Danny Zborover

#### Further reading:

Allen J. Christenson. *Popol Vuh: The Sacred Book of the Maya* (Norman: University of Oklahoma Press, 2007).

**potato** The potato (*Solanum*) is a FOOD crop of the New World comparable in age to the WHEAT and barley of the Old World. There are more than 235 species of wild potato. These have successfully resisted frost, extreme altitudes, drought, insect pests, and microbial diseases. Early human populations in southern CHILE were gathering and roasting wild potatoes 13,000 years ago. Potatoes have been cultivated in the Andes for at least 10,000 years, about the same length of time as beans and squash. During this long period, Andean farmers developed eight species and thousands of varieties of domesticated potatoes (see AGRICULTURE). One reason they were able to do this is the enormous number of microclimates in the Andes, where small changes in altitude led to changes in temperature and moisture. A second reason is in the genetic makeup of the *Solanum* genus. This remarkable diversity led to high productivity and a reduction of risk to farmers.

Of the eight species of cultivated potatoes, *pitiqiña* is closest to its wild forebears. The other seven species of domesticated potatoes were developed from *pitiqiña*, which is highly nutritious. Its tubers are extremely variable, both in form and in color. The yellow potato (*limeña* or *papa amarilla*) is deep yellow and especially tasty. It is adapted to the shorter days of the central Andes and is not found outside that region. The *phureja* potato is grown at low to mid-altitudes (7,200–8,500 feet [2,195–2,590 m] above sea level) on the warm moist eastern slopes of the Andes from VENEZUELA to ARGENTINA. Its small, irregular-shaped tubers are nutritious with good flavor. *Phureja* lacks a dormant period and sprouts immediately. This is good for continuous cropping but a drawback for storage.

There are literally thousands of varieties of the *andigena* potato, which is found from Argentina to Venezuela. The tubers are large, and the modern *tuberosum* species is closely related. Two frost-resistant species of potatoes are grown at high altitudes in southern PERU and BOLIVIA; they are *ajanhuiri* and *rucki*. *Ajanhuiri* is grown between 12,000 and 1,300 feet (3,658–396 m) in the region around Lake Titicaca. The tubers are nutritious but are too bitter to eat without processing. *Rucki* potatoes (actually two species) are grown at even higher altitudes and are even more frost resistant; they also require processing to be edible.

Long ago, Andean farmers devised a process of leaching potatoes in running water, then drying them in the sun and freezing them at night; this process created a lightweight flour called *chuño* that is highly nutritious, portable, and can be stored indefinitely. *Rucki* potatoes are still planted today to reduce the risk of crop loss in extreme conditions. In the Andes, potatoes provided the calories and nutrition for survival and population growth in one of the most challenging environments in the world. Technical developments—the creation of new varieties and the invention of *chuño*—made the development of civilization possible.

—Patricia J. Netherly

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**Potosí** Located high in the eastern Andes Mountains (14,764 feet [4,500 m] above sea level) on an alluvial plain in modern-day BOLIVIA, Potosí served as a center for SILVER MINING from its founding in 1545 through the end of the 17th century. The huge quantities of silver extracted from Potosí made it synonymous with wealth throughout Europe. The forced LABOR methods employed there contributed to the Black Legend, an understanding of Spanish colonial rule that emphasized its cruelty toward and exploitation of indigenous peoples.

Increased activity in the eastern Andean highlands during the GONZALO PIZARRO rebellion enabled the Spanish to discover the extensive silver ore deposits of the Cerro Rico (Rich Mountain) around which the city of Potosí developed (see CIVIL WARS IN PERU). This discovery is the subject of folklore, for despite evidence of pre-Hispanic silver mining by communities in the immediate vicinity of the Cerro Rico, even the rich surface ores remained virtually untouched. One story emphasizes the destined arrival of the Spaniards. At the height of Inca rule, agents approached the site to examine it (see INCAS). A voice from inside the mountain commanded them not to take the silver; it was meant for other masters.

Following the 1548–49 pacification of the Pizarro rebellion, settlement in Potosí began in earnest; Spaniards throughout Peru flocked to the city in order to stake their claims. They brought with them the *YANA* and *ENCOMIENDA* Indians who provided the labor force during the initial phase of silver mining. The terms of service differed depending on the demands of the Spanish master and the legal status of the indigenous laborer, but most miners owed their masters a fixed quantity of ore or refined silver, which was to be given at intervals. Upon fulfilling this duty, native individuals were usually free to extract ore for their own profit.

The early period of extraction (1545–60) was limited primarily to surface mining. Ore was crushed by means

of human- or animal-powered mills and was then refined in traditional Andean furnaces, called *guayras*. When placed on the windswept hills around Potosí, air rushing through strategically cut vents over flaming llama dung produced temperatures capable of separating impurities from the silver ore. Ores of sufficient quality could be made into pure, coinable silver.

By 1550, as many as 25,000 native Andeans resided in Potosí. Fifteen years later, that number had more than tripled. Many came to fulfill the demands of the Spaniards to whom they were pledged, but some came in hopes of escaping the onerous tribute demands of their masters. The urban ECONOMY of Potosí offered indigenous people a means of subsistence apart from their traditional *AYLLUS*.

The exhaustion of surface ores led to a decline in silver production beginning in the late 1560s. This, in turn, instigated the mass departure of Amerindian laborers. The introduction of water-driven mills and a new amalgamation technique solved the problem of dwindling surface ores and made the refining process more efficient. Amalgamation, a process developed in New Spain (MEXICO) in the 1550s, involved adding mercury to pulverized ore inside a refining tank. The resulting chemical reactions enabled silver to be separated from less valuable components of the ore. Amalgamation made it possible to refine even low-quality ores into pure silver. The resulting increase in profitability made cutting mineshafts a worthwhile enterprise. Spanish settlers managed to ensure a sufficient indigenous workforce by reviving the pre-Hispanic *MITA* labor draft system. Silver production spiked in the late 1570s. Output leveled off in the 1590s, but production remained high through the first few decades of the 17th century.

See also POTOSÍ (Vol. II).

—Jonathan Scholl

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**pottery** See CERAMICS.

**probanza de mérito** The Spanish Crown never possessed the resources necessary to fund the enormous costs of the exploration, CONQUEST, and settlement of the New World; instead, the MONARCHS OF SPAIN often negotiated private agreements with individuals or corporations, offering financial rewards, offices, and titles to those who organized, equipped, and funded these early ventures. Likewise, the thousands of conquistadores who participated in the conquest were not part of a formal Spanish army; rather, most joined the early conquest expeditions in the hope that their services would be

rewarded with money, offices, and titles. Thus, the *probanza de mérito*, or “proof of merit” petition, served to highlight individual services to the Crown. Thousands of these petitions are housed in archives in Spain and throughout Latin America, offering rich details about the various conquest campaigns. Scholars have too often overlooked the value of these documents, claiming that the self-serving purpose of these records exaggerates individual accomplishments and thereby distorts the history of the conquest. Nevertheless, individual petitioners had to be careful not to exaggerate their achievements, as witnesses often contradicted such claims. Colonial *probanzas* provide some of the richest documents for reconstructing the history of the campaigns of conquest and their participants.

—J. Michael Francis

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**Puerto Rico** Part of the much larger Caribbean culture area, Puerto Rico presents the longest continuous span of occupation in the Antilles. The archaeological record indicates that human settlement began on the island during the Mesoindian or the Preceramic period, from 7,900 to 2,000 years ago. It is presumed that early migrants made their way east from Yucatán or Central America to Mona Island and Puerto Rico from 6,600 to 4,500 years ago (see MIGRATION). These sites are identified with the Casimiroid culture, which is noted for the lithic artifacts associated with hunter-gatherer cultures.

From around 2,000 years ago to the first contact with Europeans, about 500 years ago, dramatic cultural changes occurred around the Caribbean. These were characterized by diverse ceramic styles and increased population density (see CERAMICS). The first group that migrated into the Antilles during this period were the Saladoid. Making their journeys between 2,000 to 1,400 years ago, the Saladoid brought with them horticulture that featured MANIOC and MAIZE, as well as polychrome pottery technology. Within the area of Puerto Rico and the Virgin Islands, subregional Saladoid cultures named the Huecan and the Cedrosan developed permanent settlements; they are associated with ceremonial centers and ball courts.

While some accounts identify Puerto Rico and its aboriginal population as Carib, the indigenous peoples that CHRISTOPHER COLUMBUS encountered at the end of the 15th century are generally known as TAINO (see CARIBS). Columbus symbolically took possession of the island of Borikén, as it was known among the Taino, in the name of Spanish Crown in 1493, yet Spanish settle-

ment of the island did not begin until 1508. When the island’s first Spanish governor, JUAN PONCE DE LEÓN, arrived on the island and renamed it *Puerto Rico*, there were approximately 20 loosely confederated indigenous political territories. The CACIQUE (chieftain) Agueibana was the most politically influential and had the largest traditional territory. As with the prior colonization of HISPANIOLA, and under orders from the Spanish Crown, Ponce de León set out to control the island’s resources and subdue its inhabitants. To accomplish his mission, he established a now legendary yet peaceful relationship with Agueibana. After Ponce de León entered into the “making relations ceremony” with Agueibana, it would seem that this early association between the Spaniards and Puerto Rico’s Taino was at the least amicable.

While Ponce de León did set out to subjugate the Taino, his initial strategy was not militarily oriented. Rather, his first economic endeavors were agricultural initiatives (see AGRICULTURE). Puerto Rico’s Taino were not subject to overt military extermination policies nor was the overall population forced to exploit GOLD (see MINING). Of the Taino who were pressed into such service, it was consistently reported that “those natives who could escape fled to the interior, away from the slave driving masters.”

By 1515, only 5,500 indigenous people were officially distributed in the Spanish *ENCOMIENDAS* in Puerto Rico. The *encomienda* was a Spanish trusteeship LABOR system that institutionalized “rights and obligations” between the *encomendero* (grantee) and the people under his “care.” An expansion of medieval feudal institutions, Indian lands were theoretically to remain in the Amerindians’ possession; nevertheless, they were required to pay tax (tribute) and provide free labor at certain times of the year to the *encomendero*. In exchange, the *encomendero* was responsible for their welfare, their assimilation into Spanish culture, and their Christianization.

From 1515 to 1518, outbreaks of smallpox are said to have wiped out two-thirds of Puerto Rico’s indigenous inhabitants, as well as a significant percentage of Spaniards (see DISEASE). These estimates relate solely to those Indians within the *encomienda* system, as no censuses were taken in the mountainous region at this time.

Just three years after the initial colonization of the island in 1511, and one year after the first gold smelter was ordered built, more than 11,000 aboriginal islanders began the first of a series of military offensives against the Spanish. Although Puerto Rico received the least number of enslaved Africans in the Indies, many of those who arrived joined the Taino in the mountainous interior (see SLAVERY). In what the Spanish named the “Cimarron Rebellions,” these two distinct cultural groups combined forces in military campaigns against the Spanish Crown.

While Old World diseases, slavery, low birth rates after the CONQUEST, malnutrition, suicide, intermarriage, departure to other islands, and outright WARFARE all reduced the indigenous population, these factors did



not lead to a complete extinction of Puerto Rico's Taino Indians, despite what has been promoted historically.

See also PUERTO RICO (Vols. II, III, IV).

—Roberto Múkaro Borrero

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**pulque** Pulque is the slightly sour, carbohydrate-rich fermented product of the sap of the xerophytic agave or maguey (*Agave americana* and others). Consumed in Central and western MEXICO, it is a prominent traditional beverage associated with ritual intoxication. Part of a constellation of products—FOOD, fiber, construction material, fuel, and fertilizer—derived from the agave, pulque (*octli*, in NAHUATL) is weakly alcoholic and appears white due to the suspension of a diverse community of yeast and eubacteria (see ALCOHOL). Viable as a beverage for a brief period of 24–36 hours, pulque undergoes putrescent decomposition, developing a mucilaginous body and a disagreeable odor. Its artisanal production begins with the collection of sucrose-rich *aguamiel* from specially prepared, mature plants of six to 12 years of age. Once collected, the *aguamiel* is transferred to fermentation containers; during the preconquest period,

these were large, flared-neck ceramic jars (see CERAMICS). Roots were traditionally added during fermentation to increase intoxicating effects. Among the AZTECS, special intoxicating pulques were prepared for use in ritual (see RELIGION). Pulques flavored by the addition of fruits may have precolonial roots; however, most are of later invention. Agave use is documented in the Early Preclassic period, although the production of pulque may have begun sometime later as the plant came under increasing cultivation. Representations of agave and pulque occur at the Classic-period metropolis of TEOTIHUACÁN (200–800 C.E.). Representations are also common in Postclassic-period CODICES. A highly significant food resource for the large Postclassic-period populations of Central Mexico at the eve of the Spanish CONQUEST, agave cultivation is strongly associated with xeric areas where *aguamiel* and pulque augmented the traditional MAIZE and legume-based diet and provided a potable source of water in areas with limited surface water supplies.

See also PULQUE (Vol. II).

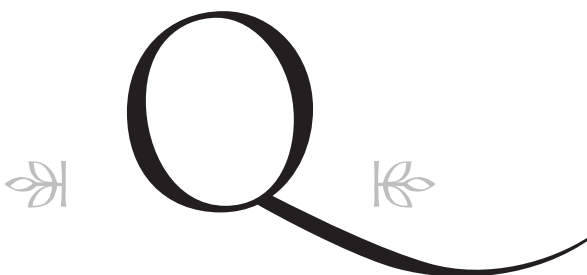
—Christopher Von Nagy

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**punishment** See CRIME AND PUNISHMENT.



**Quechua** Quechua is best described as a group of seven related languages, which are not mutually intelligible as they are divided into many dialects. Today, there are at least 10 million Quechua speakers in the Andean republics, ranging from southern COLOMBIA, ECUADOR, PERU, and BOLIVIA to northwestern ARGENTINA. There is an extensive record of oral LITERATURE, poetry, and song; written Quechua is now taught in bilingual schools.

Most Quechua speakers are found in Peru and Bolivia. It was long thought that the great extent of Quechua was related to the expansion of the Inca state, which introduced Quechua as the language of administration and that the language was further spread by the Spanish colonial authorities (see INCAS). However, studies in historical linguistics have shown that in the centuries before 500 B.C.E., the original language, proto-Quechua, was spoken on the central Peruvian coast and adjacent highlands. From 0 to 500 C.E., divergent forms of Quechua expanded into the central highlands, including Junín and along the coast to the north and south of the original area.

In the centuries that followed, further expansion and diversification occurred into the north-central highlands and coast and along the southern coast into the southern highlands and the WARI heartland, displacing Aymara-related languages and extending to the south of Cuzco. By about 800 C.E., one divergent dialect, very different from the dialect spoken in Cuzco, had moved north from Chachapoyas into highland Ecuador, long before the arrival of the Incas. To the south, the expanding Inca state seems to have facilitated the spread of Quechua into eastern Bolivia and

northwestern Argentina, without penetrating a block of Aymara, Puquina, and Uruquilla dominance around Lake Titicaca and extending south to Lake Poopó. Thus, the early expansion was fostered by spontaneous contact between peoples, who were probably multilingual, through TRADE or pilgrimage. For many of these groups, the Quechua dialect of Cuzco was another language to be learned.

—Patricia J. Netherly

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**Quetzalcóatl (Kukulkán)** In NAHUATL, this deity's name means "feathered serpent." Called Kukulkán among the MAYA, the god Quetzalcóatl has great time depth and geographic spread throughout Mesoamerica, where he was revered as the patron of rulers, learning, and merchants.

Although serpent iconography dates to Olmec times (1000–400 B.C.E.), such as on Monument 19 from La Venta, most archaeologists place the serpent-plus-feathers motif later (see OLMECS). For example, within the citadel (Ciudadela) on the Street of the Dead in TEOTIHUACÁN in Central MEXICO, stands the Temple of Quetzalcóatl (150–250 C.E.). This terraced, truncated pyramid has multiple copies of a feathered serpent head, with ruffed neck feathers, on the terrace risers.

In the Yucatán Peninsula, feathered serpents are also common at Uxmal (800–1000 C.E.), where pairs



A feathered serpent head representing Quetzalcóatl adorns the Aztec Templo Mayor. (Courtesy of J. Michael Francis)

adorn building facades in long intertwining patterns. The Nunnery Quadrangle and Governor's Palace are noteworthy in this regard. Moreover, the Itzá held the feathered serpent as central to worship. Feathered serpent images at CHICHÉN ITZÁ (800–1100) adorn several ceremonial structures, including the largest ball court in Mesoamerica, where feathered-serpent columns are used in the upper and lower Temple of the Jaguars, and feathered serpent balustrades flank stairways. The Temple of the Warriors features large feathered serpent columns. Similar columns are found at the Toltec site TULA, in Hidalgo, north of MEXICO CITY (see TOLTECS). The AZTECS borrowed widely from Toltec traditions and beliefs, and Quetzalcóatl became one of their most venerated deities.

The Temple of Kukulkaán (also referred to as the Castillo), Chichén Itzá's largest structure, has large stone serpent heads at the foot of the north balustrades. At the equinoxes, the setting Sun shines light across the terraces, which casts a light-and-dark shadow to create the pattern of a diamond-back rattlesnake from the stone heads at the foot of the pyramid

to the top. Feathered serpent motifs are evident at MAYAPÁN (1200–1450) as copies of the ARCHITECTURE at Chichén Itzá. Given that numerous Mesoamerican rulers adopted the name *Quetzalcóatl* as their own, religious ritual became mixed with history and myth into legends about real people (see RELIGION).

—Walter R. T. Witschey

**quipu** The *quipu* (*quipo*, *khipu*) is an Andean device that predates the rise of the Inca Empire (see INCAS). In general, *quipus* consist of a series of variously placed knotted cords (called “pendant threads”) connected to a central cord. The position, color, length, and design of these cords allowed Inca *quipucamayoc* (specialists who created and “read” the *quipus*) to record and “read” the information that each *quipu* contained. The precise nature of the information encoded on these *quipus* has been the source of much scholarly contention, however. Most scholars have argued that *quipus* served principally as mnemonic devices and that the information encoded on the different knots was used mainly to



Felipe Guamán Poma de Ayala's illustration of a *quipucamayoc* (Inca accountant and treasurer), holding a *quipu* in his hands (*The Royal Library, Copenhagen, Denmark*)

record numerical quantities, such as census data, troop numbers, and the contents of storehouses. Indeed, it appears that most *quipus* recorded information of that nature.

Nevertheless, over the past several decades, the debate over other possible uses of Inca *quipus* has intensified, and many modern Andeanists now believe that *quipus* were used to record much more than numerical information. Indeed, recent scholarship suggests that Inca *quipus* reflected a striking degree of uniformity and could be used to record sophisticated grammatical constructions; in other words, it has been argued that *quipus* could in fact record language and therefore could be “read.” It should also be noted that many Spanish colonial accounts claimed that *quipus* were used to record non-numerical information, such as myths, legends, history, and poetry. For several decades after the Spanish CONQUEST, *quipucamayocs* continued to function in colonial PERU, often appearing in Spanish courts, where they were asked to read from their *quipus*. Transcriptions of these testimonies have begun to yield fascinating new clues about the information encoded on Inca *quipus*.

—J. Michael Francis

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# R

**regidor** Council members, or *regidores*, represented their cities and towns at the local level in the basic political unit of the Spanish Crown, the *CABILDO*. From the moment the first Spaniards settled in the New World, they introduced concepts of government based on medieval codes of law and customary practice. The *cabildo*, or municipal council, was the cornerstone of Castilian society. In America, the Spaniards used the founding of a town and the election of *cabildo* members as a means of colonization.

In MEXICO CITY, after the defeat of the TRIPLE ALLIANCE in 1521, Spaniards founded a *cabildo* and set about rebuilding the capital city from the ashes of TENOCHTITLÁN. The *cabildo* was composed of *alcaldes*, who typically functioned in a judicial capacity, and *regidores*. As political administrators, *regidores* collected tribute and enforced regulations related to local markets and commerce, building projects, and infrastructure. They also oversaw the organization of municipal celebrations, royal receptions, and religious festivities. Most *regidores* involved in the formation of Mexico City had been granted *ENCOMIENDAS*, which gave them access to indigenous tribute or LABOR; others held interest in MINING, SUGAR cultivation, cattle, and TRADE. Access to labor and resources fostered resentment and political factionalism among the early Spanish elite.

Royal administrators took the notion of the *cabildo* and superimposed it on indigenous communities organized around *repúblicas de indios*, a Spanish term often used to refer to semi-independent groups of Indians who controlled a given portion of land (see REPÚBLICA DE INDIOS). While royal provisions stipulated that membership of indigenous *cabildos* should include only native people, the expanding presence of *castas*, a term used to

identify those of mixed-blood ancestry, compromised this practice (see ALTEPETL; CAH; MESTIZAJE/MESTIZO). During the colonial period, *cabildo* members from Indian towns stand out as some of the most active mediators between the Spanish and indigenous worlds.

See also REGIDOR (Vol. II).

—Alex Hidalgo

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## religion

### CARIBBEAN BEFORE 1492

On October 12, 1492, CHRISTOPHER COLUMBUS landed on a small island in the Caribbean, which he named San Salvador. It was there that he made initial contact with the TAINO. His perceptions of the native people, as well as those of the other early colonial CHRONICLERS, were affected by a variety of factors, including a Christian and patriarchal value system, fear, a sense of isolation, and culture shock at being in an alien environment. Columbus's financial debt to Queen Isabella and his need to validate his geographical theories further impaired his judgment and affected his treatment of the indigenous population. All of these factors are important to keep in mind when attempting to understand pre-Columbian religious beliefs and practices in the Caribbean.

The archaeological evidence is scanty and inconclusive. Over the centuries since initial contact, most indigenous ceremonial and burial grounds have been looted or destroyed. Nevertheless, on his first voyage to the Caribbean, Columbus described the artifacts he saw. His original journal was lost, but the Dominican friar BARTOLOMÉ DE LAS CASAS recorded the following excerpt in his *Apologetica historia de las Indias*: “We have found many beautifully carved statues and masks in the shape and likeness of women. I do not yet know whether they are for the purpose of adornment or religious devotion.”

It is clear from this entry that Columbus was curious about the beliefs of the Amerindians. In March 1495, Columbus commissioned a Catalan missionary from the Jeronymite order, Fray Ramon Pané, to live with and learn about the Taino people. Pané was a simple man who had come to the New World to serve as a chaplain to the newly arrived Spanish settlers. Over a three-year period, he wrote extensively about the Taino belief system. While his writing style reflects a lack of EDUCATION, he nonetheless mastered the native language. Pané went on to write the most complete and reliable account of Taino customs and beliefs ever recorded.

According to Pané, Taino religion and mythology included aspects of animism, shamanism, totemism, and polytheism. The two major deities in the Taino pantheon of gods and goddesses were Yucahu Bagua Maorocoti and Attabeira Yermao Guacar Apito Zuimaco, his mother, who was also mother of the celestial waters, human fertility, and the Moon. One of Attabeira’s names identifies her as the creator and supreme deity. The *batey*, the sports field and ceremonial grounds of the native population, was named after Atabey (Attabeira), and representations of her abounded at these locations. Some scholars have suggested that the games played on these fields were imbued with religious significance and helped predict the future.

The name Yucahu Bagua Maorocoti translates as “lord of the yucca, the seas, and without male ancestor” (see MANTOC). This indicates that Attabeira, like Tiamat in the Enuma Elish, is the great mother and the one creator. It was she alone, like the Egyptian creator Nun, who without the aid of a male engendered Yucahu and all the other deities. It was also she who was represented in the elliptical stone objects (*cemíes*) depicting a snake eating its own tail—she with no beginning and no end. *Cemíes* were an important part of the Taino belief system, as the spirits of their deities and their ancestors resided within these sacred objects. Other *cemíes* were usually tripointed, mountain-shaped statues made of stone or wood.

The Taino belief system played an integral part in the people’s daily existence. The Taino believed that DISEASE was the result of one of two things: disordered thinking (stress or anxiety) or a nutritional deficiency. Illness was therefore treated with spiritual counseling, directed by a *bebique*, or shaman. Upon entering a hallucinogenic trance after inhaling a powdered herb (*coboba*), the *bebique* would

speak to the spirits in order to ascertain the cause of an illness. At times, a ritual sacrifice involving abstention and/or fasting was prescribed. Other times, an exorcism was performed. Most often, the cure was as simple as creating a *cemí* of an ancestor or protective spirit for the patient. The Taino are recorded to have been very free with all their possessions, sharing everything they had except for their personal *cemíes*, which they guarded religiously.

Other deities who figured strongly in the Taino pantheon are Yaya, Spirit of Spirits and Father of the Sky, and Itiba Cahubaba, Ancient Bleeding One and Mother Earth. It is not clear whether these were other manifestations of Attabeira and Yucahu or separate deities. In addition, Pané described other *cemíes* the Tainos worshipped and their characteristics. These included Maquetaurie Guayaba, lord of the dead, and Guabancex, mistress of the hurricane, the Amazon woman (see AMAZON WOMEN).

The Taino religious pantheon was complex and seemed to be representative of the dual nature of all things. According to their creation myth, the Taino originated in a land called Caonao (land of GOLD) on a mountain called Cauta (sacred mountain). On this mountain, there were two caves. One was called Caciba Jagua (cave of the sacred tree), and the other, Amayauna (cave of no importance). The Taino people emerged from Caciba Jagua; all other people emerged from Amayauna.

Like many other indigenous cultures, Taino cosmology included a belief in the power of four sacred elements: earth, fire, water, and air. Everything coming from the earth, including herbs and other plants, roots, and fruits were considered medicinal as well as nutritional (see MEDICINE). Newborn babies were blessed and purified by being immersed in water and, in addition to abstaining from sexual relations and fasting, men washed themselves before undertaking any potentially dangerous journey for protection. Healing herb potions (*jarabes*) were heated over a fire to activate their healing powers, and great leaders were often burned on a pyre to purify their spirits. The *bebique* often used the power of breath to suck or blow spiritual forces into or out of his patients, and upon burning on a ritual pyre, dead men were said to expel or confess truths.

The belief system of pre-Colombian Caribbean peoples had many similarities and a common origin with both North and South American native cultures. There is evidence that these groups traded on a regular basis; hence, cultural diffusion would have occurred, contributing to the multifaceted, rich, and complex nature of Taino spirituality (see TRADE).

## MESOAMERICA BEFORE 1492

Although unique in their own ways, the religions of Mesoamerica’s settled cultures shared some fundamental beliefs. Mesoamericans believed that the earth was a middle world, positioned between the various levels of the upper world and underworld, they believed in a similar

pantheon of deities who served roles within these worlds, and they imbued their deities with attributes of the flora and fauna associated with these worlds. Mesoamerican deities were connected with the clouds, rain, the Sun, and the Moon. Some took the form of humans, MAIZE, snakes, jaguars, and lizards. Still others, especially those associated with death and the underworld, took the form of skeletons, spiders, bats, and owls. Moreover, many deities appear in both masculine and feminine guises, reflecting the Mesoamerican belief in the duality of all things.

Mesoamericans also shared similar creation myths, in which deities created the world and humankind through their labor and/or sacrifice. By way of gratitude and in order to receive continued favor, humans were expected to show respect for their deities through specific rituals. Indeed, the relationship between humans and deities was tightly bound to reciprocity.

Creation myths and the reciprocal obligations they formed were honored at ceremonial centers with special connections to the underworld and upper world, such as caves and mountains, respectively. In addition, individual polities typically constructed primary ceremonial centers that commonly took the form of pyramid temples. The great pyramids formed a ritual center that included government buildings, markets, shrines, upper-class dwellings, and sometimes ball courts. They also formed a religious center where rulers performed rituals that affected the entire community and its relationship with the cosmos. Just as the pyramid was the center of the world of the community, it was also the symbolic center of the community's link to the universe and its deities. Indeed, through these pyramids, the temporal and religious world of each culture was made and ordered.

Once created, Mesoamerican cultures needed to maintain the correct balance within the universe. This was a delicate matter—shortage or excess could result in disaster. For example, drought, hurricanes, and crop failure were seen as signs of the deities' disapproval. Mesoamericans maintained the balance by fulfilling their obligations to deities through rituals and sacrifice. Because in most creation stories the deities bled or even sacrificed themselves to create the earth and humans, they required human blood for their sustenance, although sometimes animal blood was acceptable. Indeed, blood-letting rituals and HUMAN SACRIFICE were common elements in Mesoamerican religious observance.

These rituals not only “fed” the deities and fulfilled humanity's obligations but maintained the world itself. In the Nahuas' (AZTECS) creation myth, after the Sun was created it failed to move across the sky until the deities had sacrificed themselves. Similarly, humans were required to offer their blood to sustain the world; however, Mesoamericans also believed that the world was created and destroyed on a cyclical basis. For example, at the time of the Spanish CONQUEST, the Nahuas thought that the universe had already passed through four cycles and that they were living in the fifth age. At the end of each era,

the deities would create a new world and the cycle would repeat itself. Failure to sustain the world in its present cycle could result in its destruction. Thus, droughts, hurricanes, and earthquakes were also seen as warning signs to center and balance the world through religious ritual.

The community's responsibility to the deities and the world they had created fell upon the shoulders of the elite. Indeed, elite corps of warriors, priests, and rulers were responsible to the people for maintaining both the temporal and supernatural reciprocal relationships of the community. These responsibilities reinforced the elites' social and religious status by creating an extraordinary focus on elite people themselves. As the highest-ranking members of the elite, Mesoamerican rulers were not only heads of government but religious heads. As spiritual leaders, they possessed sacred powers to intervene with deities and the cosmos on behalf of their communities.

Nevertheless, the elite did not carry all the responsibility for maintaining balance; people were responsible for the daily order of their homes and individual lives. Mesoamericans believed that the human body was a miniature replica of the cosmos. Like the cosmos, the body followed a cycle of creation and destruction. The body also possessed supernatural forces that required maintenance through personal rituals and observances. Overall, religion bound together the sociopolitical units of Mesoamerica, reinforcing the roles of rulers, elites, and commoners, while giving each group a part to play in the maintenance of their natural and supernatural worlds.

Complex calendars governed the religious rituals to ensure their observance. As all Mesoamericans were agriculturalists who needed the favor of the gods to ensure a good crop, calendric rituals usually coincided with key events in the agricultural cycle such as sowing, sprouting, growing, and harvesting, and the rainy and dry seasons (see AGRICULTURE). The calendars also represented the Mesoamerican concept of time. Time existed in three separate yet constantly intersecting planes: human time, the time of the gods, and the time before the deities created humans. Every day, these natural and supernatural times intersected, and humanity received an imprint from the deities.

The Calendar Round was created to predict such imprints. This calendar consisted of two interconnecting cycles. The first, called the *tzolkin* by the MAYA, or *tonalpohualli* in NAHUATL, was the 260-day count composed of 20 day names and 13 numbers that rotated to create 260 individual days. Each day had its own omen and destiny that came to define the day itself and the characteristics of those born on that day. For example, someone born on the day of Akbal would have the propensity to be wealthy, feminine, and a skilled orator. This calendar interlocked with a 365-day calendar that followed the solar year, consisting of 18 months of 20 days, plus an additional month of five days. As both calendars rotated, numbered days became aligned with numbered months to form a date that would not repeat for 18,980 days. Thus, the day

1 Kan 2 Pop would not recur for another 52 years. This 52-year cycle was a large part of Mesoamericans' belief in cyclical creation and destruction and, as such, was a focus of significant ritual in all cultures.

The Aztecs believed that although each era of existence lasted for several 52-year cycles, the world was always in danger of being destroyed on the last day of each cycle. Thus, they celebrated what is known as the New Fire Ceremony. During the five days preceding the end of the cycle, all fires were extinguished, possessions were broken, and the people practiced a state of mourning. On the last night, Nahuatl priests would await Pleiades' passing through the meridian at midnight. On the star's passing, a man was sacrificed, and a fire was started in his chest, which subsequently kindled all the fires throughout the Valley of MEXICO. The next day, the renewal of another cycle was celebrated with feasting, bloodletting, and sacrifice. All settled cultures practiced similar rituals at the end of each cycle.

Astronomical observations greatly influenced Mesoamerican calendars and religious beliefs. Buildings were carefully aligned with the cycles of celestial bodies including the Moon, Sun, and Venus. For example, the Aztecs constructed the Templo Mayor so that on the spring equinox, the Sun rose directly between the two shrines—one for the god Huitzilopochtli, the other for the god Tlaloc—at its summit. The Maya aligned the sun temple at Dzibilchaltún so that on the equinoxes, the Sun would seem to rise in the middle of its main doorway. Likewise, the pyramid “El Castillo” at CHICHÉN ITZÁ was constructed in such a way that during the equinoxes, the Sun would cast a shadow of the pyramid's platforms on the side of the staircase to make a body of light that connected to the illuminated head of a snake positioned at the bottom of the stairs. For the Maya, the scene appears as though Kukulcán, the feathered serpent, is moving down the pyramid (see QUETZALCÓATL).

Finally, Mesoamerican religions were inclusive in nature. Mesoamerican cultures allowed conquered peoples to continue venerating their own deities as long as they also now venerated those of the conquerors. Additionally, the conquerors could adopt the deities of their subjects, such as the Nahuas' appropriation of Xipe Totec, an Oaxacan god of agriculture, spring, and goldworkers. In the end, this inclusiveness contributed to the creation of common beliefs among Mesoamerican religions.

### SOUTH AMERICA BEFORE 1492

At the time of the Spanish conquest, the vast continent of South America was home to tens of millions of people, divided into distinct ethnic groups, with diverse languages, cultures, and religious traditions. While very little is known about the religious beliefs and practices of the majority of pre-Columbian groups, recent advances in archaeological and ethnohistorical research are beginning to provide more detailed information. Religious beliefs and practices in pre-Columbian South America



Felipe Guamán Poma de Ayala's illustration of the burial practices of the Chichaysuyus, who resided in one of the four quarters of the Inca Empire (*The Royal Library, Copenhagen, Denmark*)

were remarkably diverse, with localized networks of gods, sacred shrines, rituals, and spiritual leaders. Unlike much of Mesoamerica, where many ethnic groups shared common deities, South American religion was far more diverse. Nevertheless, despite the many different religious traditions, some commonalities do appear to have existed.

First, virtually all religious traditions in pre-Columbian South America were polytheistic, consisting of a diverse pantheon of terrestrial and celestial deities. Andean peoples, for example, believed that the sacred resided all around them, in streams, rivers, mountains, boulders, and even small stones. All of these elements of the physical world were capable of embodying the divine and thus of exerting influence on their daily lives. Local cults emerged throughout the Andes, from COLOMBIA to CHILE, linking populations with the divine powers and spirituality of the land that surrounded them.

Second, most religions or cultural practices included human and animal sacrifice. Religious traditions throughout the continent also reflected profound concern about the afterlife, and most groups venerated deceased ancestors.



The use of religious symbolism was ubiquitous in pre-Columbian societies. In fact, the most reliable primary resource from which to study these religions is the ARCHITECTURE and other material remains discovered by archaeologists. For example, several ceramic pieces found in the northern Andes of South America included two or more animals combined into one, such as half-feline and half-eagle, or even an animal body with a human face (see CERAMICS). Another common theme found in these pieces was the polarity of man and woman, usually featuring a pair of human beings side by side, some with feline legs and feet.

Of all the pre-Columbian cultures of South America, the ethnic group about whom the most is known is the INCAS. With polytheistic beliefs, the Incas worshipped many deities, all of whom had some connection to the natural elements of the Earth. An example was the Sun God, Inti. In addition to the Sun, the Incas venerated an ultimate creator, the weather/thunder god, the Moon Goddess, and a goddess of the sea. The Sun God was the figurehead of all religious and cultural aspects of life and dictated the authoritative structure of the society. The ruler of the empire was believed to be a direct descendant of Inti.

An important yet controversial aspect of Inca religious and cultural practices was the chewing of the COCA leaf. In its natural form, coca has both mental and medicinal effects; it was chewed throughout much of South America, well beyond the borders of the Inca Empire. Hallucinogenic drugs or plants also played a significant part in religious rituals; these mind-altering substances allowed a shaman to travel to the otherworld in order to communicate with the deities. The use of hallucinogenic substances was highly regulated, their consumption often restricted to all but shamans.

See also COFRADÍA (Vol. II); CURANDERA/CURANDERO (Vol. II); INQUISITION (Vol. II); MISSIONS (Vol. II); RELIGION (Vols. II, III, IV); SANTERIA (Vol. III).

—Mark Christensen  
Rosalina Diaz  
Christina Hawkins

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**religious orders** Within the CATHOLIC CHURCH, all nuns and some priests are members of religious orders. Generically, members of religious orders are known as “regulars,” or “regular clergy,” in that they follow the special rules (Latin, *regula*) of their order. There are three major types of religious orders. Orders for men

are known as “first orders,” with female orders being known as “second orders” since historically male orders preceded female orders, while the latter tended to adopt the rules of the first. A third order consists of laypeople who voluntarily follow the regulations of an order as best they can in their daily lives. Both male and female orders played a vital role in the development of the church in early colonial Latin America.

The Dominican and Franciscan orders were the most famous of the missionary orders in the New World. Both were founded by charismatic leaders in the 13th century, and both sought to revitalize the Catholic Church at the time. The Franciscans, founded by St. Francis of Assisi, were openly a missionary order. The Franciscans felt that by personally imitating Christ through poverty and humility, they could draw people to a deeper form of Christianity. The Dominican order, founded by St. Dominic de Guzmán, sought to attract converts to the faith through preaching and to deepen the faith of existing Christians. The members of these two orders took strict vows of poverty and sustained themselves through begging. As a result, the Franciscan and Dominican orders were known as “mendicant” orders. They practiced a strict egalitarianism, and individual members were known simply as “brothers,” and in English also as “friars.”

Other mendicant orders important in the evangelization of the New World were the Mercedarian and Augustinian orders. The Mercedarians (Order of Our Lady of Mercy) had as their goal the redemption of Christian captives held by Muslims. The Mercedarian order quickly became one of the most important orders in early Latin America, with several of the chaplains on important expeditions, such as those of HERNANDO CORTÉS, coming from this order. The Augustinian order played an important role in early educational efforts in Latin America and was one of the largest religious orders in MEXICO during the colonial period (see EDUCATION).

Religious orders took great pride in having been the first in any given missionary field. While some clergy accompanied the armies of CONQUEST, normally it was the arrival of an organized band of missionaries that gained precedence for a specific order. Although a Mercedarian accompanied Cortés in the conquest of Mexico, the Mercedarians are not usually considered the first order to have Christianized Mexico. The arrival of 12 Franciscans some three years after the conquest of the AZTECS initiated the evangelization of that country. The Dominicans are generally credited with being the first order in PERU.

In each major territory, different religious orders developed specific geographical regions, often on the basis of where other orders had failed to have a presence. In the case of Mexico, the Franciscans tended to first carry out their mission in the central region around modern MEXICO CITY, although Franciscan influence was also found elsewhere. The Dominicans concentrated their efforts on the southern region between Mexico City and

Oaxaca. The Augustinians were active in central regions not already claimed by the other orders, but especially in the west, in the region of Michoacán. In a similar manner, other orders came to dominate entire regions of the New World; for example, the Mercedarians were the dominant order in GUATEMALA, although other orders had a presence there.

The primary mission of the religious orders was the conversion of the indigenous people to Christianity. At the onset, the missionaries faced several major obstacles, the greatest of which was communication. The friars did not know the native languages; and the NATIVE AMERICANS did not know Spanish. Rather than train the indigenous people in Spanish or Latin, the missionaries learned the native languages, focusing on a few widely spoken languages, such as NAHUATL among the peoples of Central Mexico, Mayan in the Yucatán and Central America (see MAYA), and QUECHUA and Aymara in the Andean regions. The friars copied the languages in Latin characters, writing grammars, dictionaries, and handbooks for indoctrination. The first book published in the New World was a Christian catechism in Nahuatl, written for use in the conversion of the Aztecs.

While converting Amerindians to Christianity was the central goal, the missionary techniques of the religious orders differed. One of the major controversies of the early colonial period had to do with the administration of the sacrament of baptism. The Franciscans believed that after a relatively short period of indoctrination, native people could be baptized by a priest in a simple ceremony, using holy water and oils. The other orders, especially the Dominicans, held that native people needed a long and protracted period of study of Christian doctrine, followed by the full ritual involving new garments, salt, saliva, and other features, just as in any other baptism in Europe. Similarly, the Franciscans believed that indigenous people could be baptized at any time of the year, while the other orders restricted the sacrament to Easter and Pentecost Sundays.

Some sacraments could only be performed by the local bishop, particularly the sacrament of confirmation. In the early days of the missionary effort, there were no bishops, and when they did arrive, they served in the Spanish CITIES, often far from the remote indigenous villages. As a consequence, the friars secured permission from the pope to exercise the functions of bishops in regions located over two days' ride from the local bishop. The final permission from the pope, contained in a letter called Omnimoda, granted not just powers of bishop but all the powers of the pope himself to the missionaries operating in remote regions.

Religious orders had important vocations beyond conversion. In the towns and villages of the New World, it was the religious orders that started schools, both at the lower and university level. The Dominicans were especially active in the field of education. The Franciscans also set up schools, their most famous in Mexico being

the College of the Holy Cross in Tlatelolco, a suburb of Mexico City. That school was founded to train the sons of the Aztec elite in both Christian doctrine and European culture. It was thought that if the sons of the nobility embraced Spanish culture, their subjects would be more willing to embrace Christianity. While several students at the college went on to important leadership roles in indigenous society, none were allowed to join the religious orders or the clergy. While it seems the first missionaries hoped that the young native boys who were under their tutelage could eventually become friars and priests, within a few years most came to believe that the indigenous lacked the necessary moral direction to become priests. Nonetheless, native individuals continued to serve in the monasteries and convents in an ancillary manner. Frequently called *donados*, some took the habit of the order but did not take its religious vows. Others served in the parishes, teaching Christian doctrine, leading prayer services, playing MUSIC and singing, or helping to maintain the churches and cloisters.

The majority of the religious orders sustained themselves through gifts and bequests, either of outright cash donations or property. The property could be sold for cash or maintained by the order and rented for ongoing income. The orders also established endowments to support special causes, such as saying memorial masses or providing dowries for poor young WOMEN, either to marry or to enter the convent. Funds received for endowments, and all funds in excess of what was needed for the daily expenses, were invested in property in the form of mortgages. The interest on a mortgage was used to pay for the purposes of the endowment, such as masses or dowries. Only the Franciscans refused to accept property or make investments.

See also AUGUSTINIANS (Vol. II); DOMINICANS (Vol. II); FRANCISCANS (Vol. II); JESUITS (Vol. II); MERCEDARIANS (Vol. II); MISSIONS (Vol. II).

—John F. Schwaller

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**república de indios** In many records of colonial MEXICO, the terms *república de indios* (republic of Indians) and *república de españoles* (republic of Spaniards) appear with great frequency, often in legal and social contexts that assume two fully segregated domains, one populated by indigenous people, the other by Spaniards, creoles, mestizos, and Africans. However, the various social, economic, and political practices recorded in colonial

documents suggest that while initially these two terms referred to two highly differentiated groups of people, by late colonial times this differentiation was not so clear in some domains, such as large urban settlements, and increased in geographically isolated communities. The term *república de indios* should therefore be regarded as a bureaucratic concept for a set of legal dispositions, not always reflecting social realities, through which the Spanish Crown attempted to maintain politically expedient territorial, legal, and social divisions between indigenous and nonindigenous peoples.

After the CONQUEST, the Spanish Crown had to contend with local lineages and traditional notions of rulership. Thus, it allowed for the appointment of what were called “natural lords,” lineage rulers who maintained their standing in early colonial governance systems. This duality was reflected in the designation of a local ruler as “CACIQUE and governor.” For the most part, the Crown did not interfere directly with the election of indigenous rulers for the first two generations or so after the conquest; however, it did prepare the ground for their demise. The Crown seized the initiative during indigenous inheritance crises, inserting nonelites and even outsiders into the local sphere as governors at these times. The date of rupture with the lineage ruler varies across regions; it occurred in 1564 in Texcoco, around 1560 in Pátzcuaro and by 1560 in the Toluca valley, and from 1579 onward in central Yucatán. By the end of the 16th century, indigenous communities had been placed under the direct authority of the Crown and the centralized clergy. In this manner, the Crown succeeded in mapping a regional political chain of command onto Indian communities without overtly replacing elite groups or triggering major rebellions.

In 1516, a Spanish priest named BARTOLOMÉ DE LAS CASAS presciently argued for the major social and political features that came to characterize *pueblos de indios* (Indian towns): segregated indigenous villages directly controlled by Crown officials, with a church and a hospital governed by a qualified priest, and a population subject to rotating, periodic LABOR obligations related to labor-intensive colonial enterprises such as MINING and manufacture, and to community needs. To this general framework should be added land-tenure laws, which restricted the sale of indigenous communal or private land to non-Indians, and land-tenure patterns that emphasized communal landholdings but allowed elites and influential Indian townspeople to usufruct some portions of land. The indigenous community could be a *cabecera de doctrina*, or the head of the smallest colonial administrative unit (*sujeto*, or dependency). *Cabeceras* had a resident priest who managed the doctrinal education, mass, and public registers and periodically visited the *sujetos*.

Indians could elect lower-level local officers to serve in the town’s CABILDO (city council), which consisted of two alcaldes (local magistrates), about four REGIDORES (city council members), and an *escribano* (notary). Although offi-

cially usually did not serve consecutive terms, in practice, these positions rotated among males with kinship ties to traditional elite groups or ambitious males who wished to increase their social standing; the amount of personal resources and responsibilities required for these offices acted as deterrents for overburdened commoners.

Amerindians had a variety of obligations to the Crown and to their local community. A fixed monetary yearly tax was collected from each adult indigenous person: WOMEN were assigned a lower tax, which did not automatically translate into a reduced obligation, since they had unequal access to monetary income; men contributed a fixed number of days of free labor per year—often one full day per week—to various community and Crown projects. Community funds were held in a communal box with three keys with symbolic assignments: one for the Indian head of government, another for the priest, and the third for high colonial officials. These labor and tax obligations were a heavy burden to most commoners. Labor service at regional mines and workshops contributed, along with epidemic DISEASE, to the catastrophic indigenous mortality rates during the late 16th and early 17th centuries (see MINING).

In contrast to the more complex social status of urban Indians, the relative independence and isolation of rural community residents allowed them to acquire a corporate identity that was based on local sociopolitical and religious institutions. This identity became increasingly localistic and parochial with the passage of time. The rise in rural populations that began with the demographic recovery of indigenous communities in the mid-17th century resulted in the creation of more rural communities, or *pueblos*, in the late 17th and the 18th centuries. The basic requirements for a *pueblo de indios* was a population of at least 80 families, a church building, and an adequate political rationale. The creation of new *pueblos* often called for the submission of 16th-century *títulos primordiales* (primordial titles) establishing land rights given to the community by a Spanish court; this resulted in a proliferation of new *títulos*, which imitated the style and content of earlier documents.

Paradoxically, even groups of people whose main ethnic background was not indigenous established settlements that shared traits with *pueblos de indios*. For example, the early northern Puebla community of Tenampulco, which had disintegrated due to depopulation in the late 16th century, lent its name to a new community that settled beside the former’s abandoned church building in the mid-18th century. Although the new community functioned virtually as a *pueblo de indios*, most of its residents were MULATO ranchers rather than indigenous people. In this manner, the *pueblo de indios* contributed to the formation of a strong local identity in rural communities. This form of group identity has persisted in the face of numerous attempts at centralization and nation building in independent Mexico.

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**requerimiento** The *requerimiento* (requirement) was a legal document that constituted, in the words of historian Patricia Seed, a “protocol for CONQUEST.” It was used by the Spanish to legitimize their conquests in the Americas. In competition with the Portuguese for overseas territories, the Spanish sought to prove their legal title to the Americas. By the second decade of the 16th century, questions were being raised about the legitimacy of the conquests. For example, in 1511, the Dominican friar ANTONIO DE MONTESINOS preached a series of sermons on HISPANIOLA that denounced the exploitation of indigenous peoples. In response, the Crown convened a panel of theologians in 1513. One member of the panel, Juan López de Palacios Rubios of the Council of Castile, drafted the *requerimiento*.

Influenced by medieval Spanish legal traditions, the *requerimiento* outlined the hierarchy of Spanish colonial authority. It traced how God had granted the popes not only spiritual but also temporal authority over all peoples of the world, the descendants of Adam and Eve. When Pope Alexander VI donated the Americas to the Catholic Kings (Isabella and Ferdinand) in his bull *Inter Caetera* in 1493, he transferred jurisdiction of its lands and peoples to them. As a legal document, the *requerimiento*

named indigenous peoples as vassals of the Crown and demanded that they submit to the pope and Spanish authority and allow Christian missionaries to preach freely. If they rejected these terms, the Spanish could justifiably wage war upon and enslave them.

The *requerimiento* was intended to be read aloud to indigenous peoples in the presence of a notary and an interpreter. Gonzalo Fernández de Oviedo, who later assumed the position of royal chronicler, accompanied the first expedition that reputedly used the *requerimiento*, namely that of PEDRO ARIAS DE ÁVILA to Tierra Firme in 1514. Other CHRONICLERS and historians described its use in the conquests of MEXICO, PERU, and other parts of Spanish America.

A vocal opponent of the enslavement and exploitation of the Amerindians, Dominican friar BARTOLOMÉ DE LAS CASAS, riled against the *requerimiento*. In his *History of the Indies*, Las Casas wrote that even if indigenous peoples understood Spanish, the terms of the *requerimiento* were still opaque. He argued that the concepts expressed in the document—a monotheistic god as creator, papal authority, and Christianity—would be incomprehensible without adequate religious instruction. Indigenous peoples did not have the information necessary to accept the terms of the document. The *requerimiento* effectively gave the Spanish a legal justification for waging war on indigenous peoples and conquering and enslaving them.

—Karoline P. Cook

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**Sahagún, Bernardino de** (b. ca. 1499–d. 1590) *Franciscan friar in Central Mexico* This member of the Order of Saint Francis was born ca. 1499; in 1529, he left Spain for MEXICO, where he remained until his death in 1590. While extremely active in the foundation of the Mexican church and its ministering to millions of NAHUATL-speaking parishioners, he is best known today for his work on the FLORENTINE CODEX, a monumental study of Nahua society, culture, and history (see AZTECS). Sahagún’s work on the Florentine Codex has earned him such titles as the “first anthropologist,” “pioneer ethnographer,” and even “father of modern anthropology.” However, while the codex was completed under Sahagún’s careful supervision, it should be noted that the Florentine Codex was a collaborative endeavor, involving numerous Nahua (Aztec) aides. These assistants gathered information for the friar; they conducted extensive interviews with Nahua elders, many of whom were alive when the Spanish first arrived. Moreover, these assistants recorded the text in the Nahuatl language. Not surprisingly, the Florentine Codex is considered among the most important written works of the entire colonial period.

Among his many other accomplishments, Sahagún achieved fame as a teacher of Latin to select Nahua youth at the College of the Holy Cross in Tlatelolco. This was the first institution of higher learning in the mainland Western Hemisphere. Some of his students later became teachers there and collaborated with him on his Nahuatl writings.

Sahagún is associated with many seminal Nahuatl texts. His collection of Christian songs in Nahuatl, *Psalmodia Christiana*, appeared in 1583. Other pieces include catechistical works and examples of traditional

high rhetoric. His earliest extant effort is a collection of sermons. Written in 1540, a copy made in 1548 on native *amate* (fig bark) paper and bearing Sahagún’s own handwritten notations from 1563 currently rests in Chicago’s Newberry Library. As an original composition, it is the oldest sermonary from the Americas.

Sahagún’s linguistic expertise was well recognized. He was the lone expert censor, and for good reason. Perhaps no other European in 16th-century Mexico aside from the author of the first published Nahuatl dictionary (1555), the equally renowned Franciscan Alonso de Molina, could match Sahagún’s understanding of the Nahuatl language.

See also Franciscans (Vol. II).

—Barry D. Sell

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**saints** Saints played an important role in 16th-century Spanish Catholicism (see CATHOLIC CHURCH). As people who had lived lives worthy of emulation and beatification, saints could intercede on behalf of those who prayed to them. As material objects, saints’ images not only served to perpetuate the narrative of their lives and teach moral behavior but acted as objects to which people could make offerings and petition in times of need. In Spain, the communal aspects of local RELIGION allowed each city or town to select saints they believed would best serve the needs

of its inhabitants. Saints protected Spanish communities and individuals against plagues, crop failure, and other natural disasters, and each saint had a particular niche in the cosmos as the patron of rains, harvest, childbirth, and so on. Moreover, saints had designated feast days that were arranged within the liturgical calendar year.

The Spanish conquistadores and friars brought the cult of saints to the Americas. After removing the AZTECS' idols from their main temple in TENOCHTITLÁN, HERNANDO CORTÉS erected shrines to the Virgin Mary and Saint Christopher in their place. Additionally, from the time they began establishing churches, friars insisted that each indigenous polity have a patron saint. From what is understood about the early friars and their methods, it is unlikely that they tried to replace indigenous deities with saints possessing similar characteristics. They also promoted the patron saints of their particular order and wrote hagiographies in indigenous languages to educate the native people about them. Yet given the relatively small number of ecclesiastics and the significant linguistic barriers, it would have been difficult for the friars to be the sole transmitters of information about Catholic saints. It is likely that the indigenous people also gradually learned about saints through their increasing contact with ordinary Spaniards and the ecclesiastics' linguist-aides.

Thus, when indigenous CITIES, TOWNS, and PROVINCES began to acquire their own patron saints, their inhabitants usually had only limited knowledge of those saints and their supernatural properties. Nevertheless, this did not impede indigenous acceptance of saints. Indeed, of all the aspects of Catholicism, saints had the most significant impact on the lives of the Indians throughout Latin America. Saints' names were given to people, churches, towns, and confraternities, and saints appear in the earliest examples of indigenous documentation, from testaments and municipal documents to primordial titles and annals. The Nahuatl term *santopan*, "where a saint is," was even occasionally employed as a general term for the subunits of ALTEPETL. Although documentary evidence suggests that the cult of the saints did not fully emerge in New Spain (MEXICO) until around the 1580s, saints became a part of the Indians' lives from the time they were introduced.

The close parallels between Spanish and precontact American religious traditions no doubt played an important role in native acceptance of saints. Catholicism's association between martyrdom and blood and the figures of Christ and many saints likely appealed to many indigenous people, as did the Catholic tradition of honoring saints with processions, decorative accoutrements, flowers, incense, dances, and MUSIC. Furthermore, the Nahuas (Aztecs), MAYA, MIXTECS, and INCAS already had patron deities for cities, towns, and households. The idea that towns and households could venerate supernatural beings who provided protection against myriad disasters was not new to the indigenous peoples of many areas of the New World, nor was the idea of adopting conquerors' deities into existing ideologies (although the Spaniards' demand for the

exclusive worship of their god was a novelty). Indeed, the newly adopted patron saint of a city or town, like the precontact deities before them, served to unify the polity and its constituent parts. Thus, following tradition, Amerindians quickly embraced Catholic saints and combined whatever limited knowledge about them they had gleaned from friars and other Spaniards with their existing understandings of patron deities and their veneration (see SYNCRETISM).

It is understandable that the saints of New Spain took on indigenous qualities and characteristics. For example, because of Saint John the Baptist's association with water, Nahuas celebrated the saint's feast day with rituals once used to venerate Tlaloc, the precontact deity of water. Additionally, the native people viewed saints as dualistic deities who were capable of both blessing and punishing, as their older deities had been. Indeed, because the feast day of Saint Francis coincided with the end of the rainy season and the start of the cold season in Central Mexico, a change that frequently brought about a loss in crop, Nahuas referred to the saint as "the cruel." Moreover, because both indigenous people and Spaniards celebrated supernatural figures according to religious calendars based on agricultural cycles, saints and precontact deities were frequently celebrated on similar days. Such similarities allowed Saint Joseph to be associated with Xipe Totec, the Virgen de las Candelas with Chalchiuhtlicue, and Holy Week with the rites to Tezcatlipoca.

Similar to Christians in 16th-century Spain, communities in New Spain sought the intercession and appeasement of their saints, and a saint's feast day provided the opportunity to acquire both. It was not uncommon for communities to spend enormous amounts on the feast day of their patron saint. Similar to precontact rituals, communities honored their saints (whom they took to be the actual saints and not just images) with music, dancing, CACAO, PULQUE, and feathers (see ALCOHOL). Such devotion trickled down to individual homes and families. By 1560, images of saints had appeared in the homes of many Indians. Documentary evidence suggests that some indigenous people even had specific places of worship set aside in their homes for saints.

To be sure, the impact of the cult of saints varied from region to region. Yet by the end of the 17th century, Central Mexico saints were at the center of confraternities, an important part of the native religious experience and had even begun to "own" land. Although such manifestations were not quite apparent in 1560 throughout all of New Spain, the seeds for such devotions were being sown at that time.

—Mark Christensen

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**Salamanca, School of** As a result of Spanish endeavors in the New World, intellectuals in the Iberian Peninsula debated over the legality of the CONQUEST and the nature of the NATIVE AMERICANS. During the 1520s and 1530s, a group of theologians led by Dominican friar FRANCISCO DE VITORIA expounded on these issues in a series of lectures held at the University of Salamanca in Spain. Collectively, this group of scholars is known as the School of Salamanca.

The early 16th century saw an influx of information to Spain from the New World that described incidents of violence and oppression against the indigenous population of the Americas. In 1512, King Ferdinand commissioned a *junta*, or meeting, of royal officers, theologians, and academicians to discuss the polemic surrounding the validity of the conquest. Partly to satisfy Ferdinand's desire to justify the Crown's actions, this group of intellectuals put together a legal code known as the LAWS OF BURGOS to regulate relations between Spaniards and native peoples.

A decade later, as information from the colonies continued to stir controversy, a group of scholars led by Vitoria attempted to rationalize the conquest along theological lines. For Vitoria and his followers, this meant a close examination of natural law, or the universal norms that direct people's behavior. Vitoria challenged the idea that the Indian was a natural slave who could not adequately govern himself. Proponents of this view pointed to anthropophagy and HUMAN SACRIFICE as evidence of the barbaric nature of the Amerindian. The fact that Christianity had not appeared in the New World until the arrival of the Spaniards also contributed to the image of the native person as a natural slave subject to the rule of the more powerful Spaniards (see SLAVERY).

In a series of lectures held in Salamanca between 1538 and 1539, Vitoria, unsolicited by the Crown, reexamined the issues surrounding the conquest known to contemporaries as the "affairs of the Indies." In *De Indis*, Vitoria systematically addressed questions of FAMILY, law, political structure, and urban development, items closely associated with European ideals of civilized life. While some Caribbean groups had led a primitive lifestyle, the Aztec and Inca Empires had been highly organized polities that were, in the minds of some early explorers, worthy of imitation (see AZTECS; INCAS). In addition, Vitoria examined the notion that the development of industry, TRADE, and RELIGION represented markers of civility. He found little to substantiate claims that these elements were absent among the Amerindians, pointing instead to the hierarchical organization of religion, the ascetic nature of New World priests, and the observation of feasts and holidays. He concluded that in terms of natural law, the Indians were neither barbarians or natural slaves but simply people subjected to negative influences.

Vitoria held the Prime Chair of Theology at Salamanca from 1529 to 1546. His work charted the course of theological inquiry at Salamanca and influ-

enced the work of other members such as Domingo de Soto and Melchor Cano, as well as that of the Jesuits Luis de Molina and Francisco Suárez.

—Alex Hidalgo

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**Santa Fe, Capitulations of** See CAPITULATIONS OF SANTA FE.

**Santo Domingo** See HISPANIOLA.

**secular clergy** See CLERGY, SECULAR.

**Sepúlveda, Juan Ginés de** (b. ca. 1490–d. 1574) *Spanish humanist, renowned philosopher, and defender of military and Christian conquest of the Americas* Born to an elite family from Córdoba, Spain, sometime in the 1490s, Juan Ginés de Sepúlveda led an influential life, much of which he spent among Catholic royalty. In 1521, sponsored by the powerful de' Medici family, he attained his doctorate in philosophy from the College of Bologna. From 1523 to 1526, he resided at the papal court where he wrote his first tome, an Aristotelian tract called *Dialogus de appetenda Gloria*, which challenged the concept of pacifism. After nearly a decade as a canon of Salamanca and *visitador general* in the Spanish court, in 1536, Sepúlveda became the royal historian to Charles I (Holy Roman Emperor Charles V) and official tutor to the future king Philip II (see MONARCHS OF SPAIN). He compiled the 30-volume narrative about Charles I entitled *De rebus gestis Caroli Quinti*, which praised the Holy Roman emperor for his aggressive stance against heresy and paganism.

Influenced by juristic humanism, which emphasized the classical binaries of sacred and profane, Sepúlveda wrote *Democrates secundus* (published in 1547) in which he defended the CONQUEST and subjugation of the Americas as a just war aimed at wiping out indigenous barbarism and expanding the Christian realm, a position that brought Sepúlveda into direct conflict with the Dominican friar BARTOLOMÉ DE LAS CASAS. In 1550, the two influential figures debated the nature of native people before a distinguished group of royal scholars in Valladolid. Referring to the numerous European accounts of CANNIBALISM, idolatry, and HUMAN SACRIFICE, Sepúlveda charged that the Amerindians' barbarity left them in a state of natural SLAVERY. The colonial enterprise, he argued, merely reestablished the divine and natural hierarchy of the world. While official policy shifted away from the enslavement

of native peoples, Sepúlveda's views found receptive audiences among Europeans wishing to justify the institutions of colonialism.

—R. A. Kashanipour

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**silver** Prior to the European CONQUEST of Latin America, silver, GOLD, and other precious metals served multiple purposes. The ancient Andeans of South America became experts at extracting silver from the earth and converting it into jewelry, decorations for religious rituals, tools, and various household items. The CHIMÚ people were among those who mastered the art of “silversmithing,” constructing portraits and decorative pieces out of the precious metal.

By the time the Spanish arrived in PERU, the INCAS had formed one of the wealthiest and largest empires in the world. Inca ART was almost always made out of precious metals such as gold and silver, and some royal buildings were decorated with the same. Indeed, the preconquest silversmiths were found to possess equal or greater skill than their Spanish and other European counterparts. On their arrival in the New World, Europeans immediately began exploiting both silver and gold in massive quantities, thus establishing MINING as the primary colonial industry.

Until the Spanish and Portuguese settlers discovered MEXICO in the 1520s, the primary specie (coined money) exported from the New World was gold; however, with the fall of TENOCHTITLÁN and the discovery of silver in Mexico (and later Peru), silver soon replaced gold as the most important source of wealth in the New World. Nevertheless, in the first two decades after the conquest, productivity was slow and profits were minimal. Yet, with the discovery of rich silver deposits of POTOSÍ (modern BOLIVIA) in 1545 and Zacatecas (Mexico) the next year, productivity had dramatically increased by the 1540s and 1550s.

The indigenous peoples of South America had used silver primarily to display their prestige, and therefore, it was extracted from the earth with the intent of paying homage to the ruling religious and political authority. It was not used as currency. Not surprisingly, European demand for silver drastically conflicted with indigenous perceptions and usage of silver; for Europeans, silver and gold were viewed primarily as sources of power and wealth. Therefore, European merchants and monarchs alike fought to acquire as much of these metals as possible.

Given that the economic well-being of Spain was dependent on the incoming shipments of precious primary commodities from the New World, the increase in silver production only increased Spain's dependency on

the metal. Well known during this time period was the “king's share,” or the *quinto* (royal fifth), which awarded the Spanish monarch with a one-fifth tax on total consignments. Nevertheless, it is important not to exaggerate the role that silver played during the early decades of the colonial era. For example, King Phillip II's income from American silver represented only 20 percent of the Crown's total revenue. Even so, as the colonial era advanced, silver did become increasingly important to Spain's economy.

See also MERCURY (Vol. II); MINING (Vols. II, III, IV); SILVER (Vols. II, III).

—Christina Hawkins

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## slavery

### THE AMERICAS BEFORE 1492

Slavery was widespread in the Americas before 1492, just as it was in almost all regions of the world in ancient times. Nevertheless, this type of slavery had nothing in common with the African slave trade later established by Europeans in the Atlantic world. Slavery in the Americas was not chattel slavery: Enslaved people were not considered to be objects, and the condition was not inheritable.

The form of ancient American slavery archaeologists know the most about existed in Mesoamerica, where documents related to it were written by indigenous people as early as the 1540s, using the Roman alphabet to write phonetically in their own languages. From these sources, we know that people could sell themselves or their children into slavery in times of famine or other calamity or be pressed into servitude as punishment for a crime (see CRIME AND PUNISHMENT). In TEXCOCO (one of the Nahuatl states in Central MEXICO), for example, a highly refined code governed people's voluntary passage into an enslaved state and guaranteed them certain protections, such as that they could “buy themselves back.”

WARFARE, however, produced the greatest numbers of slaves in Mesoamerica. When one ethnic state conquered another, a whole people could pass into a type of servitude. This did not mean that they all became personal slaves but that they lost ownership of their land and became tenants on the land of others. Warriors taken prisoner on the battlefield became slaves in the more modern sense: They were bound and taken to the homes of the victors to work or were later sacrificed in religious ceremonies (see HUMAN SACRIFICE). Indeed, a key element of Mesoamerican warfare was the collection of slaves who could be sacrificed to the deities. At times, individuals other than captured warriors were enslaved. WOMEN and



children might become slaves, and some were sacrificed to the deities, but most lived on in the households of nobles or successful warriors as domestic workers, concubines, or even lesser wives. Though a woman's sense of identity was likely torn asunder, her children, at least, had equal footing in society.

Only the larger parameters around the transfer of prisoners into slavery are known. In the Aztec world, slaves not claimed by a particular warrior as his own booty could be sold in a market, such as the one at Azcapotzalco (see AZTECS). Sometimes, such slaves were bought by clans in need of sacrifice victims; others were sent east to work in the part of Mesoamerica most committed to the production of COTTON cloth (though they themselves probably did supportive tasks in order to free local women for weaving, which was considered a holy act). LA MALINCHE, famous for having been HERNANDO CORTÉS's translator during the CONQUEST, was born in the NAHUATL-speaking world but was later enslaved and sent east. Cortés came across many such enslaved people on the MAYA coast.

It is impossible to enter into the mental world of such slaves, though a lament of a female domestic does survive as it was written down in about the 1560s. In the song, the woman cries aloud that her master should not treat her arrogantly, as she was a prisoner of war, not someone sold voluntarily by her own family. This supports the idea that whatever sadness may have been experienced by women taken as slaves during times of conflict, they did not necessarily feel any sense of shame or inferiority (perhaps a motivating factor in Malinche's participation in the Spanish conquest).

Evidence of slavery has also been recovered from the Inca world of South America and includes several texts written by both indigenous scribes and Spanish priests (see INCAS). From these accounts we know that the Inca king collected *aqllakuna* from each ethnic state conquered by his armies and that these women became wives of leading figures and/or lived in walled seclusion, where they wove cloth and brewed *CHICHA* for the empire (see *ACLLA*). (A small number were sacrificed in religious ceremonies or became priestesses in Inca temples.) While in one sense the *aqllakuna* were enslaved, theirs was also a position of honor. It has even been argued that they played a central role in the expansion and consolidation of the Inca realm.

There is less information about slavery in other regions of the hemisphere; nevertheless, it is clear that slavery was generally associated with warfare. Among both nomadic and semipermanent cultures, people made war to secure hunting rights in certain areas, gather particular resources, and take captives. Enemy warriors might be tortured to death—and were accorded great honor if they managed to show no feeling—particularly if a group needed to avenge the loss of its own warriors. Individual men might be allowed to live on as slaves. ÁLVAR NÚÑEZ CABEZA DE VACA was a Spaniard who was enslaved on the

Gulf coast shortly after PÁNFILO DE NARVÁEZ's failed 1527 expedition to conquer FLORIDA. He later wrote of his experiences, which likely reflected pre-Columbian local practices. Like other male slaves, Cabeza de Vaca worked hard at the least pleasant tasks necessary to the group's survival and was always somewhat hungry. Nevertheless, his status as a slave was not permanent.

Women and children taken in war, although known as slaves at first, were usually eventually adopted as citizens of their new communities and thus lost their slave status. The years after 1492 produced many "captivity narratives" in North America from which the experiences of enslaved women in general before 1492 can be inferred. For example, Mary Jemison, a colonist's daughter, was taken by the Shawnee in the mid-18th century when she was 15 years old and sold by them as a slave to the Seneca of the Six Nations Iroquois (or Haudenosaunee). Later, she married and became a full member of society. When she had a chance to return to her biological people, she chose not to go, although she did dictate her memoirs. Clearly, Jemison no longer considered herself to be enslaved. On the other hand, Gandeaktena, a 17th-century Algonkian woman in what is today Canada, who was captured by the Iroquois, never felt at peace with her situation even though she had married into the culture. She described herself to Jesuit priests as a slave and asked to be allowed to convert to Christianity and live with them instead of remaining where she was, and she was not the only woman who responded in this way.

Among the nomadic and seminomadic peoples of pre-Columbian America, a slave was the property of the warrior who had captured him or her until he chose to sell or give his prize to another. Occasionally, however, an ethnic state attempting to achieve dominance over a particular area would disband an entire settlement or group of settlements, selling dozens of people into slavery. There is archaeological and textual evidence that slaves followed the major TRADE routes used for other goods like copper, shells, or turquoise. People undergoing such passage never existed in great numbers, however.

Though slavery was found almost everywhere in the Americas, it did not dominate life anywhere in the hemisphere. Indigenous slavery differed profoundly from that practiced by Europeans.

## EARLY COLONIAL

Immediately on encountering the Caribbean islands, Spanish colonizers sought to enslave their indigenous inhabitants. Following the Spanish Crown's direction in 1509, the Spanish governor of HISPANIOLA ordered colonizers to bring the inhabitants of the Bahamas, or Lucayas, to the main island to serve as slaves or servants for life (a status called *naboría*). Expanding their raids to other islands, colonizers enslaved TAINOS (indigenous people of the Caribbean) to work in the GOLD mines and on SUGAR estates and cattle ranches (see MINING). Gradually, colonizers carried out slave raids through-

out the Caribbean and the mainland, including Florida, Central America, and the coastal regions of VENEZUELA and COLOMBIA.

The resistance of the Taino, combined with their susceptibility to European DISEASES such as smallpox, influenza, and typhus, quickly prompted Spanish colonizers to petition the Crown to allow the importation of Muslim and black Iberians as slaves (see MORISCO). And, by the 1520s, colonizers had petitioned the Crown for black Africans, whom they considered to be easier to control than the black Iberians. Imported slaves, along with their indigenous counterparts, worked in the households, mines, farms, and estates of the Spanish colonizers on Hispaniola.

By the 1520s, fugitive slaves had joined resistant Taino communities in the interior of Hispaniola, and they gradually populated the smaller islands of the Caribbean. Africans joined in the rebellion against the Spaniards led by Enriquillo, a Taino leader who was eventually defeated. A few years later, in 1521, enslaved Wolofs, herders, and horsemen from West Africa led a rebellion on a sugar estate on Christmas Day. Enslaved Muslims and Canary Islanders joined the revolt, which was put down by an armed cavalry. Nevertheless, the Spanish Crown then banned Wolofs from being imported to the Americas because of their “excitable and rebellious spirit.”

Upon encountering the advanced civilizations of the Aztecs in Mexico (1519) and the Incas in PERU (1532), clerics and legal scholars debated the consequences and legality of enslaving indigenous people. The most famous was the Dominican BARTOLOMÉ DE LAS CASAS. After returning from the Caribbean, where he had witnessed firsthand the suffering of the Tainos in CUBA, Las Casas spent the next five decades arguing and petitioning against the exploitation of indigenous people. For years, he returned to the Americas, where he worked to convert the indigenous to Christianity; moreover, he argued for restitution to the Indians and refused to minister to Spaniards who kept indigenous slaves.

In 1550, Las Casas engaged in an influential public debate on the treatment of Amerindians. According to the Dominican cleric, the justification for Spanish rule in the Americas was the conversion and “good governance” of indigenous peoples. His opponent, JUAN GINÉS DE SEPÚLVEDA, argued that wars against the indigenous were just because the Indians were clearly slaves by nature who would benefit from serving a superior people, the Spanish. No formal mandate was established, but Las Casas’s views heavily influenced Crown policy, and the enslavement of peoples who peacefully submitted to Spanish colonization and converted to Catholicism was eventually outlawed.

Following the award of the first *ASIENTO*, or slave-trading contract, in 1518, the Spanish expanded into the mainland of Mexico and Peru. The armies of Cortés included several hundred enslaved men, who Cortés led in the conquest of Mexico in the 1520s. Likewise,

FRANCISCO PIZARRO and DIEGO DE ALMAGRO held almost 2,000 slaves in their armies during their conquests in the 1530s and the subsequent CIVIL WARS IN PERU of the 1540s. Enslaved men and women also served as domestic servants in the new CITIES of the Americas. Slaveholders valued enslaved men and women also for their symbolic worth, since the ownership of slaves indicated wealth and honor. Some owners provided silk CLOTHING, shoes, and even weapons for slaves who accompanied them in public as both guards and for display. In Peru, where the Spanish established a coastal city and the climate was ideal for the cultivation of sugar and grapes, as well as WHEAT, enslaved Africans and their descendants labored on small farms and mid-size estates. By the mid-1550s there were about 3,000 slaves in the Peruvian viceroyalty, half of them in the viceregal capital of LIMA (see VICEROY/VICEROYALTY).

Indigenous laborers worked mainly in the highland SILVER mines, while other enslaved men labored in alluvial gold deposits in the tropical lowlands. By the 1540s, Africans and their descendants worked in gangs of 10 to 15 in the southern Andes and, eventually, coastal ECUADOR and lowland southern Colombia. In Mexico, enslaved men and women also worked in Spanish households as domestic servants, as well as on the lowland and coastal sugar estates. Initially, enslaved African and African-descent men also worked in the northern silver mines, including Zacatecas, Guanajuato, and Pachuco. In EL SALVADOR (which was part of GUATEMALA in the 16th century), enslaved men and women would eventually work on the CACAO and indigo estates. In HONDURAS, by 1545, almost 1,500 slaves worked in the gold mines.

With the early, expanding silver economy, Peru was a critical destination for captives who entered the Spanish Empire through the Caribbean port of Cartagena before crossing Central America to the Pacific city of Panama. There, indigenous slaves figured prominently in the early conquest expeditions. By the 1530s and 1540s, native slaves taken from Honduras and NICARAGUA labored as cargo bearers and canoeists in the river and overland routes across the Panamanian isthmus. Though the Spanish Crown outlawed indigenous slavery in 1550, native people scarred with brands from across Central America and CHILE continued to serve as slaves along these Pacific routes.

Enslaved Africans and their descendants proved critical to the upkeep of roads, ports, and cities throughout the Spanish Americas. The municipal councils in PANAMA purchased teams of enslaved men to monitor the roadways; others quarried rocks in order to build fortresses to defend the empire’s Pacific coast. Eventually, enslaved men served as muleteers and rowers along the isthmus roads and waterways.

Many enslaved men and women arrived in the Americas as Catholics; others converted in order to benefit from the protections afforded by the CATHOLIC

CHURCH. According to ecclesiastical mandates, slaveholders could not separate enslaved couples; rather, they had to allow them at least a nominal proximity, if not cohabitation. Church law also urged slaveholders to allow enslaved people to attend Mass on Sundays and holidays, and secular law prohibited extreme physical abuse of slaves. While these laws were repeatedly violated in Spanish America, many enslaved people did claim their rights as spouses and Catholics.

Initially, enslaved men and women were sold from Iberia to the Americas. As the Portuguese (with some Spanish merchants) gained control of the slave trade into the Americas, captives from Senegambia, Guinea-Bissau, and Sierra Leone in West Africa were among the largest numbers of Africans in the early colonial Americas. Enslaved, and eventually free, Africans and their descendants intermarried and developed kinship relationships with each other. In some cases, enslaved people formed bonds with men and women who served as the godparents to their children (see FAMILY). In other cases, slaves named each other as “shipmate” kin or fellow captives who had survived the transatlantic passage together. Using Catholic institutions for their own purposes, enslaved people also joined *cofradías*, or religious confraternities, that functioned as mutual aid societies, thus ensuring their members would be buried and particular SAINTS would be properly celebrated (see RELIGION).

Enslaved men and women resisted enslavement by, most notably, establishing fugitive communities. For example, in 1549, escaped pearl divers established one such settlement (called a *palenque*) on the island of Margarita, off the coast of Venezuela. From 1553 to 1558, a fugitive leader called King Bayano established a fugitive settlement on the Panamanian isthmus. In coastal Ecuador, the fugitive settlement of Esmeraldas was formed by the captive survivors of shipwrecks (1545 and 1553), who mixed with local indigenous populations. Seeking to secure a route from the highlands to the coast, coastal authorities launched numerous unsuccessful military expeditions to conquer the region. In other cases, fugitive communities were established in close proximity to colonial urban areas, such as those outside the Caribbean port of Cartagena. Members of fugitive settlements traded FOOD from their fields for needed goods or, in times of scarcity, raided Spanish and indigenous communities for the same.

In urban centers throughout Spanish America, enslaved men served as blacksmiths, tailors, shoemakers, and masons. Skilled laborers were often rented out by their owners and, in turn, they paid a daily, weekly, or monthly *jornal*, or “wage,” but were allowed to retain additional earnings. Enslaved women also sold their labor as cooks or wet nurses but were best known for selling bread, sweets, prepared food, and other goods on urban streets and plazas. Enslaved men and women could use their earnings to purchase themselves or another

family member and secure an official record of manumission or freedom.

See also BRAZIL, ABOLITION (Vol. III); CHARTER OF SLAVERY (Vol. III); COFRADÍA (Vol. II); LAW OF THE FREE WOMB (Vol. III); SLAVERY (Vols. II, III).

—Rachel Sarah O’Toole  
Camilla Townsend

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**Soto, Hernando de** See DE SOTO, HERNANDO.

**sugar** The sugarcane plant is native to Asia and was first domesticated near the Indian subcontinent. As a crop, sugarcane was relatively unimportant until the discovery of methods to preserve its natural sugars in a solid, granulated form. Extracting sugar solids from the plant requires grinding or crushing the cane, reducing the resulting pulp over heat, and then allowing the mixture to dry into a crystalline solid. The basic process of refinement was developed in Asia in the fourth century and spread along with the plant.

In the first millennium C.E., sugar production expanded from India into the Middle East. Islam helped further the spread of sugarcane by introducing its cultivation in the conquered regions of North Africa and Iberia. Christian crusaders brought back an appreciation for sugar from their journeys in the Holy Land. Although Europeans desired this curious, sweet “spice,” its rarity and cost excluded it from the diets of all but the wealthiest individuals.

The 15th century saw a major expansion of sugar production in western Europe. In the 1420s, sugarcane was being grown in parts of the Iberian Peninsula and on the Canary Islands. The Portuguese CONQUEST and colonization of Madeira in 1455 led to the development of sugar plantations, which would come to dominate sugar production for the next three centuries. Large-scale sugar production requires a great deal of manual

LABOR. While little labor is needed during the growing cycle, once sugarcane stalks are ready for harvest, they must be cut and crushed and the resulting pulp refined, all with little delay. If the cane is cut too late or the pulp not extracted quickly, the natural sugars in the plant will spoil, ruining the harvest. Consequently, sugarcane estates required many laborers, skilled and unskilled, to ensure timely cutting, quick transport, and efficient refining. On Madeira, the Portuguese began sugar production using a mixed labor force of free wage laborers and African slaves (see SLAVERY). Over time, as Portuguese merchants gained better access to the internal African slave TRADE, sugar growers on Madeira increasingly began to rely on slave labor.

Sugarcane was brought to the Americas with the earliest explorers and settlers in the 1490s. Despite its early arrival, sugarcane was not a primary crop in the initial decades of colonization. Most Spaniards sought to accumulate wealth through control of native goods and easily exploited natural resources; however, once these began to wane, they quickly looked to sugar as a valuable cash crop. The first sugar estates were founded in the Caribbean and in MEXICO. By the mid-16th century, the Portuguese had begun cultivating sugarcane in BRAZIL. For the next three centuries, growing European demand for sugar would lead to increased production and an ever-increasing demand for African slaves. The global impact of sugar production should not be overlooked; more than any other commodity, sugar helped create and define the complex colonial relationship between Europe, the Americas, and Africa (see COLUMBIAN EXCHANGE).

See also *ENGENHO* (Vol. II); *SUGAR* (Vols. II, III).

—Robert Schwaller

**syncretism** Syncretism is the union or reconciliation of the beliefs and practices of two different cultures that results in a hybrid manifestation. Colonial cultures have frequently been described as syncretistic because they tend to combine elements of both the indigenous culture and that of the colonial power. In early colonial Latin America, the areas of greatest syncretism were language and RELIGION.

In language, the native cultures first adapted their own words to describe the new Spanish items. Later, they adopted Spanish nouns, using them according to

their own rules of grammar. For example, the Nahuas (AZTECS) first described European horses as “*mazatl*,” the native word for “deer.” Later, they adopted the Spanish word (*caballo*) and used it according to NAHUATL rules, resulting in *cabuallo*. The most common area of borrowing into Spanish occurred when Europeans lacked words or names, especially for the new plants and animals they encountered in the New World. In MEXICO and PERU, the Spanish developed different vocabularies, especially for local products. In Mexico, fresh corn (MAIZE) became known as *elote* (from the Nahuatl *elotl*), while in the Andean region it came to be known as *choollo*, a QUECHUA word.

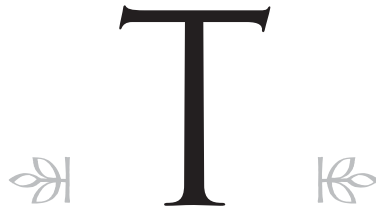
In the area of religion, indigenous cultures variously embraced aspects of the Christian religion and grafted them onto their own. In the Andean highlands, for example, various aspects of the earth goddess Pachamama were identified with the Virgin Mary in Christianity. Likewise, although the Nahuatl term *Tonantzin* (our revered mother) frequently appeared in pre-Columbian contexts as a form of address for various female deities, it came to be applied to the Virgin Mary (see SAINTS).

The process of syncretism, though perhaps seemingly haphazard, was more often quite logical. Indigenous cultures attempted to understand the Spanish in terms of their cultural assumptions, just as the Spanish attempted to understand the NATIVE AMERICANS according to their own European cultural assumptions. Where each culture saw a similarity to its own, it assumed that the underlying tenets were the same. Consequently, the Spanish missionaries heard one of the Nahua gods described as “He through whom all things live.” This resonated with them as an apt description of the Christian god, and they adopted this locution as an epithet for God, yet the native peoples heard it as an epithet for their own deity Tezcatlipoca. What ensued was what one scholar has described as the “double-mistaken identity.” The missionaries assumed that the Nahuas understood that they were describing God, while the Nahuas understood that the missionaries must be describing Tezcatlipoca.

—John F. Schwaller

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**Taino (Taíno)** The Taino were an ethnic and cultural Arawak-speaking group that inhabited most of the Caribbean islands of HISPANIOLA, CUBA, Jamaica, PUERTO RICO, the Bahamas, and the Virgin Islands. Originally from the region of the Orinoco river delta in northeastern South America, the ancestors of the Taino, known as the Saladoid, or Igneri, began to migrate to the Leeward Islands around the year 100 C.E., displacing or incorporating the earlier inhabitants (see MIGRATION). The Taino culture arose out of the Saladoid around the year 1200 with unique social and technological adaptations to their island environments.

Taino villages had a complex social structure. The CACIQUE, or chieftain, most often a male (although there were some female caciques), inherited rank and status from his (or her) maternal lineage. The *behique*, or shaman, ranked second after the cacique. Below them, the *nitainos* constituted a type of nobility, with the *naborías*, or commoners, making up the bulk of the population. The Taino were skilled stone carvers, with many of their idols (*cemíes*) and ritual belts comparable in technical execution to the best Mesoamerican stone artifacts (see ART). Taino religious and social life centered on communal ceremonies known as *areitos*, which were held on broad stone-lined plazas; the largest of these plazas thus far discovered are at Caguana and Jácanas in Puerto Rico (see RELIGION). The Taino believed in supreme deities that controlled various aspects of nature: Examples are the storm god, named Huracán, and a supreme creator, known as Yocahu. The *cemíes* or spirits of the ancestors served as intermediaries with the deities and protected the living during their daily activities.

The years between 1200 and 1500 were characterized by a flowering of Classic Taino culture in

Hispaniola and Puerto Rico, with independent villages falling under the rule of regional caciques, increased population growth, and a more intense exploitation of local resources. Taino AGRICULTURE, based on the cultivation of MANIOC, produced large surpluses and allowed for further diversification of the ECONOMY. COTTON, TEXTILES, TOBACCO, and GOLD, as well as carved stone and wood objects, were produced for the elite and for TRADE.

There is little evidence of conflict between Taino villages or regional chiefdoms. Indeed, many caciques and *nitainos* married into elite families from neighboring islands. However, migrating bands of CARIBS, moving from the South American mainland, began to displace the Taino on the Leeward Islands; the Caribs also launched raids as far west as Cuba and Jamaica. Despite some military conflicts, relations between the Carib and Taino also included trade, intermarriage and, in some cases, military and political alliances.

The Taino were devastated by the Spanish CONQUEST; much of their language and culture was suppressed. Nevertheless, the Taino survived and their descendants in Cuba, the Dominican Republic, and Puerto Rico are beginning to rediscover their original language, religion, and culture and claim recognition for their legal rights.

—Francisco J. González

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**Taki Onqoy (Taqui Ongoy, Ayra, Aira)** Taki Onqoy is a QUECHUA term meaning “dancing sickness” that was used to describe a resurgence of Andean RELIGION in the 1560s as a form of resistance to the Spanish CONQUEST of PERU and the imposition of Catholicism. Uncovered by Spanish priest Luis de Olivera in 1564, the movement flourished in the central Andes north and west of CUZCO.

Taki Onqoy reflected Andean despair about oppressive Spanish colonialism. A messianic movement, its adherents (*takiungos*) believed that the old indigenous deities would rise up to destroy the Spaniards through DISEASE, earthquakes, and other natural disasters and return Peru to indigenous rule (see *HUACA*). Taki Onqoy did not call on Andeans to take up arms against the Europeans, for the deities would destroy them. *Takiungos* urged Andeans to stop practicing Christianity and to offer sacrifices to the *huacas* once again. Followers were expected to undertake five-day periods of abstinence from salt, MAIZE, chili peppers, and sexual relations. They were also to stop worshipping the Christian god, eating Spanish FOOD, and dressing in European CLOTHING. Those who had been baptized as Christians engaged in frenzied dances, shaking and trembling while cursing the Christian faith.

Although men and children joined the movement, WOMEN seem to have played a particularly prominent role in it. Spanish investigators found thousands of *takiungos* among the Lucanas and Soras indigenous groups. Cristóbal de Albornoz, whose reports constitute the most important historical source about the movement, was a

leader in the campaign to root out the heresy. More than 8,000 Indians were punished, many with temporary or permanent exile, before Taki Onqoy subsided.

—Kendall Brown

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**Tawantinsuyu** See INCAS.

**Tenochtitlán** Located on a small island in Lake Texcoco in the Valley of MEXICO, Tenochtitlán grew from a humble village to the capital of the Aztec Empire within a century (see AZTECS). Although there is some archaeological evidence for human occupation on this island as early as 1000 c.e., according to Aztec historical accounts, it was a small group of Mexica nomads who first settled there in 1325, under the territorial dominion of Azcapotzalco. The Mexicas overthrew Tepanec rule (from Azcapotzalco) in 1428 and formed a TRIPLE ALLIANCE in which Tenochtitlán took the dominant role. As tribute flowed into the city, it experienced rapid urban growth. By 1519, on the eve of the Spanish CONQUEST, Tenochtitlán had reached the size of 4.5–5.8 square miles (12–15 km<sup>2</sup>),



Located in Mexico City's National Museum of History and Anthropology, this model reconstruction shows the ceremonial precinct of the Aztec capital city of Tenochtitlán. The main temple, or Templo Mayor, is depicted in the back center. (Courtesy of J. Michael Francis)



This picture shows a Chac-Mool from the Aztec Templo Mayor complex, in the historic center of Mexico City. Various Chac-Mools have been located in Central Mexico and the Yucatán Peninsula. Their forms are similar, and the bowl or plate that rests on their stomachs was likely used to receive offerings or sacrifices. Excavated in the early 1980s, this Chac-Mool was found fully polychromed. (Courtesy of J. Michael Francis)

with a population of 125,000 to 250,000, making it larger than any city in Spain at the time (see CITIES).

The capital was physically and conceptually divided into quarters; at the center, where these quarters converged, was situated the most important structure in the entire empire: the Templo Mayor (Great Temple). This temple served as an *axis mundi* to the Aztec quadripartite universe and was oriented to the rising Sun during the equinoxes. Further echoing the dual nature of the Aztec cosmos, the temple's top platform accommodated two of the most important gods in Aztec mythology: The southern red shrine was dedicated to Huitzilopochtli, the Aztec tribal war god and sun deity; the northern red shrine was dedicated to Tlaloc, the god of rain and agricultural fertility. The temple itself represented Coatepetl (Serpent Mountain), where Huitzilopochtli was mythically born, and Tonacatepetl, Tlaloc's "Sustenance Mountain."

Recent excavations have revealed seven different construction phases to the Templo Mayor, each completely enveloping the former structure while expanding its size; while the first structure, dating to 1325, was merely a humble shrine, the last one of the early 1500s measured 262.5 feet (80 m) at the base, and the dual tem-

ples at the top had reached a maximum height of 147.6 feet (45 m), accessed by twin staircases of more than 100 steps each. Throughout these expansion phases, the Aztecs had buried more than 100 offerings, mostly exotic animal remains, HUMAN SACRIFICES, and luxury goods from distant parts of the empire, located so that they would reflect their relative geographical position. They even included artifacts of bygone civilizations such as the TOLTECS and the OLMECS, as well as smaller temples in the TEOTIHUACÁN architectural style (see ARCHITECTURE). Thus, the Templo Mayor in itself became a microcosm for the Aztec world, both in space and time.

Surrounding the Templo Mayor was the walled-off Sacred Precinct, which in its last construction phase included about 80 minor temples dedicated to the different gods and deities. Other buildings included schools for the nobility, a ball court, a temple for the Eagle Knights, and the *tzompantli* wooden racks where more than 100,000 skulls of the sacrificial victims were publicly displayed. Surrounding these were the palaces of the Aztec kings and queens and other nobles.

Transport of people and merchandise was made through water canals that transected the city, although

paved streets also existed. Four large avenues and canals departed toward the cardinal directions from the Sacred Precinct, three of which connected the island to the mainland and to the pleasure palaces of the nobility (such as Chapultepec's zoological park and gardens). All of the city quarters were further divided into *calpultin*, neighborhoods where the commoners resided, each equipped with its own temples and schools (see *CALPULLI*). Around these were the *CHINAMPAS*, agricultural fields that fed both commoners and elite (see *AGRICULTURE*).

—Danny Zborover

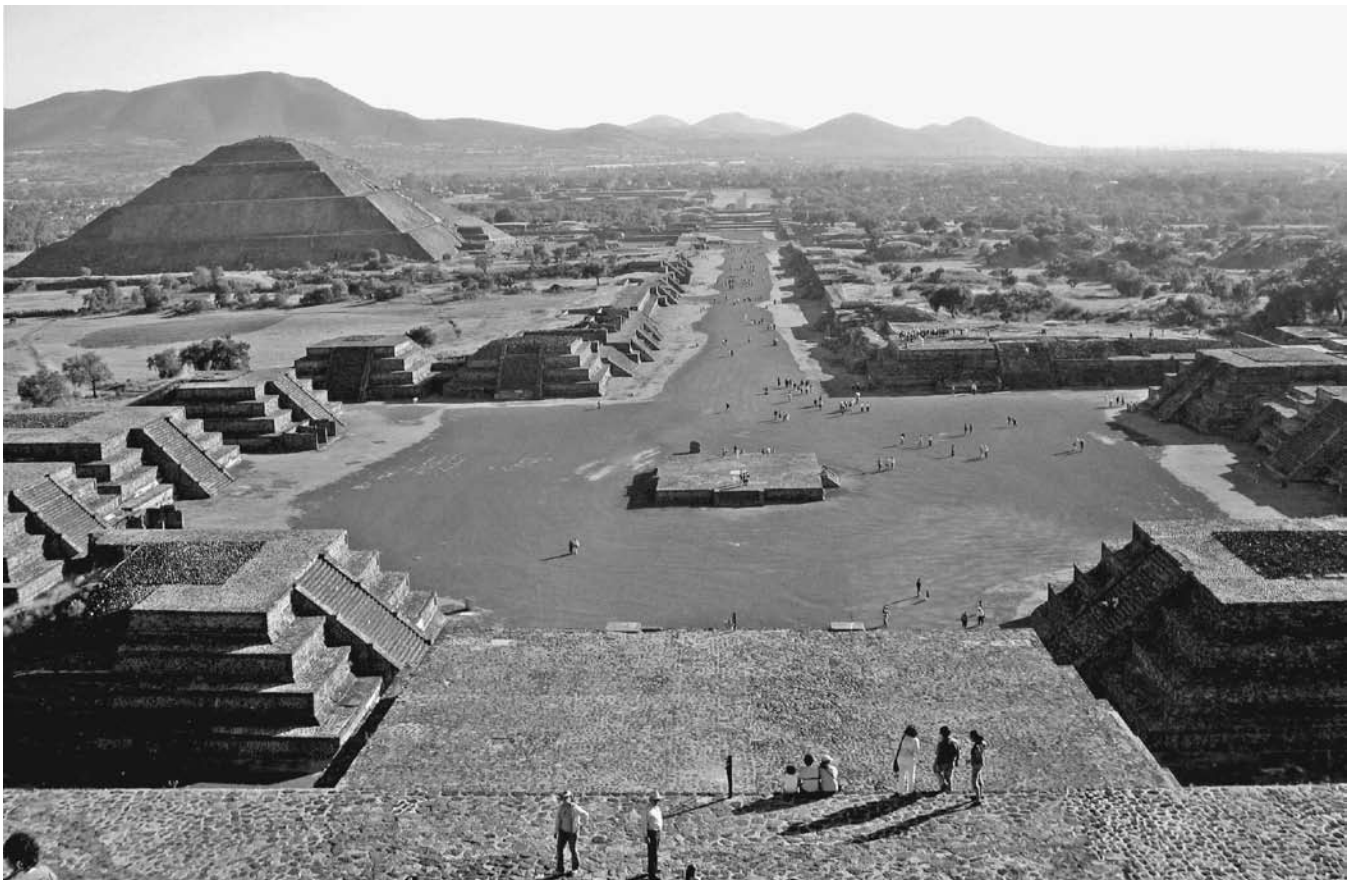
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**Teotihuacán** One of the most influential urban centers in the Basin of MEXICO and beyond, Teotihuacán came to power around 100 B.C.E., after its rival city, Cuicuilco, was destroyed by a volcanic eruption. By 300 C.E., more than half of the basin's population had migrated to Teotihuacán; population estimates range between 40,000 to 200,000, making it one of the largest

CITIES in the world at the time. The city covered an area of some eight square miles (21 km<sup>2</sup>), of which less than 5 percent has been excavated. Its design, characterized by a carefully laid out grid pattern, was unparalleled in pre-Columbian times.

RELIGION played a central role in the city's location, and Teotihuacán soon became an important pilgrimage center. Religious processions took place along its main axis, the so-called Avenue of the Dead, which was oriented to important astronomical events. Flanking it are two of the largest temples ever constructed in the Americas, the Pyramid of the Moon and Pyramid of the Sun, the latter constructed above a semi-artificial cave with mythical significance. At the other end is the Ciudadela complex, the site of the pyramid dedicated to QUETZALCÓATL (the "feathered serpent" god). The remains of hundreds of people, probably warriors, were discovered in dedicatory caches under the pyramids. Other temples were dedicated to Tlaloc (the storm god) and to Cihuacoatl, the great goddess of fertility. In their midst were palaces for the rulers and priests and numerous peripheral apartment compounds for the lesser nobility and artisans, among which were wards for ZAPOTECs and MAYA groups. These temples and residences had a unique architectural style and were lavishly decorated; they contained stone sculptures, and



The ceremonial and administrative center of Teotihuacán: view of the Avenue of the Dead and the Pyramid of the Sun (to the left), seen from the top of the Pyramid of the Moon (Courtesy of Danny Zborover)



many walls were painted with colorful murals depicting religious themes (see ARCHITECTURE; ART). Except for a few graphic signs, there is no clear evidence for a local writing system, and the language or ethnicity of the Teotihuacáanos is still debated.

Teotihuacán drew its economic power from the control of nearby OBSIDIAN sources and its strategic location along major TRADE routes. Along with material goods, Teotihuacán exported its religious ideology, which emphasized military symbolism and the cult of war, throughout Mesoamerica (see WARFARE). At its height, Teotihuacán's religious, political, and economic influence reached as far as the Zapotecs of Oaxaca and the Maya of GUATEMALA.

Teotihuacán's decline began around 500 C.E., archaeologists have discovered evidence of deliberate temple burning at that time. DISEASE had further affected the population, and there are signs of environmental degradation. Although the ceremonial center was finally abandoned around 600, numerous people continued to live in the surrounding hinterland. Almost 800 years later, the AZTECS visited the site and worshipped there and gave it its current NAHUATL name, *Teotihuacán*, which translates as "City of the Gods." Even at that time, the ruined site was impressive enough that the Aztecs believed this was the place where the Sun and Moon were born.

—Danny Zborover

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**textiles** The indigenous peoples of Mesoamerica used various techniques to make textiles, including weaving, embroidery, and twining. From early on, textiles served both functional and decorative purposes. They were used to make CLOTHING, which also signified the wearer's geographic origins, gender, occupation, social status, and religious associations. They were also used to make containers and wall hangings.

Indigenous cultures valued certain textiles above CERAMICS, ARCHITECTURE, and even metalwork. Textiles were regarded as valuable and sacred objects, revered for the sophistication of their design and embedded social meanings. This sensibility is referred to as "textile primacy" and runs counter to the Western tendency to value precious metals and jewels more highly than textiles. Sixteenth-century accounts of gift giving between indigenous populations and Spanish conquistadores underscore this difference. While the Spanish marvel at native jewelry and metalwork, they barely mention textiles. Native accounts, on the other hand, emphasize the quality and function of the ritual attire they gave to Europeans.

## TECHNOLOGY

To make cloth, threads first needed to be produced. Threads were made by manually spinning raw plant or animal fibers around a spindle (a pointed stick) to produce long, thin strands. In Mesoamerica, only plant fibers were used. In the highlands, COTTON was reserved for the elite, while coarser fibers made from maguey, palm, and yucca (MANIOC) were for commoners. Because cotton is grown at lower altitudes close to the coast, the coastal people in South America wove mainly with cotton.

Once produced, threads were woven, embroidered, or twined together to create cloth. Twining was the simplest technology and the first to emerge in the Americas. It is a nonloom technique similar to macramé, in which threads are wrapped around each other by hand. Weaving, however, was the most common process by which threads were made into fabric. The backstrap loom was the traditional weaving equipment in the Americas. It consisted of a series of sticks, one tethered by a cord to a fixed object (commonly a tree) and another attached to a belt that went about the hips of a sitting or kneeling weaver. The weaver's own weight was used to hold the warp (vertical) threads taut as the weft (horizontal) threads were passed through the loom.

Embroidery produced the finest textiles, known as tapestries. Embroidery is a superstructural technique in which threads are sewn on to a thin layer of ground cloth to create a design. The weft threads are packed tightly together in order to obscure the warp threads and create a highly durable textile. Tapestry is LABOR intensive because the designs are individually stitched onto the fabric.

## TEXTILES AND FEMALE IDENTITY

Throughout the Americas, weaving was most commonly undertaken by WOMEN (see FAMILY). In both Andean and Mesoamerican cultures, spinning and weaving were so intimately linked to womanhood that they were considered to symbolize the act of reproduction. While a full spindle is diamond shaped, like the female genitalia, the act of spinning itself was likened to conception and the growth of the fetus in the womb. Similarly, weaving, or the process by which threads become fabric, was associated with giving birth.

## SOUTH AMERICA

Textile production in South America dates back as far as 10,000 B.C.E. The largest number of ancient South American textiles have been found in coastal PERU and BOLIVIA, where the arid desert climate helped to preserve them. Some relatively well-preserved textiles have been found in oxygen-deprived caves in the Andean highlands and at other high altitude sites with perpetual freezing conditions. The earliest known textile fragments were excavated from Guitarrero Cave in the north-central Andes of Peru. These early examples, as well as the more famous Huaca Prieta textiles (ca. 3000–1800 B.C.E.), were made by twining individual plant fibers.

The Paracas textiles, which were found in burial sites along Peru's southern coast, are among the most widely studied pre-Columbian fiber structures. They date to ca. 0–200 C.E. and were used in a complex funerary tradition in which the desert sands along the south coast served as an acropolis for Paracas rulers, nobility, and retainers. The textiles were wrapped around the bodies of the deceased, encasing mummified figures placed in a fetal position.

Paracas textiles were created in two decorative styles: linear and block color. The linear style was developed first. Abstract designs or geometric patterns were embroidered onto ground cloth (a simple, thin woven textile). The block-color style, on the other hand, was used to depict the natural and human worlds. The most common motifs were humans dressed in the region's ritual costume, shamans, and predatory animals. The figures depicted on the textiles used to encase mummies might have related to a deceased's social or political status.

The WARI (Peru) and TIWANAKU (Bolivia) (ca. 500–800 C.E.) both produced tapestry textiles that were worn mainly as tunics to communicate the wearers' political dominance over their vast domains. By donning images of specific deities, Wari and Tiwanaku elites declared their divine right to political authority. The two empires shared much of the same iconography, the most ubiquitous being the staff-bearing figure also found on the famous Gate of the Sun at the Tiwanaku archaeological site. The two styles did differ in some respects, however. While the patterns on Tiwanaku textiles were able to be “read” by most people, those of the Wari were more abstract and therefore were legible to only a select few.

The INCAS, perhaps best known for their monumental architecture, also created magnificent textiles (ca. 1450–1532). Royal weavers called *aqllakuna* (see *ACLLA*) were women chosen from childhood to weave for the Inca ruler. It is also known that fine textiles were burned as offerings to the deities and that textiles played other important roles, such as delineating between classes of people in the highly stratified Inca society. Extensive tribute systems were in place to create *cumbi* (tapestry) cloth for the elite.

Perhaps the most fascinating form of Inca textile work is the *QUIPU*, which consists of a series of small cords knotted to a single, larger cord. *Quipus* were used to record numbers (particularly tribute figures) but may also have documented verbal language. The *quipu* was “read” according to the number of strings, number of knots on each string, and the type and position of each knot. As a recording device constructed entirely from fiber, it was the ultimate manifestation of textile primacy.

## MESOAMERICA

As in South America, dress was a major source of identity in Mesoamerica. The AZTECS, in particular, had laws concerning the type of dress a person could wear, according to his or her ethnicity and social status.

The dampness and humidity of the Mesoamerican climate left little in the way of textiles themselves for archaeologists to study. Nevertheless, important information has been discovered from other sources. While most pre-Columbian CODICES were destroyed, colonial codices contain detailed depictions of pre-Columbian garments.

The male loincloth is the garment shown most frequently in the codices, but other garments include the hip cloth, cape, kilt, quilted armor, warrior costume, and ceremonial attire. Female garments included skirts, capes, and ritual attire. These are general categories, as each garment differed widely according to the wearers of the garment.

Archaeologists have recovered some extant Mesoamerican textiles. Findings from Guila Naquitz in Oaxaca, MEXICO, include non-loom baskets, cordage, and knotted netting made from plant fiber (ca. 8000 B.C.E.). The largest discovery of textiles was made in CHICHÉN Itzá's sacred cenote, an oxygen-deprived limestone sink-hole on Mexico's Yucatán Peninsula. The textiles, having been submerged in water for hundreds of years, had blackened and their designs largely lost; nevertheless, they have provided valuable information about the variety and complexity of weaving practices among the MAYA. Three types of plain weaving were identified. The textiles also used bound openwork, or netlike twined spacing intermixed with traditional weaving.

A polychrome textile from the Postclassic period (ca. 900–1521) in Chiapas, Mexico, resembles clothing depicted in the Mayan Nuttall Codex. It is one of the only extant textiles that retains its original decorative scheme. Three figures are shown in procession on a yellow band, which represents the surface of the earth. The figures are wearing warrior regalia and symbolize the mythic struggle between life and death.

—Elena FitzPatrick

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**Tikal** The city of Tikal (in the kingdom of Mutal) was one of the two great supercenters of Classic MAYA culture; the other was its archrival, CALAKMUL. Tikal was located in the heart of GUATEMALA's Petén district, in an area between the San Pedro and Macal river systems; this location gave Tikal strategic control over TRADE between the Gulf of Mexico and the Caribbean. At its height, Tikal was home to 100,000 people, covered an area of some 25 square miles (65 km<sup>2</sup>), and produced a wide



Tikal's Temple 1 was built as the mortuary pyramid for the ruler Jasaw Chan K'awiil (r. 682–734), whose tomb was discovered inside in 1962. Though barely visible, the magnificent roofcomb is decorated with the image of a seated sculpture of Jasaw Chan K'awiil. (Courtesy of J. Michael Francis)



View of the Classic-period Maya city of Tikal, taken from the site's largest structure, Temple 4. Standing at 212 feet (64.5 m) in height, Temple 4 dates to the mid-eighth century and is the largest Maya structure of the Late Classic period. (Courtesy of J. Michael Francis)

array of CERAMICS, inscriptions, and ceremonial ART that continues to define Classic Maya culture.

Construction began in this area as early as 200 B.C.E. Tikal achieved enormous power and influence under the leadership of Siyaj K'ak (Fire Born), a conqueror who had been sent from the Central Mexico metropolis of TEOTIHUACÁN. Siyaj K'ak entered Tikal in January 378 C.E., Tikal's ruler died that same day, ushering in a new royal dynasty, perhaps from Teotihuacán itself. The new leadership launched what became a 150-year campaign of expansion and growth, one which made Tikal the dominant force in the Maya southern lowlands. Tikal's dominance experienced an unexpected challenge when northern rival Calakmul began its own power bid in the mid-500s; Tikal ultimately managed to defeat the upstart in the late 600s. The victory initiated a new phase of growth and ceremonial construction, but the rivalry and subsequent frenzy of growth depleted resources and manpower. These stresses, combined with overpopulation, long-term drought, and the fall of Teotihuacán and its accompanying economic power, initiated a long process of decline in the Maya lowlands. The last recorded date for Tikal is 869.

After the Classic Maya collapse, Tikal lay abandoned for nearly a millennium. In 1848, the chief of Guatemala's Petén district, Modesto Méndez, managed to locate the ruins following a tip by local MILPA farmers. For the

next century, Tikal received an intermittent stream of gentleman-travelers and occasional academic surveys. Extensive scientific excavation and reconstruction only began in the mid-1950s, first under the University Museum of Pennsylvania and subsequently under Guatemala's Proyecto Nacional Tikal. While much work remains, these and subsequent projects have helped make Tikal one of the most visited archaeological sites in the world.

—Terry Rugeley

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**Timucua** Before the arrival of French and Spanish colonists in the 16th century, the Timucua indigenous peoples had occupied the interior of northern FLORIDA, the interior of southern Georgia, and the coastal regions of northeast Florida and southeastern Georgia for some 11,000 years. Originally living as small bands of hunters and gatherers, they later formed the hunter-gatherer, horticulturist, and large agriculturalist chiefdoms that were encountered by Europeans (see AGRICULTURE).

Subsistence strategies were based on environmental conditions, while the boundaries of chiefdoms were usually dictated by physical geography and tribal affiliations.

Consisting of at least 15 distinct political and cultural groups spread across a large area and a range of ecological environments, the Timucua were linked mainly as speakers of varieties of the same language. They were not a single cultural group, as has been widely assumed. Indeed, many groups were never united, either politically or ethnically, and some were at war with each other.

Long before the Timucua were given their name by French explorers and Spanish conquistadores, at least 15 tribes spoke at least 10 varieties (dialects) of what came to be called the “Timucuan” language. The tribes that are known to have spoken Timucua were the Acuera (Diminiyuti or Ibiniyuti), Agua Dulce, Casagne, Icafui, Mocama (Tacatacuru), Ocale, Ocone, Potano, Saturiwa, Tucururu (Tucuru), Utina, Yufera, Yui (Ibi), and Yustega. The names of many of the dialects indicate which tribes spoke them. Almost certainly, there was a greater population of Timucuan speakers in Florida, who were wiped out by DISEASE before Spanish CHRONICLERS could collect information about them.

—Rebecca D. Gorman

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**Tiwanaku (Tiahuanaco)** The term *Tiwanaku* carries multiple meanings: It refers to a long-known ART style, a monumental site in BOLIVIA near the southern end of Lake Titicaca, a civilization, and an archaic Andean state. Tiwanaku culture flourished from 400 to 1100 C.E. in the altiplano, the high plateau between PERU and Bolivia. It arose through a process of intensification of economic strategies over time (see ECONOMY). Community-based inland farmers developed a number of technologies to increase production of potatoes and minimize risk, including hillside terracing, creating artificial ponds, and constructing raised field systems in the lake plain (see AGRICULTURE; POTATO).

In the high puna grasslands, herding peoples tended flocks of llamas and alpacas, which were important for their wool and meat and for TRANSPORTATION. Another group, the Uru, exploited the aquatic resources of Lake Titicaca and possibly practiced rainfall farming. Warm-climate crops such as MAIZE and COCA were obtained through exchange with groups in the valleys of the Pacific coast and the eastern mountain valleys; groups

from the altiplano later established colonists in these valleys (see FOOD; TRADE).

Throughout this period, llama caravans were used to transport goods between distant communities. Language and ideas were also transported by those who made these long journeys. By 500 C.E., CERAMICS decorated with distinctive religious iconography had spread throughout the area through Tiwanaku networks, from the altiplano around Lake Titicaca to the warm valleys of the western cordillera. At the same time, the Aymara and QUECHUA languages were spreading, at the expense of Puquina and Uruquilla.

At this time, the urban site of Tiwanaku itself was a larger ceremonial destination in a landscape dotted by urban settlements with relatively modest ceremonial structures (see CITIES). At Tiwanaku, there was a series of large and imposing ceremonial precincts built of fine stone masonry, which was brought from distant quarries. Additionally, there were palaces for the elite and special areas for artisans and the general population. While the permanent population of Tiwanaku was relatively modest, it was vastly increased by the arrival of pilgrims for religious feasts; they brought with them foodstuffs and other supplies.

Later, after 800, Tiwanaku became a highly centralized polity. Extensive areas of a neighboring valley became part of a centrally controlled raised field production system. This continued until 1100, when a prolonged drought caused the abandonment of the raised fields, as well as the abandonment and destruction of the urban center and its temples. Nevertheless, the underlying complementarity of altiplano society persisted, and llama caravans continued to link maize producers of the high coastal valleys with potato farmers near the lake and the herders of the puna; now, however, these exchanges were on a smaller, regional scale. Tiwanaku civilization coexisted with the WARI culture, centered in the southern Peruvian highlands, until about 850. While these two cultures shared some ideological elements, as seen in their art styles, they were distinct and seem not to have attempted CONQUEST or other forms of contact.

—Patricia J. Netherly

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**tlatoani** This NAHUATL term was the title used to define the ruler of an ALTEPETL (city-state). It literally means “one who says things,” that is, “speaker,” in the sense of someone who gives commands. While grammatically gender neutral, in its unmodified form, it referred to males. On the infrequent occasions when a woman occupied the position of *tlatoani*, the term was modified to *cibuatlatoani*, or “female ruler.” Sometimes, the

title was enhanced, as in *buey tlatoani* or “great ruler,” as MONTEZUMA was sometimes called. In its plural form, *tlatoque* (occasionally *tlatoanime*), it could refer to the higher reaches of the Nahuatl nobility rather than just those who were eligible to become rulers of an *altepetl* (see AZTECS).

The position of *tlatoani* in Nahuatl society is best understood in relationship to the *altepetl*. A *tlatoani* headed his own *CALPULLI* (or *tlaxilacalli*), but he could also become the overall leader of the *altepetl*, a “first among equals.” This ambiguity within a Nahuatl framework has often been ignored in favor of the popular notion that a *tlatoani*, especially one as famous as Montezuma, was an absolute ruler in some idealized European sense. From colonial times to the present, this misunderstanding has been reinforced by the use of such terms as *rey* (king) or *emperador* (emperor). Scholars have increasingly used the Nahuatl term as a way to focus on the Nahuatl, rather than European, dimensions and limitations of the position. Use of the Nahuatl term also stresses its importance as one of the defining characteristics of the *altepetl*. A community that had lost its *tlatoani* would be spoken of as being left in silence and darkness, with its people plunged into sorrow and weeping.

The *tlatoani* carried out a wide range of civil and religious functions and enjoyed privileges specific to his office. One of the most dramatic changes after the CONQUEST was his replacement at the apex of religious authority by the Spanish priests of the CATHOLIC CHURCH.

—Barry D. Sell

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James Lockhart. *The Nahuatl after the Conquest: A Social and Cultural History of the Indians of Central Mexico, Sixteenth through Eighteenth Centuries* (Stanford, Calif.: Stanford University Press, 1992).

**Tlaxcala** This is the name of a state and its capital in Central MEXICO, located just east of present-day MEXICO CITY. Both are roughly coterminous with a late pre-Hispanic area and its leading ALTEPETL known in NAHUATL as Tlaxcallan (Place of Tortillas, or, more generically, Place of Bread). Tlaxcala continues to be famous for two main reasons. First, before the Spanish CONQUEST, it was one of two major states (the Tarascans of modern Michoacán were the other) to resist the expanding TRIPLE ALLIANCE (Aztec Empire) led by TENOCHTITLÁN. Second, the Tlaxcalans were early and valuable allies to HERNANDO CORTÉS; arguably, the conquest of Mexico could not have occurred without their assistance.

The Tlaxcalans faced an increasingly grim situation when the Spaniards arrived in 1519. Over a period of decades, forces from the Triple Alliance had gradually

encircled their territory. This was accomplished through “FLOWER WARS,” in which Aztec military might was applied in calculated military engagements of varying intensity and size. This measured approach achieved many victories with minimal cost. Over time, it sapped the strength of the Tlaxcalans, who continually lost both essential allies and vital TRADE routes. If not for the arrival of the Spanish, isolation and final defeat loomed.

The Spanish arrived in Tlaxcala in the first days of September 1519. From the Tlaxcalan perspective, the newcomers were an unknown quantity in terms of their military prowess and political allegiances. They tested both in a series of hard-fought battles and negotiations. Before the end of the month, these confrontations had culminated in an alliance that would soon send 6,000 Tlaxcalans with Cortés into the heartland of enemy territory. During the fall of 1521, as many as 20,000 Tlaxcalans participated in the final siege and conquest of the capital of the AZTECS, Tenochtitlán. For the Spanish, the encounter with some of the most adept fighters of Central Mexico was a rude awakening. Earlier victories over mainly commoners fulfilling their tribute duty as soldiers left them ill prepared to deal with the armies of disciplined and well-trained warriors that followed. The Spanish now had to contend with their first real losses in terms of men, horses, and equipment. This proved a salutary lesson for the battles ahead.

The aftermath of victory over their traditional enemies could not have been foreseen by the Tlaxcalans. Well before the end of the 16th century, epidemic DISEASE and heavy emigration from Europe to the New World had drastically changed the balance of power between local peoples and the colonizers. Indeed, one dominant power had been substituted for another.

Among the thousands of pages of NAHUATL-language documents from the colonial period is a set of Tlaxcalan CABILDO (town council) minutes from 1547–67. No other indigenous community of colonial Mexico has such an abundance of early *cabildo* records. They offer unique insights into indigenous governance just decades after the conquest.

—Barry D. Sell

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Charles Gibson. *Tlaxcala in the Sixteenth Century* (New Haven, Conn.: Yale University Press, 1952).

Ross Hassig. *Mexico and the Spanish Conquest* (Norman: University of Oklahoma Press, 2006).

**tobacco** Tobacco has been important to indigenous societies throughout Latin America since ancient times. Several species of tobacco plants are indigenous to the Americas, with *Nicotiana rustica* and *N. tabacum* being common varieties that were domesticated in tropical Mesoamerica and South America, respectively.



Detail of Maya noble smoking a cigar from a Classic Maya incised shell (600–800) (Redrawn from Schele and Miller 1986: 155, plate 59a; courtesy of Joel Palka)

Archaeological evidence of tobacco use before European contact includes North American and Mesoamerican pipes and depictions of people smoking in Classic MAYA ART, with designs on ancient Maya murals at CALAKMUL indicating that tobacco was consumed as a paste or powder. Additionally, ancient Maya glyphs for tobacco snuff or paste label small ceramic bottles excavated in HONDURAS (see CERAMICS). Tobacco seeds were found in volcanic ash at the 1,500-year-old site of Cerén, EL SALVADOR.

CHRISTOPHER COLUMBUS noted the use of tobacco among indigenous populations in the Caribbean on his first voyage. Early European illustrations of NATIVE AMERICANS often show Indians smoking, indicating the newcomers' initial fascination and disgust with the practice. Tobacco was grown in gardens and fields that received adequate sun, warmth, and moisture (see AGRICULTURE). The leaves were cut, hung under roofs, and dried before being rolled, packaged, or ground up. The TAINO of the Antilles, like other Amerindians, smoked rolled dried leaves in their mouths or nostrils, or in bone, stone, and ceramic tubes. In addition to smoking, they used tobacco snuff and chew for therapeutic purposes or

to become intoxicated. Furthermore, indigenous peoples used tobacco for enemas, body paint (for decorative and medicinal purposes and to repel insects), and insecticide, and in religious ceremonies and TRADE (see MEDICINE; RELIGION). The Spanish word *tabaco* probably derived from the Taino or Arawak term for the dried leaves smoked as a cigar or in a tube. The Taino used the term *cobiba* for the tobacco plant and leaves. The Spanish terms *puro* (cigar) and *cigarro/cigarillo* (cigarette) may also have been taken from indigenous Latin American words for tobacco.

Indigenous people continued to use tobacco for ceremonial, curative, and everyday uses during the colonial period. They took tobacco with ALCOHOL and narcotics and added leaves or ground plants for flavoring. They offered tobacco to the deities, who were believed to prepare and consume the plant as people did. Colonial documents record that the inhabitants of colonial towns sometimes maintained trade relations with unconquered lowland indigenous groups, such as the Lacandón Maya, in order to acquire high-quality tobacco. This highlights not only the domestic importance of the plant but its great commercial value in the Americas and growing value in Europe. The importation of tobacco to Europe for pipe smoking was common after the 1550s, especially in Spain, England, and Holland. Later, tobacco for snuff and drink was taken for pleasure and as a stimulant, although it was believed to have medicinal purposes as well. Jean Nicot's experiments with growing tobacco in 16th-century Europe led to naming the plant's addictive component, nicotine, after him.

See also TOBACCO (Vols. II, III).

—Joel Palka

#### Further reading:

- Iain Gately. *Tobacco: A Culture History of How an Exotic Plant Seduced Civilization* (New York: Grove Press, 2001).  
Francis Robicsek. *The Smoking Gods: Tobacco in Maya Art, History, and Religion* (Norman: University of Oklahoma Press, 1978).

**Toltecs** The Toltecs ruled Central MEXICO during the Early Postclassic period (900–1200) and were the first group to integrate the region after the seventh-century fall of TEOTIHUACÁN. Much of what we know about the Toltecs comes from 16th-century Aztec descriptions; the AZTECS viewed the Toltecs as highly artistic, civilized, and urban people. This image, although idealized, is now partially supported by archaeological evidence and Postclassic iconography and inscriptions. The Toltecs' immediate ancestors might have been Chichimecas from northwestern Mesoamerica, who together with the Nonoalca of the Gulf coast settled in the Basin of Mexico, where cultural antecedents can be found in the Coyotlatelco culture dated to 700 c.e. According to Aztec

traditions, these people were led by their hero Mixcoatl, whose son, Topiltzin QUETZALCÓATL, later became the legendary founder of the theocratic capital city of Tollan (although some sources place him as one of its last rulers). This Toltec ruler-priest was eventually banished by his rival, Tezcatlipoca, the same figure who also transformed Tollan into an expansionist WARFARE state.

The Toltec capital has been identified with the archaeological site of TULA in the modern Mexican state of Hidalgo. During its apogee (900–1150), Tula was one of the largest CITIES of its time, with a population composed of NAHUATL and Otomi speakers. Like Teotihuacán before it, Tula influenced a vast region through TRADE networks from COSTA RICA to the U.S. Southwest (probably using POCHTECA-like merchants) combined with military force, the last seen in the site's extensive warfare iconography. Toltec rulers further broadened their influence through MIGRATIONS and marital alliances. Even though their domain was not as vast as that of the later Aztec Empire, the Toltecs reached areas that the TRIPLE ALLIANCE did not, and their political control extended over Central Mexico, the northern Mesoamerican periphery, the Gulf coast, Soconusco, and parts of the Huasteca and Michoacán. Early Postclassic sites in EL SALVADOR might have been Toltec colonies established by Pipil migrants from Tula. Luxury goods from these regions have been found at Tula and might have been tribute items. The Toltecs also exported green OBSIDIAN from the Pachuca Mountains; it has been found at sites all the way down to Central America.

At CHICHÉN ITZÁ, an important MAYA site in Yucatán, striking similarities in ARCHITECTURE and iconography to that of Tula point to a Toltec presence. While the direction of these cultural influences is still debated, it is clear that a pan-Mesoamerican religious transformation spread from Tula. This was associated with the cult of Quetzalcóatl (the “feathered serpent” god), as well as other Central Mexico deities such as Xipe Totec, Tlaloc, and Tezcatlipoca. The decline of Tula and gradual dispersal of the Toltecs might have been associated with new waves of Chichimec migrants (such as the Mexica) or with climatic change in the area. Still, many Late Postclassic lineages in Central Mexico and the Maya region claimed to be descendants of the Toltec dynasties, as symbols of prestige and ancestral status. Indeed, the Aztecs revered the Toltecs to the point of excavating in the already abandoned site of Tula in order to extract artifacts that they transferred to their temple in TENOCHTITLÁN.

—Danny Zborover

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Alba Guadalupe Mastache, Robert H. Cobean, and Dan M. Healan. *Ancient Tollan: A Regional Perspective of the Toltec State* (Boulder: University Press of Colorado, 2002).

**Tordesillas, Treaty of** (1494) The Treaty of Tordesillas was reached by Spain and Portugal in 1494 to resolve their competing claims regarding overseas territories. Earlier in the 15th century, papal decrees had given the Portuguese title to lands they had discovered during their explorations along the west coast of Africa, including the Azores and Cape Verde Islands. CHRISTOPHER COLUMBUS's Castilian-sponsored voyage in 1492 led to the discovery of lands that the Portuguese claimed lay within their jurisdiction. However, in a series of bulls issued in 1493, the Spanish-born pope Alexander VI granted to Spain a broad swath of lands in the Atlantic that conflicted with Portugal's claims. Alexander VI established a line of demarcation, giving Spain the lands lying 100 leagues west of the Azores and Cape Verde Islands. The line was so vague (it did not specify the length of the league or the precise point in the far-flung islands from which the measurement was to be taken) that it did little to settle the dispute.

Therefore, Portuguese and Castilian representatives met at the Spanish town of Tordesillas to negotiate an end to the conflict. The Spaniards agreed to extend the line 370 leagues west, instead of 100, and in turn, the Portuguese recognized Castilian claim to the lands Columbus had discovered. On June 7, 1494, the two monarchies ratified the accord in the Treaty of Tordesillas. The treaty line gave Portugal claim to BRAZIL when it was discovered by PEDRO ÁLVARES CABRAL in 1500. Spain used the papal bulls and the Treaty of Tordesillas to claim sovereignty over Spanish America and to justify its occupation of indigenous lands.

—Kendall Brown

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Lyle N. McAlister. *Spain and Portugal in the New World, 1492–1700* (Minneapolis: University of Minnesota Press, 1984).

**Totonacs** The Totonac civilization occupied various parts of eastern MEXICO at its peak, which coincided with the peak of AZTEC imperial expansion. The Totonacs were named such by the Aztecs and lived in what was then known as Totonacapan, which stretched between Patantla in the northeast to Cempoala in the south. In addition to cultivating the typical Mesoamerican foodstuffs of beans, MAIZE, and squash, by the 15th century, the Totonacs were also significant producers of liquid amber and COTTON. Their agricultural prowess enabled them to weather a massive famine that struck Mexico between 1450 and 1454 (see AGRICULTURE; FOOD). Indeed, during this period, the Totonacs became significant owners of Aztec slaves, as the Aztecs were desperate and willing to sell slaves in exchange for maize (see SLAVERY). The Totonacs were also recognized for their rich regalia and refined dress; early Spanish accounts of the Totonacs



are rife with references to their stately and elegance. This was due chiefly to the work of Totonac women, who excelled at weaving and embroidery (see CLOTHING; TEXTILES).

Having been at war with the Aztecs for much of the preceding century, the Totonacs were a natural ally for HERNANDO CORTÉS. The Totonac city of Cempoala was the first indigenous city that Cortés visited on his march inland toward the Aztec capital of TENOCHTITLÁN. Having joined forces with Cortés, the Totonacs, along with the Tlaxcalans (see TLAXCALA), played an instrumental role in the ultimate destruction of the Aztec Empire and the success of the Spanish CONQUEST. The Totonac community was annexed to the Spanish Empire with relatively little violence; however, the vibrancy of the Totonacs was destroyed as a result of epidemic DISEASE. Although greatly reduced in number, the Totonacs remained noteworthy on the world stage as the chief producers of vanilla until the mid-19th century. Today, some 90,000 Totonac speakers remain in the Mexican states of Hidalgo, Puebla, and Veracruz. Their language is isolated in its origins from other indigenous languages.

—Sean H. Goforth

## trade

### MESOAMERICA BEFORE 1492

Before the arrival of Europeans, trade was an important element of all ancient Mesoamerican cultures—the OLMECS, MAYA, MIXTECS, ZAPOTECs, Teotihuacanos (see TEOTIHUACÁN), and AZTECS. Beginning as early as the Preclassic period, marketplace systems were among the most sophisticated forms of exchange in Mesoamerica. Over time, these developed into elaborate networks of markets, dispersed throughout various regions.

Mesoamerican topography ranges from jungle-covered lowlands to mountainous terrain, and this remarkable diversity allowed for the cultivation and use of a wide range of products. Basic FOOD and other materials, such as MAIZE, beans, squash, CERAMICS, ground stone, and construction materials, were usually transported no more than a two-day walk by commercial traders (see TRANSPORTATION).

Luxury items, such as metals, semiprecious stones, feathers, salt, and OBSIDIAN, were transported in volume over much longer distances. Long-distance trade was an old practice and was devoted primarily to the exchange of elite items. Archaeological evidence suggests that long-distance trade was important to the development and subsistence of complex societies throughout Mesoamerica.

As a region, Mesoamerica was unified by a complex trade network, which provided markets with both raw and manufactured goods. Mesoamericans depended on local and regional markets as well as long-distance trading networks. As a result, commerce and trading routes were numerous and an essential part of Mesoamerican society.

## Olmecs

Mesoamerican trade and exchange were important aspects of the early Gulf Coast Olmec civilization, located in the modern Mexican states of Tabasco and southern Veracruz (see MEXICO). During the Preclassic period, the Olmecs were part of an extensive long-distance trade network thought to spread throughout Mesoamerica. At the time, the major routes were land based, radiating from the Gulf coast west to the Mexican highlands and southeast along the Pacific coastal plain. The trade was mostly in luxury goods such as jade; however, it also included some utilitarian goods, such as obsidian from the Maya highlands. Olmec merchants traveled throughout Mesoamerica to acquire jades, jadeites, and serpentines.

Both utilitarian and nonutilitarian resources were traded into the Olmec heartland from as far away as Oaxaca and Guerrero. Archaeological excavations have uncovered trade goods associated with the Olmec ritual context. Several thousand tons of metamorphic stone were placed in the southwest platform at La Venta. This material was mined more than 60 miles (96.5 km) south of the site, across the Isthmus of Tehuantepec (see MINING). Obsidian found in the Olmec area was thought to be the result of trade from as far away as the Valley of Mexico, Oaxaca, and GUATEMALA.

Long-distance exchange was carried out on a large scale during the period of the Olmec civilization. The Olmec style has been found in objects distributed throughout Mesoamerica; these objects include portable artifacts such as figurines, personal ornaments, and ceramics, as well as monumental sculptures. Objects made out of material from other parts of Mesoamerica have also been found at Olmec sites. Most of this material consists of imported obsidian, and artifacts made out of limonite, jadeite, serpentine, turquoise, iron pigments, mica, mollusk shell, turtle shell, stingray spines, and shark teeth.

## Maya

During the Preclassic period, the Maya utilized three different types of trade: local, regional, and long distance. Local trade consisted of exchanges made within a community. Regional trade occurred within major environmental areas, including the Pacific coastal plain, the southern mountainous and volcanic highlands, the central lowlands with tropical rain forest, and the northern lowlands with tropical vegetation. Under this system, one community would trade with neighboring communities to acquire goods not available locally within a specific area.

Long-distance trade was characterized by the exchange between major environmental areas and involved a far greater diversity of raw materials and products. For example, three major sources of obsidian used by the Maya have been found in the southern highlands, at El Chayal, Ixtepeque, and San Martín Jilotepeque. Obsidian found from 23 sites can be identified from these southern highland regions. Obsidian from all three

sources was distributed northward from the highlands to the lowlands.

The Maya desired obsidian for both utilitarian and ritual purposes. Evidence of obsidian tools in Maya lowland areas indicates that utilitarian goods were part of long-distance trade. Increasing amounts of utilitarian goods such as obsidian and salt were traded through bulk transport by sea, from the Maya area to other parts of Mesoamerica and vice versa. Utilitarian goods exchanged in local, regional, and in some cases in long-distance trade included agricultural products (various areas); balsam (Pacific coast); bark cloth (Pacific coast and lowlands); basketry (various areas); COTTON (lowlands, Pacific coast, and the Yucatán); dyes and pigments (various areas); fish and sea products (coastal areas and lakes); flint and cert (lowlands); wild game (various areas); henequen and maguey (northern lowlands); lime (lowlands); *manos* and *METATES* (southern highlands); obsidian (southern highlands); ocote, or pitch pine (highlands); ceramics (various areas); salt (northern coastal lowlands); sugar, honey, and wax (northern lowlands from the Caribbean coast); TEXTILES (various areas); TOBACCO (lowlands); tortoiseshell (coastal areas); and volcanic ash (southern highlands) (see DYES AND DYEWOOD).

Markets in the plazas of major and minor ceremonial sites were the primary centers of trade. The ancient Maya included both part-time traders and full-time merchants. Families had to obtain some basic products at local or regional markets (see FAMILY). Ruling families and members of the royal court were supported by taxes and tribute, supplemented by trade in local markets. Craft specialists not attached to the elite would obtain their food at local markets. Even full-time farming families, who were the vast majority of the population, relied on trade for pottery, salt, CACAO, and stone tools and to add variety to their diet.

Long-distance trade was undertaken by a small group of wealthy, elite merchants. These merchants controlled foreign exchanges, including most of the commerce that passed through the Maya areas between Mexico and Central America. Long-distance trade played a major role in the wealth and power of the lowland Maya elite. The lowland Maya elite required important utilitarian goods to manage these complex societies such as salt, obsidian, and grinding stones. These goods were found throughout the lowlands but not enough to sustain a large populated society; however, the elite managed and controlled long-distance trade in order to have more access to these goods.

Long-distance trade materials were part of the costuming and regalia of Maya kings, queens, nobles, and priests; without these lavish costumes, they could not carry out the public rituals that were their principal duties. These materials were crafted into mosaic head-dresses, shields, scepters, mirrors, and other regalia. Other elite long-distance goods traded within the Maya area included amber (Chiapas), cacao (lowlands, Caribbean,

and Gulf and Pacific coasts), cinnabar (southern highlands), copal and *pom* (lowlands), quetzal feathers (northern highlands), hematite (southern highlands), jadeite (northern highlands), jaguar pelts and teeth (southern and central highlands), pyrite (highlands), serpentine (highlands), albite (highlands), diorite (highlands), shark teeth (coastal area), shell (coastal area), coral and stingray spines (coastal area), polychrome ceramics (lowland area), and imported ceramics or artifacts from other Maya regions and from different regions in Mexico.

Long-distance goods and materials brought into the Maya realm from Mexico included kaolin, magnetite, metals (copper), pelts (rabbit), pottery, textiles, and turquoise. Goods and materials brought into the Maya area from other parts of Central America included chalcidony, cotton, feathers, metals (GOLD, silver, copper, and alloys), pottery, and rubber.

### Mixtecs and Zapotecs

The Maya were also linked to western Mesoamerica through trade with the Zapotecs. The Zapotecs resided in the Valley of Oaxaca, along the Pacific coast. Their center was MONTE ALBÁN. The rich gold-bearing lands of the Mixtec and Zapotec civilizations lay across the Puebla border in Oaxaca. One of the largest Mesoamerican trading centers was Coixtlahuaca in Oaxaca. *POCHTECAS* (guild merchants) from all over southern Mexico met there to trade with their northern counterparts.

### Teotihuacanos

During the Early Classic period, a substantial part of eastern Central Mexico was dominated by the great urban Center of Teotihuacán. Indeed, Teotihuacán's influence stretched all the way to Maya territory in Guatemala and HONDURAS. Long-distance trade was one of the important bases for the development of Teotihuacán civilization and the diffusion of Teotihuacán style. Stylistic links between Teotihuacán and virtually every part of Mesoamerica are often noted. Long-distance exchange was controlled by the elite Teotihuacán traders, or *pochtecas*, who moved goods in large caravans.

Most of the long-distance exchange focused on obsidian. There were several kinds of obsidian workshops at Teotihuacán: local, precinct, and regional. The products from regional workshops were distributed throughout the Basin of Mexico and beyond. The industry met the needs of literally millions of consumers.

A large proportion of the obsidian processed at Teotihuacán came from the Pachuca source complex. This material has a distinctive golden-green color and is exceptionally well suited to manufacturing fine prismatic blades. Teotihuacán controlled the Pachuca source of superior green obsidian. Much of it was used in the city itself, but small amounts have been found throughout Mesoamerica. Green obsidian was the only locally obtained valuable raw material.

### Aztecs

In the Postclassic period, from their capital city of TENOCHTITLÁN in the Basin of Mexico, the Aztecs controlled an empire that stretched from Veracruz to the Pacific coast and from Central Mexico to Guatemala. Within the Aztec Empire, exchange was conducted in three major forms: marketplace transactions, state-sponsored foreign trade, and tribute and taxation. The trade and tribute systems provided resources essential to the maintenance of Tenochtitlán, its large population, and the Aztec ECONOMY in general.

Marketplace transactions were carried out by the common majority, such as farmers and part-time small-scale producers, who sold their goods locally. Most vendors of this type dealt in subsistence goods, ceramics, ground-stone tools, charcoal, and other basic items. In addition, there were regional merchants who served major markets in the provinces. Although they also dealt in subsistence goods, these middlemen concentrated on buying and selling high bulk, medium-value products, such as salt, cotton, and cacao. They transported these goods from market to market, often across political borders. These traders were independent entrepreneurs.

At the very top of the trader hierarchy were the *pochtecas*. These professional merchants were organized into hereditary guilds and lived in specific neighborhoods. In fact, there were seven different merchant areas, or wards, in Tenochtitlán and Tlatelolco. The most important was Pochtlan. The other important long-distance trading communities were Tepetitlán, Tzonmolco, Atlauhco, Amachtlán, and Itztotolco. These names appear in areas far beyond the Valley of Mexico, and it has been suggested that these sites may have been trading centers as far back as Toltec times (see TOLTECS). Most long-distance trade outside the empire was managed by *pochtecas*. The *pochtecas* traded in volume mainly luxury goods, as well as salt and obsidian. Long-distance trade had a major impact on craft specialization at Tenochtitlán.

Long-distance exchange gave the Aztecs better access to raw materials; as a result, skilled artisans moved to Tenochtitlán in large numbers, and specialization in the production of certain goods became increasingly centralized in the city. Raw materials imported by the *pochtecas* included feathers, cotton, cloth, jade, metal ornaments, and rubber balls. Featherworkers, lapidaries, and metalworkers were organized into guilds; moreover, these artisans held a special rank in Aztec society. They produced luxury goods both for local consumption and for export. Goods were traded to regional merchants for sale in local markets or were exchanged to the *pochtecas* to trade long distance.

In addition, Aztec tribute collectors, or *calpixque*, gathered tribute payments and taxes. The Aztecs collected tribute and taxes as revenue from conquered regions. Provinces in close proximity to Tenochtitlán gave goods such as foodstuffs, warrior garb, and a variety of textiles, wood, bowls, paper, and mats. More distant provinces from different ecological areas provided luxury

goods such as precious feathers, jade, turquoise, gold, cacao, cotton, decorated cloaks, women's tunics, warrior garb and shields, gold shields, animal skins, feathers standards, gold diadems, gold headbands, and strings of gold beads (see CLOTHING).

Long-distance trade in the U.S. Southwest with northwestern Mesoamerica is shown through the presence of copper bells, iron pyrite mirrors, and macaws found among the Hohokam. Mesoamerica had a variety of cultures that not only conducted a vibrant regional trade but also exchanged goods well beyond their boundaries into the U.S. Southwest, Oklahoma, and the Mississippi Valley.

### SOUTH AMERICA BEFORE 1492

There are many gaps in the archaeological record concerning trade in preconquest South America, and even in the late pre-European period, there were different systems by which goods circulated and people and societies met their needs. Nevertheless, at the most basic level, what can be said is that goods that were essential for subsistence, such as food, were circulated, and that this circulation frequently involved reciprocity. For example, in the highlands of the central Andes, households and lineages grew crops at different altitudes: POTATOES and other tubers were grown on the highest fields; maize and other crops on the temperate mid-level lands; and cotton, hot peppers, and COCA in the lowest, warmest fields. The farmers of an *AYLLU* either had fields at different altitudes or exchanged these goods among themselves, giving them all access to each type. The circulation of goods beyond this level, however, involved more distant groups. The people who carried out these exchanges were often individual traders, and they frequently had trading partners with whom they regularly exchanged goods. These relationships tended to be inherited from father to son and did not necessarily involve higher authorities. On the north coast of PERU, for example, fishermen were specialized and often lived at a distance from cultivated land. They obtained produce from farmers inland in exchange for fish and other marine products. It is not clear, however, whether these exchanges were between trading partners or took place in a more generalized market setting under the jurisdiction of a single political ruler.

The movement of essential foods within a household, lineage, or small polity did not generally involve travel over long distances. In contrast, luxury goods, ritual items, exotic items, and even lore or esoteric knowledge were frequently exchanged over greater distances by specialists. Such individuals may have had trading partners or may have attended pilgrimage fairs. Part of this trade was undoubtedly at the behest of their chief or ruler. These exchanges were often very important. For example, the highlanders of northern Peru received salt and hot peppers from Túcume farmers in exchange for water from their rivers, which the Túcume farmers used to irrigate their crops. While there was in fact no way to

withhold this water, the exchange set up mutual relations of obligation that gave the highlanders access to lowland products and Túcume farmers rights of refuge in the highlands in times of drought or floods. Esoteric knowledge seems to have been an important type of exchange. Unlike material items, this exchange does not show up directly in the archaeological record; however, it can be seen in the expansion of religious cults and the use of particular healing practices (see RELIGION). Many of these exchanges also involved the use of fictive equivalences, which did not necessarily have to be logical or even roughly equal. Finally, in some exchange systems, particularly on the northern coast of Peru into Mesoamerica, the use of proto-monies had begun to emerge at the time of the arrival of the Spanish.

There has been much scholarly debate about whether there were markets in the Andean region. It appears that both sides are right, at least in part. It is known that very early on exchanges took place at religious festivals. These were either by barter or fixed equivalences. In the Andes of BOLIVIA and southern Peru, there was a tradition of long-distance trade involving coca and hot peppers from the warm eastern slopes of the Andes; llama meat and the wool of llamas and alpacas from the high puna region; dried potatoes, metals, and esoteric lore and religious beliefs from the altiplano around Lake Titicaca; and maize, cotton, hot peppers, and salt from the warmer valleys of the western slopes and the coastal valleys. Goods were circulated in a number of ways. By pre-Inca times, the large polities of the altiplano around Lake Titicaca had established colonies in the warm coca lands to the east and the maize-producing valleys of the coast to give them direct access to those products (see INCAS). Their core areas already included potato fields, high pastures for llamas and alpacas, access to the aquatic resources of Lake Titicaca, and access to ores and metals. Llamas were key. While they were important for their fiber and meat, they were also indispensable for the transport of bulky items over long distances. Thus, the specialists in this long-distance trade came from groups with access to llamas, though not all herders engaged in exchange.

Subsistence goods appear to have been exchanged on the basis of established equivalences. According to Spanish accounts, highland traders who came to Chíncha on the southern Peruvian coast used small copper sheets as tokens, although this has not been established archaeologically. The trade routes from the coast to the altiplano appear to have been important in the diffusion of the Aymara language to the Titicaca Basin. The textiles, pottery, and other artifacts decorated in the style associated with the religion of the TIWANAKU culture also appear to have moved along these routes. In all these instances, exchanges were a means of establishing and maintaining relations between different groups. Later, the Inca state attempted to control all exchange, particularly that over long distances. Markets, where they existed, were highly circumscribed under the Incas.

There is considerable evidence for trade between the peoples of the AMAZON and those of the Andes. Lowland products included honey, the feathers of tropical birds, medicinal and hallucinogenic plants for ritual and curing, and esoteric lore (see MEDICINE). It is not clear what was exchanged in return, but it may have included gold or bronze objects, textiles, or stone for tools such as obsidian or chert. Exchange within Amazonia was carried out by individuals or small groups of men who traveled long distances, sometimes more than 600 miles (965.5 km). Items traded included stone axes, poison for arrows, pigments for decorating pottery, and esoteric lore. While such long trips were usually undertaken by canoe, frequently through hostile territory, there appears to have been a convention of respecting individuals on trading missions. Such expeditions frequently took many months because, while it was easy to travel downstream with high water, it was sometimes necessary to wait months for low water in order to return upstream. No archaeological evidence for markets or any item that might have functioned as money has been reported for Amazonia.

There appear to have been markets, long-distance trade, and even one or more systems of proto-money along the west coast of South America from the northern coast of Peru to Mesoamerica and beyond. One of the earliest trade items was the shell of the warm-water oyster (*Spondylus*), found off the Pacific coast of ECUADOR; these shells were traded southward to Peru beginning in the Initial period around 2000 B.C.E. The inhabitants of the central Andes associated *Spondylus* with abundant rainfall and thus considered it ritually essential for successful crops. The *Spondylus* recovered at the Initial-period temple of Kotosh and the later temple at CHAVÍN de Huántar probably entered Peru from Azuay and Loja in Ecuador along overland trade routes. Trade in MOCHE times, in the first millennium C.E., may also have been primarily conducted over land, since there is abundant evidence for large llama caravans at religious centers, and these are also depicted on Moche pottery. There is also archaeological evidence for large Moche watercraft made of bundled reeds, as well as evidence that the Moche sailed to the guano islands across the open sea.

It is the traders of Lambayeque, however, who exemplify trading by sea for the central Andes. The Lambayeque were not expansionist, but their pottery (and presumably Lambayeque traders) were found in LIMA and as far south as Chíncha, in Peru. It is probable that some trade items were carried by llama caravans, but the Lambayeque also used rafts of balsa logs, guided by a system of movable centerboards, which allowed their vessels to sail against adverse currents. These rafts included a "hold" for cargo and masts with square-rigged or crescent sails. Lambayeque polities appear to have been the southern terminus of a network of marine trade that extended north along the Pacific coast of Ecuador. The inventory of the cargo recovered off the coast of northern Ecuador during FRANCISCO PIZARRO's second

voyage to Peru included elaborate gold ornaments, EMERALDS, objects of green stone, textiles, and a large quantity of *Spondylus* shell and beads. The gold ornaments were worn by the chiefs of the region to indicate their status. The cloth may also have come from Lambayeque or from ports in southern Ecuador, while the green stone figures may have been traveling south. Copper and bronze objects were also traded. Two classes of goods seem to have had quasi-monetary status: beads made of *Spondylus* shell, called *chaquira*, and thin copper sheets in the form of I bars and axes. Of the two, *chaquira* appear to have been used more widely. The status of traders is not entirely clear. They seem to have been a privileged occupational group under the jurisdiction of their regional rulers, but it is not known if they made up a particular social group or came from particular ethnic groups, or whether they were present in all major polities but were directly dependent on the paramount rulers.

See also ECONOMY (Vols. II, III, IV); TRADE (Vols. II, III, IV).

—Stephanie Lozano  
Patricia J. Netherly

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## transportation

### THE AMERICAS BEFORE 1492

Ancient roads and transport networks in the Americas have drawn considerable scholarly attention and public interest in recent years. Whereas the use and deployment of waterborne craft, such as balsa and reed boats and rafts along the Peruvian coast and large dugout canoes in Mesoamerica and North America, were clearly instrumental in the growth of such transport networks, their documented use is limited mainly to ethnohistorical and contact-era accounts and journals. Archaeological information on waterborne TRADE and interaction is therefore largely inferred from secondary forms of evidence. Ancient road networks serve as key indicators of early human social, political, and economic interaction and trade in the Americas, and ancient ports along such rivers as the Mississippi, Rio Grande (Río Bravo), Usumacinta, Pasión, Lerma-Santiago, Motagua, and AMAZON provide indirect indications of pre-Hispanic interaction (see ECONOMY).

By extension, the celebrated *POCHTECA* merchants of the Aztec era (ca. 1250–1521) maintained legions of human burden bearers, who from childhood had been trained within *pochteca* guilds for the purpose of transporting goods (see AZTECS). Because both North and Middle America

were largely devoid of domestic draft animals, human burden bearers were the primary source of overland transport; only in western South America and Peru did llamas (camelids) serve as pack animals for negotiating those regions' treacherous mountain climes. However, while Peruvian llamas could carry upward of two 66-pound (30-kg) loads of goods (rotated between three adult camelid males) at the rate of about 12 miles (19 km) per day, llamas tire easily and become uncooperative when tired. By contrast, male and female *tlameme* (human burden bearers) could carry the equivalent of 65 or more pounds of cargo for distances of between 12 and 15 miles per day, all with little more than a tumpline or strap, known as a *mecapal*.

Of course, while they were more reliable and could bear larger loads, *tlamemes* needed to be fed from local supplies or from goods ported in transit. To ameliorate this drawback, Peruvian porters often carried supplies from one end of an assigned territory to the next; from there, neighboring porters conducted the load through the next territory. Nevertheless, it is to the credit of such human burden bearers that commerce, communication, and other forms of early human interaction were made viable in the Americas.

Early European exploration and recent scientific discoveries have identified major transport network systems and ancient roads in such diverse areas of the Americas as the U.S. Southwest; the Mississippian complex of eastern North America; Casas Grandes, in Chihuahua, MEXICO; La Quemada, Zacatecas; TEOTIHUACÁN and the Teotihuacán Corridor, in TLAXCALA; the Sierra de Puebla; MONTE ALBÁN and the Valley of Oaxaca; the *saché* (road) systems of the northern MAYA lowlands and Yucatán Peninsula; the southern Maya lowlands in GUATEMALA and HONDURAS; the Llanos of Barinas, in VENEZUELA; and the Andean cordilleras of PERU, BOLIVIA, CHILE, and ARGENTINA. Significantly, the Andean achievement alone served to integrate an ancient road system and transnational transport network consisting of major highways and trunk lines over some 20,000 to 25,000 miles (32,187–40,234 km). This latticelike network extended over a vast area by way of tandem coastal and highland routes that stretch from Quito, ECUADOR, in the north, through Peru, Chile, Bolivia, and Argentina in the south; this network consisted of at least 14,000 miles (22,531 km) of built roads and road-related features (such as rope-cable suspension bridges) that traversed some of the most inhospitable and rugged terrain imaginable. The growing body of archaeological and historical evidence now invites investigators to visualize the deployment of extensive and sophisticated transport networks and ancient road systems that once teemed with people, including the elite, commoners, traders, farmers, and soldiers.

By contrast with the well-documented roads of the Inca Empire (see INCAS), the long abandoned roads of the ancestral Pueblo, Chaco, or Anasazi peoples of the U.S. Southwest made up an integrated system of some 500 miles (805 km) of known masonry and paved and

unpaved segments; this vast network connected major Pueblo towns and settlements throughout the U.S. states of New Mexico, Colorado, Arizona, and Utah. Unlike the Andean system, archaeologists continue to speculate on the probable functions of the roads and road-related features identified with the Chaco and Pueblo peoples.

Scholars have advanced a number of interpretations for the Chacoan roads, including their use as defensive networks for outlying Pueblo settlements and as trade routes, for ceremonial and political purposes, and for the transport of subsistence goods to and from rural communities. Among Pueblo peoples of the late 19th and early 20th centuries, scholars have noted the use of ceremonial circuits, or “Pueblo raceways” (replete with runners like the *CHASQUI* used by the Incas of Peru), that were intended to influence the movement of clouds, and thus rain, in the parched lands of the Southwest. American Indian beliefs and cosmologies regarding the importance and sanctity of such roads have yet to be fully considered.

Interestingly, while 16th-century Spanish accounts of the Mesoamerican road and highway systems of the Aztecs and their predecessors are readily available, only recently have scholars begun documenting these networks via ground verification studies, aerial (satellite) imagery, archaeological exploration, and ethnohistorical analysis. While Aztec-era transport network systems and roads were clearly instrumental in maintaining the Aztecs’ massive tribute system, scholars continue to grapple with how earlier systems, such as those of the northern Maya lowlands, were used.

Accounts from the 16th and 17th centuries make clear that transport networks in Peru and Mesoamerica served both the sociopolitical and economic demands of the empires that designed, developed, and maintained them. And like the systems expanded on by the Incas of Peru, Aztec imperial interests drew on extant ancient road systems as the basis for the course of thoroughfares in their empire.

The Inca road system constituted “South America’s largest contiguous archaeological remain.” For the Incas, the *qhapaq ñan*, or *Inka ñan* (Inca road), was a complex sociopolitical and economic, managerial, ideological, symbolic, and otherworldly device for communicating the mandates, privileges, and prerogatives of the quadripartite Inca Empire, known as Tawantinsuyu. Given the vastness of the Peruvian transport networks, and those of Mesoamerica and North America, one is left to ponder the enormity of the achievement in question. The paucity of domestic draft animals, with the exception of llamas indigenous to the Andean cordilleras, clearly played a role in the rise and fall of cultures, technologies, and traditions in the Americas more broadly. The development of such networks ultimately fueled the rise, fall, and integration of communities, kingdoms, and empires wherever they were deployed.

Extant ancient road systems throughout the Peruvian highlands were integrated into the broader imperial network that was both upgraded and expanded by the Incas.

A massive LABOR force, predicated on the availability of *MITA* (conscripted) laborers, permitted the construction and ongoing maintenance of a vast interregional system that incorporated both formal and informal all-weather architectural features and pavements. While Inca engineers sought to minimize damage to the natural topography, they were nevertheless known for tunneling through precipitous rock formations or terracing hillsides to accommodate roadbeds. Moreover, they erected tall tapia-adobe walls and related earthworks, as well as wooden drawbridges, stone abutments, masonry bridges and culverts, dams, and rope-cable suspension bridges. Road construction ultimately varied according to local conditions, the available materials, topography, labor demands, public works projects, military mobilizations, ritual and cosmological associations, and religious processions.

Whereas pole-roads and tall tapia-adobe side walls were deployed along coastal routes, elsewhere broad thoroughfares, cut-stone stairways, masonry sidewalls, and related linear arrangements were used. High-elevation Andean road systems were engineered to withstand the harshest conditions, and their durability was legendary. The use of elaborate stone curbs and pavements, as well as masonry retaining walls and switchbacks, was a key characteristic of such roads. It was these latter roads that were ultimately best preserved and therefore testify to the sophistication of Andean road building. Elevated roadbeds and stone or adobe sidewalls lined or enclosed road features with an eye to protecting travelers from crosswinds, flooding, the encroachment of crops and livestock, and other related conditions in agricultural regions (see AGRICULTURE).

While Inca causeways typically were of rubble-core construction, earlier civilizations made use of a variety of masonry techniques, including sun-dried brick, puddled adobe, and rammed earth. Sun-dried brick construction, for instance, can be found at such sites as CHAN CHAN or the earlier MOCHE sites of the north coast of Peru. Such construction was often coordinated with stone retaining walls, rock-cut ramps, switchbacks, stairways, and related features, which were used to buffer ascent and descent in the precipitous rock topographies. Runners, or *chasquis*, were charged with carrying *QUIPUS* (knotted and colored cords used for record keeping), messages, and fresh fish and related products to and from the lowlands to the highlands. The speed with which a runner delivered a message was directly dependent on the plethora of trunk and feeder lines that constituted the all-weather highway system. Ultimately, the whole of the Inca Empire was integrated through a host of subsidiary installations and transport network features that amazed European observers. The soldier-chronicler PEDRO CIEZA DE LEÓN wrote in 1553 that “In human memory I believe that there is no account of a road as great as this, running through deep valleys, high mountains, banks of snow, torrents of water, living rock, and wild rivers . . . excavated into precipices and cut through rock in the mountains. . . . in all places it

was clean and swept free of refuse, with lodgings, storehouses, Sun temples, and posts along the route.”

### TRAVEL TO THE AMERICAS

The European “discovery” of the Americas followed 15th-century maritime advances. Aided by new technology, including astrolabes and caravel ships, mariners advanced down the coast of Africa and then farther into the Atlantic, beyond the Canary Islands and the Azores. CHRISTOPHER COLUMBUS arrived in the Caribbean while searching for a sea route to Asia, and also sailing to Asia, albeit around the Cape of Good Hope, PEDRO ÁLVARES DE CABRAL landed in BRAZIL in 1499.

The early voyages yielded information about ocean currents and wind patterns that proved invaluable in establishing regular shipping routes. Subsequent voyages by FERDINAND MAGELLAN (1521–22), Miguel López de Legazpi (1564), and Friar Andrés de Urdaneta (1565) linked the Americas with Asia. The Americas thus came to serve as the critical link between transatlantic fleets and the Manila galleons (see FLEETS/FLEET SYSTEM). The Atlantic fleet initially sailed from Seville to Havana. From there, cargo ships continued on to destinations in Veracruz (Mexico), Nombre de Dios in PANAMA, and Cartagena in COLOMBIA. On the Pacific side, ships sailed between Acapulco (Mexico) and Manila (Philippines). LIMA’s port of Callao linked the Andean ECONOMY with the rest of the Americas.

While regular oceanic transportation set in motion Spanish and Portuguese colonialism, it also facilitated the rise of a new mercantile economy. The Americas played a crucial role in this: American SILVER promoted commerce in European goods, African slaves, and Asian luxury products such as silk and spices (see SLAVERY). Lucrative trade inspired maritime rivalries and piracy, however, which resulted in the Spanish Crown developing a fleet system with an armed escort to provide greater security (see PIRATES AND PIRACY). Despite its initial success, the fleet system did not make ships impervious to attack, nor was it entirely satisfactory to merchants. In 1628, Dutch vessels led by Piet Heyn captured the Spanish treasure fleet and during the second half of the 17th century, the fleet system became less profitable because of smuggling and increased trade within the Americas and with China.

### TRAVEL WITHIN THE AMERICAS

Most European transport within the Americas followed overland routes, as there were few navigable rivers. One exception was the Río de la Plata (River Plate). In 1580, BUENOS AIRES was reestablished as a port to provide an Atlantic outlet to the silver mines of Potosí, in Bolivia. Only in the late 18th century did Buenos Aires come to serve this purpose, although until then it occupied an important place in the transatlantic slave trade because of its proximity to Portuguese traders. For the most part, river transportation, and indeed most local transportation involving water systems, remained the preserve of NATIVE AMERICANS. Canoes figured prominently in

waterborne commerce in the Valley of Mexico, for example, where lakes and canals made canoes an efficient, inexpensive form of transportation. The largest canoes, more than 50 feet (15.25 km) long, were capable of carrying several tons of cargo to MEXICO CITY.

Before the CONQUEST, the Americas typically lacked draft animals for overland transportation, with the exception of alpacas and llamas in the Andes. In the absence of draft animals, Amerindians relied on people to carry goods. In Mexico, carriers known as *tamemes* were an integral part of the transport system. Spaniards even hired *tamemes* to carry them around town, notwithstanding government prohibitions. Before the arrival of Europeans, the indigenous people had made no use of the wheel. Afterward, mules were used to pull carts and wagons. In the Andes, where complex geography had previously made effective transportation essential to the integration of the Inca Empire, mules found a place alongside the traditional caravans, or *trajines*. The discovery of silver deposits in Potosí bolstered the use of *trajines* during the colonial period. Mules and horses became a mainstay of overland transport, sometimes with unforeseen consequences. Nonsedentary Native Americans, for instance in Chile and Mexico’s north, soon adapted to horses and became sufficiently mobile to evade colonial control.

Spaniards followed Native American precedents in maintaining road networks. The Inca Empire had relied on trunk lines that ran from Quito through Cuzco and down to Chile. These lines were supplemented by feeder roads that traversed the diverse, mountainous topography. The overall Andean network stretched for thousands of miles, and many roads were paved with stone. With established trade routes there developed a wide range of facilities to support transportation, including inns, granaries, and storehouses, as well as customs houses. Where no previous roads existed, Spaniards built new ones to serve the silver mines and transcontinental trade. The royal road, or *camino real*, in Mexico connected Veracruz with the capital and Acapulco. The royal road thus played an integral part in connecting the Pacific and Atlantic economies.

See also TRANSPORTATION (Vols. II, III, IV).

—Richard Conway  
Rubén G. Mendoza

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**Trent, Council of** See COUNCIL OF TRENT.

**Triple Alliance** (1428–1521) Established in 1428 the Triple Alliance was a coalition established between the three largest polities in the Valley of MEXICO: the Mexicas (AZTECS) of TENOCHTITLÁN-Tlatelolco, the Acolhua of Texcoco, and the Tepanec of Tlacopan. Each of the alliance capitals was governed by its respective king (TLATOANI), who further ruled several domains and lesser kingdoms in his area. Nevertheless, since Tenochtitlán was commanding the CONQUEST wars, it soon became the most prominent of the three; indeed, *Aztec Empire* is often used as an equivalent term for the *Triple Alliance*.

In less than a century after its formation, the Triple Alliance ruled over the largest recorded territory of any indigenous polity in Mesoamerican history. Stretching from the Gulf coast to the Pacific Ocean, this noncontiguous empire was further divided into tributary provinces, each consisting of different ethnic groups. Towns that submitted peacefully were considered allies to the empire and thus their internal organization remained relatively unchanged; however, those groups that had to be subdued by military force were obligated to pay tribute, and their rulers often were replaced by Aztec emissaries. The tribute, which included food supplies, raw materials, and exotic goods, was essential to the political economy of the Triple Alliance and was distributed unequally among the three capitals, with Tlacopan receiving the smallest portion. In addition, the Triple Alliance established military garrisons and enclaves in strategic provinces, which were populated by migrants from the Valley of Mexico. Still, some groups strongly resisted the marching armies of the empire, such as the Tlaxcalans and the Tarascans (see TLAXCALA).

The Triple Alliance dissolved soon after the Spanish conquest, although the colonial administration largely followed pre-Columbian territorial divisions and even took advantage of its provincial political and economic organization.

—Danny Zborover

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**Tula (Tollan)** The Postclassic-period (ca. 650–1150) center of Tula served as the capital of the Mexican ethnic group known as the TOLTECS; the site lies in the Mexican state of Hidalgo, some 90 minutes north of MEXICO CITY. The city apparently grew from TRADE relations with the far larger TEOTIHUACÁN, located 40 miles (64 km) to the southeast. Tula entered its period of apogee sometime around 900. This was a time of political fragmentation and

constant WARFARE, the latter evident in the glorification of soldiers in Tula ART. Indeed, the culture's most famous material artifacts are the so-called Atlantes, a series of iconic warrior statues measuring 15 feet (4.5 m) in height. The center's location undoubtedly related to nearby deposits of OBSIDIAN, the glassy black volcanic rock used in the manufacture of pre-Columbian knives and arrowheads. At its height, Tula controlled a vast trade empire that extended as far north as New Mexico.

Tula's relationship with the MAYA city of CHICHÉN ITZÁ in MEXICO's Yucatán Peninsula remains a subject of ongoing controversy. Scholars have long noted key similarities between the two sites and for many years believed that Tula had conquered Chichén Itzá. However, the supposed political links may have been more apparent than real, instead reflecting a common source of symbols and ideas current throughout Mesoamerica in the Early Postclassic era. The resemblances between the two centers may also have resulted from close economic relations, through which Tula provided obsidian in exchange for Chichén Itzá's salt.

After 1100, the city entered a severe decline, the reasons for which include a prolonged drought that scourged northern and Central Mexico, as well as the rise of peripheral cultures that had grown wealthy and powerful under Tula's wing. Sometime around 1150, Tula was burned and abandoned, giving rise to a period of Central Mexico political instability that ended only with the establishment of Aztec hegemony (see AZTECS). To this day, much of Tula and Toltec history remains elusive. Aztec legends of a mighty culture seated in a place called Tollan may have been more mythological than real. Modern archaeology was late in positively identifying Tula as the seat of Toltec power.

—Terry Rugeley

**Tulum** Located approximately 80 miles (129 km) south of Cancún in MEXICO's Yucatán Peninsula and situated on a cliff overlooking the coast, the MAYA site of Tulum probably functioned as the port and lookout for the neighboring site of Cobá, located 26 miles (42 km) into the interior. Tulum's original name was apparently *Samá*, meaning "dawn," in reference to the striking sunrises visible from its coastal heights. The name *Tulum* means "wall" and refers to the fact that the original city was surrounded by walls, the remnants of which are still visible today.

Although the structures seen today date mostly from the Late Postclassic period (1250–1520), Tulum was inhabited as early as 400 or 500 C.E., in fact, it may have been a city of considerable importance in the 13th and 14th centuries. Its wealth and influence doubtless grew from its connection to maritime TRADE. The city appears to have functioned as an independent political jurisdiction at the time of European contact in the early 16th century. Tulum's most visible structure is notable for the presence



of the so-called Descending God, who appears to be diving headfirst into unseen water. Its picturesque Castillo, which overlooks the Caribbean from a cliff high above the sea, has become an icon of Yucatec Maya archaeology.

—Terry Rugeley

**Tupinambá** A subgroup of the Tupí people of northeastern Brazilian territory, the Tupinambá were seminomadic forest dwellers encountered by Portuguese settlers in the early 16th century (see BRAZIL). Initially, Portuguese merchants engaged in TRADE with the Tupinambá; however, as SUGAR emerged as a major cash crop for Portuguese imperialists, the demand for Tupí land increased dramatically. Naturally, a confrontation resulted, as the Tupí felt no obligation to turn over their ancestral lands to the foreigners.

Another source of confrontation between the Portuguese and the Tupinambá was the practice of CANNIBALISM. An essential part of Tupí culture, the ritual of holding prisoners of war for several months only to fatten them up for a village feast horrified Portuguese settlers, as well as Jesuit missionaries who had been sent to Brazil to convert the Indians to Christianity (see RELIGION; RELIGIOUS ORDERS).

As the demand for sugar grew in Europe, the Portuguese in Brazil increasingly used force to clear the lands, forcing any remaining indigenous persons to work on the plantations (see SLAVERY). However, around 1547 at the Bay of All Saints, one of the most productive sites of sugarcane at the time, the Tupinambá revolted; they destroyed one of Brazil's Portuguese settlements and killed all of its inhabitants.

For the next half of the 16th century, the Portuguese Crown instituted a royal governor and constructed a capital city on that very site, as a means to formally establish authority over rebellious groups. As the Portuguese presence grew, the Tupinambá were absorbed into the settlement as slaves. Due to the unsanitary conditions and overcrowding in the slave quarters, fatal European DISEASES quickly worked their way through the indigenous populations, killing off many of the Tupí. In addition, the Tupinambá intermarried with members of other indigenous groups, until they finally ceased to exist as an identifiable group.

See also JESUITS (Vol. II).

—Christina Hawkins

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**universities** See EDUCATION.

**Uruguay** Uruguay is a small South American nation located on the South Atlantic Ocean between ARGENTINA and BRAZIL. During most of the colonial period, the region was referred to as the “Banda Oriental” (Eastern Band) of the Río de la Plata (River Plate). The term *Uruguay* is a GUARANÍ word that likely is derived from *urú*, a small bird that inhabits the region. Before the Spanish CONQUEST, most of Uruguay was inhabited by members of the Charrúa language group, whose subgroups included the Yanó and the Chaná. The Charrúa’s existence was similar to that of nomadic hunting societies of Argentina. They lived in loose FAMILY groups of 10 to 15, largely for the purposes of self-defense. They lived in rudimentary unroofed dwellings supported by wooden posts and hunted deer and rhea on foot with bows and arrows, bolas, and nets. Charrúa groups that resided close to a river also fished from dugout canoes.

The conquest of Uruguay began mainly as an extension of Spain’s conquest of the Inca Empire in PERU (see INCAS). By pushing south into CHILE, and from the Atlantic side seeking the source of the Río de la Plata, the Spanish hoped to find more precious metals as well as ways to ship more efficiently the SILVER and GOLD they continued to seize from the Incas.

Juan Díaz de Solís landed on the Banda Oriental in 1516, 70 miles (113 km) from the future site of Montevideo; however, shortly after landfall, Díaz and

all the members of his party were killed by local Querandí Indians. FERDINAND MAGELLAN also explored the estuary in 1520; he managed to avoid the Querandí before continuing along his southerly route to the Pacific.

Sebastian Cabot explored Uruguay’s coast in 1527. He anchored near the modern town of Colonia and established a fort nearby. From there, Cabot dispatched Captain Juan Álvarez Ramón to explore the Uruguay River. Álvarez’s ship soon ran aground, however, and he and his men were ambushed by the Charrúa while they marched back to the fort. Álvarez and most of his men were killed. Undeterred, Cabot sent another party of three men inland toward Peru. One of them, Francisco César, was able to recount his journey but did so with a great deal of hyperbole. He told of conquering immense kingdoms and thereby created the myth of the “Lost City of Caesars,” which Spanish explorers continued to look for until the 19th century. Cabot eventually returned to Spain but not before founding the soon-to-be-abandoned town of Sancti Spiritus along the Paraná River.

Upon his return to Spain, Cabot helped convince Charles I to fund a force of 1,600 to accompany PEDRO DE MENDOZA in his attempt to settle the Río de la Plata. Mendoza founded BUENOS AIRES in 1536, across the river from modern-day Uruguay. His large contingent, however, proved difficult to feed. Spanish desperation at a lack of FOOD and supplies provoked new hostilities with the Querandí, and Mendoza soon abandoned his men; he later died on his way back to Spain. The remaining residents of Buenos Aires abandoned the town in 1541.

There was very little Spanish activity in the Río de la Plata region until after 1580, when Buenos Aires was resettled.

See also MONTEVIDEO (Vol. II); URUGUAY (Vols. III, IV).

—Eugene C. Berger

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**Valdivia, Pedro de** (b. ca. 1500–d. 1553) *Spanish conquistador of Peru and conqueror and governor of Chile* Pedro de Valdivia was born in the town of Badajoz in the Spanish province of Extremadura sometime in 1500. As a young man, he enlisted in the service of Charles I (Holy Roman Emperor Charles V) in his many wars in Flanders and Italy from 1520 to 1525. Returning to Spain in 1533, Valdivia married Marina Ortíz de Gaete. He soon tired of domestic life, however, and in 1535, he left his wife in Spain and embarked on an expedition to VENEZUELA.

After a few years of participating in various expeditions, Valdivia came to serve under FRANCISCO PIZARRO in 1537 during his civil war with DIEGO DE ALMAGRO (see CIVIL WARS IN PERU). As a lieutenant under Pizarro's brother HERNANDO PIZARRO, Valdivia participated in the important BATTLE OF LAS SALINAS near CUZCO on April 26, 1538. In reward for his services, Valdivia was named lieutenant governor of CHILE and given permission to conquer the southern parts of PERU and the region of Chile recently discovered by Almagro.

Valdivia began his expedition of CONQUEST in January 1540. In an effort to avoid the perilous route through the Andes that Almagro had followed earlier, Valdivia took a route through the Atacama Desert. After a series of battles with the indigenous peoples of Chile, the expedition reached the fertile valley that the native people called Mapocho. On February 12, 1541, Valdivia founded the city of Santiago, which was to serve as capital of the new colony. Appointed governor of the new territory by the members of Santiago's CABILDO (town council), news of Francisco Pizarro's assassination arrived.

Receiving only a few reinforcements from Peru, Valdivia was determined to subdue the native population. For several years, he engaged in WARFARE with the indigenous peoples until he received word in 1547 of the rebellion of GONZALO PIZARRO and the arrival of a royal commissioner, PEDRO DE LA GASCA. Valdivia, swearing off his old allegiance to the Pizarros, offered his services to the royal army. Commanding forces at the Battle of Sacsayhuamán, Valdivia aided in the victory won on April 9, 1548, against Gonzalo Pizarro's forces. In reward for his services, Valdivia was confirmed with the title of royal governor of Chile. With more reinforcements, he then renewed his conquest of southern Chile.

In March 1550, Valdivia founded the city of Concepción and, later, the towns of Valdivia and Villarica. After returning to Santiago, Valdivia received reports that forces led by the Araucanian (Mapuche) chieftain Caupolicán had attacked and defeated the Spanish at the fortress of Tucapel on December 2, 1553. In response, Valdivia led another expedition against the Araucanians but took only 50 mounted Spaniards. The Araucanian armies, under the command of the famed native leader Lautaro, defeated the Spaniards and captured Valdivia at the Battle of Tucapel on January 1, 1554. After torturing Valdivia, the indigenous group killed him, reportedly by stuffing him full of molten GOLD.

See also ARAUCANIANS (Vol. II).

—John F. Chuchiak IV

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**Vázquez de Coronado, Francisco** See CORONADO, FRANCISCO VÁSQUEZ DE.

**Velázquez de Cuéllar, Diego** (b. 1465–d. 1524) *Spanish conquistador and governor of Cuba* Diego Velázquez was born into a prominent Spanish family from Cuéllar, in Segovia. He first ventured to the Americas in 1493 on CHRISTOPHER COLUMBUS's second voyage, during which Velázquez traveled around much of CUBA, the island that he would later conquer and govern. During the 1490s, he participated in the CONQUEST and initial settlement of the island of HISPANIOLA. After the removal of Columbus as governor of the Indies, Velázquez was named lieutenant governor under the new royal appointee, Nicolás de Ovando. During this time, Velázquez became one of the wealthiest *encomenderos* on the island (see ENCOMIENDA).

Upset by the appointment of Diego Columbus as governor of the colony, in 1511, Velázquez organized an expedition to conquer Cuba. Members of this expedition included HERNANDO CORTÉS as his secretary, as well as BARTOLOMÉ DE LAS CASAS, PEDRO DE ALVARADO, Cristóbal de Olid, and BERNAL DÍAZ DEL CASTILLO, among others. Technically, this expedition was in violation of Diego Columbus's prerogatives as governor. Nonetheless, after successfully conquering the island and founding several towns, the Crown recognized Velázquez as governor of Cuba.

Beginning in 1517, Velázquez sought to expand his jurisdiction by organizing a series of expeditions to explore the mainland. In 1519, he sent Cortés on a voyage of exploration along the coast of Yucatán and MEXICO. Following Velázquez's example, Cortés sought to free himself from his superior's control. After the founding of Veracruz, Cortés led his forces into the Mexican interior, initiating the conquest of the Aztec Empire, and eventually, Cortés was successful in gaining royal acceptance of this action (see AZTECS). Velázquez had tried to forcibly stop Cortés by sending an expedition to Mexico under the command of PÁNFILO DE NARVÁEZ. Unfortunately for Velázquez, Narvárez was defeated and his men incorporated into Cortés's company. In 1524, shortly after Cortés's successful conquest, Diego Velázquez de Cuéllar died in Cuba.

—Robert Schwaller

**Venezuela** First encountered by CHRISTOPHER COLUMBUS on his third voyage in 1498, Venezuela is a land of diverse geography and rich history. Four distinct geographical regions make up the physical landscape, which covers just over 350,000 square miles (906,496 km<sup>2</sup>). The first region settled by European explorers was the coast. Consisting of low sandy beaches and rolling fertile hills inland, the coast stretches more than 1,700 miles (2,736 km), from the Gulf of Venezuela and Lake

Maracaibo on the western border to the Orinoco River Delta to the east. Lake Maracaibo, formed 36 million years ago, is the oldest and largest lake in South America; and the Orinoco River is one of the longest on the continent, extending west to east for more than 1,300 miles (2,092 km) before spreading into a 250-mile- (402-km-) long delta along the east coast.

South of Lake Maracaibo is the second region, the Andes and Segovia Highlands. A chain of the Andes rises more than 16,000 feet (4,877 m) from the south before dropping into the diverse ecosystem of semidesert, plains, and low mountains east of the great lake.

The Orinoco River, with its 200 tributaries, divides the final two regions of Venezuela. To the north, the Llanos (plains) and river valleys provide the country with vast grasslands that are ideal for raising livestock. South of the river and making up more than 45 percent of Venezuela's total landmass is the Guayana region. Mineral-rich, rocky highlands form the bulk of the area, which also claims the world's highest waterfall, Angel Falls.

The history of Venezuela's early inhabitants is even more diverse than the landscape they settled. While the first residents most likely came from Asia via the Bering Strait and then south through PANAMA, some scholars believe they came south from the chain of islands in the Caribbean (see MIGRATION). While their precise origins remain unclear, the archaeological evidence suggests that these first inhabitants, known as Paleoindians, had settled the region by about 20,000 B.C.E. The Paleoindians lived in hunter-gatherer groups, crafting stone tools and weapons.

From 5000 B.C.E. to 1000 C.E., another group, known as Meso-Indians, emerged. Settling along Venezuela's coast, the Meso-Indians crafted bone and shell tools. They became skilled navigators of the rivers and coastal areas. They also gathered edible and medicinal plants from among the diverse vegetation along the waterways (see MEDICINE).

Beginning around 1000 and lasting until the time of European exploration, the Neo-Indians settled along the Caribbean coast and Orinoco River. Composed of seminomadic and settled peoples, the Neo-Indians formed two separate but similar cultures; pottery styles and mortuary rituals were the main differences (see CERAMICS). The Neo-Indians spoke a variety of languages, including Arawak and Carib. Before the arrival of Europeans in the early 16th century, the Neo-Indians consisted of various groups, with an overall population of roughly 350,000 to 500,000.

Along the shores of Lake Maracaibo, the Guajiro, descendants of early Arawak cultures, operated a series of intricate canals and waterways, which to European explorers resembled those of the city of Venice. "Little Venice," or *Venezuela*, astounded early explorers. Other groups included the Timoto-Cuicas, the most agriculturally advanced group in Venezuela, and the Caquetíos, whose cave paintings and artwork still exist in areas west of the Andes (see AGRICULTURE). In the central and eastern regions of Venezuela, the CARIBS flourished.

Mastering basic agricultural methods and astronomy and developing a farming calendar, the Caribs were the first to make contact with European explorers.

By 1500, the Spanish had organized large pearl-fishing expeditions along Venezuela's northern coast, which they called "Terra Firme." Considered of nominal value by the local peoples, the Spanish originally obtained permission to exploit the large oyster beds. The Spanish enslaved indigenous people to find the pearls, which not only led to a rapid decrease in pearls but also sparked a dramatic decline in the native population (see *SLAVERY*). Within a few years, most of the pearl fisheries were barren. Still, the Spanish found other economic resources along the central coast: They gathered Amerindians in slave raids.

In 1528, the King Charles I of Spain (Holy Roman Emperor Charles V) issued the rights to settle Venezuela to a German banking firm. This firm, the Welsers, occupied Venezuela's western coast, where it established several small settlements. Searching for mineral deposits, slaves, and *GOLD*, the Germans embarked on several expeditions to the Andes and around the Maracaibo region. Numerous expeditions, under the leadership of men such as Ambrosius Alfiñguer, NIKOLAUS FEDERMANN, and Georg von Speyer, led to nothing more than numerous legal and financial difficulties for the Crown. During the 1550s, the Welser firm returned administrative power to the Spanish. Although the Spanish and Germans did not find an Indian civilization comparable to the INCAS or AZTECS, early Spanish settlers profited through the exploitation of Venezuela's fertile valleys and grasslands.

See also *CARACAS* (Vols. II, III, IV); *NEW GRANADA*, *VICEROYALTY OF* (Vol. II); *VENEZUELA* (Vols. II, III, IV).

—Spencer Tyce

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**Vespucci, Amerigo** (b. 1454–d. 1512) *Italian explorer and cartographer* Amerigo Vespucci was born and educated in Florence, Italy. His early career was shaped by the powerful de' Medici family, who dispatched him to their offices in Seville, Spain, in 1492. Vespucci first sailed to the Americas in 1497 under the sanction of King Ferdinand of Spain, who sought clarification on the nature of the mainland and island masses that had been discovered by CHRISTOPHER COLUMBUS. Between 1497 and 1504, Vespucci participated in at least two and possibly as many as four expeditions to the Americas, sailing first under the Spanish and later the Portuguese flag. His successive voyages to the New World took Vespucci to numerous destinations, including BRAZIL, GUYANA, HISPANIOLA, and, by some indications, Patagonia. These experiences, combined with his significant skills as an

astronomer, cartographer, and navigator, led Vespucci to conclude that these areas were too varied and large to be a part of Asia but instead constituted whole new continents (see *MAPS*).

In 1507, Martin Waldseemüller composed a world map, bestowing a Latin form of Vespucci's first name on the new continents, actually labeling just the southern portion *America*. By 1538, another map was published in Europe applying *America* to both continents, and the name stuck. Waldseemüller's map, along with two letters attributed to Vespucci (now widely believed to be forgeries), created a sense in Europe that Vespucci was trying to enhance his image at the expense of Columbus. Regardless, in 1508, the Spanish Crown created a special post for Vespucci, chief navigator of Spain. From Seville, Vespucci was paid a prodigious sum to streamline navigational *EDUCATION* and practices and plan future voyages. He died of malaria a wealthy man on February 22, 1512, with the knowledge that all of Europe considered the Americas a New World.

—Sean H. Goforth

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**viceroy/viceroyalty** In the 15th and 16th centuries, the number of Spanish territorial possessions grew through dynastic acquisitions and overseas expansion. To more effectively manage these territories, the *MONARCHS OF SPAIN* appointed viceroys to govern specific regions. The political jurisdictions governed by viceroys are called viceroyalties. The first viceroy of the Americas was appointed prior to their discovery. In the contract between CHRISTOPHER COLUMBUS and the monarchs Ferdinand and Isabella, Columbus was promised the title of viceroy of any lands he discovered (see *CAPITULATIONS OF SANTA FE*). While Columbus and his son Diego both briefly ruled as viceroys, the appointment of future viceroys lapsed until after the discovery and *CONQUEST* of the Aztec and Inca Empires in the 1520s and 1530s (see *AZTECS*; *INCAS*). In both *MEXICO* and *PERU*, the Crown feared that the conquistadores who governed following their conquests might revolt against royal power.

In order to maintain better control over these newly acquired territories and to help restrain the excesses of the conquistador-settlers, the Spanish Crown divided the Americas into two viceroyalties. The Viceroyalty of New Spain was founded in 1535 with the appointment of ANTONIO DE MENDOZA as viceroy. The seat of this viceroyalty was based in the former Mexica capital of TENOCHTITLÁN, renamed *MEXICO CITY*. New Spain eventually encompassed all of modern-day Mexico, Central America, most of the Caribbean, parts of the U.S.

Southwest, California, FLORIDA, and the Philippines. After a devastating civil war between conquistadores in South America, in 1542, the Crown appointed Blasco Núñez Vela to govern the Viceroyalty of Peru from its capital, LIMA (see CIVIL WARS IN PERU). The Viceroyalty of Peru contained all of Spanish South America and some islands in the southern Caribbean. Viceroyalties were divided into provinces and smaller districts corresponding to various judicial and ecclesiastical officials. Each viceroyalty also held a high court, called an *AUDIENCIA*, over which the viceroy presided as president.

See also NEW GRANADA, VICEROYALTY OF (Vol. II); NEW SPAIN, VICEROYALTY OF (Vol. II); PERU, VICEROYALTY OF (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); VICEROY/VICEROYALTY (Vol. II).

—Robert Schwaller

**Virgin of Guadalupe** The worship of the Virgin of Guadalupe is one of the best known and visually attested elements of Mexican culture. When the Spaniards first arrived in New Spain (see MEXICO), they brought with them many things from home, including a strong devotion to Marian cults. Two of the most popular Marian devotions transported to the New World were those of Our Lady of Guadalupe of Extremadura and the Virgin of los Remedios.

Brought to New Spain by one of HERNANDO CORTÉS's soldiers, the Virgin of los Remedios became associated with the CONQUEST and with the *peninsulares*, or those born on the Iberian Peninsula. Guadalupe of Extremadura, however, became closely linked to the Mexican Guadalupe.

The most well-known version of the Mexican legend states that in 1531 the Virgin of Guadalupe appeared before a Nahua man named Juan Diego and commanded him to tell the bishop of Mexico to build a shrine to her on the hill of Tepeyac. As lasting proof of the apparition, the Virgin's image was imprinted on Juan's cloak. Recent studies, however, strongly suggest that this event did not actually occur but rather was the creation of two 17th-century authors. Miguel Sánchez, in his Spanish account *Imagen de la Virgen María, madre de Dios de Guadalupe* (1648), and Luis Laso de la Vega, in his NAHUATL account *Huei tlama-huiçoltica* (1649), both describe the Virgin's appearance to Juan Diego. There are no 16th-century written accounts that relate such an apparition; thus, it is believed that the devotion does not stem from an actual event.

Prior to the legend of her apparition to Juan Diego, the Virgin was associated with an *ermita* (hermitage) at Tepeyac. The origins of the *ermita* are ambiguous at best, but most evidence indicates that it was founded by Archbishop Alonso de Montúfar around 1555 or 1556. Originally dedicated to the Nativity of the Virgin Mary, the *ermita* venerated an image that closely resembled an image of the Guadalupe of Extremadura in Spain.

Because the two images looked alike, the *ermita* began to take on the popular, unofficial name of Guadalupe.

It is widely believed that the indigenous population readily adopted the Virgin of Guadalupe as an object of devotion. The Nahua protagonist of the legend, Juan Diego, and Fray BERNARDINO DE SAHAGÚN's claim that the indigenous associated Guadalupe's shrine at Tepeyac with the Nahua mother deity Tonantzin, whose pre-Columbian worship was claimed to have also taken place on Tepeyac, certainly contributed to the assumption that native people widely supported the Virgin. Yet, the assumption pales under close examination. While Juan Diego was a creation of 17th-century authors, the lack of sources independent of Sahagún and the mendicant's overall rejection of the Tepeyac shrine as neo-idolatry until 1648, make an indigenous following doubtful. Indeed, there is no evidence to suggest that the 16th-century devotion to Guadalupe was ever popular among indigenous peoples. Prior to 1648, the Virgin of Guadalupe had only a modest, largely Spanish following.

See also GUADALUPE, OUR LADY OF (Vol. II); VIRGIN OF GUADALUPE (Vol. II, III).

—Mark Christensen

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**Vitoria, Francisco de** (b. ca. 1486–d. 1546) *Spanish theologian and founder of international law* Francisco de Vitoria was born around 1486 in Vitoria, in the Basque province of Avala. He joined the Dominican order, which sent him to France to study at the University of Paris (see RELIGIOUS ORDERS). Vitoria returned to Spain in 1523 and three years later gained the prestigious Prime (*prima*) Chair of Theology at the University of Salamanca (see SALAMANCA, SCHOOL OF). Responding to the threat posed by the Protestant Reformation to Catholicism, Vitoria reinvigorated scholasticism at Salamanca and in other Spanish universities.

Vitoria was also deeply engaged in the debates over laws governing Spanish treatment of the Amerindians. He rejected Spain's claim to sovereignty over the Americas based on the papal donation of 1493 and the TREATY OF TORDESILLAS. Instead, he argued that Amerindians were rational beings in a world community subject to natural law and the law of nations. Thus, Vitoria held that they retained their natural right to their lands and LABOR. He conceded that Spaniards had the right to preach Christianity in the New World and to seek indigenous converts, although the missionaries could not coerce the Amerindians into baptism (see RELIGION). Only if the indigenous peoples prevented such teaching were the Spaniards justified in making

war against them or deposing their leaders. Indigenous practices such as CANNIBALISM, he held, might warrant the Spaniards' holding them in temporary tutelage.

Vitoria's students and disciples published his lectures posthumously. They include *De Indis* and *De Jure belli Hispanorum in barbaros*. The Spanish monarch Charles I often consulted with Vitoria on important legal matters. Vitoria and his students influenced thought on the law of nations (*jus gentium*), and Vitoria has thus been called the founder of international law. His students included

Melchor Cano, Bartolomé Medina, and Domingo de Soto. Vitoria died in 1546.

—Kendall Brown

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## warfare

### CARIBBEAN

The early European chroniclers generally described the TAINO inhabitants of the Greater Antilles as peaceful, in contrast with the warlike CARIB who lived on the Lesser Antilles to the east and on the coastal mainland of South America. However, both Taino and Carib warriors proved to be skillful fighters, as well as resourceful and brave defenders of their lands.

Among able-bodied Taino males, warfare was a secondary activity to farming, fishing, and hunting. There is little evidence of internal conflict among Taino bands or even against the archaic indigenous inhabitants of the islands, who survived in areas of CUBA and HISPANIOLA until the European CONQUEST. However, raids by the aggressive Carib launched from South America displaced the Taino from the eastern Caribbean and from as far as the Virgin Islands by 1492. This threat led to a corresponding militarization of Taino culture in PUERTO RICO and Hispaniola, whose inhabitants were the most vulnerable due to their proximity to the Carib-held islands.

Taino men were physically fit and were expert swimmers. Because they were defending their home islands and villages, they also enjoyed the advantage over their enemies of knowing the terrain. They were skilled in the use of their traditional weapons, which evolved from modified tools. For hand-to-hand combat, the weapon of choice was the *macana*, a paddlelike sword made from especially dense hardwood; *macanas* measured about three feet (1 m) long. The wood was highly polished and sometimes embellished with carvings or paint. Other close-quarter weapons included axes and knives made from highly pol-

ished and sharpened stones. Defensive equipment such as shields, helmets, and body armor were unknown.

The Taino arsenal also included missile weapons such as bows and arrows, several examples of which have been recovered in Cuba. Bows tended to be about five feet (1.5 m) tall and crafted from a single piece of wood. Arrows were about three feet (1 m) long, with feathers (fletches) fixed at the base of the shaft to help ensure accuracy. Arrowheads were made from diverse materials, including stone (chert and flint), shell, fire-hardened wood, stingray spines, and fish teeth used both as points and as barbs. Taino warriors also used light spears or javelins of about six feet (1.8 m) in length and dart throwers (similar to the *atlatl* used in Mesoamerica); the latter were used to launch darts, four to five feet (1.2–1.5 m) in length, which had great penetrating power at close range.

A toxic coating of *aji* (chili) paste or poisonous tree sap was added to all of these missiles. A version of tear gas was also sometimes used; perforated gourds were filled with ground chilies mixed with ashes and flung, creating a cloud of irritating dust. Before and after combat, Taino warriors would join the rest of village in a spiritual ceremony, or *areyto*, which required the purging of the body, inhalation of *coboba* (a hallucinogenic herbal mixture) and tobacco smoke, dancing and offerings to the *cemies*, or ancestral spirits. These ceremonies provided psychological support and enhanced warrior morale. Afterward, the CACIQUE, or chieftain, would address the men to make sure they understood the goals of the operation and shared any available information about the enemy. The typical Taino force could range from a few dozen to a few hundred warriors; however, Spanish CHRONICLERS indicate that they faced large armies numbering in the thousands in both Hispaniola and Puerto Rico.

Logistical support was minimal, usually consisting of a water bottle made from a gourd and *casabe* (yucca bread), since the Taino as a rule always operated in their home territory, close to food and other supplies. While the local cacique was in command of the warriors from his own village, overall command of larger forces was held by a designated supreme cacique.

In terms of military tactics, the Taino favored surprise and stealth, such as ambush, using the thick tropical vegetation as cover, and predawn attacks on enemy encampments or villages. After hitting the enemy with missiles, the warriors would dash in to engage in hand-to-hand combat. Once the battle started, warriors would engage in single combat with the closest enemy, with the caciques shouting encouragement but having little overall control of the fight. The caciques would also lead the chase if the enemy broke or direct the retreat if the Taino were forced to withdraw. Since killing or driving off raiders and recovering any captives were the main purposes of military expeditions, there was little emphasis on taking prisoners. There are some accounts of combat at sea between Taino and Carib raiders, although this seems to have been the result of chance encounters rather than planned naval battles.

For Carib males, to be a man was to be a warrior. The Caribs thus developed a fearsome reputation not only because of their deadly seaborne raids but also because they practiced CANNIBALISM. Men achieved prestige and honor by obtaining captives to serve as laborers or concubines or to be ritually eaten. Carib villages did not have a clearly defined social hierarchy; rather, a well-respected and successful warrior leader, or *ubutu*, would approach the village warriors and convince them to launch a raid. Other villages might also join in the expedition. These were launched during favorable seasons when the seas were relatively calm. The typical Carib raid involved eight to 10 *piraguas*, or large canoes, with about 500 warriors and several dozen women to serve and cook.

The typical Carib raider was a seasoned sailor and warrior. His weapons were almost identical to those used by the Taino, such as the *butu*, or hardwood war club, akin to the *macana*, two to three feet (0.6–1 m) in length, three inches (7.6 cm) thick, and elaborately carved. The Carib also excelled as archers; their bows were described as similar to the English longbow; they were roughly six feet (1.8 m) long and fired poisoned barbed arrows. The Carib also used blowguns, but apparently only for hunting.

Because their raids could often take them hundreds of miles into enemy lands, Carib warriors had to carry some provisions with them, usually *casabe* bread and smoked fish. Upon reaching enemy territory, the Carib would send scouts to determine the location of villages and other useful information. Once ready, the Carib would wait until dawn to attack; night attacks typically occurred when there was a full moon. The warriors would paint their bodies with black dye and would surge into the unsuspecting village amid loud cries and shouts aimed at terrifying the inhabitants. If the element of surprise was lost, the Carib

would shoot incendiary arrows into the village, setting the huts on fire and forcing the defenders into the open. They would capture men, women, and children, as well as provisions for the return voyage. The Carib would also take with them the bodies of fallen comrades.

Upon arriving to their home island, the captives would be divided among the warriors and a feast would take place, in which selected enemy males would be cooked and eaten as part of the victory ritual. Other captives would be traded with neighboring Carib villages or to other ethnic groups along the South American mainland (see TRADE).

## MESOAMERICA

The history of pre-Columbian Mesoamerica was one of violence, though no more so than that of any other region of the ancient world. It was a universe of shifting alliances and mutual antagonisms, in which increasingly strong political entities forged themselves and then broke apart. Indigenous peoples throughout the Americas lived in bands that sometimes came together to form chieftaincies, from which occasionally emerged paramount chieftaincies or confederacies. These in turn occasionally became centralized enough to constitute states, and twice in the Americas—in the case of the AZTECS and the INCAS—states expanded their power over others to form empires, though even in these cases the leading city-state (or ethnic state) did not have an unshakable grasp on power. Mesoamerica had the oldest tradition of AGRICULTURE in the hemisphere. Populations there were thus denser and accumulations of wealth greater than in most other regions. The stakes in warfare were therefore higher: States came to power and ultimately crumbled, leading to widespread dislocation.

The OLMECS were the first Mesoamerican group to expand their influence. Although they developed a military force, they seem to have done so only to protect the trade on which they depended, rather than to conquer new territory. By contrast, TEOTIHUACÁN is considered the first center of military expansion in the Mesoamerican world, dominating the central valley of MEXICO and surrounding area (perhaps even dispatching military expeditions as far as MAYA territory) from about 100 to about 750 c.e. After its decline, other powerful entities emerged. From 950 to 1150, the TOLTECS and their allies dominated Central Mexico. Toward the end of the Toltec domination, nomads (called Chichimecas by their descendants) began to come down from the north, disrupting the settled peoples of Central Mexico. In the early 15th century, the Mexica-Tenochca (now often called the AZTECS) emerged as the dominant Chichimec group, establishing a tight alliance with Texcoco, Tlacopan, and other smaller groups (see TRIPLE ALLIANCE).

Until the 1970s, many scholars believed that the Maya were unique among Mesoamericans and did not actively participate in the cycles of alliance building and warfare. The now largely decoded Maya glyphs tell us otherwise, however. The Maya made war as readily as all others and

saw many of their own states rise and fall. Nonetheless, the most detailed information on war relates to the Aztecs. Historical annals written in NAHUATL in the 16th century, when there were still people alive who remembered the old oral histories, include many details and even the Aztecs' thought processes regarding warfare.

Some recurrent myths are associated with Aztec warfare, such as that the warriors did not fight to kill but only to take captives to be used as sacrificial victims (see HUMAN SACRIFICE). While it is true that most Mesoamerican war parties wished to return home with prisoners suitable for sacrifice, there was almost always a wider political purpose for war, and this determined the nature of the fighting. One ethnic state might attack another merely to remind disgruntled tribute payers who had the upper hand, and thus take only a few prisoners. A state might also launch a war against another people who had long prevented them from dominating a region and for that reason might kill thousands. Aztec annals record, for example, that when the Mexica and their allies attacked the Huastecs, it had been their goal to wipe the Huastec nation from the face of the earth. Such an agenda was quite rare in the history of Mesoamerican warfare, however; most of the time, no single state had sufficient power to eliminate all its enemies.

It is also true that Aztec understandings and representations of warfare revolved around the religious practice of human sacrifice (see RELIGION). Warriors rose through the ranks to attain fame and glory, which was based on the number of captives they acquired and the circumstances of their capture. To go to battle was to accept the possibility of oneself's being sacrificed to the gods. Women also partook of the honor associated with war. When they gave birth, it was said that they had seized a human soul from the cosmos; if they died in the process, they went to the same heaven reserved for men who died in battle. Again, however, wars were rarely undertaken for spiritual reasons alone but rather to gain control over chiefly lines and thus over resources. When the Aztecs fought the people of Cuauhnáhuac (Cuernavaca), for example, they took home not only prisoners to sacrifice but also a woman of the ruling Tlahuica line to marry their king so that her children would be Aztecs as much as Tlahuicas. It was through such marriages that the Aztecs gained control over the majority of Mexican territory where COTTON was cultivated.

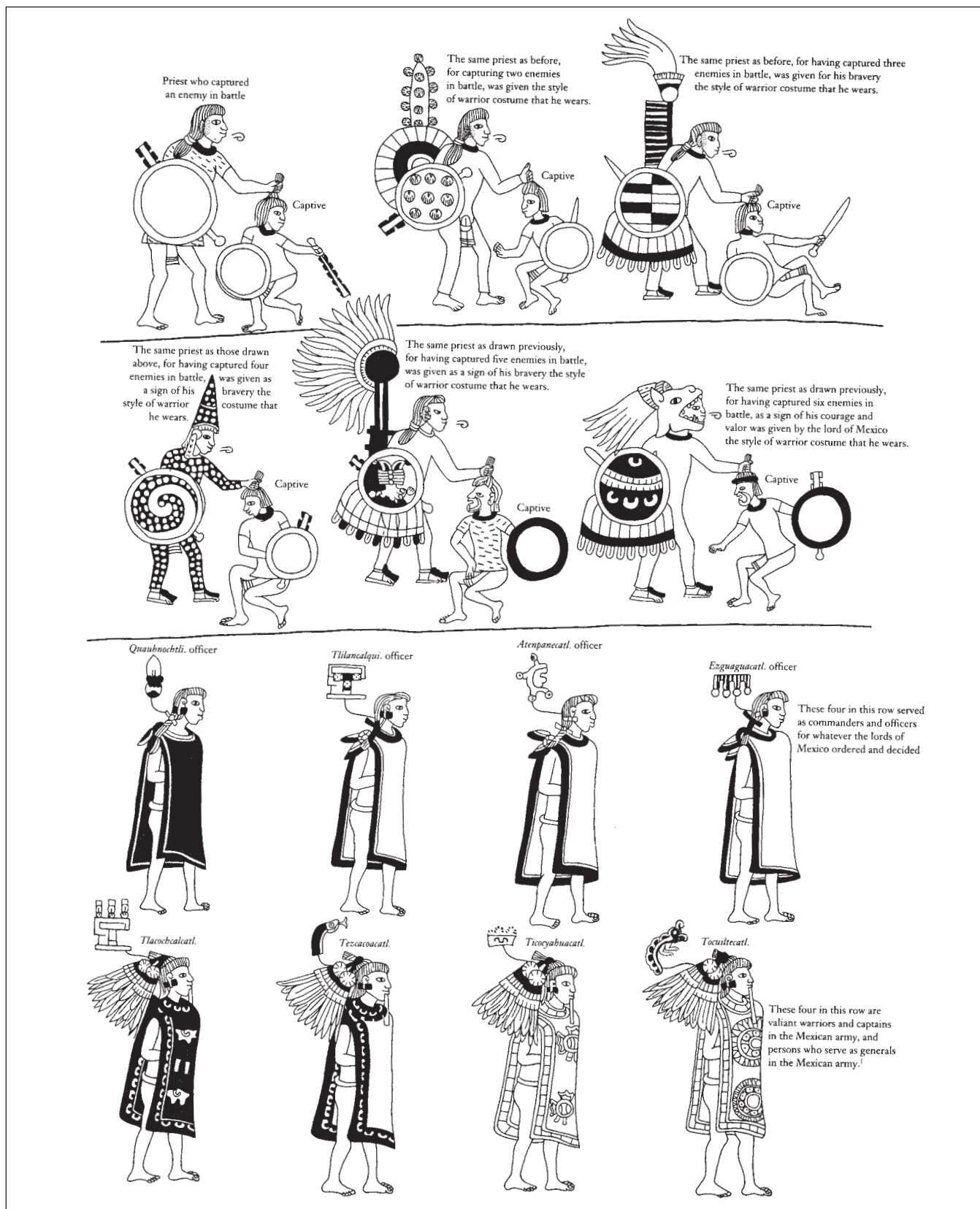
In Mesoamerica, as elsewhere, the mechanics of warfare changed over time. With farming came a settled, as opposed to a nomadic, existence, and fortifications were built to protect communities. Over time, a fort or cluster of forts might grow powerful enough to prevent potentially hostile peoples from passing through an area. This was a significant step toward being able to farm more intensively, which led to better food supply and thus population growth. Teotihuacán was the first to amass a group of men large enough to be classified as a true "army." Because many men could go into battle, projectile weapons such

as slings, spears, and dart throwers were developed, and padded cotton armor was invented. On the other hand, the Maya states that dominated their surrounding regions had smaller populations and continued to rely principally on hand-to-hand combat. Later, the Toltecs invented a short sword, which was both lighter than previous blades and more efficient; the same man could now carry a dart thrower with shield and quiver as well as a lethal blade. When the Chichimecas migrated to Central Mexico from the north, they brought with them the bow and arrow (see MIGRATION). This weapon made small, lightly loaded forces more powerful than before as they could inflict more damage from hidden vantage points.

The Aztecs appropriated the best weapons from both the ancient Mesoamerican and invading Chichimec peoples. They used darts and dart throwers (*atlatl*), bows and arrows (*mitl*), stones and slings, long spears, bladed and knobbed clubs, and, especially, a newly invented sword (*macuahuitl*) that contained several projecting OBSIDIAN blades and delivered a deadly, slashing blow. (It rapidly became the weapon of choice throughout much of Mesoamerica.) The Aztecs also improved cotton armor and developed a lighter shield made, not from wood, but other fire-hardened plant materials. The Aztec army was highly organized at all levels, from generals to novice foot soldiers. All Aztec boys went to school to learn the arts of war. Most of the time, men lived as farmers and/or artisans, but when they were called to go on a military expedition, they knew what to do. On taking his first captive, a novice attained a higher status, was given certain prizes, and was grouped differently the next time he went to war. The same process occurred after the second, third, and fourth captives were taken. Few men, apparently, ever captured more than that. If they did, however, and if they took them from a particularly fearsome set of enemies, such as the Huexotzinco, they became commanders.

Aztec society was so deeply committed to warfare that it spawned the notion of staged battles, called "FLOWER WARS," or *xochiyaoyotl*, with rival states. In these prearranged conflicts, Aztec forces frequently faced off against the unconquered people of TLAXCALA, for example. Although the wars were prearranged, the losers still faced death on the field or sacrifice afterward. Whether these wars were designed to keep the population of young men on their toes or for some other reason is not certain. One theory suggests that the flower wars were a long-term military strategy designed to weaken powerful polities over time and thus avoid the heavy casualties that would result from a single conquest campaign.

Once a group began to attain power over its neighbors, a "snowball effect" was often seen, with more and more communities succumbing to the dominant power. However, large territories of subject peoples were difficult to control in an era before rapid communication was possible, thus power was always somewhat tenuous. The Aztec state famously crumbled when the Spanish appeared on the scene, and this was not a new phenomenon.



Named after the Spanish viceroy of Mexico Antonio de Mendoza, the Codex Mendoza was compiled roughly two decades after the conquest of the Aztec Empire. The information contained in this remarkable work was gathered from indigenous scribes and interpreters who had firsthand knowledge of the Aztec Empire before the arrival of Europeans. This image shows various Aztec priests and their captives, as well as the assorted regalia they wore as signs of their military achievements. (Codex Mendoza, Courtesy of Frances F. Berdan and Patricia Reiff Anawalt)

Long before, Teotihuacán, TULA, and the Classic Maya city-states had met a similar fate.

### SOUTH AMERICA

Warfare, rebellion, and other forms of interregional conflict and violence were once so prevalent in ancient PERU that archaeologists subdivided the region's primary cultural and temporal developments on the basis of conquest events and periods of political and social consolidation, instability, and fragmentation. Organized violence and the use of coercive force arose in tandem with the evolution of state-level societies and complex civilizations the world over. Patterns of warfare and social violence initially surfaced in Peru with the advent of the Initial period (ca. 1800 B.C.E.) and soon proliferated with the expansion of the CHAVÍN Horizon at 800 B.C.E. These patterns were soon institutionalized with the rise of WARI and TIWANAKU in the highlands around 600 to 1000 C.E. The Late Horizon (1450–1532), in turn, corresponded with the dynamics of Inca conquest, expansionist warfare, the violent suppression of ethnic rebellion, and the rise and fall of empire (see INCAS). Because the Incas were ultimately toppled through the coincidence of a protracted civil war, pandemic DISEASE, and the violent and direct onslaught of Spanish forces and their indigenous allies, Inca imperial warfare and military institutions are among the most thoroughly documented contact-era forms of organized (state-level) violence in all of South America.

The complexities of the chronological subdivisions in question should therefore provide some sense of the many groups, cultures, and civilizations that rose to prominence and statehood on the basis of protracted episodes of conflict, the deployment of coercive force, and the escalation of ritualized forms of violence that culminated in the pre-Hispanic era, with the fall of the Inca Empire in 1532. The emergence of complex states is largely identified with the harnessing of coercive force and the use of organized violence for political ends, and in ancient Peru, such forms of conflict and violence are seen to coincide with the emergence of the Initial period in 1800 B.C.E. While interregional conflict and violence can be traced to far earlier periods in Peru and South America more generally, it was only with the advent of intensive farming, irrigation systems, public works, and the growth of large towns and CITIES that scholars see an escalation in the ubiquity of human trophies, cranial trauma, and the portrayal of militaristic themes and the iconography of violence in ART.

Early evidence for the bloody aftermath of early forms of interethnic conflict and warfare has been identified on Peru's north coast, at the site of Cerro Sechín within the Sechín Alto platform complex. Touted as the largest early monument complex in the Americas, archaeologists recovered a "macabre megalithic wall" composed of sculpted monoliths dating to 1200 B.C.E. The megalithic wall depicts dismembered human remains, decapitated heads, stacked skulls, severed limbs, torsos, and viscera interspersed with helmeted and armed warriors brandish-

ing shock weapons such as pikelike clubs or stone maces. At the nearby highland settlement of Chavín de Huántar (dated by radiocarbon assay to ca. 800 B.C.E.), a constellation of particularly graphic and supernaturally inspired iconography devoted to the depiction of mutilated enemies and human trophies has similarly been identified. Such depictions were but one of the many technologies of terror that were refined over the course of Peruvian prehistory to exalt the exploits of the victors, intimidate enemies, perpetuate fear in subject populations, and reify the status of warrior elites and the patrons of war.

The MOCHE civilization of Peru redefined the art of war and ritual violence by fabricating a massive corpus of particularly graphic depictions of warfare in CERAMICS, paint, and related works of art. The multitude of finely detailed ceramic depictions of pitched battles, elaborately dressed warriors, weaponry, competing elites and warlords, and supernaturals provides a major resource for the study and interpretation of Peruvian warfare and ritual violence; it also reflects the growing importance of militarism and the martial arts with the emergence of the Moche state in the Early Intermediate period (ca. 200 B.C.E.–600 C.E.).

The rise of the early highland expansionist states of the Wari (Peru) and Tiwanaku (BOLIVIA) serve to define those forms of Andean warfare and attendant forms of social violence and bloodshed; these forms prevailed well into the Late Horizon period (1450–1532) and culminated with the collapse of the Inca Empire in 1532. Middle Horizon (600–1000 C.E.) patterns of warfare specific to the Wari and Tiwanaku coincide with the emergence of elaborate militaristic displays at major centers and Wari colonies in the Cuzco and Moquegua regions, albeit with initially limited evidence for violent conflict, conquest, or provincial resistance. A recent forensic study of drilled, perforated, and suspended human trophy heads from the Wari site of Conchopata (600–1000 C.E.) suggests that the taking of heads largely took place among fresh kills or freshly dispatched war captives, primarily men and children.

Wari rule from 650 to 800 was specifically correlated with high levels of violence and cranial trauma, with upward of 33 percent of the adult samples from Beringa, 26 percent from Conchopata, and 31 percent from La Real exhibiting such trauma. Interestingly, wound patterning in females differs from that of males, with females bearing wounds primarily on the posterior of the cranium and males on the anterior. This may indicate that the females were dispatched or executed with blows to the back of the head, whereas males tended to be felled during hand-to-hand combat.

During this same period, Wari influence became widespread in highland contexts; Wari centers emerged in regions once thought to constitute the exclusive domain of the Tiwanaku state. While Wari sites in the core area are only marginally retrofitted or strategically located with defensive consideration in mind, Wari provincial or frontier centers exhibit elaborate defensive features. The frontier hill fort at Pikillacta consists of a large walled

complex with a supporting suite of regional settlements and strategically situated hilltop emplacements located over mountain passes within striking distance of key exchange routes in the highlands.

With the emergence of the Late Intermediate period (ca. 1000–1450), much of Peru and the Andean highlands was dominated by fragmented regional polities and pervasive warfare. At the same time, little in the way of militaristic iconography or martial themes prevails in any given region, despite the intensification of warfare and other forms of social violence. Despite this fact, indigenous informants recalled the period as that of the *auca runa*, or the “time of warriors,” fragmented polities, and constant warfare. With the exception of the CHIMÚ state of north coastal Peru, the highlands were dominated by *pukaras*, or hilltop forts and redoubts, with extensive evidence of violence and conflict.

The Ecuadorean highlands, for example, saw the proliferation of hilltop sites and fortifications and significant quantities of stone and bronze mace heads, axes, and related shock weapons (see ECUADOR). Other highland regions witnessed the development of fortified hilltop settlements or forts, replete with walls, ditches, towers, and defensive terrace systems. The escalation of conflict corresponded with the growing deployment of *bolas* (sling stones), stone and bronze mace heads, and an increase in craniofacial trauma borne in the skeletal remains of period populations. Scholars interpret these findings as reflections of the tandem emergence and proliferation of small, fragmented, raiding polities and the occasional expansion of the conquest state in the wake of the decline of both the Wari and Tiwanaku ca. 1000 C.E. This, in turn, coincided with the emergence of *KURAKA* lords, hereditary warlords, and *sinchi* war leaders; the proliferation of hill forts or *pukaras* with concentric fieldstone walls, parapets, and baffled or staggered gates; the proliferation of stone mace heads, projectile points, and sling stones; and the coincident balkanization, or fragmentation, of the former political and economic integrity of the Titicaca Basin in the period from 1000 to 1450.

The fractious polities and wars of the Late Intermediate period were quelled with the emergence of the Incas as a formidable sociopolitical and economic bulwark of highland Andean civilization in the mid- to late 15th century. While the preceding Late Intermediate period was one of political and economic fragmentation and internecine warfare, the Inca juggernaut fashioned order out of chaos, all through an ambitious and determined program of conquest and consolidation. Archaeological evidence and historical accounts indicate that target groups that readily surrendered or submitted to Inca authority were treated with considerable lenience; however, groups that resisted Inca control were systematically eliminated through outright conquest, genocide, and deportation. Resettlement programs were undertaken to assuage or minimize the potential for ethnic rebellions within the empire, a preoccupation that appears to have weighed heavily on the nature of Inca military strategy (see *MITMAQ*).

Significantly, period accounts make clear the Incas' ability to rapidly mobilize and deploy vast armies of citizen-soldiers, *MITA* (LABOR service or tax) conscripts and auxiliaries, porters, women, llama pack trains, and related support personnel often numbering into the tens of thousands, and in some cases, the hundreds of thousands. Spanish victories over the massive Inca forces make clear that the Incas were predisposed to traditional military deployments that relied on massing, or the concentration of armed forces in overwhelming numbers, a command structure that relied on the physical leadership of officers at the helm of major engagements, and the deployment of flanking movements and the three-pronged attack.

In addition to the aforementioned command orientation and numbers, Inca armies drew heavily on highland and coastal resources and access, including the vast road and transport networks, distant storage facilities numbering into the thousands, ancient Wari civic-ceremonial and military installations, an effective organizational and bureaucratic framework, and the creation and mobilization of a host of allies across the length and breadth of the Andean cordilleras. In this way, the Incas launched an effective and overwhelming program of conquest. Through intermarriage, they established a complex network of alliances. Together, these strategies characterized the expansion and consolidation of the Inca Empire, the largest empire ever forged in the Americas prior to European contact.

See also *MILITARY* (Vols. II, III, IV); *PRESIDIO* (Vol. II); *RIOTS AND REBELLIONS* (Vol. II); *WAR* (Vol. II).

—Francisco J. González  
Rubén G. Mendoza  
Camilla Townsend

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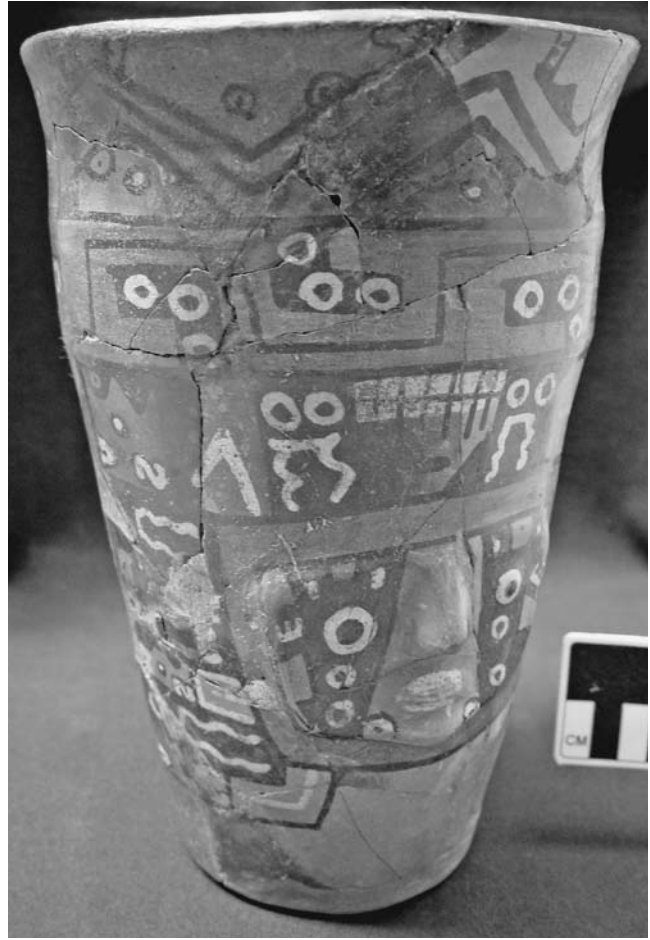
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**Wari (Huari)** Between 600 and 1000 C.E., the largest Andean power was the Wari Empire. Its capital city, Huari, located near the modern city of Ayacucho, was a dense urban settlement that covered more than 1.5 square miles (3.9 km<sup>2</sup>). At its height, the Wari Empire controlled some 800 miles (1,287.5 km) of the Peruvian Andes, from Cajamarca to Moquegua. Before the rise of the INCAS, the Wari built a vast network of roads to connect administrators in different areas to the central capital and facilitate the movement of goods and information (see TRADE). The Wari Empire coexisted with the north coast MOCHE civilization and the TIWANAKU state to the south in BOLIVIA. Wari society was characterized by its unique standardized ARCHITECTURE, agricultural innovations, and lavish imperial goods (see AGRICULTURE).

The Wari built administrative centers in many highland regions, such as Azangaro and Jincamocco in Ayacucho, Pikillacta in Cuzco, Cerro Baúl in Moquegua, and Viracochapampa in Huamachuco. Smaller centers have been uncovered in the coastal Nazca and Majes Valleys. While no Wari installations have been found in the coastal areas between the Moche and Nazca drainages, societies living in this area imitated Wari-style goods and obtained a few high-quality imports made in the imperial capital. It remains unclear if the Wari Empire ever conquered or controlled these groups.

Wari centers of administration are easily identified in aerial photographs because they used a unified spatial design. Large walled complexes were subdivided into smaller rectilinear compounds that consisted of lateral halls built around a central open patio space called a “patio group.” Such units were sometimes adjoined to open plazas or clusters of small irregular rooms. Some Wari sites had D-shaped temples; others had large rectangular buildings with a series of interior wall niches. Both were related to ancestor worship or the dedication of offerings (see RELIGION). Wari imperial architecture contrasts with that of Moche and Tiwanaku because it does not include pyramidal monuments.

Wari installations were often affiliated with subsidiary settlements and a sophisticated system of agriculture. Since Wari colonies occupied areas that required irrigation to grow crops, some scholars have suggested that they developed the technology to build canals across rugged terrain and perhaps were the first to terrace steep hills below the altitude of seasonal rainfall. Irrigation technology allowed more land to be used for agriculture in areas with warmer climates that were favorable for growing



Large Wari drinking vessels, called *k'ero*, were used at ceremonial events to drink *chicha*. Ritually smashed in the Wari brewery at Cerro Baúl, this example depicts the head of the front-face deity, with surrounding decorative animal heads drawn in a similar manner to the Tiwanaku style. Such Wari-Tiwanaku hybrids provide evidence of the frontier interaction between the Wari and Tiwanaku people in the Moquegua Valley of southern Peru. (Courtesy of Donna Nash/Photo credit Ryan Williams)

MAIZE. During Inca times, maize was valued because it was made into a fermented drink called *CHICHA*. The brewing of *chicha* at Wari sites, depictions in Wari ART, and elaborate decorated drinking vessels show that *chicha* was equally important in Wari society (see ALCOHOL).

Wari ritual and luxury items shared several features with Tiwanaku art, such as the icon of the “staff god,” a human or supernatural person grasping a staff in each hand. The staff god is depicted on both Wari and Tiwanaku TEXTILES, as well as other kinds of goods. Wari designs are highly variable and reflective of multiethnic interactions within the empire; however, some goods, such as the “face neck jar,” appeared throughout the empire (see CERAMICS). Decorated as persons of different ages wearing diverse CLOTHING, these jars came in various sizes, and some were life size. Face neck jars were used to serve *chicha* and often bore intricate designs. Depictions of Wari elites show that WOMEN wore long dresses overlaid by a cloak or

long shawl, while men wore thigh-long shirts along with a loincloth and some form of hat or headdress.

—Donna Nash

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**wheat** Wheat was brought to the Americas by Europeans; before their arrival, most indigenous populations cultivated MAIZE, other native cereals, or tubers as staples. Because wheat flour, along with WINE and olive oil, was an essential part of the “Mediterranean trinity,” Spaniards in the New World attempted to introduce wheat into native agricultural production (see AGRICULTURE). This met with varying degrees of success, but most indigenous people initially rejected wheat for a variety of reasons, the principal being, simply put, that they considered wheat to be inferior to maize. For an equal measure of seed, maize yielded 10 times more FOOD than wheat. Maize also produced more with less LABOR and less land. Maize, then, was cheaper both to produce and to buy. Additionally, wheat grown on land larger than a garden plot required costly European equipment such as a plows, as well as draft animals. And because indigenous peoples were required to pay tithes on transactions involving Spanish goods and lands, wheat was subject to the tithe, whereas maize was not. Finally, the processes of threshing by treading—by running animals over the sheaves—and milling were unfamiliar to New World populations.

By the mid-16th century, however, wheat was being grown on small farms that were usually owned by Spaniards and worked by native laborers. Andean indigenous populations, in particular, were more willing than other NATIVE AMERICANS to accept wheat as a food crop. The reasons for this might have included the fact that colder, higher elevations are more suitable for growing wheat than maize or other local cereals; moreover, Andeans were familiar with quinoa, which is similar to wheat. In any event, wheat production was more prevalent early on in PERU than anywhere else in the Americas; indeed, by the late 16th century, the Peruvian region of Huamanga produced approximately 75,000 bushels of wheat annually. Overall, by the mid-16th century, wheat was available in local markets throughout the Americas, largely for a Spanish clientele (see TRADE).

The Spaniards’ introduction of and demand for wheat immediately imbued the cereal with defining capabilities. For Spaniards, wheat was a “civilized” cereal that helped to draw the line between them and the native, maize-eating populations. Throughout the colonial period, the social implications of wheat continued to evolve, especially in the presence of a growing mestizo population that increasingly chose wheat over maize (see MESTIZAJE/MESTIZO). This choice was not one of prudence (wheat could be up to 10 times more expensive than maize) but of preference

and status. In addition, the flow of European immigrant workers into the growing MINING industry and the local ECONOMY contributed to an increased demand for wheat as a staple cereal. Nevertheless, indigenous peoples continued to prefer maize, thus Spaniards and their mestizo offspring—familiar with Old World techniques and relying heavily on native labor—dominated the wheat market.

See also WHEAT (Vols. II, III).

—Mark Christensen

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Arnold J. Bauer. *Goods, Power, History: Latin America’s Material Culture* (Cambridge: Cambridge University Press, 2001).

**wine** Viniculture, or wine production, in the Americas dates back to the 16th century. Although several wild species of grapes (*vitis*) existed in the Americas before 1492, there is no evidence that NATIVE AMERICANS ever produced wine. Spanish colonists introduced European vines after the CONQUEST of MEXICO in 1521, and thereafter, European vines and wine production spread rapidly. By the 1530s, the New World was producing its own wine from locally cultivated vines.

Wine formed part of what one scholar characterized as the “essential triad” of necessities (the others being WHEAT and olive oil) for all Iberian colonists. Wine was not just a central part of the Iberian diet; it was an essential ingredient in the celebration of Catholic Mass. The religious significance of wine made it necessary to ship vast quantities across the Atlantic. This posed a series of problems. For one, the vast distances between Spain and its overseas possessions made it difficult to supply the entire colony. Not only that, but it was not uncommon for wine shipments to spoil en route. The COST of TRANSPORTATION also meant that Spanish wine was expensive for colonists to purchase. For these reasons, policies were introduced both in Spain and the colonies to promote the development of local viticulture. For example, in 1519, Spain’s Board of Trade (CASA DE CONTRATACIÓN) ordered that each ship bound for the Indies carry vines for the establishment of vineyards.

The introduction of Old World vines met with mixed results. Attempts to grow European vines in Mexico failed miserably, mainly because of the environmental differences between Mexico and Spain. Conditions in PERU, CHILE, and ARGENTINA proved far more propitious, however. Given the importance of wine in Catholic sacraments, it is hardly surprising that the Jesuit order emerged as one of the most important wine producers in the early colonial period (see RELIGIOUS ORDERS).

Most of early colonial Latin America’s wine production supplied local markets. Increasingly, however, wines produced in South America found their way to other parts of the Americas, where they could be purchased for less than Spanish wines. By the 17th century, in response



to protests from viticulturalists in Spain that American wines represented a serious threat to their economic well-being, the Spanish Crown began to issue bans on the expansion of New World vineyards.

See also JESUITS (Vol. II); WINE (Vol. II).

—J. Michael Francis

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**witchcraft** The defining characteristic of witchcraft in the belief of early modern Christendom was a pact with the devil (see DIABOLISM IN THE NEW WORLD). The witch acquired supernatural powers from the devil through such a pact. The next most notable characteristic was that the witch was most often a woman, consistent with the medieval Christian notion that WOMEN were weak willed and thus more susceptible to the devil's temptations. These two characteristics were less prevalent in the witchcraft of 16th-century Latin America, but over time, they became increasingly associated with ideas about witchcraft in the New World. By the 17th century, as the associations among witchcraft, women, and the devil gradually disseminated in Latin America, other standard features of witchcraft beliefs were elaborated, although not to the extent that they were in Europe. These included flight (transvection), often to gatherings known as witches' sabbaths where Christian rites were inverted and mocked; sexual relations with demons or the devil himself; the use of animal familiars as mediators between the demonic and terrestrial realms; and the use of talismans, potions, powders, and salves to achieve supernatural and usually harmful ends.

In the 16th century, Spaniards in the Americas tended to see the hand of the devil nearly everywhere, in otherwise seemingly inexplicable misfortunes or in anything heterodox, especially among the indigenous populations. Thus, colonial officials often were warned about diabolical influence. The written instructions given to VICEROYS at the time of their appointment cautioned them to be mindful of the workings of the devil and to work to prevent the public practice of sorcery (*hechicería*). Parish priests conceded that witchcraft (*brujería*) was widely practiced among the indigenous populations. But for most of the century, what Spaniards interpreted as diabolical witchcraft is more accurately described as an assortment of native pagan rites and shamanistic practices (see RELIGION).

Strictly speaking, there was a distinction between the early modern Christian concepts of witchcraft and sorcery as understood by learned authorities, although the two were often conflated in the popular under-

standing. As noted, the witch acquired her supernatural powers from the devil or a demon through a pact, while the sorcerer was skilled at using things such as spells, incantations, rituals, and recipes based on ingredients with supposed supernatural properties, all of which were the source of his power. For 16th-century Latin America, there is a further distinction between indigenous and European sorcerers: The former marshaled their powers primarily as a means to influence natural or divine forces, while the latter applied their powers to the practice of maleficent magic, or sometimes to counter the magic of other sorcerers or the harm done by witches.

The great witch hunts of 16th- and 17th-century Europe were in large part the result of a complex of confessions obtained by coercion, often under torture or the threat of torture, combined with denunciations from confessed witches who were obliged to identify all others whom they knew to be witches. The early modern conceptualization of witchcraft was that it was a collective activity, culminating in the witches' sabbath, and therefore, it was impossible that a confessed witch did not personally know any other witches. Thus, a witch who refused to name accomplices would be interrogated repeatedly over a long period of time, often in conjunction with further torture, until authorities were satisfied that she had identified all her accomplices. This probably helps to explain why in 16th-century Latin America, accusations of sorcery were much more frequent than accusations of witchcraft. Until the ecclesiastical and civil apparatuses for the prosecution of witchcraft were in place, and until authorities came to believe witchcraft posed a substantial threat, conditions did not favor mass hysteria over witches on a scale seen in Europe.

Nevertheless, there was still great concern in Latin America over the wide variety of heterodox practices that Spaniards considered superstitious. During the period ending about 1560, there were numerous prosecutions for the practice of sorcery in Mexico, while the problem did not appear in most of the rest of Latin America until the 17th century. The first accusations of sorcery in Mexico were made against indigenous people for pagan practices that more closely resembled what the Spanish referred to as native idolatry. This helps explain the lack of correspondence between European ideas about witchcraft and sorcery or witchcraft cases in the New World during the first decades after the CONQUEST. Spaniards often recognized that Indian heterodox practices had their origins in preconquest religions, but because they associated native religions with the devil and demons, it was a short leap for them to connect idolatry and witchcraft. And as the decades progressed, the cases gradually came to have more in common with standard European notions about witchcraft.

The Holy Office of the Inquisition was not established as an independent tribunal in Mexico until 1571, but the first friars of the postconquest period had the authority to exercise inquisitorial powers; Mexico's

first bishop, Fray Juan de Zumárraga, had inquisitorial authority as ecclesiastical judge ordinary beginning in 1532 and later under the title of apostolic inquisitor. Zumárraga believed it was important that he prosecute idolatry and maleficent magic among the indigenous people, although he also tried a relatively small number of cases against Spaniards, Amerindians, and Africans during his brief career (d. 1548). These included offenses such as the use of love magic, divination, invocation of the devil, quackery, and even the exercise of maleficent magic by a Spanish parish priest in 1540. Many of the charges against the priest resembled those made against witches in Europe, including the power to make himself invisible, transvection, calling on the devil in hell, and possession of a book containing the devil's signature.

After Zumárraga's death, subsequent inquisitors continued to prosecute cases of dealings with the devil and maleficent magic in general, and the details of these cases gradually came to conform more closely to European ideas about witchcraft. For example, in 1558, a NAHUATL-speaking individual who was accused of the hanging death of his wife argued in his defense that he had been tricked by the devil into committing the offense. As Christian ideas took firmer root in the belief systems of indigenous peoples, there was a blending of Christian and native spiritual discourse, in which both Amerindians and Spaniards came to associate preconquest gods more closely with the Christian devil, and thus associated native pagan practices more closely with witchcraft (see SYNCRETISM).

See also INQUISITION (Vol. II).

—Michael S. Cole

## women

### MESOAMERICA

Women are depicted on the ancient ruins of Mesoamerica and figure in the histories recorded in the Mayan glyphs (see MAYA). From these sources, archaeologists have gained insights into the lives of women in Mesoamerica before 1492. Beyond this, the lives of Nahua women are discussed in myriad contexts and described from a variety of viewpoints in 16th-century texts written in NAHUATL by indigenous men who had mastered the Roman alphabet (see AZTECS; CODICES). All scholars now agree on a central truth regarding Mesoamerican women: They were not marginalized or disparaged but rather played central roles in society that were understood to be complementary to those of men. These roles were in general consistent throughout the region, though there were of course variations.

Women worked in the household. While their lives centered on the home, they also moved freely in the streets, markets, and fields. The four-cornered house held spiritual significance in that it mirrored the universe. Women's work keeping house—sweeping, washing, keeping order—was therefore considered sacred. It was the job of humans in general to maintain order in the universe

and stave off pandemonium, and ordinary women were central in this regard, as were priestesses and priests. In the Maya world and in a number of other Mesoamerican cultures, weaving was considered a holy act, reminiscent of a godly act of creation (see RELIGION; TEXTILES).

Women's most important contribution was understood to be as bearers of the next generation; they would keep the FAMILY line from being extinguished, hold to traditions, and ensure that future years unfolded as they should. Children were "precious" in Nahuatl terminology and were likened to the green shoots of a tree, chips of stone from a mother rock, and hair growing. When a woman gave birth, she was thanked by all the family for making the future possible. Her courage was likened to that of a warrior: She had gone into battle and seized a soul out of the universe and brought it home to help worship the gods. If a woman died in childbirth, she went to the same heaven reserved for men who had died in battle (see WARFARE). This tradition stood in stark contrast to the Judeo-Christian concept that the Spanish would later introduce to the indigenous world, namely, that childbirth was woman's punishment for her essential evil.

Nevertheless, successful warriors and noblemen often had numerous wives, and the inequality bred by that situation had repercussions in women's daily lives. Polygyny brought some advantages for women; for example, as a woman aged, she was likely freed from much of the harder LABOR as younger women took over the work. However, for the least powerful women in a household, and especially those taken as prisoners of war, life was likely very difficult. Additionally, except for the women of the most powerful states, women in ancient Mesoamerica lived with the constant threat of war. A woman who was taken from her people and brought to live with her conquerors generally was not abused, her labor was valued, and her children were not considered slaves. She had, nonetheless, lost the opportunity to mother the children that would carry her own family line forward, and she had lost her place in her kinship group and thus much of her identity.

Women's value to society and their vulnerability are especially evident in the lives of noblewomen, about whom the most is known. Archaeological and documentary sources all support the notion that women played crucial roles in establishing a ruling chief's lineage and, thus, in giving him authority; that is, who a man's mother was mattered if he wanted people to believe that he had a legitimate right to rule. The entire family tree created legitimacy. The other side of this picture, however, was that a noblewoman's marriage and the fate of her children might be bound up with politics and with violence. A woman might be married off to prevent or end a war. She might marry into an allied state but in later years find her husband's state at war with her own. In that case, her sons' status as heirs would be threatened. These permutations were often very tricky. For example, Nezahualpilli, king of Texcoco, was only seven years old when his father, Nezahualcōyotl, died in his 70s. Nezahualpilli had much

older half brothers, born to a wife whose lineage had lost power since her marriage, and many of them were killed in their father's old age. Some of them had escaped that fate, however, and began a civil war when Nezahualpilli was crowned as king. Such a narrative was not uncommon in the Mesoamerican context.

Women's public roles varied considerably between regions. Among the MIXTECS, women and men inherited power in parallel descent, thus women were often rulers. Among the Nahuas, it was rare for women to rule, though this did occur. Women also sometimes spoke publicly, and public speech was integral to power. Priestesses spoke publicly, though it is not certain whether they spoke before mixed audiences. Likewise, female poets sometimes intoned their songs, though it is unclear if they did so only within a closed circle where high nobles were being entertained. After the Spanish CONQUEST, women often addressed Spanish or indigenous authorities on behalf of their families, which may have been an ancient tradition. The evidence suggests that the strongest variant of patriarchy in Mesoamerica was among the Maya, though even here it was far from rigid. This may have been because the Maya were engaged in almost constant warfare. Limitations on women may have been increasing among the Aztecs before the arrival of the Spanish for the same reason. It seems logical to assume that masculinity was deemed more important than femininity in those places most dependent on the success of male warriors for their survival, but even this would not be a universal truth.

Archaeologists have more information about certain subgroups of women in the Nahua world than elsewhere. Aztec merchants, for example, seem to have formed almost a clan apart, and their wives played unusual roles by Mesoamerican standards. People were born into merchant families, and merchants married within their group. Women worked in partnership with their husbands, trading goods in their husbands' absence and selling in the marketplace (see TRADE). Midwives, doctors, girls' teachers, and priestesses (categories that overlapped to an unknown degree) also had somewhat unusual roles, in that they dedicated more of their time to what might be termed their professional activities than to work in the home. It is not known how these women attained their positions. They, too, might have been born into them, or certain inclinations and talents may have come into play. Most likely, both these factors were true to differing extents.

Women's lives in pre-Columbian Mesoamerica had much in common, though there was variability between regions and subgroups. Although they often lived with the danger of warfare and of becoming concubines to the enemy, they generally enjoyed roles complementary to those of men.

### SOUTH AMERICA

South America is a vast continent with several distinct cultural regions and in the past was home to many diverse societies. Each of these societies had its own idea of the

roles women and men were to play in the family and in the wider community. The only "written" indigenous records for pre-Columbian South American history consist of the Inca *QUIPU*, but these have not yet been deciphered (see INCAS). Thus, scholars must rely mainly on the accounts of European conquistadores and clergy to understand the lives of women and men at the time of colonial contact.

Accounts written by European peoples are highly problematic, and many ignore the roles of women in South American societies; however, a few provide glimpses of women's importance and power in colonial contexts. Understanding the lives of women in pre-contact New World societies is even more difficult because archaeology rarely provides information about individual people and daily life. Many historical narratives of prehistoric South American peoples are merely projections of Victorian ideals that place women in the home and men in the public sphere. A close examination of New World communities, however, paints a very different picture. Depictions of people, mythical and otherwise, as well as human burials, provide evidence that aids in the understanding of the real or ideal roles of women and their relationship to men. The following examples convey the diversity of women in South America before 1532.

Based on the accounts of Spanish CHRONICLERS, the Incas had clear ideas about the roles of women in Andean society. Women were responsible for making clothes for their families, and many also paid tax to the Inca state with their weaving labor. Some girls between the ages of eight and 10 were selected to become *AQLLAKUNA*; these "chosen women" were kept secluded and received special training to make high-quality CLOTHING, FOOD, corn beer (called *CHICHA*), and many other products specifically for the Inca ruler, or Sapa Inca (see *ACLLA*). Upon reaching maturity, these educated women, called *mamaconas*, served many important roles in the Inca Empire. Some *mamaconas* continued to live in these educational and productive female enclaves, called *aqllawasi*. Every provincial capital in the Inca Empire had an *aqllawasi*, and each compound had its own female administrators who managed land and large stores of corn, wool, and other materials. These administrators were also charged with the EDUCATION of young *aclla* students.

*Mamaconas* of high status served in temples as priestesses and were charged with the care of important shrines or served as deity impersonators. The earth and the Moon were powerful female deities throughout the Andean region. Distinctively female deities are represented on stone sculptures at the early highland monumental site of CHAVÍN de Huántar and appear on large, elaborately painted ceramic urns from the WARI south coastal center of Pacheco (600–1000 C.E.). Sacred mountain peaks, highland lakes, and springs took on both male and female personas and were worshipped in their respective regions with festivals and offerings. During Inca times (1400–1532), both boys and girls were interred as HUMAN SACRIFICES in mountaintop offerings.

Perhaps the most famous of these sacrificial victims, called Juanita, was recovered by Johan Reinhard and his research team from Mount Ampato 20,932 feet (6,380 m) above sea level near Arequipa, PERU. Juanita was dressed in the clothing of a *mamacona*.

Women were highly valued in many Andean societies because of the importance of the textiles they produced and the food and *chicha* they prepared; these items were all important items in Inca political encounters. In many ways, the labor and knowledge of skilled *mamaconas* were key sources of the Sapa Inca's wealth and power and were crucial to Andean politics during Inca times. Women's production of textiles and food preparation was widespread in the Andes; however, it should be noted that there are known instances of men fulfilling these roles among some prehistoric groups.

Archaeological investigations of ancient tombs and human remains are important sources of information about individuals and the different sorts of people who lived in towns and communities throughout South America. Because of the excellent preservation on the western desert coast of Peru and CHILE, most archaeological evidence that can be linked specifically to women comes from the graves uncovered in these countries.

Going back to the earliest mummies in the world, of the Chinchorro of northern Chile (ca. 5000–1700 B.C.E.), women received parallel treatment in burial to men. Some scholars believe that the elaborate mummification practices of the Chinchorro demonstrate that South Americans revered and perhaps worshipped their ancestors. As both women and men were buried in a laborious fashion, it appears that they were equally valued ancestors among the coastal Chinchorro.

Human skeletons can reveal the effects of daily life on the body. In general, early burial populations that permit comparisons between females and males are few, but some groups of fisher/hunter-gatherers (ca. 6600–3600 B.C.E.) exhibit similar patterns of stress on the skeletons of both sexes, suggesting that women and men may have shared work tasks, whereas other groups show disparities in health and nutrition between the sexes. The difference between early groups is not surprising given the variety encountered by Spanish explorers at the time of first contact with South American groups.

A great deal more information exists for groups later in time. As large settlements appeared and individuals were given special burials for religious reasons or because of their status, women were among those buried in monuments or to be accompanied by numerous or elaborate goods. For instance, the site of La Galgada (ca. 1950–1550 B.C.E.) included the burials of elite women alongside those of men in successive phases of the monumental constructions. Indeed, the interments at La Galgada exhibit early evidence for typical elite female dress, including the use of *tupu* pins as clothing accessories.

The goods buried with female and male persons can provide information about the real or ideal roles of

women and men in a society. In many coastal cemeteries, women were buried with spinning and weaving implements. Interestingly, it is in the graves of Paracas-period women located in the Ica Valley (Peru) that the earliest known form of the *quipu* has been found.

Women who were members of families engaged in ceramic production also seem to have held high status, perhaps because of their crafting skill. High-status female burials associated with pottery making have been uncovered at the Wari site of Conchopata in Ayacucho and in the urban sector of the MOCHÉ capital between the two pyramidal monuments, Huaca de la Luna and Huaca del Sol.

Forensic examinations of human skeletons can reveal details about the general health and well-being of women in the past. For instance, some Wari burials exhibit evidence of domestic violence, while many Nazca trophy heads, presumed to be warriors captured in battle, are now known to be the skulls of women. Inca mountaintop sacrifice victims, interpreted as noble children, include both male and females of different ages. Elements of these sacrifices are similar: The victims are finely dressed and



Felipe Guamán Poma de Ayala's illustration of men and women from the Inca nobility preparing the soil for planting, which occurred during the month of August. (*The Royal Library, Copenhagen, Denmark*)

are accompanied by extra clothing and dressed human statuettes in GOLD, SILVER, and *Spondylus* of the same sex as the interment; yet boys also have llama figurines, whereas the girls are associated with ceramic vessels. Thus, burial evidence suggests that even within the same society, women had a variety of experiences based on class, occupation, personal accomplishments, or life histories; moreover, women and men might have had equitable value, but they also had particular symbolic associations based on their ideal roles within the larger society.

Women's contribution to daily household activities is not surprising, but Andean women were active in community affairs and participated in most of the same jobs as men. Couples often worked together, and there were few instances in which men were separated from their wives. For instance, during the Inca period, women accompanied soldiers on military campaigns, carrying men's gear, preparing food, and caring for the injured. Women participated equally in agriculture, pastoralism, and craft production. A representational mold-made Moche ceramic vessel shows a man and women working together to brew *chicha*. There is little to no evidence to suggest that there were restrictions on women owning goods or having access to land. Historical accounts describe how the mothers and favored wives of Inca emperors had their own country estates, supplied with dedicated servants to work their fields and maintain their palaces. Inca queens were mummified and venerated after death in the same manner as male Inca rulers. Likewise, on the northern coast during the early contact period, Spanish conquistadores encountered small polities that were ruled by women.

This same pattern of equality in access to resources and relative political power also seems to apply to other regions of South America. Metal votive figurines from the Quimbaya culture of COLOMBIA show both men and women holding the same objects, such as cigar holders and fine green stone adzes, which have been interpreted as items of prestige.

Information about women's lives in the prehistoric societies of South America is limited and remains an underexplored theme in archaeological research. Future research examining human skeletal populations and representations of people in art holds promise for understanding the roles of women in the diverse communities that occupied the South American continent before 1532.

### EARLY COLONIAL

The Spanish introduced to the New World ideals of society, government, and religion that were highly patriarchal and that often conflicted with the gender roles of indigenous populations. Indigenous gender roles were based largely on different, yet equally important roles for men and women. Although this "gender parallelism" should not be mistaken for equality—men dominated the apex of the precontact social hierarchy—difference did not mean devaluation. However, the development of colonial

society included the adoption of Spanish forms of gender relations, which took some 50 to 70 years to emerge fully in Central Mexico, and longer in other regions. This delay, coupled with a demographic imbalance that favored women due to the wars of conquest, allowed indigenous women to maintain their traditional status and power in the years immediately following the conquest.

The CATHOLIC CHURCH believed that the home provided safety in which women could perform their duties free from the temptations of the outside world, which ostensibly could corrupt a woman's fragile and weak nature. European women received strict counsel to avoid the public sphere. Indeed, women were to remain in the "private" sphere, while men attended to the "public" one. Thus, in Spanish society, women were prohibited from participating in politics. Although they had some legal rights, most laws supported the power and authority of men.

In contrast, early colonial society in New Spain saw indigenous women playing a significant and active role in the courts. Women made wills and served as witnesses for wills; they initiated and defended in litigation at rates comparable to those of men. Moreover, they sold, bought, and inherited property. The extent of women's legal participation even inspired one 16th-century Spanish jurist to comment that an indigenous man with a legal dispute to settle "will not appear before the court without bringing his wife with him."

Furthermore, Spaniards' toleration and reinforcement of indigenous rulers' political authority and landholdings worked to the advantage of many noble Mixtec women. In Mixtec culture, marriage alliances were necessary to form the *yubuitayu* sociopolitical unit. If the male ruler died, the female ruler, or *cacica*, could continue to rule alone, without remarrying (see CACIQUE). Native people, Spaniards, and the church alike recognized the status of *cacicas*. Mixtec *cacicas* owned large houses, the best lands, large herds of sheep, saltworks, and many other material possessions.

Although Mixtec *cacicas* seemed to fare better than most, indigenous noblewomen responded to the opportunities the conquest provided. In the Andes, Spanish definitions of "private property" were largely absent prior to the conquest. Yet, as Spaniards began to enforce their understandings of property to usurp land, Andean noblewomen often joined in the land grab, manipulating the new property forms for their own benefit. In Central Mexico, many native noblewomen married Spaniards, thus aligning themselves with the ruling party, and this was made easier by the shortage of Spanish women. This strategy not only secured the status of a noblewoman and her family but provided her offspring with a more financially and socially secure position in society. Whereas native men had much more difficulty in marrying Spanish women, 16th-century indigenous noblewomen throughout New Spain increasingly married Spanish men.

Spanish perceptions of the public and private spheres discouraged women from participating in labor outside

the home. In the years immediately after the conquest, however, indigenous women continued to fulfill many public roles. Although the Spanish prohibited specific vocations—such as priestess, female market official, and female confessor—most women went about their work much as they had before the conquest. Indeed, colonial society (and especially Spanish settlers) greatly depended on women's labor to supply foodstuffs and other goods. Thus, indigenous women labored daily in their homes and in the local colonial economy as craft producers, members of artisan guilds, spinners, embroiderers, featherworkers, and preparers of food. Every day, significant numbers of women left their homes to sell the products of their labor in the markets. Others served city-dwellers as wet nurses, weavers, flour grinders, and maids. Overall, the documentary evidence suggests that colonial indigenous women participated in politics and society much as they had in precontact times. As a result, their household labor for and marriage to Spanish colonists enabled women to become key figures in transmitting indigenous culture to colonial society.

Although many indigenous women exploited the opportunities the conquest afforded, or managed to get along in colonial society without being overrun by it, some women were affected much more negatively. Female slaves made up a large proportion of the female population in early colonial society (see SLAVERY). Representing 30 to 40 percent of all enslaved Africans transported to the Americas, female slaves were put to work everywhere, from rural SUGAR plantations to urban Spanish homes. These women had minimal legal rights. Uprooted from their country and deprived of their freedom, slave women faced the greatest challenges of all women in the New World.

Due to their utility, female slaves outnumbered male slaves in nearly every city of colonial Latin America. Urban slave women were typically domestics serving as cooks, household servants, wet nurses, laundresses, and seamstresses. Many owners, particularly widows, hired out their female slaves to provide themselves with a fixed monthly income. Although subject to many abuses, particularly the sexual advances of their owners, urban slave women fared better than rural slave women. Slave women assigned to the fields worked alongside male slaves, performed the same tasks, and received the same punishments. Women cut and ground sugarcane, chopped firewood, worked inside the dangerous mills, and drove animals. Plantation owners knew no gender differentiation in physical tasks, but they did reserve the more skilled jobs and supervisory roles for men.

While some Spanish women were present in the early years—some even participated in the wars of conquest—they represented only 16.5 percent of all immigrants by 1560. Many came as wives, others as prospective wives, and still others as common laborers. Spanish women also came in religious capacities. In 1530, six Spanish nuns came to the New World to establish a school for young

indigenous girls. Convents emerged within two decades of the conquest and continued proliferating throughout the colonial period. These institutions provided a respectable option for unmarried elite women and wealthy widows, while finding a place for those socially incongruent. Indeed, the Santa Clara convent in Cuzco was intended to house orphaned mestiza girls Spanish society deemed too anomalous (see *MESTIZAJE/MESTIZO*).

The paucity of Spanish women in early colonial society meant that indigenous and black women experienced the brunt of Spaniards' sexual desires—a large number were raped or otherwise sexually abused. *ENCOMIENDA* labor demands commonly forced women into the households of Spanish men, and the archives are replete with court cases concerning *encomenderos* or other Spanish men raping or otherwise abusing their indigenous servants. Domestic female slaves shared a similar fate. Moreover, the *encomienda's* tribute quota of goods, commonly cotton cloth or other textiles, fell heaviest on indigenous women producers and continued to grow as the indigenous population declined. And as the colonial period progressed, native women were frequently forced to work in sweatshops, or *obrajes*.

Despite widespread abuses, 16th-century women were not all passive victims. Admittedly, the colonial experience of a native elite was unlike that of a commoner or a slave. Yet all strata provide numerous examples of women who actively manipulated Spanish laws and culture, within set parameters, to accommodate and adapt to a nascent colonial society.

See also DOWRY (Vol. II); WOMEN (Vols. II, III, IV).

—Mark Christensen  
Donna Nash  
Camilla Townsend

### Further reading:

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**Xerez, Francisco de** (b. 1497–d. ca. 1565) *secretary to Francisco Pizarro and Spanish chronicler* Born in Seville in 1497, Xerez came to the New World in 1514. In 1524, he sailed on FRANCISCO PIZARRO’s first voyage of exploration as his secretary, responsible for a complete account of the expedition. Unfortunately, this account has not survived. Xerez also embarked on Pizarro’s second voyage in 1526, again as secretary. The account of this journey was long attributed to Juan de Sámano, secretary to the COUNCIL OF THE INDIES, who had it copied for a member of the royal family and signed the copy. However, internal evidence and comparison with Xerez’s later account make it clear that Xerez was the author of this earlier text, which is known now as *La relación Sámano-Xerez* (see CHRONICLERS). The account describes the geography and the indigenous peoples encountered, as well as the capture of a native trading vessel from Salango by the pilot Bartolomé Ruiz (see TRADE). The work describes the vessel and its crew and provides a meticulous inventory of the GOLD and other precious artifacts it carried.

Xerez embarked again on Pizarro’s third voyage to PERU, in 1532, describing Tumbes, the journey to Cajamarca, and the events that led to the capture and seizure of the Inca ruler ATAHUALPA. Xerez broke his leg the day the Sapa Inca was captured and was bedridden for months (see CONQUEST; INCAS). During this period, he completed his account. Xerez received his share of the spoils of Cajamarca and returned to Seville in June 1534. The following month, he published his *Verdadera relación de la conquista del Perú* (*True Account of the Conquest of Peru*); in part, Xerez’s work aimed to correct an account published months earlier by Cristóbal de Mena. The *Verdadera relación* was an instant success and was trans-

lated into every major European language. It remains the definitive source for the events of the period it covers, a tribute to the precision and impartiality Xerez brought to his task.

—Patricia J. Netherly

**Further reading:**

Raúl Porras Barrenechea. *Los cronistas del Perú (1528–1650) y otros ensayos*, edited by G. Y. Franklin Pease (Lima: Banco de Crédito del Perú, 1986).

**Xibalbá** Xibalbá refers to the pre-Columbian MAYA underworld. The most extensive treatment of the term comes from the POPOL VUH, or “Council Book,” a compilation of myth, history, and genealogy composed in the Postclassic K’iche’ (Quiché) language of western GUATEMALA but written in the Roman alphabet and shown to friar Francisco Ximénez sometime between 1701 and 1703. Ximénez copied the manuscript, which eventually made its way into Guatemala’s University of San Carlos library, where it was rediscovered in the 1850s. Xibalbá stories come from the first half of the Popol Vuh, the section most closely identified with Classic-era mythology (250–1000 c.e.) and hence is pre-K’iche’ in origin.

The term *Xibalbá* probably means “place of fright.” It was the subterranean home of the Death Gods, hideous, insectlike beings that ruled the world before the creation of human beings. However, as the Popol Vuh relates, through a series of tricks, the Hero Twins Hunahpu and Xbalanque descended to the underworld to avenge the death of their father and uncle. Disguised as traveling

magicians, Hunahpu cut Xbalanque into many pieces, then reassembled him alive. When the Death Gods asked Hunahpu to work the same magic on them, he obliged, but after cutting them up refused to bring them back to life. The Hero Twins thus vanquished the Death Gods and limited their power to Xibalbá, whence they could no longer demand sacrifice of the living (see HUMAN SACRIFICE). Only at this juncture was the world safe for the creation of human beings.

Exactly how universal the concept of Xibalbá was remains uncertain. The Maya were and are a fragmented

peoples, whose language and cultural constructs differed significantly from place to place. Contemporary Yucatec Maya use the term *metnal* to refer to the underworld, and their concept of its ways and means bears a heavy imprint of Spanish Catholicism (see CATHOLIC CHURCH; SYNCRETISM).

—Terry Rugeley

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**yana** Long before the rise of the Inca state in the Andes, local and regional leaders, or *KURAKAS*, obtained LABOR through the institution of *yana* (plural *yanakuna*, *yanacona*), meaning “he who serves me” (see INCAS). The *yanakuna* were men who had been given to the *kuraka* either as children or adults by their *AYLLU*, or group of origin. Such individuals were no longer counted as members of their *ayllu*; rather, they were counted among the *yanakuna* of their *kuraka*, which was a separate category.

*Yana* was a permanent status. In most cases, one of the sons of a *yana* would take his place when he died. In other cases, the other sons returned to their father’s group of origin; however, in the case of distant farmers or herders, they stayed on and were counted as *yanakuna*. *Yanakuna* married WOMEN given or designated by their *kuraka* or the Sapa Inca (see FAMILY). Andean polities were composed of groups of nested corporate groups called *ayllus*, which were in turn grouped into moiety divisions. At each level, the farming households cultivated the fields of their *kurakas* and provided, on a rotating basis, a service that was apportioned to their group or *ayllu* and carried out over short periods each year. This system was known as the *MITA*.

Andean rulers needed access to full-time service for their own households, however, in order to cultivate their personal fields of specialized crops such as COCA or to look after their personal herds in distant ecological zones; likewise, they required specialized artisans. The *yanakuna* who were assigned to work at a distance, either farming, herding, or as craftsmen, were probably selected as young

adults. Those who were chosen to serve in the household of the *kuraka*, or who assisted in administration or diplomatic missions, were likely chosen as children from among the best and brightest; these children were raised in the household of their *kuraka*, where they received the necessary training. They were also supported by their *kuraka*, which is why early Spanish observers referred to them as “*criados*,” a term applied to individual servants who had been raised in a Spanish noble’s household to provide confidential service. It should be noted that these *yanakuna* were not “servants,” as the term is sometimes translated.

*Yanakuna* may have made up between 1 and 5 percent of the workforce. Women of high rank were “given” women on a permanent basis from the *ayllus* subordinate to their fathers or husbands; these women provided personal service and served as weavers. While they were not called *yanakuna*, clearly the levy was similar. The Incas used this long-standing Andean institution in new ways to increase their direct access to resources. For example, the Inca HUAYNA CÁPAC had personal herds of camelids, distinct from state herds, in the altiplano near Cochabamba; these herds were tended by *yanakuna*, who also transported the MAIZE grown by the MITMAQKUNA of Cochabamba to CUZCO by llama caravan (see TRANSPORTATION). Some high-ranking *yanakuna* were placed by the Inca as *kurakas* over regional polities; this happened at Collique in the Chillón Valley, on the central coast of PERU.

See also *YANACONAJE* (Vol. II).

—Patricia J. Netherly

# Z

**Zapotecs** The term *Zapotec* refers to a linguistic and ethnic group who designate themselves as the Benizaa, or “people of the cloud.” Located in central and southern Oaxaca, MEXICO, the Zapotecs occupy four distinct ecological zones—valley, highland, isthmus, and the Miahuatlán region—and speak no fewer than six mutually unintelligible dialects. Around 1500 to 1100 B.C.E., several Zapotec egalitarian families first settled in the Valley of Oaxaca, an area that remains the central hub for Zapotecs to this day. In 900 B.C.E., a ranked authority had formalized in San José Mogote, a village in the valley’s upper arm; there, archaeologists have discovered the earliest known “public structure” in Oaxaca and signs of economic, artistic, and religious contact with the OLMECS. The earliest evidence for glyphic writing and the sacred calendar anywhere in Mesoamerica was also found at this site and dates to about 600 B.C.E.

Zapotec society was composed of two endogamous strata, the hereditary nobility and the commoners, each further divided into several social ranks. State affairs were headed by the male ruler (*coqui*), together with his wife (*xonaxi*); priests were chosen from among their relatives (see FAMILY). Although no Zapotec CODICES have survived from pre-Columbian times, the Zapotecs left numerous carved and inscribed stone monuments that depict the rulers involved in ceremonial activities and often their genealogies. Many of these monuments have been found in decorated tombs, since the Zapotecs practiced ancestor worship and often revisited burial sites. The Zapotecs further believed that the cosmos was partitioned between the forces of the “Lightning” and those of the “Earthquake,” and they venerated the supreme creator god Coquixee and the god of lightning and rain,

Cocijo. The vital force that breathed life into everything was called *pi* (see RELIGION).

Between 900 and 500 B.C.E., other minor Zapotec centers appeared in each of the three arms of the Valley of Oaxaca, and there is evidence for intercommunity conflict and raiding. In 500 B.C.E., the central site of MONTE ALBÁN was established by a Zapotec confederation and became Mesoamerica’s first imperialist kingdom. At this period, the Zapotec people had a strong connection with TEOTIHUACÁN and established an enclave in this important city. The Zapotecs excelled in the manufacture of a specialized gray pottery, and its presence outside of the Valley of Oaxaca is often a good indicator of their presence (see CERAMICS).

After the fall of Monte Albán around 800 B.C.E., the valley’s political organization fragmented into smaller Zapotec kingdoms, among which were those of Zaachila and Mitla. The latter became an important religious center, and today stands out for its ornate architecture. There is further evidence for a Mixtec presence at this site and others in the valley and probably even encroachment over ancestral Zapotec lands (see MIXTECS). In the late 15th century C.E., Cociyopij, a ruler from the Zaachila royal house, established a new Zapotec capital in the Isthmus of Tehuantepec, close to Oaxaca’s Pacific coast. This kingdom fought fiercely against the advancing armies of the AZTECS but eventually cooperated after a political marital alliance. The Aztecs established the city of Oaxaca as a tributary province to their empire, and it was the Aztecs who coined the appellation *Zapotec*, meaning “people of the zapote tree.” Today there are about 300,000 Zapotec speakers who live mostly in nucleated villages throughout Oaxaca.

—Danny Zborover

**Further reading:**

Joyce Marcus and Kent Flannery. *Zapotec Civilization: How Urban Society Evolved in Mexico's Oaxaca Valley* (London: Thames & Hudson, 1996).

***zeque* system (*ceque* system)** The *zeque* system was one of the most elaborate ceremonial schemes in ancient America. It functioned between the 15th and 16th centuries in the Inca capital city of Cuzco and probably also in other provincial centers (see INCAS). Much of the present knowledge of the system comes from the 17th-century description of Father Bernabé Cobo, who likely derived his information from the writings of the Spanish chronicler Polo de Ondegardo, which date back to the late 1550s (see CHRONICLERS). Archaeological investigations in and around Cuzco have confirmed and expanded on these historical descriptions and have further linked the *zeque* to similar Andean cultural phenomena, such as the NAZCA LINES.

The *zeque* system was composed of an articulated system of *HUACAS*, or shrines, which Cobo numbered at 328 but which originally might have reached 400. *Huacas* consisted of buildings and tombs, as well as natural or modified landscape features such as springs, stones, hills, fields, caves, trees, and roads. These shrines were positioned on a radial system of 41 or 42 abstract lines, or *zeques*, that stretched out from the center of Cuzco. Although the lines were not physically marked on the landscape, the *huacas* were connected through a network of visible trails. The lines were further distributed between the four territorial divisions that constituted Tawantinsuyu, or the Inca Empire: Chinchaysuyu, Antisuyu, and Collasuyu had nine lines each, while Cuntisuyu had 14 or 15. The lines' length measured

between three and 28 miles (4.8 and 45 km), and each included three to 15 *huacas*. The first *huaca* in a line was within the Cuzco city limits (in or close to Coricancha, the Temple of the Sun), while the last was usually located at the edge of the Cuzco Valley. The system was not symmetrical, nor were the lines straight, often being skewed to accommodate certain shrines.

This complex system had both a social and ritualistic function. Some of the *huacas* served as horizon markers for astronomical observations in the ritual calendar, while others were tied to the irrigation system and water distribution in the valley. Certain *huacas* served as boundary markers between social groups (see *AYLLU*). Each cluster of lines was further divided into groups of three, which were assigned a rank according to the Inca kinship hierarchy of moieties. Individual lines were also assigned a rank, usually one to a royal kin group (*panaga*) and the others to nonroyal groups. Each group performed ceremonies at their respective *huacas*, during which they offered sea-shells, COCA, GOLD, and SILVER, and sacrificed llamas, GUINEA PIGS, and even children (see HUMAN SACRIFICE). According to Cobo, more than 1,000 people were required to record the history and rituals associated with each of the *huacas*, and the resemblance of the *zeque* system to a spread-out *QUIPU* is often noted. The *zeque* system, however, was not static and probably developed through time to adapt to new social realities, such as the addition of royal kin groups. It came to an end by the late 16th century, when most of the *huacas* were destroyed by the Spaniards and the Inca kinship system became fragmented.

—Danny Zborover

**Further reading:**

Brian S. Bauer. *The Sacred Landscape of the Inca: The Cusco Ceque System* (Austin: University of Texas Press, 1998).

# ❧ APPENDIX ❧

## PRIMARY SOURCE DOCUMENTS

The following section contains more than a dozen primary documents designed to give readers firsthand accounts of the indigenous world and the encounter between Native Americans and Europeans. Each primary source is preceded by a brief introduction, designed to provide readers with a general framework from which to begin a deeper analysis of the document. It is important to recognize that the introductions are not meant to serve as the final word on these complicated and, in some instances, contradictory texts; instead, readers should be encouraged to think critically about the sources that follow. Why were they written? Who is the intended audience? What do these sources tell about the pre-Columbian period and the nature of the conquest and early colonization of the Americas? What do they ignore? How trustworthy are these documents, and how should historians interpret them?

The texts that follow provide broad geographical coverage and introduce readers to a wide range of topics and themes. The sources are divided into five different sections. Wherever possible, I have selected texts that provide insight into the indigenous worlds that Europeans encountered after 1492. While some of these accounts were written by Europeans, several of the selections that follow were composed by Native American authors, written in native languages.

### Two Native Texts from Mesoamerica

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*The following two documents provide a unique window into the indigenous world of Mesoamerica. The first selection is a brief excerpt from one of the most remarkable texts ever produced in the Americas, known as the Popol Vuh (Council Book). Written by the K'iche' Maya of western Guatemala, the Popol Vuh tells the story of creation, and*

*the excerpt here records the beginning, from the primordial world to the creation of the earth and the animals.*

*The second document is a little-known Nahuatl-language poem, entitled "Chalcacihuacuicatl," which is filled with humor and evocative emotion.*

#### "The Primordial World," Popol Vuh, Date Unknown (Excerpt)

*The Popol Vuh is the single most important example of Maya text to have survived the Spanish conquest. It is also one of the world's great works of literature, containing extensive sections on the creation of the world, the formation of animals, the creation of the first human beings out of maize, the actions of gods in the otherworld, and the relationship between deity and humankind in Maya theology.*

*Most previous translations have relied on inaccurate Spanish versions rather than the original K'iche' (Quiché) Mayan text. Based on nearly 30 years of research by a leading scholar of Mayan literature, this translation with extensive notes is uniquely faithful to the original language of its authors. Retaining the syntax and style of the text, the reader is provided with a window into the worldview of the ancient Maya. Nevertheless, the clarity and eloquent narrative of the text is also remarkably accessible to nonspecialists with an interest in world religions and literature.*

*The Popol Vuh was written by anonymous noble members of the K'iche', a branch of the Maya that dominated the highlands of western Guatemala prior to the arrival of Spanish conquerors in 1524. The anonymity of the authors is unusual since most colonial-period highland Mayan documents were prepared for some official purpose, such as land titles, and were duly signed by their authors as testimony of their veracity. It is likely that those who were responsible for compiling the Popol*

*Vub did not wish their identities to be known for fear of persecution by Spanish authorities.*

*The authors of the Popol Vuh were traditionalists in the sense that they recorded the history and theology of the ancient highland Maya people without adding material from European sources. The text thus contains very little direct Christian influence. By its own account, it is a faithful record of the contents of a much older pre-Columbian book that could no longer be seen. The K'iche' authors venerated their traditional Maya gods as "luminous, wise beings who brought life and light" to the world through their creative works and who "accomplished their purpose in purity of being and in truth" long before the arrival of the Christian God to their lands. Thus, the Popol Vuh contrasts its "ancient word" with that of the more recent voice of Christianity.*

*Such unapologetic reverence for the ancient Maya gods would have been offensive to the Spanish missionaries who, in the early decades of the Spanish conquest, sought to destroy the most overt expressions of Maya religion and literature. Nearly two centuries after the arrival of the Europeans in Guatemala, a Dominican priest named Francisco Ximénez wrote that many ancient books were still kept in secret by the K'iche's so that the Spanish authorities would not learn of them. It was the loss of such precious books as the glyphic Popol Vuh that may have prompted K'iche' scribes to preserve what they could of their literature by transcribing their contents into a form that would make them safer from the fiery purges of Christian authorities.*

*Although the Popol Vuh is undated, internal evidence points to the work being completed within a few decades of the Spanish conquest, sometime between 1554 and 1558. The fate of the 16th-century transcription of the Popol Vuh is unknown for the next 150 years, until 1701, when Ximénez became aware of the existence of the manuscript and borrowed it long enough to make a copy of the Maya text. Ximénez's copy is the oldest known version of the text, as the original was apparently returned to the Maya and has not been seen since. There must have been hundreds, if not thousands, of texts destroyed in the purges of the Spanish conquest. The survival of the Popol Vuh is therefore a fortuitous accident that allows the reader to hear the authentic voice of its Maya authors speaking centuries after their passing.*



## THE PRIMORDIAL WORLD

THIS IS THE ACCOUNT of when all is still silent and placid. All is silent and calm. Hushed and empty is the womb of the sky.

THESE, then, are the first words, the first speech. There is not yet one person, one animal, bird, fish, crab, tree, rock, hollow, canyon, meadow, or forest. All alone the sky exists. The face of the earth has not yet appeared. Alone lies the expanse of the sea, along with the womb of all the sky. There is not yet anything gathered together. All is at rest. Nothing stirs. All is languid, at rest in the sky. There is not yet anything standing erect. Only the expanse of the water, only the tranquil sea lies

alone. There is not yet anything that might exist. All lies placid and silent in the darkness, in the night.

All alone are the Framer and the Shaper, Sovereign and Quetzal Serpent, They Who Have Borne Children and They Who Have Begotten Sons. Luminous they are in the water, wrapped in quetzal feathers and cotinga feathers. Thus they are called Quetzal Serpent. In their essence, they are great sages, great possessors of knowledge. Thus surely there is the sky. There is also Heart of Sky, which is said to be the name of the god.

## THE CREATION OF THE EARTH

THEN came his word. Heart of Sky arrived here with Sovereign and Quetzal Serpent in the darkness, in the night. He spoke with Sovereign and Quetzal Serpent. They talked together then. They thought and they pondered. They reached an accord, bringing together their words and their thoughts. Then they gave birth, heartening one another. Beneath the light, they gave birth to humanity. Then they arranged for the germination and creation of the trees and the bushes, the germination of all life and creation, in the darkness and in the night, by Heart of Sky, who is called Huracan.

First is Thunderbolt Huracan, second is Youngest Thunderbolt, and third is Sudden Thunderbolt. These three together are Heart of Sky. Then they came together with Sovereign and Quetzal Serpent. Together they conceived light and life:

"How shall it be sown? When shall there be a dawn for anyone? Who shall be a provider? Who shall be a sustainer?"

"Then be it so. You are conceived. May the water be taken away, emptied out, so that the plate of the earth may be created—may it be gathered and become level. Then may it be sown; then may dawn the sky and the earth. There can be no worship, no reverence given by what we have framed and what we have shaped, until humanity has been created, until people have been made," they said.

Then the earth was created by them. Merely their word brought about the creation of it. In order to create the earth, they said, "Earth," and immediately it was created. Just like a cloud, like a mist, was the creation and formation of it.

Then they called forth the mountains from the water. Straightaway the great mountains came to be. It was merely their spirit essence, their miraculous power, that brought about the conception of the mountains and the valleys. Straightaway were created cypress groves and pine forests to cover the face of the earth.

Thus Quetzal Serpent rejoiced:

"It is good that you have come, Heart of Sky—you, Huracan, and you as well, Youngest Thunderbolt and Sudden Thunderbolt. That which we have framed and shaped shall turn out well," they said.

First of earth was created, the mountains and the valleys. The waterways were divided, their branches coursing among the mountains. Thus the waters were divided, revealing the great mountains. For thus was the creation of the earth, created then by Heart of Sky and Heart of Earth, as they are called. They were the first to conceive it. The sky was set apart. The earth also was set apart within the waters. Thus was conceived the successful completion of the work when they thought and pondered.

## THE CREATION OF THE ANIMALS

THEN were conceived the animals of the mountains, the guardians of the forest, and all that populate the mountains—the deer and the birds, the puma and the jaguar, the serpent and the rattlesnake, the pit viper and the guardian of the bushes.

She Who Has Borne Children and He Who Has Begotten Sons then asked:

“Shall it be merely solitary, merely silent beneath the trees and the bushes? It is well that there should be guardians for them,” they said.

Thus they considered and spoke together, and immediately were created the deer and the birds. Having done this, they then provided homes for the deer and the birds:

“You, deer, will sleep along the courses of rivers and in the canyons. Here you will be in the meadows and in the orchards. In the forests you shall multiply. You shall walk on all fours, and thus you will be able to stand,” they were told.

Then they established the homes of the birds, both small and great.

“You, birds, you will make your homes and your houses in the tops of trees, and in the tops of bushes. There you will multiply and increase in numbers in the branches of the trees and the bushes,” the deer and the birds were told.

When this had been done, all of them received their places to sleep and their places to rest. Homes were provided for the animals on the earth by She Who Has Borne Children and He Who Has Begotten Sons. Thus all was completed for the deer and the birds.

Source: Allen J. Christenson. *Popol Vuh: The Sacred Book of the Maya*, 67–75 (Norman: University of Oklahoma Press, 2007).

### “Chalcacihuacuatl” (“Chalca Woman’s Song”), Date Unknown

*The tradition of singing poems aloud in public settings was an important part of the Nabua world. These songs were passed from generation to generation, changing with the times. Many of them were written down in the second half of the 16th century with the encouragement of the Franciscans. Within the song tradition, there existed a subgenre that centered on the persona of the concubine. There is evidence that the song below—or a version very close to it—was used as a political protest by the Chalca people after they had been conquered by the Mexica (Aztecs) and wanted their chiefly lines reinstated. The life of a concubine taken in war is likened to the life of a conquered city-state. The sexual imagery and the evocation of a woman’s sphere through references to spinning and weaving are typical enough in the Nabua world for us to assume that such metaphors appeared in other common versions of the song as well.*

*Here, the character who sings veers between trying to make the best of her life with her new lord (even making sexual overtures) and expressing agonizing pain and regret (especially about her lost ability to become the respected mother*

*of a recognized clan). In the end, she is an old woman, lamenting her life, yet asking for peace. Such mixed reactions were undoubtedly typical of women in her situation.*

*Readers should remember that in Nahuatl, the song is very funny and erotic in certain sections and very beautiful and tragic in others. Most probably the song was performed by a man, but we cannot be certain of the conventions surrounding performance. Certainly, the song is saturated with images that would have been familiar to the audiences of that day, though they are entirely unfamiliar to us. To sing “Tocuilan style,” for example, seems to have had to do with singing exuberantly. Flowers represented the fragility and beauty of life. To call a king or any other social superior “a little boy” was actually an accepted form of expressing the opposite, that is, of deference. A king might do the reverse, addressing his social inferiors as his grandfathers. Undoubtedly other aspects of the song that still seem mysterious today will one day be translated more effectively.*



“This is a composition of the Chalca, with which they came to entertain King Axayácatl because he had conquered them as if they were just women.”

Stand up [or, Stop!], you who are my little sisters! Let’s go, let’s go, we will look for flowers. Let’s go, let’s go, we will pick some flowers. They were here, they were here, scorched flowers, shield-flowers. It is enticing, it is enjoyable, in the flower garden of war.

Good are the flowers. Let them be my wreath. In these my various flowers let me wrap myself. I am a Chalca woman.

I long for the flowers, I long for the songs. In our spinning place, our customary place [our womanly sphere], I am intoning the songs of the king, little Axayácatl. I twirl them together [into a strand] like flowers; I twist them forth as a flower.

Their songs are like paintings, they are good, like fragrant [pleasant] flowers. My heart imbibes the sweet smell of the earth.

What in the world am I to think of what you say, my lover [sexual partner], you, little Axayácatl? What if I were to pleasure him . . .

I just sing Tocuilan style, I whistle to him. What if I were to pleasure him . . .

Boy, little servant boy, you who are king, little Axayácatl, are you truly a man? Though it may be you are someone spoken of [well-known, chosen], is it true you no longer go to cut firewood? Ay, go stoke the pot and light a big fire!

Come and bring it, come bring what is there! Come give it to me! O child! You! Lay out the things [the mats]. You and I will lie together. You will be happy, you will be happy, will be happy. And I will do it peacefully, gently.

Let it not be, please don't stick your hand in my skirts, little boy, you who are king, little Axayácatl. Maybe I am painted, my little hand is itching. Again and again you want to seize my breast, even my heart.

Now perhaps you yourself will ruin my body-painting. You will lie watching what comes to be a green quechol bird flower. I will put you inside me. Your *tenchalobthli* lies there. I will rock you in my arms.

It is a quetzal popcorn flower, a flamingo raven flower. You lie on your flower-mantled mat. It lies there inside . . . No longer.

You lie on your golden reed mat. It lies in the [precious] feathered cavern house, inside the painted house . . . No longer.

. . . this is the home. I am distraught. O mother, maybe I can spin. Maybe I even used to be able to weave—but it was all for naught. As a noble girl-child, I was spoken of in connection with my [future] marriage.

It is infuriating. It is heartrending, here on earth. Sometimes I worry

and fret. I consume myself in rage. In my desperation, I suddenly say, hey, child, I would as soon die.

Hey mother, I am dying of sadness here in my life with a man. I can't make the spindle dance. I can't throw my weaver's stick. You cheat me, my child.

What in the world can I do? Am I to go along sacrificing myself, just as people are offered on their shields in the fields [of war]? You cheat me, my child.

Little boy, my child, you who are king, little Axayácatl, you just ignore me [are negligent toward me]. You used to sacrifice yourself.

You say you are manly [you consider yourself a man]. Do I [a woman] know my way in war? I know your enemies, my child. And you just ignore me.

I wish you yourself had been a woman. Perhaps then you would not sample [use sexually] she who is like the blossom and song of concubinage, my child.

Ah manly nobleman, my lord, you who are king, little Axayácatl. Instead you've taken off. You're angry, little boy. My child, I'm about to go home, too.

Perhaps thus you took me with sorcery. You spoke the right words. Behold now the drunkard, maybe you yourself are drunk. Are there social rules in our home?

Did you buy me anywhere? Did you buy me for yourself, my child? Did my aunts and uncles come to trade? Yet you do it heedlessly [impetuously, without restraint] and you get angry, little boy. I'm going home, my child.

You who are my little sister, woman priest, please look! Many

songs were offered in Cohautepec, at the wooden [or eagle] circling wall, where they came down upon us at Panohuayan.

I make [live] my womanhood. My heart suffers. I don't know what in the world I am to do. I will become a man like [together with] him—howsoever it was that the skirts and blouses of our men, our lovers, were many and full [literally “more,” “plentiful”].

Hand me my softened maize, you who are king, little Axayácatl. Let me just pat one [tortilla] out for you. *Neoc*, my child, *neoc*, my child. Pleasure him. Sing to him. Tocuilan style.

Do you call yourself an eagle, an ocelot, my child? Do you boast before your enemies? *Neoc*, my child. Pleasure him . . .

I, a woman, don't yet have a skirt, a blouse [I have not yet attained true womanhood.] He's the one who came here to offer their beautiful songs; he came here to offer shield-flowers [war]. What is to become of us? I'm a Chalca woman and I'm Ayocuan.

I crave my fellow women, the Acolhuaque. I crave my fellow women, the Tepaneca. What is to become of us? I'm a Chalca woman and I'm Ayocuan.

They are ashamed to be made concubines, my child. Are you going to do to me what you did to the poor little Cuauhtlatoa? Peacefully take off your skirts, spread your legs, you the Tlatelolca, you who stink. Come take a look here in Chalco!

Let me have my plumes, mother! Paint me up! What will my lover think of me? You pass before them [her lover and his men] as you leave. Won't he be greedy,

rapacious in Huexotzinco, in Xayacamachan?

How is the song sung, how did people used to sing? He is an eagle *quecholli*. Won't he be greedy, rapacious in Huexotzinco, in Xayacamachan?

In Tetzmolocan I, a woman, anoint my hands and feet with oil. I came to get my maguey skirt and blouse, and I'm going to go use them up.

I desire the Xaltepetlapan Huexotzinca, their leather ropes, their leather thongs. I'm going to go use them up.

He jests [or deceives, or knows] a bit more. He demands me, the child, the king, little Axayácatl. Hey! What comes of it that it seems he makes me live as a concubine in the home of [dependent upon] others? Because of me, you will have twice the kingdom [or family] to keep, my child. Maybe that's the way your heart wants it. Though it should be so . . .

Is it not wholeheartedly, my child, that you bring in concubinage, since it is your home? Maybe that's the way your heart wants it.

What in the world have you done to me, my lover? Don't adorn yourself thus any longer—you are really a bad man. What have you confused [disordered]? It is my heart. You flower-twist your words.

In my spinning place, I speak of you. In my weaving place, I remember you. Little boy, what have you confused? It is my heart.

I am an old courtesan. I am your [plural] mother. I become a rejected old woman, an old maiden lady. I am a Chalcan person. I have



come to pleasure you, my flower  
doll, my purple flower doll.

Little king Axayácatl also wants  
it. Come see my flowery painted  
hands, come see my flowery  
painted breasts.

Don't go let your heart take a  
needless tumble somewhere, little  
Axayácatl. Here is your hand. Go  
along holding me by my hand. Be  
content.

On your flowery reed mat, in your  
sitting place, little boy, peacefully  
go to sleep. Relax, my child, you  
who are King Axayácatl.

Source: Camilla Townsend. *Malintzin's Choices: An Indian Woman in the Conquest of Mexico*, 216–226 (Albuquerque: University of New Mexico Press, 2006).

## Christopher Columbus and the Early Conquest of the Americas

*The three short documents that follow are all well known to scholars of the early colonial period. This section includes the two 1492 contracts between Christopher Columbus and the Crown of Castile. These documents are then followed by one of the most controversial and often ridiculed texts of the early colonial period, the Requirement, or Requerimiento.*

### The Capitulations of Santa Fe, April 17, 1492

*After many years trying to secure royal support to sponsor his expedition across the Atlantic, Christopher Columbus finally reached an accord with Queen Isabella and King Ferdinand in mid-April 1492. The formal contract, known as the Capitulations of Santa Fe, came just four months after the fall of Granada, the last Moorish kingdom on the Iberian Peninsula. Juan de Coloma, the royal secretary, represented the Crown in the negotiations with Columbus. The overall cost of the initial voyage, including three ships, crews, and supplies, was relatively modest. However, if the venture proved successful, Columbus stood to gain handsome rewards, both in titles and in material goods. As compensation for his services, Isabella and Ferdinand offered Columbus five significant concessions. They appointed him admiral of all the territories he discovered*

*and promised that the title would pass to his heirs in perpetuity. Secondly, Columbus was granted the commission of viceroy and governor general. He was also given the right to one-tenth of all merchandise, including gold and silver, acquired in any territory he discovered. Moreover, the monarchs granted Columbus jurisdiction over whatever legal disputes arose in his jurisdiction. Finally, Isabella and Ferdinand authorized Columbus the right to invest up to one-eighth of the costs of all merchant vessels in his admiralty and to keep for himself up to one-eighth of all profits generated from that commerce.*

*Readers will note that the agreement makes no mention of Asia, an omission that has led some scholars to conclude that Columbus's intentions were to discover new lands and not an Atlantic passage to Asia. However, the absence of any specific reference to Asia does not necessarily mean that Columbus had no intention of discovering a western route to the continent. In fact, it is worth noting that King Ferdinand and Queen Isabella gave Columbus a letter of introduction to the great khan; moreover, one of the crewmembers on Columbus's 1492 voyage was an interpreter who spoke some Arabic, a language that was understood in many parts of India and one that Europeans believed would be understood in East Asia.*



The things requested and that Your Highnesses give and grant to Sir Christopher Columbus in partial reward for what he will discover on the voyage that now, with the help of God, he is to make on the Ocean Seas in the service of Your Highnesses, are the following:

First, Your Highnesses, as the lords you are of the Ocean Seas, appoint Sir Christopher Columbus from now on as your admiral on all those islands and mainland discovered or acquired by his command and expertise in the Ocean Seas during his lifetime and, after his death, by his heirs and successors one after the other in perpetuity, with privileges and prerogatives equal to those that Sir Alfonso Enriquez, your high admiral of Castile, and his other predecessors in the office held in their districts.

It pleases Their Highnesses. Juan de Coloma.

Also, Your Highnesses appoint Sir Christopher your viceroy and governor general in all those islands and any mainland and islands that he may discover and acquire in the seas. For the governance of each and every one of them, he will nominate three persons for each office, and Your Highnesses will select and appoint the one most beneficial to your service, and thus the lands that our Lord permits him to find and acquire will be best governed to the service of Your Highnesses.

It pleases Their Highnesses. Juan de Coloma.

You wish him to have and take for himself one-tenth of all and any merchandise, whether pearls, precious stones, gold, silver, spices, and any other things and merchandise of whatever kind, name, or sort it may be, that is bought, exchanged, found, acquired, and obtained within the limits of the admiralty that Your Highnesses from now on bestow on Sir Christopher, deducting all the relevant expenses incurred, so that, of what

remains clear and free, he may take and keep one-tenth for himself and do with it as he pleases, reserving the other nine-tenths for Your Highnesses.

It pleases Their Highnesses. Juan de Coloma.

Should any lawsuits arise on account of the merchandise that he brings back from the islands and mainland acquired or discovered, or over merchandise taken in exchange from other merchants there in the place where this commerce and trade is held and done, and if taking cognizance of such suits belongs to him by virtue of the privileges pertaining to his office of admiral, may it please Your Highnesses that he or his deputy, and no other judge, shall be authorized to take cognizance of and give judgment on it from now on.

It pleases Their Highnesses, if it pertains to the office of admiral and conforms to what the admiral Sir Alfonso Enríquez and his other predecessors had in their districts, and if it be just. Juan de Coloma.

On all vessels outfitted for trade and business, each time, whenever, and as often as they are outfitted, Sir Christopher Columbus, if he wishes, may contribute and pay one-eighth of all that is spent on the outfitting and likewise he may have and take one-eighth of the profits that result from such outfitting.

It pleases Their Highnesses. Juan de Coloma.

These are authorized and dispatched with the replies from Your Highnesses at the end of each article. In the town of Santa Fe de la Vega de Granada, on the seventeenth day of April in the year of the birth of our savior Jesus Christ one thousand four hundred and ninety-two.

*I, the Queen. By command of the king and queen.  
Juan de Coloma.*

Source: Helen Nader, ed. and trans., and Luciano Formisano, ed. *The Book of Privileges Issued to Christopher Columbus by King Fernando and Queen Isabel, 1492–1502*, 63–66 (Berkeley: University of California Press, 1996).

## The Capitulations of Granada, April 30, 1492

*Just two weeks after signing the Capitulations of Santa Fe, King Ferdinand and Queen Isabella issued a writ, known as the Capitulations of Granada. This agreement formally conferred on Columbus the offices of admiral, viceroy, and governor of the islands and mainland he might discover. The agreement also formalized Columbus's title of nobility (which would be passed on to his heirs).*



Granada, 30 April 1492

Sir Fernando and Lady Isabel, by the grace of God king and queen of Castile, León, Aragón, Sicily, Granada, Toledo, Valencia, Galicia, the Balearics, Seville, Sardinia, Córdoba, Corsica, Murcia, Jaén, the Algarve, Algeciras, Gibraltar and the Canary Islands, count and countess of Barcelona, lords of

Vizcaya and Molina, dukes of Athens and Neopatria, counts of Rousillon and Cerdagne, marquises of Oristano and Goceano.

Because you, Christopher Columbus, are going at our command with some of your ships and personnel to discover and acquire certain islands and mainland in the Ocean Sea, and it is hoped that, with the help of God, some of the islands and mainland in the Ocean Sea will be discovered and acquired by your command and expertise, it is just and reasonable that you should be remunerated for placing yourself in danger for our service.

Wanting to honor and bestow favor for these reasons, it is our grace and wish that you, Christopher Columbus, after having discovered and acquired these islands and mainland in the Ocean Sea, will be our admiral of the islands that you discover and acquire and will be our admiral, viceroy, and governor of them. You will be empowered from that time forward to call yourself Sir Christopher Columbus, and thus your sons and successors in this office and post may entitle themselves sir, admiral, viceroy, and governor of them.

You and your proxies will have the authority to exercise the office of admiral together with the offices of viceroy and governor of the islands and mainland that you discover and acquire. You will have the power to hear and dispose of all the lawsuits and cases, civil and criminal, related to the offices of admiral, viceroy, and governor, as you determine according to the law, and as the admirals of our kingdom are accustomed to administer it. You and your proxies will have the power to punish and penalize delinquents as well as exercising the offices of admiral, viceroy, and governor in all matters pertaining to these offices. You will enjoy and benefit from the fees and salaries attached, belonging, and corresponding to these offices, just as our high admiral enjoys and is accustomed to them in the admiralty of our kingdoms.

With this our writ or its transcript certified by a public clerk, we order Prince Sir Juan, our most dear and beloved son, and the princes, dukes, prelates, marquises, counts, masters, priors, and commanders of the orders; royal councilors, judges of our appellate court, and judges and any other justices of our household, court, and chancery; subcommanders and commanders of our castles, forts and buildings; all municipal councils, royal judges, corregidores, municipal judges, sheriffs, appeals judges, councilmen, parish delegates, commissioned and noncommissioned officers, municipal officials, and voting citizens of all cities, towns, and villages of these our kingdoms and domains and of those that you may conquer and acquire; captains, masters, mates, warrant officers, sailors and ship's crews; and each and every one of your subjects and citizens now and in the future, that, having discovered and acquired any islands and mainland in the Ocean Sea, once you and your designated representative have performed the oath and formalities required in such cases, from then on you shall be accepted and regarded for the rest of your life, and your sons and successors after you forevermore, as our admiral of the Ocean Sea and viceroy and governor of the islands and mainland that you, Sir Christopher Columbus, discover and acquire.

[All the officials and people] shall put into effect everything pertaining to these offices, together with you and the proxies you appoint to the offices of admiral, viceroy, and governor. They shall pay and cause to be paid to you the salary, fees, and other perquisites of these offices. They shall observe and cause

to be observed for you all the honors, gifts, favors, liberties, privileges, prerogatives, exemptions, immunities, and each and all of the things that, by virtue of the offices of admiral, viceroy, and governor, you should receive and that should be paid to you fully and completely, in such a way that nothing will be withheld from you. They shall not place of consent to place hindrance or obstacle against you in any way.

For with this writ we grant to you from now on the offices of admiral, viceroy, and governor as a hereditary right forevermore, and we grant you actual and prospective possession of them, as well as the authority to administer them and collect the dues and salaries attached and pertaining to each of them.

If it should be necessary for you, and you should request it of them, we command our chancellor, notaries, and other officials who preside over the table with our seals to give, issue, forward, and seal our letter of privilege with the circle of signatures, in the strongest, firmest, and most sufficient manner that you may request and find necessary. None of you or them shall do otherwise in any way concerning this, under penalty of our displeasure and a fine of 10,000 maravedís for our treasury on each person who does the contrary.

Furthermore, we command the man who shows you this writ to summon you to appear before us in our court, wherever we may be, within fifteen days of having been cited, under the same penalty. Under this same penalty, we command every public clerk who may be summoned for this purpose to give the person showing this writ to him a certificate to that effect, inscribed with his rubric, so that we may know how well our command is obeyed.

Given in our city of Granada on the thirtieth day of the month of April in the year of the birth of our Lord Jesus Christ one thousand four hundred and ninety-two.

*I, the King  
I, the Queen*

*I, Juan de Coloma, secretary of the king and queen or lords, had this written at their command.*

*Approved in form: Rodericus, doctor.*

*Registered: Sebastián de Olano. Francisco de Madrid, chancellor.*

*Source:* Helen Nader, ed. and trans., and Luciano Formisano, ed. *The Book of Privileges Issued to Christopher Columbus by King Fernando and Queen Isabel, 1492–1502*, 66–67, 69 (Berkeley: University of California Press, 1996).

## The Requerimiento, 1513

*Drafted by the Spanish jurist and university professor Juan López de Palacios Rubios (1450–1524) the requerimiento, or “requirement,” was a legal document that constituted, in the words of historian Patricia Seed, a “protocol for conquest.” In 1512, Spain’s king Ferdinand convened a meeting of prominent jurists and theologians, including Palacios Rubios, to address charges of Spanish cruelty and exploitation of the indigenous peoples of the Caribbean. Palacios Rubios defended the legality of Spain’s overseas empire, as well as the authority they had to enslave the native population. From these deliberations, Palacios*

*Rubios provided the text for the requirement. This legal document was used by the Spanish to legitimize their conquests in the Americas and justify the enslavement of Amerindians who rejected Spanish rule. Influenced by medieval Spanish legal traditions, the requerimiento provided an outline of the hierarchy of Spanish colonial authority. It traced how God had granted the popes not only spiritual but also temporal authority over all peoples of the world, descendants of Adam and Eve.*

*As a legal document, the requerimiento named indigenous peoples as vassals of the Crown and demanded that they submit to the pope and Spanish authority and allow Christian missionaries to preach freely. In return for their submission, the document promised them protection and royal privilege. However, if they rejected these terms, the Spanish could justifiably wage war upon and enslave them. The requerimiento was intended to be read aloud to indigenous peoples in the presence of a notary and an interpreter. Of course, even if the document were read before the start of any hostilities, the Native Americans who heard its content would not have understood what it conveyed. Not surprisingly, many Spanish contemporaries, including the Dominican friar Bartolomé de Las Casas denounced the document and its usage in the conquest campaigns. One 16th-century chronicler writing about the early phases of the Caribbean conquests asserted that the Indians would bear the requirement (in a language they did not understand) only after they had been captured and enslaved.*



On the part of the King, don Fernando, and of doña Juana, his daughter, Queen of Castille and León, subduers of the barbarous nations, we their servants notify and make known to you, as best we can, that the Lord our God, Living and Eternal, created the Heaven and the Earth, and one man and one woman, of whom you and we, all the men of the world, were and are descendants, and all those who came after us. But, on account of the multitude which has sprung from this man and woman in the five thousand years since the world was created, it was necessary that some men should go one way and some another, and that they should be divided into many kingdoms and provinces, for in one alone they could not be sustained.

Of all these nations God our Lord gave charge to one man, called St. Peter, that he should be Lord and Superior of all the men in the world, that all should obey him, and that he should be the head of the whole human race, wherever men should live, and under whatever law, sect, or belief they should be; and he gave him the world for his kingdom and jurisdiction.

And he commanded him to place his seat in Rome, as the spot most fitting to rule the world from; but also he permitted him to have his seat in any other part of the world, and to judge and govern all Christians, Moors, Jews, Gentiles, and all other sects. This man was called Pope, as if to say, Admirable Great Father and Governor of men. The men who lived in that time obeyed that St. Peter, and took him for Lord, King, and Superior of the universe; so also they have regarded the others who after

him have been elected to the pontificate, and so has it been continued even till now, and will continue till the end of the world.

One of these Pontiffs, who succeeded that St. Peter as Lord of the world, in the dignity and seat which I have before mentioned, made donation of these isles and Tierra-firme to the aforesaid King and Queen and to their successors, our lords, with all that there are in these territories, as is contained in certain writings which passed upon the subject as aforesaid, which you can see if you wish.

So their Highnesses are kings and lords of these islands and land of Tierra-firme by virtue of this donation: and some islands, and indeed almost all those to whom this has been notified, have received and served their Highnesses, as lords and kings, in the way that subjects ought to do, with good will, without any resistance, immediately, without delay, when they were informed of the aforesaid facts. And also they received and obeyed the priests whom their Highnesses sent to preach to them and to teach them our Holy Faith; and all these, of their own free will, without any reward or condition, have become Christians, and are so, and their Highnesses have joyfully and benignantly received them, and also have commanded them to be treated as their subjects and vassals; and you too are held and obliged to do the same. Wherefore, as best we can, we ask and require you that you consider what we have said to you, and that you take the time that shall be necessary to understand and deliberate upon it, and that you acknowledge the Church as the Ruler and Superior of the whole world, and the high priest called Pope, and in his name the King and Queen Doña Juana our lords, in his place, as superiors and lords and kings of these islands and this Tierra-firme by virtue of the said donation, and that you consent and give place that these religious fathers should declare and preach to you the aforesaid.

If you do so, you will do well, and that which you are obliged to do to their Highnesses, and we in their name shall receive you in all love and charity, and shall leave you, your wives, and your children, and your lands, free without servitude, that you may do with them and with yourselves freely that which you like and think best, and they shall not compel you to turn Christians, unless you yourselves, when informed of the truth, should wish to be converted to our Holy Catholic Faith, as almost all the inhabitants of the rest of the islands have done. And, besides this, their Highnesses award you many privileges and exemptions and will grant you many benefits.

But, if you do not do this, and maliciously make delay in it, I certify to you that, with the help of God, we shall powerfully enter into your country, and shall make war against you in all ways and manners that we can, and shall subject you to the yoke and obedience of the Church and of their Highnesses; we shall take you and your wives and your children, and shall make slaves of them, and as such shall sell and dispose of them as their Highnesses may command; and we shall take away your goods, and shall do you all the mischief and damage that we can, as to vassals who do not obey, and refuse to receive their lord, and resist and contradict him; and we protest that the deaths and losses which shall accrue from this are your fault, and not that of their Highnesses, or ours, nor of these cavaliers who come with us. And that we have said this to you and made this Requisition, we request the notary here present to give us his

testimony in writing, and we ask the rest who are present that they should be witnesses of this Requisition.

*Source:* Arthur Helps. *The Spanish Conquest in America and Its Relation to the History of Slavery and to the Government of the Colonies*, vol. 1, 264–267 (London: J. W. Parker & Sons, 1855–1861).

## Spanish and Indigenous Voices in the Conquest of Mexico

*What follows are a series of brief vignettes from one of the most dramatic episodes of the 16th century, the conquest of Mexico. The first three documents are taken from Spanish sources, two of which are drawn from eyewitness accounts of the conquest. However, unlike many regions of the Americas where the conquest narrative is told only from the perspective of the Spanish participants, Mexico's story has also been told from the perspective of the vanquished. Thus, the Spanish accounts are then followed by three indigenous accounts of the conquest, originally written in the Nahuatl language just decades after the events they describe and appearing in the Florentine Codex.*

### Hernando Cortés, Third Letter to King Charles I, May 15, 1522 (Excerpt)

*In 1519, Cuba's governor, Diego Velázquez de Cuéllar, appointed Hernando Cortés to lead an exploratory expedition to the Mexican coastline. However, Cortés had other plans. Cuba's governor had granted Cortés license to explore and trade along the Gulf coast of Mexico, but he was not granted authorization to conquer or colonize. Nevertheless, Cortés ignored those instructions (and restrictions) and instead transformed the exploration into a two-year war of conquest against the Aztec Empire. In order to gain the favor of King Charles of Spain, Cortés wrote a series of letters, justifying his actions and outlining his services to the Crown. Below is an excerpt from Cortés's third letter to the king, dated May 15, 1522. The letter records the lengthy siege of the city of Tenochtitlán and its final capture on August 13, 1521.*



That evening I arranged that when we entered the city on the following day three heavy guns should be prepared and taken into the city with us, for I feared that the enemy, who were so massed together that they had no room to turn around, might crush us as we attacked, without actually fighting. I wished, therefore, to do them some harm with the guns, and so induce them to come out to meet us. I also ordered the *alguacil mayor* (chief constable) to make ready the brigantines, so that they might sail into a large

lake between the houses, where all the canoes had gathered; for they now had so few houses left that the lord of the city lived in a canoe with certain of his chieftains, not knowing where else to go. Thus we made our plans for the morrow.

When it was light I had all the men made ready and the guns brought out. On the previous day I had ordered Pedro de Alvarado to wait for me in the market square and not to attack before I arrived. When all the men were mustered and all the brigantines were lying in wait behind those houses where the enemy was gathered, I gave orders that when a harquebus was fired they should enter the little of the city that was still left to win and drive the defenders into the water where the brigantines were waiting. I warned them, however, to look with care for Guatimucín [Cauhtémoc], and to make every effort to take him alive, for once that had been done the war would cease. I myself climbed onto a roof top, and before the fight began I spoke with certain chieftains of the city whom I knew, and asked them for what reason their lord would not appear before me; for, although they were in the direst straits, they need not all perish; I asked them to call him, for he had no cause to be afraid. Two of those chieftains then appeared to go to speak with him. After a while they returned, bringing with them one of the most important persons in the city, whose name was Ciguacoacin, and he was captain and governor of them all and directed all matters concerning the war. I welcomed him openly, so that he should not be afraid; but at last he told me that his sovereign would prefer to die where he was rather than on any account appear before me, and that he personally was much grieved by this, but now I might do as I pleased. I now saw by this how determined he was, and so I told him to return to his people and to prepare them, for I intended to attack and slay them all; and so he departed after having spent five hours in such discussions.

The people of the city had to walk upon their dead while others swam or drowned in the waters of that wide lake where they had their canoes; indeed, so great was their suffering that it was beyond our understanding how they could endure it. Countless numbers of men, women and children came out toward us, and in their eagerness to escape many were pushed into the water where they drowned amid that multitude of corpses; and it seemed that more than fifty thousand had perished from the salt water they had drunk, their hunger and the vile stench. So that we should not discover the plight in which they were in, they dared neither throw these bodies into the water where the brigantines might find them nor throw them beyond their boundaries where the soldiers might see them; and so in those streets where they were we came across such piles of the dead that we were forced to walk upon them. I had posted Spaniards in every street, so that when the people began to come out they might prevent our allies from killing those wretched people, whose number was uncountable. I also told the captains of our allies that on no account should any of those people be slain; but they were so many that we could not prevent more than fifteen thousand being killed and sacrificed that day. But still their warriors and chieftains were hiding in corners, on roof tops, in their houses or in canoes on the lake, but neither their dissimulations or anything else availed them anything, for we could clearly see their weakness and their suf-

fering. When I saw that it was growing late and that they were not going to surrender or attack I ordered the two guns to be fired at them, for although these did some harm it was less than our allies would have done had I granted them license to attack. But when I saw that this was of no avail I ordered the harquebus to be discharged, whereupon that corner which they still held was taken and its defenders driven into the water, those who remained surrendering without a fight.

Then the brigantines swept into the inner lake and broke through the fleet of canoes; but the warriors in them no longer dared fight. God willed that Garci Holguín, a captain of one of the brigantines, should pursue a canoe which appeared to be carrying persons of rank; and as there were two or three crossbowmen in the bows who were preparing to fire, the occupants of the canoe signaled to the brigantine not to shoot, because the lord of the city was with them. When they heard this our men leapt aboard and captured Guatimucín and the lord of Tacuba and the other chieftains with them. These they then brought to the roof close to the lake where I was standing, and, as I had no desire to treat Guatimucín harshly, I asked him to be seated, whereupon he came up to me and, speaking in his language, said that he had done all he was bound to do to defend his own person and his people, so that now they were reduced to this sad state, and I might do with him as I pleased. Then he placed his hand upon a dagger of mine and asked me to kill him with it; but I reassured him saying that he need fear nothing. Thus, with this lord as prisoner, it pleased God that the war should cease, and the day it ended was Tuesday, the feast of Saint Hippolytus, the thirteenth of August, in the year 1521. Thus from the day we laid siege to the city, which was on the thirtieth of May of that same year, until it fell, there passed seventy-five days, during which time Your Majesty will have seen the dangers, hardships and misfortunes which these, Your vassals, endured, and in which they ventured their lives. To this, their achievements will bear testimony.

Of all those seventy-five days not one passed without our being engaged in some manner with the enemy. On the day that Guatimucín was captured and the city taken, we gathered up all the spoils we could find and returned to our camp, giving thanks to Our Lord for such a favor and the much desired victory which He had granted us.

*Source:* Hernando Cortés. *Letters from Mexico*, rev. ed., translated and edited by Anthony Pagden, 262–265 (New Haven, Conn.: Yale University Press, 1986).

### Francisco López de Gómara, *Istoria de la conquista de México*, 1552 (Excerpt)

*In 1552, roughly three decades after the Spanish conquest of Tenochtitlán, Hernando Cortés's private secretary, Francisco López de Gómara, published a history of the conquest of Mexico (Istoria de la conquista de México). Gómara himself was not a participant in the conquest; however, he had access to Cortés's papers, and he likely interviewed some of the participants. Gómara's work celebrated and glorified Cortés's*

role in the conquest of Mexico, ignoring the contributions of other conquistadores. This omission irritated many of the other Spanish participants in the conquest, and Gómara's publication certainly influenced Bernal Díaz del Castillo to complete his True History of the Conquest of Mexico.

The excerpt below describes an event that occurred during the late spring of 1520 in the Aztec capital city of Tenochtitlán. Cortés and his men had arrived in Tenochtitlán in early November 1519. Within the first week, Cortés had taken Montezuma captive and placed the Aztec ruler under house arrest. Meanwhile, Cuba's governor Diego de Velázquez de Cuéllar had dispatched a group of 800 men led by Pánfilo de Narváez to capture Cortés—who had disobeyed the governor's orders by sailing to Mexico—and take him back to Cuba as prisoner. Narváez's party landed on the Mexican coast on April 20, 1520. When Cortés learned of their arrival, he quickly assembled 266 men and set off from Tenochtitlán for the coast. On arrival, he launched a surprise nighttime attack during which he captured Narváez; not only that, but he also managed to persuade most of Narváez's men to accompany him back to Tenochtitlán to assist in the conquest.

However, when Cortés returned to the capital, he quickly discovered that all had not gone well during his absence. When Cortés had left Tenochtitlán for Veracruz two months earlier, he appointed Pedro de Alvarado to be in charge of the 80 Spaniards left behind in the city. In Cortés's absence, Alvarado ordered the massacre of a large number of indigenous nobles during the Aztec festival of Tóxcatl, the celebration to honor the god Huitzilopochtli. The killings provoked Tenochtitlán's residents to attack the Spaniards, and the fighting forced the Spaniards to retreat into the city's fortified palace compound.

Below is Gómara's account of the Tóxcatl massacre. Readers should compare Gómara's rendering of this event with the Nabua version of the same incident, which is also included in the following pages.



Cortés wanted to get at the root of the rebellion of the Mexicans. He interrogated all the Spaniards together, and some said it was caused by the message sent by Narváez; others, by the desire of the people to drive them out of Mexico, as had been planned, as soon as there were ships in which to sail, for during the fighting they kept shouting "Get out!" Others said it was to liberate Montezuma, because the Indians said "Free our god and king if you wish to live!" Still others said it was because the Indians wanted to steal the gold, silver, and jewels of the Spaniards, for they heard the Indians say: "Here you shall leave the gold you took from us!" Again, some said it was to keep the Tlaxcalans and other mortal enemies out of Mexico. Many, finally, believed it was because the images of the gods had been cast down and [the Indians] wished to give themselves to the devil.

Any of these things could have caused the rebellion, let alone all of them together; but the principal one was this: A few days after Cortés had left to encounter Narváez, there was

a solemn festival, which the Mexicans wished to celebrate in their traditional fashion. They begged Pedro de Alvarado (who had stayed behind to act as warden and Cortés' lieutenant) to give his permission, so that he would not think they were gathering to massacre the Spaniards. Alvarado consented, with the proviso that they were not to kill men in sacrifice or bear arms. More than six hundred (some say more than a thousand) gentlemen, and even several lords, assembled in the yard of the main temple, where that night they made a great hubbub with their drums, conches, trumpets, and bone fifes, which emit a loud whistle. They were naked, but covered with precious stones, pearls, necklaces, belts, bracelets, jewels of gold, silver, and mother-of-pearl, wearing many rich plumes on their heads. They performed the dance called *macehualixtli*, which means "reward through work" (from *macehualli*, a farmer).

... [T]hey spread mats in the temple yard and placed drums upon them. They danced in rings, grasping hands, to the music of the singers, to which they responded. The songs were sacred, not profane, and were sung to praise the god whose feast was being celebrated, to induce him to give them water or grain, health or victory, or to thank him for giving them peace, children, health, and the like. Those who knew the language and these ceremonial rites said that, when the people dance in the temple [on this occasion], they performed very differently from those who danced the *netotelixtli*, in voice, movement of the body, head, arms, and feet, by which they manifest their concepts of good and evil. The Spaniards called this dance an *areyto*, a word they brought from the islands of Cuba and Santo Domingo.

While the Mexican gentlemen were dancing in the temple yard of Huitzilopochtli, Pedro de Alvarado went there, whether of his own notion or following the decision of the rest, I cannot say. Some say he had been warned that the Indian nobles of the city had assembled to plot the mutiny and rebellion which they later carried out; others, that [the Spaniards] went to see them perform this much-praised and famous dance, and, seeing them so rich, they coveted the gold the Indians were wearing, so he [Alvarado] blocked the entrances with ten or twelve Spaniards at each one, himself went in with more than fifty, and cruelly and pitilessly stabbed and killed the Indians, and took what they were wearing. Cortés, who must have felt badly about the affair, dissembled his feelings so as not to irritate the perpetrators, for it happened at a time when he had need of them, either against the Indians, or to put down trouble among his own men.

Source: Francisco López de Gómara. *Istoria de la conquista de Mexico*. In *Cortés: The Life of the Conqueror*, translated and edited by Lesley B. Simpson, 206–208 (Berkeley: University of California Press, 1964).

### Bernal Díaz del Castillo, *The True History of the Conquest of Mexico*, ca. 1567 (Excerpt)

This excerpt comes from the firsthand account of the Spanish conquistador Bernal Díaz del Castillo, who was an eyewitness to one of the most defining moments in history, the Spanish conquest of Mexico. Díaz is best known today for his detailed chronicle *Historia verdadera de la conquista de la Nueva*

España (The True History of the Conquest of New Spain). *He was born in the Spanish town of Medina del Campo in 1495, and he arrived in the New World as a young man in 1514. Before participating in Hernando Cortés's fateful voyage in 1519, Díaz had participated in other expeditions as a foot soldier in Cuba and Yucatán. Nonetheless, while his chronicle covers the general period from 1517 to 1568, its primary focus is the events from 1519 to 1521: the downfall of Tenochtitlán and the Aztec Empire.*

*He began writing his retrospective account in 1551 and used Cortés's own letters to the Spanish king and Francisco López de Gómara's biographic chronicle, often by taking a strong position against the latter. Many of the inaccuracies pointed out in Díaz's chronicle are probably due to the fact he was writing three decades after the events he described. Furthermore, Díaz was attempting to morally justify the Spaniards' actions during the conquest, depicting the conquistadores as the Christian liberators of New Spain, both from the devil's influence as well as the brutal Aztecs; he further emphasized his own poverty and the small return the conquistadores had received and thus hoped that his chronicle would guarantee a future prosperity for his heirs. A copy he sent to Spain in 1575 was not published until 1632. Díaz kept working on another version until his death in Guatemala in 1584. This latter manuscript was not published until the early 20th century and is considered today as one of the most detailed chronicles of the conquest of Mexico.*

*In the excerpt below, Díaz describes the moment when the Spaniards, led by Cortés, first caught glimpse of the Mexica city of Tenochtitlán, capital of the Aztec Empire. Not only does Díaz marvel at the site of the city, its natural setting, its architecture and beauty, but he also laments its destruction. Of course, it is worth noting that Díaz neglects to mention the thousands of Indian allies who had accompanied Cortés and his men to Tenochtitlán.*



During the morning, we arrived at a broad Causeway and continued our march towards Iztapalapa, and when we saw so many cities and villages built in the water and other great towns on dry land and that straight and level Causeway going towards Mexico, we were amazed and said that it was like the enchantments they tell of in the legend of Amadis, on account of the great towers and cues and buildings rising from the water, and all built of masonry. And some of our soldiers even asked whether the things that we saw were not a dream. It is not to be wondered at that I here write it down in this manner, for there is so much to think over that I do not know how to describe it, seeing things as we did that had never been heard of or seen before, not even dreamed about.

Thus, we arrived near Iztapalapa, to behold the splendour of the other Caciques who came out to meet us, who were the Lord of the town named Cuitlahuac, and the Lord of Culhuacan, both of them near relations of Montezuma.

And then when we entered the city of Iztapalapa, the appearances of the palaces in which they lodged us! How spacious and well built they were, of beautiful stone work and cedar wood, and the wood of other sweet scented trees, with great rooms and courts, wonderful to behold, covered with awnings of cotton cloth.

When we had looked well at all of this, we went to the orchard and garden, which was such a wonderful thing to see and walk in, that I was never tired of looking at the diversity of the trees, and noting the scent which each one had, and the paths full of roses and flowers, and the many fruit trees and native roses, and the pond of fresh water. There was another thing to observe, that great canoes were able to pass into the garden from the lake through an opening that had been made so that there was no need for their occupants to land. And all was cemented and very splendid with many kinds of stone [monuments] with pictures on them, which gave much to think about. Then the birds of many kinds and breeds which came into the pond. I say again that I stood looking at it and thought that never in the world would there be discovered other lands such as these, for at the time there was no Peru, nor any thought of it. Of all these wonders that I then beheld today all is overthrown and lost, nothing left standing. Let us go on, and I will relate that the Caciques of that town and of Coyoacan brought us a present of gold, worth more than two thousand pesos.

Early next day we left Iztapalapa with a large escort of those great Caciques whom I have already mentioned. We proceeded along the Causeway which is here eight paces in width and runs so straight to the city of Mexico that it does not seem to me to turn either much or little, but, broad as it is, it was so crowded with people that there was hardly room for them all, some of them going to and others returning from Mexico, besides those who had come out to see us, so that we were hardly able to pass by the crowds of them that came; and the towers and cues were full of people as well as the canoes from all parts of the lake. It was not to be wondered at, for they had never before seen horses or men such as we are.

Gazing on such wonderful sights, we did not know what to say, or whether what appeared before us was real, for on one side, on the land, there were great cities, and in the lake ever so many more, and the lake itself was crowded with canoes, and in the Causeway were many bridges at intervals, and in front of us stood the great City of Mexico, and we—we did not even number four hundred soldiers! and we well remembered the words and warnings given us by the people of Huexotzingo and Tlaxcala, and the many other warnings that had been given that we should beware of entering Mexico, where they would kill us, as soon as they had us inside.

Let the curious readers consider whether there is not much to ponder over in this that I am writing. What men have there been in the world who have shown such daring?

*Source: Bernal Díaz del Castillo. The Discovery and Conquest of Mexico, 2d ed., translated by A. P. Maudslay, 190–192 (Cambridge: Da Capo Press, 2003).*

### A Nahuatl Account of the Tóxcatl Massacre, Florentine Codex, ca. 1550s (Excerpt)

The three brief excerpts that follow are all taken from the Florentine Codex, one of the most remarkable texts ever produced in the New World. This monumental work, written in Nahuatl and Spanish, was completed under the direction of the famed Franciscan friar Bernardino de Sahagún. It is bound in three volumes, divided into 12 parts called “books.” Sahagún conceived the work as something akin to an encyclopedic history of traditional Nahuatl (Aztec) life and culture (the first 11 books), culminating in a Nahuatl account of the conquest of Mexico (book 12).

The Florentine Codex is unique in its size, coverage, sophistication, and depth; its hundreds of folios are beautifully written in parallel Nahuatl and Spanish columns and copiously illustrated. Sahagún began to compile material for the manuscript in the late 1540s, almost three decades after the conquest, and he continued to work on it throughout the 1550s and 1560s. However, the final product was very much a collaborative effort. Sahagún employed numerous Nahuatl aides to gather information, interview witnesses, and compose the text in their own language (Nahuatl). For example, much of the information used to write about the Spanish conquest likely was based on testimonies gathered from individuals who witnessed the events firsthand.

Still, it is important to recognize that the entire work was completed under Sahagún’s careful supervision, even if the extent of Sahagún’s influence remains difficult to quantify. However, despite the friar’s involvement in the creation and organization of the Florentine Codex, recent scholarship (in particular the magisterial work of James Lockhart) has convincingly demonstrated that the work contains numerous elements, both in form and content, that derived from Nahuatl oral traditions. It is therefore highly likely that the views of the Spanish conquest in the three excerpts that follow represent authentic Indian voices, told by survivors who witnessed firsthand the fall of the Aztec capital city of Tenochtitlán.

Chapter 20 of book 12 presents a Nahuatl version of the Tóxcatl massacre of 1520. Readers should compare the Nahuatl version of this event with the Spanish account of Francisco López de Gómara (included in previous pages).



Twentieth chapter, where it is said how the Spaniards killed and annihilated the Mexica who were celebrating the feast of Huitzilopochtli at what they call the Teohtualco [Divine Courtyard, Courtyard of Gods, temple courtyard].

When things were already going on, when the festivity was being observed and there was dancing and singing, with voices raised in song, the singing was like the noise of waves breaking against the rocks.

When it was time, when the moment had come for the Spaniards to do the killing, they came out equipped for battle.

They came and closed off each of the places where the people went in and out: Quauhquihuac, Tecpantzinco, Acatliyacapan, and Tezcacoac. And when they had closed these exits, they stationed themselves in each, and no one could come out any more.

When this had been done, they went into the temple courtyard to kill people. Those whose assignment it was to do the killing just went on foot, each with his metal sword and his leather shield, some of them iron-studded. Then they surrounded those who were dancing, going among the cylindrical drums. They struck a drummer’s arms; both of his hands were severed. Then they struck his neck; his head landed far away. Then they stabbed everyone with iron lances and struck them with iron swords. They stuck some in the belly, and then their entrails came spilling out. They split open the heads of some, they really cut their skulls to pieces, their skulls were cut up into little bits. And some they hit on the shoulders; their bodies broke open and ripped. Some they hacked on the calves, some on the thighs, some on their bellies, and then all their entrails would spill out. And if someone still tried to run it was useless; he just dragged his intestines along. There was a stench as if of sulfur. Those who tried to escape could go nowhere. When anyone tried to go out, at the entryways they struck and stabbed him.

But some climbed up the wall and were able to escape. Some went into the various calpulli temples and took refuge there. Some took refuge among, entered among those who had really died, feigning death, and they were able to escape. But if someone took a breath and they saw him, they stabbed him. The blood of the warriors ran like water; the ground was almost slippery with blood, and the stench of it rose, and the entrails were lying dragged out. And the Spaniards went everywhere searching in the calpulli temples, stabbing in the places where they searched in case someone was taking shelter there. They went everywhere, scratching about in all the calpulli temples in searching.

And when it became known [what was happening], everyone cried out, “Mexica warriors, come running, get outfitted with devices, shields, and arrows, hurry, come running, the warriors are dying; they have died, perished, been annihilated, o Mexica warriors!” Thereupon there were war cries, shouting, and beating of hands against lips. The warriors quickly came outfitted, bunched together, carrying arrows and shields. Then the fighting began; they shot at them with barbed darts, spears, and tridents, and they hurled darts with broad obsidian points at them. A cloud of yellow reeds spread over the Spaniards.

Source: James Lockhart, ed. and trans. *We People Here: Nahuatl Accounts of the Conquest of Mexico*, 132–136 (Berkeley: University of California Press, 1993).

### A Nahuatl Account of the Noche Triste, Florentine Codex, ca. 1550s (Excerpt)

Following the 1520 Tóxcatl massacre, Pedro de Alvarado and his small Spanish force came under siege in Tenochtitlán. Hernando Cortés and 266 of his men were absent, having left the city to engage the forces of Pánfilo de Narváez, who had been sent from Cuba to arrest Cortés. However, Cortés managed to



capture Narváez in a surprise attack, and he convinced most of Narváez's men to return with him to Tenochtitlán to resume the conquest. With his forces replenished (1,300 Spaniards and 200 Tlaxcalans), Cortés was permitted to reenter Tenochtitlán unimpeded. However, he and his men soon found themselves trapped and under attack. Unable to withstand the siege, the Spaniards attempted to escape the city during a strong rainstorm, late at night on June 30, 1520. The Mexica (Aztecs) discovered them, however, and attacked them as they fled on the causeway. Only a portion of the group—which included Cortés—was able to reach the western shore of the lake alive. In total, 860 Spaniards and at least 1,000 Tlaxcalans were killed before the survivors finally reached Tlaxcala five days later. Spanish chroniclers would later refer to this event as the *Noche Triste*, or “night of sorrows.”



Twenty-fourth chapter, where it is said how the Spaniards and Tlaxcalans came out and fled from Mexico by night.

When night had fallen and midnight had come, the Spaniards came out. They formed up, along with all the Tlaxcalans. The Spaniards went ahead, and the Tlaxcalans were following, bringing up the rear, like their wall of protection. [The Spaniards] went carrying a wooden platform [or platforms]; they laid it down at a canal and crossed over on it.

At this time it was drizzling and sprinkling, the rain was gently dripping down. They were able to cross some other canals, at Tecpantzinco, Tzapotla, and Atenchicalco. But when they got to Mixcoatechialtitlan, at the fourth canal, there they were seen coming out. It was a woman fetching water who saw them; then she shouted, saying, “O Mexica, come running, your enemies have come out, they have emerged secretly!” Then another person shouted, on top of [the temple of] Huitzilopochtli; his crying spread everywhere, everyone heard it. He said, “O warriors, o Mexica, your enemies are coming out, let everyone hasten with the war boats and on the roads!”

When it was heard, there was a clamor. Everyone scrambled; the operators of the war boats hastened and paddled hard, hitting one another's boats as they went in the direction of Mictlantongo and Macuilcuitlapilco. The war boats came upon them from both directions; the war boats of the Tenochca and the war boats of the Tlatelolca converged on them. And some people went on foot, going straight to Nonoalco, heading toward Tlacopan to try to cut them off there. Then the war-boat people hurled barbed darts at the Spaniards; from both sides the darts fell on them. But the Spaniards also shot at the Mexica, shooting back with iron bolts and guns. There were deaths on both sides. Spaniards and Tlaxcalans were hit, and Mexica were hit.

When the Spaniards reached Tlaltecayoacan, where the Tolteca canal is, it was as though they had fallen off a precipice; they all fell and dropped in, the Tlaxcalans, the people of Tlilihquitepec, and the Spaniards, along with the horses, and some women. The canal was completely full of them, full to the very top. And those who came last just passed and crossed over on people, on bodies.

When they reached Petlascalco, where there was yet another canal, they passed gently, slowly, gradually, with caution, on the wooden platform. There they restored themselves, took their breath, regained their vigor. When they reached Popotlan, it dawned, light came. They began to go along with spirit, they went heading into the distance.

Then the Mexica went shouting at them, surrounding them, hovering about them. They captured some Tlaxcalans as they went, and some Spaniards died. Also Mexica and Tlatelolca were killed; there was death on both sides. They drove and pursued [the Spaniards] to Tlacopan. And when they had driven them to Tiliuhcan, to Xocotliyoahuican, at Xoxocotla, Chimalpopoca, son of Moteucōma, died in battle. They came upon him lying hit by a barbed dart and struck [by some hand weapon]. At the same place died Tlaltecatzin, a Tepaneca lord who had been guiding the Spaniard, pointing out the way for them, conducting them, showing them the road.

Then they crossed the Tepçolat (a small river); they forded and went over the water at Tepçolac. Then they went up to Acueco and stopped at Otoncalpolco, [where] wooden walls or barricades were in the courtyard. There they all took a rest and caught their breath, there they restored themselves. There the people of Teocalhueyacan came to meet them and guide them.

Source: James Lockhart, ed. and trans. *We People Here: Nahuatl Accounts of the Conquest of Mexico*, 154–156 (Berkeley: University of California Press, 1993).

### A Nahuatl Account of the Smallpox Epidemic, Florentine Codex, ca. 1550s (Excerpt)

The following document, from chapter 29 of book 12 of the Florentine Codex, records the spread of a smallpox epidemic that struck Central Mexico between October and December of 1520. Among the many victims (some have suggested that the epidemic claimed 40 percent of Central Mexico's population in just one year) was the new Aztec ruler who followed Montezuma, Cuicatláhuac.



Twenty-ninth chapter, where it is said how, at the time the Spaniards left Mexico, there came an illness of pustules of which many local people died; it was called “the great rash” [smallpox].

Before the Spaniards appeared to us, first an epidemic broke out, a sickness of pustules. It began in Tepeilhuitl. Large bumps spread on people; some were entirely covered. They spread everywhere, on the face, the head, the chest, etc. [The disease] brought great desolation; a great many died of it. They could no longer walk about, but lay in their dwellings and sleeping places, no longer able to move or stir. They were unable to change position, to stretch out on their sides or face down, or raise their heads. And when they made a motion, they called out loudly. The pustules that covered people caused great desolation; very many people died of them, and many just starved to death; starvation reigned, and no one took care of others any longer.

On some people, the pustules appeared only far apart, and they did not suffer greatly, nor did many of them die of it. But many people's faces were spoiled by it, their faces and noses were made rough. Some lost an eye or were blinded.

This disease of pustules lasted a full sixty days; after sixty days it abated and ended. When people were convalescing and reviving, the pustules disease began to move in the direction of Chalco. And many were disabled or paralyzed by it, but they were not disabled forever. It broke out in Teotl eco, and it abated in Panquetzaliztli. The Mexica warriors were greatly weakened by it.

And when things were in this state, the Spaniards came, moving toward us from Tetzococo. They appeared in the direction of Quauhtitlan and made a halt at Tlacopan. There they gave one another assignments and divided themselves. Pedro de Alvarado was made responsible for the road coming to Tlatelolco. The Marqués [Cortés] went and established himself in Coyoacan, which became his responsibility, along with the road coming from Acachinanco to Tenochtitlán, for the Marqués considered the Tenochca great and valiant warriors.

And it was right in Nextlatilco, or in Ilyacac, that war first began. Then [the Spaniards] quickly reached Nonoalco, and the warriors came pursuing them. None of the Mexica died; then the Spaniards retreated. The warriors fought in boats; the war-boat people shot at the Spaniards, and their arrows sprinkled down on them. Then [the main force of the Mexica] entered [Nonoalco]. Thereupon the Marqués sent [his men] toward the Tenochca, following the Acachinanco road. Many times they skirmished, and the Mexica went out to face them.

Source: James Lockhart, ed. and trans. *We People Here: Nahuatl Accounts of the Conquest of Mexico*, 180–184 (Berkeley: University of California Press, 1993).

## Spanish and Indigenous Voices in the Conquest of Peru

The first document in this section records one of the most dramatic episodes in the conquest of the Inca Empire, namely the capture of the Inca ruler Atahualpa. It is told from the perspective of the Spanish soldier-chronicler Pedro de Cieza de León. Cieza was not present at the time of Atahualpa's capture, but his account, written more than three decades after the events it describes, is still one of the most important texts for early colonial Peru.

Cieza's account is then followed by a remarkable indigenous text, written by Titu Cusi Yupanqui, the eldest of Manco Inca, the ruler installed by the Spanish after Atahualpa's execution. In this excerpt, Tuti Cusi records two speeches that he claimed his father delivered before his death.

The final document in this section is an incredible letter written by a disgruntled conquistador to Spain's King Philip II. The letter's author, Lope de Aguirre, condemns

King Philip for not rewarding those who fought and suffered in His Majesty's service. Aguirre then explains his reasons for rebelling against the Crown and his intentions to conquer Peru for himself and his followers.

### Pedro de Cieza de León, *Crónica del Perú*, ca. 1554 (Excerpt)

*Born in Llerena, Spain, sometime between 1518 and 1522, Pedro de Cieza de León was still a young boy when he left his family in early June 1535 and journeyed across the Atlantic. After a brief stay on the island of Hispaniola, Cieza de León sailed to Cartagena (present-day Colombia). From 1535 until his return to Llerena in 1552, Cieza de León traveled extensively throughout Colombia, Ecuador, Peru, and Bolivia. He took copious notes on his journeys and interviewed Spanish veterans of the initial conquest campaigns, as well as Inca lords and indigenous informants who survived the initial conquest of Peru. From his personal experiences and his detailed interviews, Cieza de León drafted one of the finest chronicles of the 16th century, Crónica del Perú. Initially, Cieza planned to write a four-part history of Peru; however, his death in 1554 prevented him from completing the entire chronicle. Nevertheless, Cieza's remarkable history remains one of the most important accounts of the conquest and early settlement of the Andean region of South America.*

*In the brief excerpt below, Cieza records one of the most dramatic episodes in the conquest of Peru, the capture of the Inca Atahualpa. In November 1532, a small band of 168 Spanish conquistadores, led by Francisco Pizarro, marched into the northern Andes of Peru, thus initiating the conquest of the Inca Empire. After reaching the city of Cajamarca, Pizarro sent two squads, headed by Hernando de Soto and Hernando Pizarro, to the camp where the Inca Atahualpa and his army rested. Atahualpa and his forces had just emerged victorious in a lengthy and brutal civil war between Atahualpa and his half brother Huáscar. Using Indian translators who had been seized during one of Pizarro's earlier expeditions to Peru, the emissaries conversed with Atahualpa, who agreed to visit the Spaniards in Cajamarca.*

*The following afternoon, November 16, Atahualpa went down into the town, carried on a litter and accompanied by several thousand bodyguards. Pizarro sent out Father Vicente de Valverde, who explained to Atahualpa (through the indigenous translator named Felipillo by the Spaniards) the requerimiento, a legalism that asserted Spain's sovereignty over the New World by way of papal donation and that encouraged the indigenous peoples to become Christians. Never having seen a book, Atahualpa asked to see a Bible carried by the priest but haughtily threw it on the ground when he could make nothing of it. At that point, the priest ran toward the*

*Spaniards, who were hidden in buildings around the square. They fired upon Atahualpa's men and then stormed out, the horses trampling the Inca's escort. Terrified Indians tried desperately to escape from the walled square but were cut down. In the end, Pizarro himself captured Atahualpa and placed the Inca ruler under house arrest. Thus began the conquest of the Incas.*



## CHAPTER XLV

### About how Atahualpa entered the plaza where the Christians were, and how he was seized and many of his people were killed and wounded

Don Francisco Pizarro had ordered that General Hernando Pizarro and the captains Soto, Mena and Belalcázar and the Spaniards on horseback ready for battle should be prepared to charge at the enemy because Atahualpa had sent word that they should be hidden and even the horses tied up. They put some small guns in a high place designated for watching games or making sacrifices, so that Pedro de Candia could discharge them when a certain signal, agreed upon by all of them, was given. At that [signal], the horsemen and footmen were to boldly charge, and about only fifteen shield bearers would stay with the governor. They would prudently allow some squadrons and Atahualpa to enter the plaza, but then they would take the two gates, and if [the Indians] wanted war, they would lance and capture those that they could. But they also discussed that if Atahualpa came in peace, they would uphold it.

[Atahualpa] began to depart from where he had halted; in a short time all the tents were raised, and the people kept the order and arrangement of their squadrons, many with hidden arms, as has been written. They carried large drums, many trumpets, and their banners were raised; it certainly was a marvelous sight to see such an army mobilized for so few. Every so often an Indian came to survey the condition of the Spaniards. Each one would return joyfully, [saying] that they all hid out of fear in the houses, and only their captain with very few men were visible. When Atahualpa heard this, his pride grew further, and he seemed fiercer than he later appeared. Most of his men urged him to go or give them permission to go and tie up the Christians, who did not emerge, already fearful because they saw their strength. When [Atahualpa] arrived within a crossbow shot of the lodgings, some Indians went ahead, surveying more carefully how our men were. They saw what they had heard: not a horse or a Christian other than the governor with those few could be seen. They talked about [the Christians] as if they already were prisoners in their power.

They began to enter the plaza. When the squadrons reached the center of it, they formed a very large circle. Atahualpa entered after many of his captains and their people had done so. He passed all of them before his litter was set down. Because he was in the middle of the people, he stood up on top of the platform. He spoke loudly that they should be brave, that they should take care that no Christian escape them, or any horse, and that they should know that [the Christians] were hiding in fear. He reminded them how they had always

vanquished many people and nations, serving under his and his father's banners. He assured them that if because of their sins the Christians should prevail against them, it would be the end of their pleasures and religious beliefs because they would do with them what they had heard had been done with those of Coaque and Puná. He took one banner in his hand and vigorously waved it.

When Pizarro saw that Atahualpa had halted in the plaza, he ordered Friar Vicente de Valverde, a Dominican, to go to Atahualpa and prod him to come because it was already so late that the sun was about to set and to admonish him to put down the weapons and come in peace. The friar took along Felipillo so that his cause would be understood by Atahualpa. When he reached him, he told him what has been said and that he was a priest of God who preached His law and strove whenever possible for peace rather than war because that pleased God very much. While he was saying this, he held his breviary in his hands. Atahualpa listened to this as something of a mockery. Through the interpreter he understood everything well. He asked Friar Valverde for his breviary. He placed it in his hands, somewhat disconcerted from finding himself among such people. Atahualpa looked at it and looked at it again, and he leafed through it once or twice. Annoyed with so many pages, he flung it into the air without knowing what it was because to have understood it, they should have told him in another way, but the friars never preach around here, except where there is no danger or raised lances. And looking at Friar Vicente and Felipillo, [Atahualpa] said to tell Pizarro that he would not move from the place where he was until they return and retribute to him all the gold, silver, stones, cloth, Indian men and women, and everything else that they had stolen. With this answer, having collected the breviary, the skirts of his habit flying high, [the friar] rushed back to Pizarro, telling him that this tyrant Atahualpa was like a wounded dog and that they should attack him.

When the friar left, according to what they tell us now, in order to provoke his people's anger Atahualpa told them that the Christians—in contempt of him and after having raped so many women and killed so many men and pillaged whatever they could without shame or fear—were asking for peace with the intention to gain supremacy. They let out loud cries and sounded their instruments. The rest of the squadrons had arrived, but they did not enter the plaza because it was so full; they remained next to it on another plain. When Pizarro learned what had happened to Friar Vicente with Atahualpa, and realizing that there was no time to spare, he raised a towel, the signal to move against the Indians. Candia fired the shots, a novelty for them and frightening, but even more so were the horses and the horsemen who loudly shouting “Santiago, Santiago!” came charging out of the lodgings against the enemies, who were stunned and did not make use of the artifices they had planned. They did not fight; rather, they looked where they could flee. The horsemen entered among them, quickly defeating them. Many were killed and wounded.

With the footmen, who fought with buckler and sword, the governor pushed toward the litter where there was a group of lords. They gave them some slashes that would sever the

hand or arm of those who held the litter, who then with great courage would hold it with the other, wishing to protect their Inca from death or prison. A foot soldier, Miguel Estete, native of Santo Domingo de la Calzada, arrived—the first one to lay a hand on Atahualpa in order to seize him. Then Alonso de Mesa arrived. Pizarro, shouting that they should not kill [Atahualpa], came next to the litter. Because there were so many Indians, they hurt each other more; the horses fell between them everywhere, and they had neither the spirit nor the inclination to fight; they were found wanting that day, or God wished to blind them. They wanted to leave the plaza, but could not because so many filled it. They did a deed never seen or heard; in one furious throng they went for one part of the bulwark that surrounded the plaza, and because the wall was wide, they forced it with such vehemence that they broke it and made way to flee.

They wailed loudly. They were shocked by what they were seeing. They asked each other if it was real or if they were dreaming. And the Inca, where was he? More than two thousand Indians died, and many were wounded. [The Spaniards] went out of the plaza in pursuit to where Atahualpa's camp was. A heavy rain came, which was sufficient relief for the Indians. The Lord Atahualpa was taken by the governor to the lodging, and he ordered that he should be given full honors and good treatment. Some of the Christians shouted to the Indians to come and see Atahualpa because they would find him alive and well and without any wounds—a joyous news for all of them. Thus, more than five thousand Indians without weapons were collected that night; the others dispersed throughout the district of Cajamarca, proclaiming the great misfortune that befell them and shedding many tears for the capture of the lord whom they loved so much.

All the Christians came together and assembled, and Pizarro ordered that they should fire a shot so they could hear what he wanted. There were great spoils of gold and silver vessels, cups of thousands of shapes, cloth of great value, and other jewels of gold and precious stones. Many principal ladies of royal lineage or of *caciques* of the kingdom became captives—some very lovely and beautiful, with long hair, dressed according to their fashion, which is of an elegant style. They also held many *mamaconas*, who are the virgins in their temples. The loot that these 160 men could have had was so great that if they had learned about it without killing Atahualpa and had asked him for more gold and silver, although what he gave was a lot, there would not have been in the world anyone who could equal them. None of the Spaniards had been in danger. They all believed it was a miracle that God allowed it to transpire as it did, and therefore they gave Him many thanks for it. The defeat and capture of Atahualpa took place in the province of Cajamarca, in the jurisdiction of what is today the city of Trujillo, on Friday, the day of the Holy Cross of May of the year of the Lord fifteen hundred and thirty-three years.

Source: Pedro de Cieza de León. *The Discovery and Conquest of Peru*, edited and translated by Alexandra Parma Cook and Noble David Cook, 209–213 (Durham, N.C.: Duke University Press, 1998).

### Titu Cusi Yupanqui, *History of How the Spaniards Arrived in Peru, 1570* (Excerpt)

*The following account is a brief excerpt from a 1570 manuscript entitled Relación de cómo los españoles entraron en Pirú (History of How the Spaniards Arrived in Peru). The account, written by Titu Cusi Yupanqui, is one of only a few colonial texts authored by a native Andean. Titu Cusi was born around the time that Francisco Pizarro initiated the conquest of the Inca Empire in 1532. He was the eldest son of Manco Inca, whom Spanish conquistadores installed as a puppet ruler after they executed Atahualpa in 1533. At the time, Manco Inca was about 20 years old. Manco was a son of the great Inca ruler Huayna Cápac, whose death had touched off a civil war within the Inca Empire between two of Manco's half brothers, Atahualpa and Huáscar.*

*Initially, Manco struggled to win the support of his own people. They knew the Spaniards controlled him, and some wondered if another of Huayna Cápac's sons might better defend the people. A few conspired against him, and Manco persuaded Diego de Almagro, one of the Spanish leaders, to have them murdered. However, despite his initial alliance with the Spanish, Manco soon began to resent the Spaniards' abuse of the Indians and particularly of himself. He therefore conspired to overthrow and expel the Spaniards. On April 18, 1536, Manco Inca escaped from Cuzco and raised a huge army. The Incas besieged Cuzco and ambushed Spanish relief expeditions that had been sent from Lima.*

*Although Manco nearly captured Cuzco, the siege ultimately failed, and his army disintegrated. He withdrew with several thousand followers northwest of Cuzco to Vilcabamba, where he established a new Inca state. On occasion, Manco negotiated with the Spaniards; he even allowed several Spaniards to take refuge at Vilcabamba after they had murdered Francisco Pizarro in revenge for the execution of Diego de Almagro. In 1544, hoping to please the new Spanish viceroy, Blasco Núñez de Vela, the Almagristas murdered Manco while playing quoits.*

*It is unclear why Titu Cusi wrote this account, but he may have been negotiating with Spanish officials to be recognized as the head of the Inca dynasty. Much of the account chronicles the breakdown of the initial alliance between Francisco Pizarro and Manco Inca. Below, Titu Cusi records the speech that Manco Inca allegedly delivered to his captains shortly before his death. It is followed by Titu Cusi's account of the speech his father gave him shortly before his death.*



#### Speech that Manco Inca made to his captains when he was near death. He said:

“Sons, you see me in this way because I trusted these Spanish people, especially the seven who guarded me for so long and whom I treated like sons, as you have seen. And they have repaid my good treatment by doing this to me! I do not think

that I will escape from this. By your very lives, remember what I have told you and admonished you about so many times in Cusco, in Tambo, and in all of the other places where you have been gathered together in response to my call and in all the places where you have gone with me. I do not want to go into it now, since I know that you all remember what I have said. The pain will not permit it and there is no reason to bother you with it.

“I charge you with looking after my son Titu Cusi Yupanqui. You know he is the light of my eyes and that I consider this boy not just a son, but also a brother because of his great capacity for understanding. So I have charged him to look after, and be responsible for, all of you and any children I have. I beg you to treat him in the same way that you have treated me. I am so impressed with him that I know he will thank you and pay you well for it. Therefore, call him to me here so that I can give him my blessing and tell him what he must do.”

### Speech that Manco Inca made to his son at the moment of his death

“My beloved son, you can see how I am, and so I do not have to say any more about my pain in words since deeds have already told the tale. Do not cry. If someone should cry, it should be me, if I could, for having gotten myself into this fix, for believing so firmly in such people as this and treating them so well, even though they were undeserving. As you know, those men came here fleeing from their companions because of crimes they must have committed where they had come from. I took them in and favored them with the heart of a father. Look well: I order you never, ever, to enter into any kind of accord with people such as this, so that what happened to me will not happen to you. Do not allow them to enter your land, even if they approach you with sweet words. Their words deceived me and will deceive you, too, if you believe them.

“I commend your brothers and sisters and your mother to your care, so that you will look after them and take care of them and favor them in the same way I would treat you. See that you do not make my bones suffer by treating your siblings and mother badly, because you know that they will feel it greatly if you do.

“I commend these poor Indians to your care as well. Look after them so far as is reasonable. Remember that they have followed me and protected me and helped me in all my times of need, leaving their lands and environs out of love for me. So do not work them too hard, or harass them, or scold or punish them without reason, because in doing so you will anger the Viracochan. I have ordered them to respect you and honor you as lord in my place, since you are my firstborn son and heir to my kingdom and this is my last wish. I rely on their goodness, and expect them to honor and respect you as their lord and not to do anything other than what I have ordered them or what you would tell them.” Then my father died and left me in the town of Vitcos. . . .

*Source:* Titu Cusi Yupanqui. *History of How the Spaniards Arrived in Peru*, edited and translated by Catherine Julien, 141–143 (Indianapolis, Ind.: Hackett Publishing Co., 2006).

## Lope de Aguirre, Letter to King Philip II of Spain, 1561

*Born in the Basque town of Oñate ca. 1514, Lope de Aguirre was one of thousands of early 16th-century Spaniards who journeyed to the Americas in search of fame and fortune; however, Aguirre's story is one of frustration, bitterness, and anger. In 1560, an aging Aguirre joined Pedro de Ursúa's ill-fated expedition to search for the land of El Dorado, a kingdom east of Peru rumored to be filled with unimaginable riches. Aguirre joined a force of more than 300 Spaniards and scores of African slaves and indigenous carriers. After months of suffering in the Amazon's blistering heat, the party found no evidence of El Dorado. Then on New Year's Day of 1561, as frustrations mounted, Aguirre joined with a dozen other armed men and stormed Ursúa's tent and murdered the expedition leader. Aguirre's revolt against the Crown had begun, and over the next six months, another 60 members of the expedition were killed. The survivors sailed down the Amazon River and eventually reached the island of Margarita on July 20, 1561. There, Aguirre and his close followers plotted to return to Peru and conquer it for themselves.*

*Aguirre never reached Peru, however. With his rebellion collapsing from within and Spanish forces closing in to capture him, Aguirre drafted a remarkable letter to King Phillip II, in which he denounced the Spanish ruler for failing to recognize and reward those who had suffered so greatly in the service to the Crown and who never received their due compensation. The document that follows is a translation of Aguirre's letter to the king.*

*Shortly before his death, Aguirre murdered his mestiza daughter, Elvira, an act he justified as merciful to spare her from the abuse she would endure as the daughter of a rebel. Soon thereafter, on October 27, 1561, Aguirre was shot; his corpse was beheaded, quartered, and put on public display as a warning to other potential rebels.*



To King Philip, the Spaniard, son of Charles the Invincible:  
From Lope de Aguirre, your lesser vassal, old Christian, of middling parents but fortunately of noble blood, native of the Basque country of the kingdom of Spain, citizen of the town of Onate.

In my youth I crossed the sea to the land of Peru to gain fame, lance in hand, and to fulfill the obligation of all good men. In 24 years I have done you great service in Peru, in conquests of the Indians, in founding towns, and especially in battles and encounters fought in your name, always to the best of my power and ability, without requesting of your officials pay nor assistance, as can be seen in your royal records.

I firmly believe, most excellent King and lord, that to me and my companions you have been nothing but cruel and

ungrateful. I also believe that those who write to you from this land deceive you, because of the great distance.

I demand of you, King, that you do justice and right by the good vassals you have in this land, even though I and my companions (whose names I will give later), unable to suffer further the cruelties of your judges, viceroy, and governors, have resolved to obey you no longer. Denaturalizing ourselves from our land, Spain, we make the most cruel war against you that our power can sustain and endure. Believe, King and lord, we have done this because we can no longer tolerate the great oppression and unjust punishments of your ministers who, to make places for their sons and dependents have usurped and robbed our fame, life, and honor. It is a pity, King, the bad treatment you have given us.

I am lame in the right leg from the arquebus wounds I received in the battle of Chuquinga, fighting with marshall Alonzo de Alvarado, answering your call against Francisco Hernandez Girón, rebel from your service as I and my companions are presently and will be until death, because we in this land now know how cruel you are, how you break your faith and your word, and thus we in this land give your promises less credence than to the books of Martin Luther.

Your viceroy the marquis of Canete hanged Martin de Robles, a man distinguished in your service; and the brave Tomas Vasquez, conquistador of Peru; and the ill fated Alonso Dias, who worked more in the discoveries of this kingdom than the scouts of Moses in the desert; and Piedrahita, a good captain who fought many battles in your service. In Pucara they gave you victory, and if they had not, Francisco Hernandez would now be the king of Peru. Do not give much credence to the claims your judges make of services performed, because it is a great myth, unless they call having spent 800,000 pesos of your royal treasury for their vices and evil deeds, a service. Punish them as evildoers, as such they certainly are.

Look here, King of Spain! Do not be cruel and ungrateful to your vassals, because while your father and you stayed in Spain without the slightest bother, your vassals, at the price of their blood and fortune, have given you all the kingdoms and holding you have in these parts. Beware, King and lord, that you cannot take, under the title of legitimate king, any benefit from this land where you risked nothing, without first giving due gratification to those who have labored and sweated in it.

I am certain there are few kings in hell because there are few kings, but if there were many none would go to heaven. Even in hell you would be worse than Lucifer, because you all thirst after human blood. But I don't marvel nor make much of you. For certain, I and my 200 arquebus-bearing Marañones, conquistadores and *hidalgos*, swear solemnly to God that we will not leave a minister of yours alive, because I already know how far your clemency reaches. Today we consider ourselves the luckiest men alive, because we are in these parts of the Indies, with faith in God's commandments full and uncorrupted as Christians, maintaining all that is preached by the holy mother church of Rome, and we intend, though sinners in life, to achieve martyrdom through God's commandments.

Upon leaving the Amazon river, called the Maranon, on an island inhabited by Christians called Margarita, I saw some

reports from Spain regarding the great schism of Lutherans there, which caused us to be frightened and surprised. In our company there was a German named Monteverde, and I ordered him cut to pieces. Destiny rewards the prudent. Believe this, excellent Prince: Wherever we are we ensure that all live perfectly in the Christian faith.

The dissolution of the priests is so great in these parts that I think it would be well that they feel your wrath and punishment, because there is now none among them who sees himself as less than governor. Look here, King, do not believe what they might tell you, because the tears that they shed before your royal person is so that they can come here to command. If you want to know the life they lead here, it is to deal in merchandise, seek and acquire temporal goods, and sell the Sacraments of the Church for a price. They are enemies of the poor, uncharitable, ambitious, gluttonous, and arrogant, so that even the lowest of the priests tries to command and govern all these lands. Correct this, King and lord, because from these things and bad examples faith is not impressed upon the natives. Furthermore, if this dissolution of the priests is not stopped, there will be no shortage of scandal.

If I and my companions, by the correct position we have taken, are determined to die, for this and for other things that have happened, singular King, you are to blame, for not duly considering the labor of your vassals and for not thinking of what you owe them. If you do not look out for your vassals, and your judges do not take care of this, you certainly will fail in government. Certainly there is no need to present witnesses, but simply to point out that each of your judges has 4,000 pesos of salary, 8,000 pesos in expenses, and after three years in office each has 60,000 pesos saved, along with properties and possessions! Despite all this we would be willing to serve them as we do, except that for our sins they want us to drop to our knees wherever we are and worship them like Nebuchadnezzar. This is insufferable. Just because I am an unfortunate man made lame in your service (and my companions long and weary in the same) I should not fail to advise you never to trust your conscience to these learned persons. It is in your royal interest to watch out for them, as they spend all their time planning the marriages of their children, and care for nothing else. The common refrain among them is: "To the left and to the right, I possess all in my sight."

The friars do not want to bury poor Indians, and they are lodged in the best estates in Peru. The life they lead is bitter and burdensome, as each one has as a penance a dozen young women in his kitchen, and as many boys engaged in fishing, hunting partridges, and bringing fruit! They get a share of everything. In Christian faith I swear, King and lord, that if you do not remedy the evils of this land, divine punishment will come upon you. I tell you this to let you know the truth, even though I and mine neither expect nor want mercy from you.

Oh, how sad that a great Caesar and Emperor, your father, should conquer with the power of Spain the great Germany, and should spend so much money from these Indies discovered by us, and that you should not concern yourself with our old age and weariness enough to provide for our daily bread.

You know that we know in these parts, excellent King and lord, that you conquered Germany with arms, and Germany has conquered Spain with vices. We over here are happier with just corn and water, to be removed from such a bad irony. Let those who suffer such an irony keep their reward. Let wars spread where they may, and where men take them. Never, no matter what adversity might come upon us, will we cease to be subject to the teachings of the Holy Mother Church of Rome.

We cannot believe, excellent King and lord, that you would be so cruel to such good vassals as you have in these parts. Your judges must be acting this way without your consent. I say this, excellent King, because two leagues from the city of Kings [Lima], there was discovered near the sea a lake where there were some fish God permitted to exist there. Your evil judges and officials, to profit from the fish for their pleasures and vices, leased them in your name, giving us to understand, as though we were fools, that this was done by your will. If this is so, master, let us catch some of the fish, because we worked to discover it, and because the King of Castile has no need for the 400 pesos they leased it for. Illustrious King, we do not ask for grants in Cordoba or Valladolid, nor in any part of Spain, which is your patrimony. Deign to feed the weary and poor with the fruits and proceeds from this land. Remember, King and lord, that God is the same for all, and the same justice, reward, heaven, and hell.

In the year 1559 the marquis of Canete entrusted the expedition of the river of the Amazons to Pedro de Ursua, Navarrese, or rather, a Frenchman. He delayed the building of the boats until the year 1560 in the province of the Motilones, in Peru. The Indians are called Motilones because they wear their head shaved. These boats were made in the wet country, and upon launching most of them came to pieces. We made rafts, left the horses and supplies, and took off down the river at great risk to our persons. We then encountered the most powerful rivers of Peru, and it seemed to us to be a fresh water sea. We traveled 300 leagues from the point of launching.

This bad governor was so perverse and vicious and miserable that we could not tolerate it, and it was impossible to put up with his evil ways. Since I have a stake in the matter, excellent King and lord, I will say only that we killed him; certainly a very serious thing. We then raised a young gentleman of Seville named Don Fernando de Guzman to be our king, and we made an oath to him as such, as your royal person will see from the signatures of all those who were in this, who remain in the island of Margarita, in these Indies. They appointed me their field commander, and because I did not consent to their insults and evil deeds they tried to kill me, and I killed the new king, the captain of his guard, the lieutenant-general, his majordomo, his chaplain, a woman in league against me, a knight of Rhodes, an admiral, two ensigns, and six other of his allies. It was my intention to carry this war through and die in it, for the cruelties your ministers practice on us, and I again appointed captains and a sergeant major. They tried to kill me, and I hung them all.

We went along our route down the Marañon river while all these killings and bad events were taking place. It took us ten and a half months to reach the mouth of the river, where it

enters the sea. We traveled a good hundred days, and traveled 1,500 leagues. It is a large and fearsome river, with 80 leagues of fresh water at the mouth. It is very deep, and for 800 leagues along its banks it is deserted, with no towns, as your majesty will see from the true report we have made. Along the route we took there are more than 6,000 islands. God only knows how we escaped from such a fearsome lake! I advise you, King and lord, not to attempt nor allow a fleet to be sent to this ill-fated river, because in Christian faith I swear, King and lord, that if a hundred thousand men come none will escape, because the stories are false and in this river there is nothing but despair, especially for those newly arrive from Spain.

The captains and officers with me at present, and who promise to die in this demand like pitiful men are: Juan Jeronimo de Espinola Ginoves, admiral; Juan Gomez, Cristobal Garcia, captain of infantry, both Andaluz; mounted captain Diego Tirado, Andaluz, from whom your judges, King and lord, with great injury, took Indians he had earned with his lance; captain of my guard Roberto de Sosaya and his ensign Nuflo Hernandez, Valencian; Juan Lopez de Ayala, from Cuenca, our paymaster; general ensign Blas Gutierrez, conquistador for 27 years; Juan Ponce, ensign, native of Seville; Custodio Hernandez, ensign, Portuguese; Diego de Torres, ensign, Navarre; sergeant Pedro Gutierrez Viso and Diego de Figueroa; Cristobal de Rivas, conquistador, Pedro de Rojas, Andaluz; Juan de Saucedo, mounted ensign; Bartolome Sanchez Paniagua, our lawyer; Diego Sanchez Bilbao, supply; Garcia Navarro, inspector general, and many other hidalgos of this league. We pray to God our Lord that your fortune ever be increased against the Turk and the Frenchman, and all others who wish to make war on you in those parts. In these, God grant that we might obtain with our arms the reward by right due us, but which you have denied.

Son of your loyal Basque vassals, and I, rebel until death against you for your ingratitude.

*Lope de Aguirre, the Wanderer*

*Source:* Thomas H. Holloway. "Whose Conquest Is This Anyway? Aguirre, the Wrath of God." In *Based on a True Story: Latin American History at the Movies*, edited by Donald F. Stevens, 39–44 (Wilmington, Del.: Scholarly Resources, 1997).

## Views from Colombia and Brazil

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*The final two documents provide a brief look at two regions often ignored in studies of the early colonial period. The first document is a translation of a formal contract (capitulación) between the Spanish Crown and Don Pedro Fernández de Lugo. This contract granted Lugo the rights to explore and conquer Colombia's interior. Lugo's contract initiated one of the last major conquest expeditions in 16th-century South America, which was led by Gonzalo Jiménez de Quesada.*

Finally, the primary source section ends with a remarkable text, originally written in French, about Brazil's Tupinambá Indians. The excerpt is taken from Jean de Léry's *History of a Voyage to the Land of Brazil*, and records the nature of Tupinambá marriage rituals and practices, as well as the treatment of their children.

### Contract between Pedro Fernández de Lugo and the Spanish Crown, January 22, 1535

*It is important to recognize that the Spanish Crown never possessed the resources to fund the exploration, conquest, or settlement of the New World; instead, it negotiated private agreements with individuals or corporations, offering financial rewards, offices, and titles to those who organized, equipped, and funded these early ventures. Over the course of the 16th century, the Crown entered into more than 70 of these private agreements, known in Spanish as capitulaciones. Such private contracts helped push the boundaries of Spain's American possessions and, at the same time, mitigate the threat of Portuguese, French, and English expansion in the New World.*

*Below is an example of one such contract, a 1535 agreement between the Spanish Crown and the governor of the Canary Islands, Pedro Fernández de Lugo. The agreement reveals a great deal about the expectations and motivations of Fernández de Lugo, his son, and the Crown. However, it must also be read with caution. In spite of his position as governor of the Canary Islands, Fernández de Lugo was not in a position to fund the entire armada on his own. In order to finance this ambitious venture, he needed partners. Thus, while Alonso de Lugo traveled to Seville to recruit men, gather equipment, and negotiate the armada's costly transportation across the Atlantic, Pedro Fernández de Lugo worked to secure additional financing. In May 1535, he reached an agreement with two Italian merchants, both residents of Tenerife, to split the costs of the armada. Juan Alberto Gerardini and Cristóbal Francesquini agreed to divide equally the expenses of the Lugo venture, in return for an equal share of future profits over the next three years in the Santa María region (in modern-day Colombia).*

*At the end of November 1535, after more than seven months of careful and costly preparations, Pedro Fernández de Lugo's armada departed from the port of Santa Cruz, on the island of Tenerife. In total, the armada consisted of no fewer than 10 ships, which together carried somewhere between 1,000 and 1,200 passengers (among them a small number of women and black slaves). After a brief stop on the island of Hispaniola to gather additional supplies, the armada continued to Santa Marta, where it arrived to great fanfare and celebration on January 2, 1536. The new governor wasted no time in his effort to recoup the expenses he had incurred over the previous months. After several moderately profitable campaigns into nearby provinces, Fernández de Lugo selected his lieutenant*

*general, Gonzalo Jiménez de Quesada, to command an expedition up the Magdalena River. In early April, just three months after his armada had arrived in Santa Marta, Fernández de Lugo sent the Jiménez expedition into the Colombian interior to search for an overland route to Peru, rich new lands to conquer, and a route to the South Sea (Pacific Ocean).*

*Unfortunately for Fernández de Lugo, most of the spoils of the conquest of Santa Marta found their way to other pockets. In fact, Fernández de Lugo never even learned the fate of the expedition he had worked so hard to organize and fund. On October 15, 1536, just six months after the Jiménez expedition had departed, Santa Marta's elderly governor was dead.*



First, I hereby grant license and authority to don Pedro Fernández de Lugo, *adelantado* of the Canary Islands, on our behalf and in our name and in the name of the Royal Crown of Castile, to conquer, pacify and colonize the lands and provinces still left to be conquered, pacified and colonized in the Province of Santa Marta. The Province of Santa Marta extends westward to the borders of the Province of Cartagena, whose conquest and governorship we have entrusted to Pedro de Heredia, and eastward to the borders of the Province of Venezuela, whose conquest and governorship has been entrusted to the Germans Bartolomé and Antonio Welser. From there, the Province of Santa Marta extends south all the way to the South Sea, provided that you do not enter the boundaries or jurisdictions of any other province that has been granted to any other governor.

In recognition of his obedient service on our behalf, and in order to pay him due honor, we promise to make the said *adelantado* our governor and captain general of Santa Marta and the towns within its borders for all the days of his life, with an annual salary of one million *maravedies*, which he is to enjoy from the day he and his people set sail from one of the ports in the Canary Islands to carry out the conquest. The salary is to be paid from our royal revenues and taxes generated in the province. During his tenure as governor and captain general he is to colonize and conquer the territory; if this should not occur, we are not obligated to pay him anything whatsoever.

We want and we order that when it is our lord God's pleasure to take the *adelantado* don Pedro Fernández de Lugo from this present life, that you, Alonso Luis de Lugo should inherit the governorship and Captaincy General of the province for all the days of your life, with the annual salary of one million *maravedies* in accordance with the same terms, and in the same manner, in which your father, the *adelantado*, holds it.

Furthermore, we grant the *adelantado* don Pedro Fernández de Lugo the title of our *adelantado* of the lands and provinces that are discovered and populated. Upon your father's death, you, don Alonso Luis de Lugo, are to inherit this title.

Furthermore, I give him license to construct, in accordance and agreement with our officials in the province, two fortresses within the borders of the territories discovered and colonized. These fortresses are to be built in locations that he and our royal officials consider necessary for the defense and



pacification of the lands and provinces. And we grant him an annual salary of 75,000 *maravedies* for the maintenance and occupancy of each fortress. These fortresses are to be built at his own expense; we are not obliged to pay for them, nor are any of the monarchs who follow us. Once our royal officials deem them fully operational, the salary for each fortress is to be paid from the fruits of the land.

Furthermore, you, don Alonso Luis de Lugo, on behalf of your father don Pedro Fernández de Lugo, have requested that we grant you a certain number of Indian vassals from the new lands and provinces that you happen to discover and pacify. As far as this request is concerned, we have decided to wait until we receive detailed reports about the nature of the new lands that you discover and colonize. In the meantime, in order to compensate you for your hardships and your services, we decree that you are to receive an annual share of one-twelfth of all benefits that pertain to the Crown, excluding revenues from lands already discovered and pacified. However, before you receive your share, you are to pay all the expenses and salaries incurred by our royal officials in the conquest.

Furthermore, in order to assist you with the costs of transporting the people necessary for the conquest, we will reward you with a payment of four thousand gold *ducados*, to be paid by our officials from the taxes and benefits that we receive from the lands and provinces conquered.

We give you permission to issue land grants to the residents and settlers of the lands and provinces that are conquered and colonized, in the same manner as our governors in other provinces of our Indies have done before, and continue to do.

We give license so that Lugo, or anyone else to whom he gives authority, can transport one hundred black slaves from our kingdom, or from the Kingdom of Portugal and Cape Verde Islands, to Santa Marta. At least one-third of these slaves must be females; and you shall be exempt from all applicable taxes that belong to us in such circumstances. However, should you sell them all, or even some of them, on the islands of Hispaniola, San Juan, or Cuba, or anywhere else for that matter, you will forfeit these tax exemptions, which then must be paid to our royal treasury.

We will send orders to grant *adelantado* Lugo permission, as is customary, to take as many as three ships currently docked in the Canary Islands. These ships, and their captains, must have some familiarity and knowledge of the Indies; and/or they must be willing to sail there. Furthermore, these vessels must be free of commitments to any other armada. And the owners of these vessels are to be paid a just fee.

One of the conditions of this agreement is that, as far as the pacification, conquest, settlement, and treatment of the Indians is concerned, your father, the *adelantado*, is required to follow and obey to the letter, all that is proclaimed in the laws and instructions that we have issued, and anything else that we decree in the future.

This agreement is made with your father, the said *adelantado*, on the condition that when he departs from the Canary Islands on this conquest and colonization, he takes with him any and all religious clergy that we assign to the task of instructing the native Indians of those lands in Our Holy Catholic Faith. He is not to carry out the conquest without them. And he is to pay the costs

of their passage, their provisions, and all other necessary maintenance costs, in accordance with their character. He is to incur all of these expenses over the course of the entire voyage, without taking from them anything whatsoever. We entrust that he will do this and comply with our orders, as it serves both God and us; should he do differently, we will consider it a great disservice.

In accordance with the rights and laws of our kingdoms, when our subjects and the captains of our armies happen to capture some prince or lord from the lands where, under our orders, they are at war, the ransom collected from that lord or *cacique*, as well as all of his private possessions, belong to us. However, in consideration of the great hardships and difficulties that our subjects endure in the conquests of the Indies, and in order to reward them for their services and offer them some compensation, we declare and order that should you happen to take some *cacique* or lord captive, then his treasures of gold, silver, precious stones, and pearls that you acquire, either through ransom or in any other manner, that you give us a share of one-sixth. The remainder should be divided amongst the conquistadors, having first paid the royal-fifth tax. In the event that the said *cacique* or principal lord should die in battle, or later through the legal process, that we be given half of his belongings. This payment shall be issued before any of the costs incurred by our royal officials are reimbursed. The other half shall be divided amongst the conquistadors, once again after the royal-fifth is paid.

*In the Villa de Madrid, 22-01-1535.*

Source: J. Michael Francis. *Invading Colombia: Spanish Accounts of the Gonzalo Jiménez de Quesada Expedition of Conquest*, 29–33 (University Park: Pennsylvania State University Press, 2007).

### Jean de Léry, *History of a Voyage to the Land of Brazil*, 1578 (Excerpt)

*The 1494 Treaty of Tordesillas, which divided the New World between Spain and Portugal, certainly did not prevent other European powers from attempting to establish permanent footholds in the New World. For example, beginning early in the 16th century, French sailors and merchants actively engaged in trade up and down the Brazilian coast, where they exchanged European goods for brazilwood, highly valued in Europe for the red dye it produced. In 1555, after decades of trading ventures along the Brazilian coast, the French attempted to establish a permanent settlement in Brazil. A year later, a young Calvinist minister named Jean de Léry arrived in the French colony to preach the new faith to Brazil's Tupinambá Indians.*

*Jean de Léry was born in Burgandy, France, in 1534. In 1556, Léry was one of 14 Calvinist ministers who left Europe for Brazil to establish what became the first Protestant mission in the New World. His History of a Voyage to the Land of Brazil was not completed and published until 1578, 20 years after Léry had returned from Brazil. At times fanciful and romantic, Léry's rich descriptions and keen observations about*

*Tupinambá society make his chronicle among the most important and valuable primary accounts of Brazil's indigenous peoples in the 16th century. The lengthy chronicle, consisting of 22 chapters, addresses a wide range of subjects and themes, from geography, flora, and fauna to Tupinambá religious practices, warfare techniques and weapons, the treatment of military captives, as well as the practice of cannibalism. In the section that follows, Léry describes Tupinambá marriage practices, polygamy, adultery, and childhood. Léry died of the plague in France in 1613.*



## CHAPTER XVII:

### Of Marriage, Polygamy, and Degrees of Consanguinity Observed by the Savages; and of the Treatment of Their Little Children.

Now to touch on the marriage customs of our Americans. They observe only these three degrees of consanguinity: no one takes his mother, his sister, or his daughter as a wife, but an uncle may take his niece; aside from this, all the other degrees are of no concern to them. As for ceremonies, they have none, except that he who wants to take a wife, whether widow or maiden, after having ascertained that she is willing, will address himself to the father (or, if that is not possible, the nearest kinsman) and ask that she be given to him in marriage. If the answer is "Yes," then without further contract (for there is no profit in it for notaries) he will take her to wife. If, on the contrary, he is refused, he will desist without further ado. But note that since polygamy, that is, a plurality of wives, is common in their region, men may have as many as they please; in fact, they make a virtue out of a vice, so that those who have the greatest number are deemed the most valiant and bold. I have seen one who had eight, about whom he told tales in his own praise.

And what makes one marvel in this multitude of women is that while there is always one who is the husband's favorite, the others are not at all jealous and do not complain, or at least show no signs of it; all of them, busy with the housework, weaving their cotton beds, tending their gardens, and planting their roots, live together in an incomparable peace. On that point I will let each of you consider whether (even if it were not forbidden by God to take more than one wife) it would be possible for our women over here to live in such harmony. Better to send a man to the galleys than to put him in the midst of such a tumult and uproar as undoubtedly there would be; witness what happened to Jacob for having taken Leah and Rachel, even though they were sisters. How could several of our women live together, considering how often she who was especially ordained of God to be man's helpmeet and delight, is instead like a familiar demon in his house? In saying this, by no means do I intend to censure in any way those who behave otherwise: that is, who render the honor and obedience that they rightfully owe their husbands; on the contrary, when they are dutiful, thus bringing honor upon themselves first of all, I consider them as praiseworthy as I deem the others deserving of all blame.

To return, then, to the marriage customs of our Americans. Adultery on the women's part is held in such horror that, even though they have no other law than that of nature, if a married woman abandons herself to anyone other than her husband, the husband is empowered to kill her, or at least to repudiate her and send her away in shame. It is true that before they marry off their daughters, the fathers and relatives have no great scruples about prostituting them to the first comer; as I have already mentioned elsewhere, although the Norman interpreters had already, before our arrival, taken advantage of them in several villages, nonetheless their reputations were not ruined. But, as I said, once they are married they take care not to stumble, under pain of being beaten to death or sent away in shame.

I will add that, considering the hot region they inhabit, and in spite of what is said of Orientals, the marriageable young people of that land, boys as well as girls, are not so much given over to lust as one might think; and would to God it held no more sway over here. Nevertheless (for I would not make them out to be more virtuous than they are), sometimes when they are greatly vexed with each other they call each other *tyvire*, which is to say "bugger"; one can conjecture from this (for I affirm nothing) that this abominable sin is committed among them.

When a woman is with child, she avoids carrying heavy burdens, but does not abandon her ordinary tasks. Indeed, the women of our Tupinamba work far and away more than the men; for except for a few mornings (and not in the heat of day) when they cut wood to make gardens, the men do nothing except go to war, hunt, fish, and make their wooden swords, bows, arrows, feather garments, and the other things I have specified elsewhere, with which they adorn their bodies.

Concerning childbearing, here is what I can say as an eyewitness. Another Frenchman and I had bedded ourselves down one night in a village. Around midnight we heard a woman scream; thinking that it was that ravaging beast *Jan-ou-are* [jaguar] (which, as I have said elsewhere, preys on the savages) trying to devour her, we ran to her immediately. We found it was not that, but rather that her labor pains were making her cry out. So I myself saw the father receive the child in his arms, tie off the umbilical cord, and cut it with his teeth. Continuing to serve as midwife, but unlike ours over here, who pull on the noses of newborn infants to make them more beautiful, he, on the contrary, pushed in his son's nose and crushed it with his thumb; this is done over there with all children, who are thought to be prettier when they are snub-nosed.

As soon as the baby has come out of his mother's womb, he is washed clean and immediately painted all over with red and black by the father, who then lays him down, without swaddling him, in a cotton bed hung in the air. If the child is a male, the father makes him a little wooden sword, a little bow, and little arrows feathered with parrot plumes; then, placing it all beside the infant, and kissing him, he will say to him, his face beaming, "My son, when you come of age, be skilled in arms, strong, valiant, and warlike, so that you can take vengeance on your enemies." The father of the child I saw born named him *Orapacen*, that is, the bow and the string: for this word is composed of *orapat*, which is bow, and *cen*, which means its string. And that is how they name all their children, randomly giving

them names of familiar things, just as we do to dogs and other animals over here: *Sarigoy* [opossum], a four-footed animal; *Arignan*, a hen; *Arabouten*, the brazilwood tree; *Pindo*, a tall grass, and so on.

As for nourishment, it will be some chewed flour, and other soft foods, along with the mother's milk. The mother stays in bed only a day or two, and then takes her baby, suspended from her neck in a cotton scarf made for the purpose, and goes off to the garden or to her other tasks. This is not to disparage the customs of the ladies over here, who, on account of our bad air, stay in bed for two or three weeks, and are for the most part so delicate that, although they have no illness that would prevent them from nurturing their infants as the American women do, as soon as they are delivered of them they are inhuman enough to send them away; so that if the children do not die without their mothers' knowing anything about it, in any case they must be partly grown and old enough to provide some pastime before their mothers will endure their presence.

Now if there are some dainty ladies here who think I do them wrong in comparing them to these savage women, whose rural fashioning (they will say) has nothing to do with their own tender and delicate bodies, I am content, so as to sweeten this bitter pill, to send them school to the brute beasts, which, even down to the smallest birds, will reach them this lesson: that it is up to each species to take care—indeed, to be at pains—to raise the progeny itself. But to cut short all their retorts, let me ask whether they would be more coddled than a former queen of France (as we read in the histories) was impelled by a true maternal passion: when she learned that her child had been suckled by another woman, she was so jealous that nothing would do but that she would make him vomit the milk that he had taken elsewhere than from his mother's breasts.

Now to return to my subject. It is commonly believed over here that if children in their tender and early infancy were not tightly swaddled, they would be deformed and bow-legged. Although that custom is by no means observed for American children (who, as I have said, are from their birth held and laid down without being swaddled), nevertheless you could not find children who walk straighter than they do. I admit that the gentle air and moderate temperature of that land are in part the cause, and I grant that in the winter it is good to keep our children well wrapped, covered, and tucked into their cradles, because otherwise they could not withstand the cold; but in the summer, and even in the temperate seasons, especially when it is not freezing, it seems to me from what I have seen (if I am not mistaken) that it would be better to let the little children caper about freely on some kind of bed one could devise, from which they could not fall, than to keep them so confined. And in fact, it is my opinion that it does great harm to these poor tender little creatures to be sweltering and half-roasted during the hot season in these swaddling clothes where they are bound as if for torture.

In any case, lest you tell me that I meddle in too many things, I will leave the raising of children over here to their fathers, mothers, and nurses, and add the following to what I have already said of American children. Although the women of that country have no clothes to wipe the behinds of their children, and do not even use the leaves of trees and grasses,

which they have in such abundance, nevertheless they are so careful that simply by using small sticks of wood that they break off, like little dowels, they clean their children so well that you never see them dirty. This is also what the adults do; of them, however (I digress to treat this foul subject), I will merely say that they ordinarily make water in their houses (since the ground is strewn with sand, and since there are fires burning throughout, there is no bad smell), but go off a long distance to get rid of their excrement.

The savages take care of all their children, which they have in swarms (although you will not find that any single father among our Brazilians will have six hundred sons, as has been written of a king of the Moluccan islands, which must be counted as a prodigy); still, because of their wars, in which it is only the men who fight and seek vengeance on their enemies, the males are more cherished than the females. You may ask what station of life the children are prepared for, and what they are taught when they are grown. In Chapters VIII, XIV, and XV, and elsewhere in this history, I have spoken of their natural state, their wars, and their eating of their enemies; you can easily imagine, since they have neither schools nor any other means of acquiring the learning of cultivated people—even less the liberal arts—, that their ordinary occupation, both as adults and as children, is to be not only hunters and warriors (true successors of Lamech, Nimrod, and Esau), but also killers and eaters of men.

Taking the discussion of the marriage customs of the Tupinamba as far as one decently can: contrary to what some people have imagined, the men preserve the modesty of nature by never consorting with their wives in public. In that respect, I maintain that they are preferable to that base Cynic philosopher who, caught in the act, instead of being ashamed said that he was planting a man; and surely those stinking billygoats that one sees in our time over here, who have not hidden themselves when committing their lustful acts, are incomparably more disgusting than they are.

To which I will add that during the space of about a year that we lived in that country and spent time in their company, we never saw in the women any signs of their monthly flux. I am of the opinion that they divert that flow, and have another way of purging themselves than that of the women over here. For I have seen young girls, twelve to fourteen years of age, whose mothers or female relatives would stand them up, feet together on a stone, and incise them with an animal's tooth as sharp as a knife, deep enough to draw blood, from the armpit down along the side and thigh, all the way to the knee. The girls, gritting their teeth in great pain, bled for some time. I think, as I have said, that from the beginning they use this remedy to hide the signs of their flow. Physicians or others more learned than I in such matters may reply, "How can you reconcile this with what you said earlier, that when they are married they are very fertile, seeing that when women cease to have their monthly flow they cannot conceive?" I reply that my intention is neither to resolve this question, nor to say any more about it.

*Source:* Jean de Léry. *History of a Voyage to the Land of Brazil*, translated by and with introduction by Janet Whatley, 152–157 (Berkeley: University of California Press, 1990).

## ❧ GLOSSARY ❧

- adelantado** Military title awarded to some Spanish conquistadores
- adobe** Mudbrick
- aguada** Artificial water reservoir
- ají** Chili pepper
- aj pitzal** Maya term for ball player
- alcalde mayor** Spanish official in charge of a certain district
- aldeia** Mission village in colonial Brazil
- alguacil mayor** Policeman and officer in a Spanish town council
- alpaca** Domesticated camelid in South America. Alpaca wool was used in textile production.
- Antisuyu** One of the four quarters of the Inca empire, located in the eastern section
- apo** In Inca Empire, a great lord or person of high status
- arroba** Spanish weight measure, roughly equivalent to 25 pounds (11.36 kg)
- aryballus** Double-handed storage vessel used by the Incas
- atl** Nahuatl word meaning “water”
- atlatl** Nahuatl word for spear or dart thrower
- Aztlán** Mythical homeland of the Mexica (Aztecs) before they migrated to the Central Valley of Mexico in the 13th century
- Bakamo** Carib deity, the Sky Serpent
- baktun** Largest unit of time in the Maya calendar, measuring a period of 400 years
- balche** Potent alcoholic beverage made from bark
- barrio** Spanish term for neighborhood or district
- bohío** Small hut or dwelling
- boyez** Carib shaman
- brujería** Spanish term for witchcraft
- butu** Hardwood war club used by Carib warriors
- cactli** Nahuatl word for “sandals”
- Calendar Round** Combination of the 365-day solar calendar (*baab*) and the 260-day sacred calendar (*tzolkin*). A total of 52 years has to pass before the same calendar combination repeats.
- calli** Nahuatl word meaning “house”
- calmecac** Aztec schools where young nobles were trained to become priests or warriors
- calpixqui** Tribute collector in Aztec Empire
- capitulación** Formal contract between the Crown of Castile and a private individual, outlining the obligations between the parties
- casta** Person of mixed race
- cédula** Spanish term for royal decree or order
- cenote** Maya term for sinkhole
- Chaak** Maya rain deity
- Chac-Mool** Meaning “red tiger,” a stone sculpture of a reclining human figure with an offering bowl or plate on its stomach
- charqui** Quechua word for freeze-dried meat
- chibal** Maya term for a “patronym group”
- chicle** Sticky sap from the *zapote* tree, later used to make chewing gum
- chimalli** Nahuatl word for the shield used by Aztec warriors
- Chinchaysuyu** One of the four quarters of the Inca Empire, located in the northern quarter of the empire
- chuño** Quechua word for freeze-dried potato
- cihuacóatl** The Aztec ruler’s closest adviser. In spite of its name, which means “snake woman,” for an Aztec goddess, the office was held by a male.
- Coatepec** “Serpent Mountain” in Nahuatl; the place where the Mexica god Huitzilopochtli was born
- coatequitl** Aztec draft labor system
- Coatlicue** The name translates as “Lady of the Serpent Skirt.” She was Huitzilopochtli’s mother.
- cofradía** Spanish term for a lay religious brotherhood
- cohiba** Taino term for tobacco plant and leaves
- colca** Inca storehouse
- Collasuyu** One of the four quarters of the Inca Empire, located in the western quarter of the empire
- conopa** Andean domestic god, often made from stone
- consulado** Spanish merchant guild
- copal** Maya incense made from pine resin
- Coricancha** Incan Temple of the Sun in Cuzco

**Coyolxauhqui** “Lady of the Bells” in Nahuatl, the moon goddess who was killed and dismembered by her brother Huitzilopochtli

**creole** Person born in the New World to Spanish parents

**cue** Aztec temple

**Cuntisuyu** One of the four quarters of the Inca Empire, located in the northern quarter of the empire

**doctrina** Rural parish in colonial Spanish America

**domesticated** Of the reproduction of a plant or animal species, controlled by human intervention

**encomendero** Individual who holds an *encomienda*

**engenho** Sugar mill in colonial Brazil

**entrada** Spanish term for military invasion

**epigraphy** The study of ancient inscriptions, such as the Mayan glyphs

**fanega** Spanish measure of volume, equivalent to about 15 bushels

**geoglyph** Drawing etched on the surface of the ground

**haab** The 365-day Maya solar calendar

**hacienda** Landed estate for farming and ranching

**hanan** Term used to designate the upper half of the two units (moieties) that divided Inca sociopolitical organization. The other half was the *hurin*.

**hatun runa** Quechua term, meaning “adult, married male,” or head of household

**hechicería** Spanish term for sorcery

**hidalgo** Spanish nobleman

**horizon** Archaeological term used to designate a particular period in time when vast regions shared a series of common traits

**huey tlatoani** The supreme Aztec ruler

**Huitzilopochtli** “Hummingbird of the South,” in Nahuatl; Mexica patron deity, associated with the Sun and with warfare

**Hunahpu** One of the Hero Twins in the Maya story of creation (Popol Vuh)

**hurin** Term used to designate the lower half of the two units (moieties) that divided Inca sociopolitical organization. The other half was the *hanan*.

**huunal** Maya jester god

**Illapa** Inca god of thunder or weather

**Inti** Inca Sun God

**Itzamnaaj** Maya Sky God

**Ixchel** Maya Moon Goddess

**ixcuahuac** Aztec sacrificial knife

**kaloomte** Title assigned to the most powerful Maya rulers

**katun** Maya unit of time, representing a period of 20 years

**k'awiil** Maya god

**kin** Maya unit of time, representing one day

**K'inich** Maya Sun God, also known as God G

**K'ujul Ajaw** Maya holy lord

**limpieza de sangre** Spanish term for blood purity, or the absence of Jewish or Moorish ancestry

**lintel** A wooden or stone beam that supports the wall above a doorway

**llama** Domesticated camelid in South America. Llama wool was used in textile production, and llamas also served as beasts of burden.

**macuahuitl** Mesoamerican sword, lined with sharp obsidian blades

**maguey** Mexican plant used to make pulque

**malqui** Quechua word for ancestor mummy

**mameluco** In Brazil, the offspring of Portuguese and Indian parents

**mano** Cylindrical stone used to grind maize, cacao beans, and chiles on the *metate* stone

**masato** Fermented beer made from manioc

**Mesoamerica** A region that covers 392,000 square miles (1.015 million km<sup>2</sup>) and includes all of modern Guatemala and Belize, two-thirds of Mexico, western Honduras, most of El Salvador, and northwestern Costa Rica

**midden** Garbage heap that contains household or community artifacts

**mitayo** An indigenous person forced to serve in a rotating labor draft called the *mita*

**moiety** A division of society into two parts

**obraje** Spanish term for textile workshop or factory

**oca** A domesticated tuber grown in the high Andes

**oidor** A Spanish judge in the high court, or *audiencia*

**orejón** Literally, “long ear,” in Spanish. Term applied to the Inca nobility, who were recognized by the large earspools they wore

**oro** Spanish word for “gold”

**pampa** Extensive grasslands region that extends over much of southern Argentina

**patio process** Process by which silver is refined through the amalgamation with mercury

**peso** Spanish coin and monetary unit. In Spanish America, one peso was worth eight reals of silver

**piragua** Large canoe

**plata** Spanish word for “silver”

**pre-Columbian period** Term used to designate the period of the history of the Americas before the arrival of Christopher Columbus

**quinoa** A domesticated grain grown in the Andean highlands of South America

**relación** Spanish word for an “account” or “report”

**repartimiento** The allocation of a group of indigenous people to a Spaniard to provide labor

**residencia** Judicial review of a royal official's tenure in office

- sacbé** Raised paved road or causeway built by the Maya
- Sapa Inca** The supreme Inca ruler
- shaman** Priest or priestess who uses magic in curing or other divinatory practices
- stela** Carved stone slab erected in front of Maya temples and altars, often with carved images and glyphic inscriptions
- swidden** Synonymous with slash-and-burn agriculture
- talud-tablero** Architectural style consisting of a platform structure, or *tablero*, on top of an inward-sloping surface or panel, or *talud*
- tambo** Inca lodge or inn to house travelers
- tameme** Nahuatl term for porter or carrier
- Tawantinsuyu** Quechua word meaning “Land of Four Quarters.” It was the name that the Incas used for their empire.
- techcatl** Nahuatl word for sacrificial stone
- tecpatl** Nahuatl word for a flint knife used in ritual sacrifices
- tematlatl** Aztec sling
- Templo Mayor** The Great Temple in the Aztec capital of Tenochtitlán
- teotl** Nahuatl term that describes a divine power or essence, found both in the natural world and in human beings
- tepache** Fermented beverage of low alcohol content; common in many parts of Mexico
- tepetl** Nahuatl word for mountain, hill
- teuctli** Nahuatl word for lord
- Tezcatlipoca** One of the four main creator gods of the Aztecs; his name translates as “Smoking Mirror”
- tlacohtli** Nahuatl word for slave
- tlacuiloque** Nahuatl term for scribe
- Tlaloc** Aztec Rain God associated with fertility. His name translates as “He Who Makes the Plants Spring Up.”
- tlamani** Nahuatl word for captor
- Tlatelolco** Tenochtitlán’s sister city, located on the northern part of the island. It was the site of a great market.
- tlatoani** An Aztec ruler, including the supreme ruler of the empire
- tokrikoq** Provincial governor in Inca Empire
- Tonatiuh** Aztec solar deity
- tun** Maya unit of time, representing one year
- tzolkin** The 260-day Maya sacred calendar
- tzompantli** Nahuatl term for skull rack
- uayeb** The unlucky last five days of the Maya solar calendar (*baab*)
- uinal** Maya unit of time, representing 20 days, or one month in the 18-month Maya solar year
- Virachocha** Inca Creator God
- visita** Official visitation or inspection conducted by Spanish royal official or ecclesiastical authority
- Xbalanque** One of the Hero Twins in the Maya story of creation (Popol Vuh)
- Xipe Totec** Aztec god whose name translates as “Our Lord the Flayed One,” closely associated with the practice of human sacrifice
- zócalo** Open plaza

# ❖ SUGGESTED READINGS ❖ FOR THIS VOLUME

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From Colonies to Independent Nations  
(1550s to 1820s)



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**MARK A. BURKHOLDER**  
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 **Facts On File**  
*An imprint of Infobase Publishing*

❧ *For Faith and Hunter* ❧

**Encyclopedia of Latin America**  
**Volume II: From Colonies to Independent Nations**

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For information contact:  
Facts On File, Inc.  
An imprint of Infobase Publishing  
132 West 31st Street  
New York NY 10001

**Library of Congress Cataloging-in-Publication Data**  
Encyclopedia of Latin America / Thomas M. Leonard, general editor.  
p. cm.

Includes bibliographical references and index.

ISBN 978-0-8160-7359-7

1. Latin America—History—Encyclopedias. I. Leonard, Thomas M., 1937–  
II. Francis, J. Michael (John Michael) III. Burkholder, Mark A., 1943– IV. Rankin, Monica.  
F1406.E5155 2010  
980'.01303—dc22 2009014594

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You can find Facts On File on the World Wide Web at <http://www.factsonfile.com>

Text design by Lina Farinella  
Composition by Hermitage Publishing Services  
Cover printed by Sheridan Books, Ann Arbor, MI  
Book printed and bound by Sheridan Books, Ann Arbor, MI  
Date printed: May 2010  
Illustrations by Patricia Meschino  
Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

This book is printed on acid-free paper.

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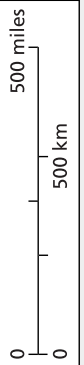
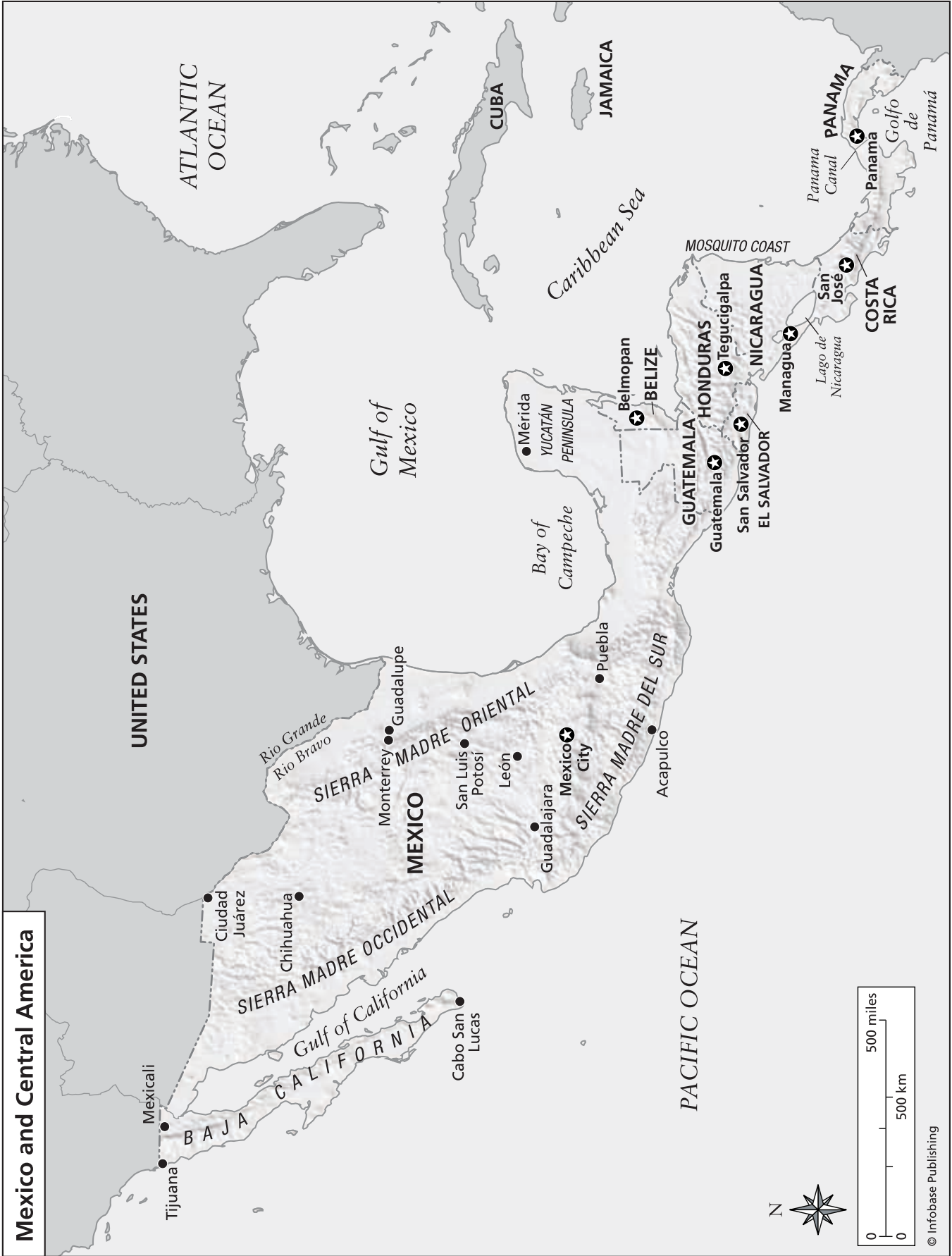
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# Mexico and Central America



# The Caribbean



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Acklins Island

Great Inagua

Guantánamo

Windward Passage

Haiti

Port-au-Prince

Santo Domingo

Jamaica

Kingston

Andros Island

Nassau

Holguin

Camaguey

Santiago de Cuba

Greater Antilles

Cuba

Cayman Islands (UK)

Isla de la Juventud

Turks and Caicos Islands (UK)

Dominican Republic

Virgin Islands (U.S./UK)

Basseterre

St. John's

Antigua and Barbuda

Lesser Antilles

Guadeloupe (France)

Roseau

Dominica

Martinique (France)

Antilles

St. Lucia

Castries

St. Vincent and the Grenadines

Kingstown

Barbados

Bridgetown

Grenada

St. George's

Port-of-Spain

Trinidad and Tobago

Venezuela

Colombia

Panama

Nicaragua

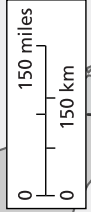
Aruba

(The Netherlands)

Netherlands Antilles

Bonaire

Curaçao



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# South America



## ❁ PREFACE TO THE SET ❁

How does one define Latin America? Geographically, Latin America stretches from the Rio Grande River on the U.S.-Mexican border and Cuba, bordering the Caribbean Sea and the Atlantic Ocean, to Tierra del Fuego at the southern tip of South America. The area is two and one-half times the size of the United States. Brazil alone is slightly larger than the continental United States. Within this vast geographic region there is enormous human and physical variety.

In historical terms, Latin America includes those parts of the Americas that at one time were linked to the Spanish, Portuguese, and French Empires and whose people speak a Romance language (a language derived from Latin, such as Spanish, Portuguese, French, and the derivative Creole). When Napoleon III popularized the term *Latin America* in the 1860s, he implied a cultural relationship between France and those countries of the Western Hemisphere where these language traditions existed: Mexico, most of Central and South America, Cuba, the Dominican Republic, Puerto Rico, Haiti, Martinique, Guadeloupe, and French Guiana. A literal interpretation of Napoleon III's definition would also include portions of the Southwest United States, Florida, and Louisiana; Quebec in Canada; and the islands of St. Pierre and Miquelon off of Newfoundland's coast. English is the first language of most Caribbean islands, and Papiamentu, a form of Creole, is predominant in the Netherlands Antilles and Aruba. Amerindian dialects remain the primary languages in parts of Mexico, Guatemala, Ecuador, Peru, and Bolivia.

The mixture of languages illustrates the diversity of race and culture across Latin America. The Amerindians, or Native Americans, dominated the pre-Columbian time period. In the 21st century, their descendants are still prevalent in Mexico, Guatemala, Ecuador, Peru, Bolivia, and the upper reaches of the Amazon River in the Andes Mountains. Latin America was colonized primarily by the Spanish and to a lesser degree by the Portuguese, first and foremost in Brazil. British, French, and Dutch interlopers followed, and in the 20th century,

the United States had a profound impact across the region. For economic reasons, slavery was practiced most notably in Brazil, along the Ecuadoran coast, and in the Caribbean Islands. Each of these ethnic groups—and the descendants of interracial relationships—produced its own culture with unique religious traditions, family life, dress styles, food, art, music, and architecture. With accelerated globalization throughout the 20th century, Western ideas and culture have had a significant impact upon Latin America.

Geography and climatic conditions also play a major role in the development of societies, their cultures, and economies. Latin America is no exception. For example, the Andes Mountains that traverse the west coast of South America served as the centerpiece of the Inca Empire in the pre-Columbian period, the source of gems and ores during the Spanish colonial period, and the ores and petroleum essential for modern-day industries. The Andes westward slopes and coastal plains provided agricultural products since the earliest of times. The rolling plains, or pampas, of north-central Argentina, southern Brazil, and Uruguay coupled with a Mediterranean-type climate turned those areas into highly productive cattle and grain centers. In contrast, the Amazon rain forest in Brazil, while still home to undiscovered Native American groups, offered little economic advantage until the 20th century, when the logging industry and land clearing for agricultural expansion cut deep into the rain forest's expanse. The tropical climate of the Caribbean and the coastal areas of Central America offered fertile ground for sugar, tobacco, and tropical fruits.

People, geography, language and culture, and economic pursuits transformed Latin America into one of the world's most diverse regions. Yet, the 41 countries and foreign dependencies that make up Latin America share four distinguishable historical time periods: the pre-Columbian period, followed by nearly three centuries of colonial rule; the struggle for national identity during the 19th century; and the quest for modernity since 1900.

The *Encyclopedia of Latin America* takes a chronological approach to the examination of the Latin American experience. Divided into four volumes, each devoted to one of the four time periods that define Latin American history, this unique reference work contrasts sharply with traditional encyclopedias. It provides students and general readers the opportunity to examine the complexity and vastness of the region's development and culture within a given time period and to compare the time periods.

Volume I, *Amerindians through Foreign Colonization*, focuses on the pre-Columbian period from the earliest Native American societies through the arrival of the Spanish conquistadores. Scholars continue to debate the number of Native Americans, or "Indians" as Christopher Columbus labeled them, who resided in the Americas when Columbus first reached the region in 1492. Estimates range from a low of 10 million to a high of slightly more than 100 million. While most scholars agree that the earliest waves of migrants came to the Americas across the Bering Straits land bridge as early as 40,000 years ago, there is continued debate over both the dates of settlement and descent of the earliest settlers. More recent scholarship in Chile and Brazil place the earliest New World migrants to 33,000 B.C.E. and suggest them to be of South Asian and Pacific Islander—rather than Eurasian—descent.

By the time of the European arrival on Latin America's mainland in the early 1500s, three highly organized Native American societies existed: Aztec, Maya, and Inca. Mexico's central valley was home to the rigidly stratified Aztec society, which by the time of the conquest reached southward and eastward to the Caribbean coast. The Aztecs had earned a reputation for their military prowess, for the brutal exploitation of the peoples brought into the empire, and for ceremonial city building, evidenced by its capital, Tenochtitlán, the site of contemporary Mexico City. From Peru's Cuzco Valley, the Inca Empire in South America stretched 3,000 miles (4,287 km) through the Andes mountain chain and inland to the east from Ecuador, in the north, to Chile, in the south. Through a tightly controlled bureaucracy, the Incas exercised control of the conquered communities. The Maya civilization began approximately in 1000 B.C.E. and, through a system of independent city-states, extended from Mexico's Yucatán Peninsula through Guatemala. For reasons not yet fully understood, Classic Maya civilization began its political collapse around 900 C.E., but Mayan society and culture remained intact. Aside from the three major groups, many other Native American societies existed throughout Latin America, such as the Arawaks and Tainos in the Caribbean and the Mapuche and the Guaraní in Argentina, Paraguay, and Chile.

Marked differences separated groups within the larger society and each group from the other. For example, even today, the Mexican government reports nearly 200 different linguistic groups; Guatemala, 26 different Mayan dialects; and an estimated 10 million Native Americans speak some form of the Quechua language in the high

Andes along South America's Pacific coast. Elaborate ceremonies that included human sacrifice characterized the Aztec, Inca, and Maya religions. Agriculture was the primary economic pursuit of all Native American groups, while hunting and fishing were pursued by some groups. Textiles and metalwork usually contained designs peculiar to each indigenous group.

Volume II, *From Colonies to Independent Nations*, focuses on the Spanish colonial period, from the early 16th century through the early 19th century. At the beginning of this time period, the Spanish explored the South and North American continents, laying out an empire in the name of the king and queen of Spain and the Roman Catholic Church. Despite the vastness of the empire, which stretched from Tierra del Fuego at the southern tip of South America to the far reaches of the northwest Pacific Coast, eastward to the Mississippi River and into the Floridas, the Spanish attention focused on the areas of modern-day Mexico and Peru. Both were home to significant Native American societies and rich in mineral wealth, particularly gold and silver. The colonies existed for the benefit of Spain, and the application of mercantilist economic policies led to the exploitation of natural resources, regulation of manufacturing and agriculture, and control of international trade, all of which contributed to a pattern of large land holdings and abuse of labor. In effect, the system drained the colonies of its specie and other wealth and negated economic development and the emergence of a significant entrepreneurial class in the colonies. The Spanish imposed their political and cultural systems on the colonies, including the Native Americans. A highly centralized governmental structure provided little opportunity for political participation by the Spanish colonial residents, except in matters at the local level. The colonial laws and rules were made in Spain and enforced in the New World by officials appointed by the Crown. During the colonial period, the Catholic Church became an entity unto itself. It administered education, hospitals, social services, and its own court system. It tithed its followers and charged fees for religious services. Because the church was exempt from taxes to the Spanish Crown, it emerged as a colonial banker and a benefactor of the Spanish colonial system. The church, therefore, was not anxious to see the system change.

In theory, the Brazilian colonial experience paralleled the Spanish model, but in application, the Brazilian model was much different. The states established on Brazil's Atlantic coast were administered like personal fiefdoms by the king of Portugal's appointed authorities. Because the colony lacked natural resources for mass exploitation and a Native American population to convert to Catholicism, Portugal gave little attention to its New World colony.

Latecomers to the New World, the British, French, and Dutch colonization schemes were confined to the Caribbean region. As with the Spanish and Portuguese,

each island fell victim to the political system of the mother country. Over time, the local governments of the British became more representative of the resident population. The economic focus on sugar production caused the importation of slave labor from Africa.

New World discontent in the mid-17th century led to reforms in the Spanish colonial system, but it took European events in the early 19th century to bring about Latin America's independence by 1826. Only Cuba and Puerto Rico remained under Spanish rule, and the British, French, and Dutch maintained control over their Caribbean island positions. Brazil received its independence on September 7, 1822, but continued to be governed by a member of the royal Portuguese family until November 15, 1889.

The legacies of colonial rule became evident immediately following independence. The establishment of governmental institutions and the place of each nation in the growing global economy that characterized 19th-century Latin America are the subject of volume III, *The Search for National Identity*. In addressing these issues, political and religious leaders, intellectuals, and foreigners who came to Latin America were confronted by the legacies of Spanish colonial rule.

The New World's Spanish descendants, the creoles, replaced the Spanish peninsulars at the apex of the rigid social structure and sought to keep political power confined to themselves. Only conflicting ideologies separated the elite. One group, the Conservatives, remained tied to the Spanish tradition of a highly centralized government, a privileged Catholic Church, and a hesitancy to reach out to the world. In contrast, the Liberals argued in favor of a greater decentralization of political power, the curtailment of church privileges, and greater participation in world affairs, particularly trade. Liberals and Conservatives, however, did not want to share political power or wealth with the laboring classes, made up of mestizos, Native Americans, or blacks. The dispute over the authority of central governments played out in different ways. In Argentina and Chile, for example, Conservatives Juan Manuel de Rosas and Diego Portales produced constitutions entrenching the Spanish traditions. In Central America, it signified the disintegration of the United Provinces by 1839 and the establishment of Conservative-led governments. The contestants for Mexican political power took to the battlefield, and the struggle produced 41 presidents from 1822 through 1848.

The Latin American world began to change in the 1860s with the emergence of Liberal leaders. It increasingly contributed raw materials to industrialized Europe. The heads of state welcomed foreign investment for the harvesting and processing of primary products and for constructing the supportive infrastructure. And, while the Liberals struck against church privileges, as in Chile during the 1880s, they still retained political power and continued to discriminate against the working classes.

Brazil and the colonized Caribbean Islands fell within the same purview as Spanish America. Although Brazil peacefully achieved independence in 1822, it continued its monarchical form of government until 1889. During that same time period, Brazil participated in the world economy through the exportation of sugar, followed by rubber and coffee. Meanwhile, the Caribbean Islands from Cuba southward to Trinidad and Tobago continued to be administered as part of European colonial empires. Administrators from Spain, Great Britain, France, and the Netherlands arrived to govern the island and to oversee the exportation of primary products, usually sugar, tobacco, and tropical fruits.

Latin America's participation in the global economy accelerated in the 20th century, but the new era also brought new players in the region's economic and political arena—the United States and Latin America's lower socioeconomic groups. These concepts form the basis for the entries in volume IV, *The Age of Globalization*.

The U.S. entry into Latin American affairs was prompted by the Cuban struggle for independence from 1895 to 1898 and the U.S. determination to construct a trans-isthmian canal. The U.S. three-month participation in the Cuban-Spanish War in 1898 and its role in securing Panama's independence in 1903 also confirmed long-standing assumptions regarding the backwardness of Latin American societies, owing to the legacies of the Spanish colonial system. More obvious was the need to secure the Panama Canal from foreign interlopers. U.S. policymakers combined the two issues—political and financial irresponsibility and canal security—to justify U.S. intervention throughout the circum-Caribbean region well into the 1920s. U.S. private investment followed the government's interventions and together led to the charge of “Yankee imperialism.”

The entrance or attempted entrance into the national political arena by the middle and lower socioeconomic groups remained an internal affair until after World War II, when they were considered to be part of an international communist movement and again brought the United States into Latin America's internal affairs. Argentina and Chile provide early 20th-century examples of the middle sector entering the political arena while the governments continued to suppress labor. The results of the Mexican Revolution (1911–17) provided the first example of a Latin American social revolution addressing the needs of the lower socioeconomic class at the expense of the elite. In the 1920s and 1930s, small Communist or communist-like political parties or groups emerged in several countries, including Costa Rica, Chile, Brazil, and Peru. While of concern at the time, the presence of communism took on greater importance with the emergence of the cold war in 1945, when the “generation of rising expectations” fused with the Communists in their call for a complete overhaul of the socioeconomic and political structures rooted in Spanish colonialism. In the ambience of the cold war, however, the 1954 presidential

election of Jacobo Arbenz in Guatemala, Fidel Castro's actions in Cuba in 1959 and 1960, the 1963–65 political crisis in the Dominican Republic, the administration of Chilean president Salvador Allende from 1970 to 1973, and the Central American wars during the 1980s were intertwined into the greater context: struggles of freedom against international communism based in Moscow. To "save" these countries from communism, the United States intervened but in so doing restored and propped the old order. The struggle against communism also resulted in a generation of military governments across South America.

Beginning in the 1980s, democratic governments replaced military regimes across Latin America, and each

of the countries experienced the growth of new political parties, mostly left of center. The new democratic governments also accepted and implemented the neoliberal, or free-market, economic model in vogue at the time. By the mid-1990s, many of the free-market reforms were in place, and Latin America's macroeconomic picture had vastly improved. Still, the promised benefits failed to reach the working classes: Half of all Latin Americans remained poverty stricken. In response to their personal crisis, beginning in 1998 with the election of Hugo Chávez as president of Venezuela, the Latin American people started placing so-called leftists in their presidential palaces. Latin America may be at the precipice of another change.

# ❖ HOW TO USE THIS ENCYCLOPEDIA ❖

The *Encyclopedia of Latin America* explores broad historical developments within the context of four time periods that together make up the complete Latin American historical experience. For example, the student or general reader can learn about a given country, when it was a “location” during the pre-Columbian period (volume I), a part of the Spanish colonial empire (volume II), a new nation struggling for its identity (volume III), or in its search for modernity (volume IV). The same can be done with political ideas and practices, economic pursuits, intellectual ideas, and culture patterns, to mention just a few of the themes that are explored across the four volumes. To locate topics in each of the four volumes, the reader should utilize the list of entries in the front matter of each volume. Words set in SMALL CAPITAL LETTERS in the body of a text indicate that an entry on this topic can be found in the same volume. At the conclusion of each entry are cross-references to related entries in other volumes in the set. For further help with locating information, the reader should turn to the comprehensive set index that appears at the end of volume IV.

Within each volume, the entries focus on the time period at hand. Each volume begins with an introduction providing a historical overview of the time period, followed by a chronology. A glossary of terms can be found in the back matter of the book. Each entry is followed by a list of the most salient works on the subject, providing the reader the opportunity to further examine the subject. The suggested readings at the end of each entry are augmented by the select bibliography appended to each volume, which offers a listing of the most important works for the time period. The further readings for each entry and selected readings for the volume together form a comprehensive list of Latin America’s most important historical literature.

Each volume also includes a collection of documents and excerpts to illustrate the major themes of the time period under consideration. Offering eyewitness accounts of significant historical events and personages, they perhaps will encourage the user to further explore historical documentation.

# ❧ ACKNOWLEDGMENTS ❧ FOR THIS VOLUME

Chancellor Thomas F. George and Provost Glen Hahn Cope of the University of Missouri [UM]–St. Louis made possible a research leave that enabled me to complete this volume on schedule. John Hoover, director of the St. Louis Mercantile Library, most graciously made available rare books from the remarkable collection in the St. Louis Mercantile Library at UM–St. Louis that provided many illustrations that appear throughout the text. Deborah E. Cribbs, assistant curator, Special Collections, at the Mercantile Library, was also most helpful. Mary Zettwoch and her colleagues in the Thomas Jefferson Library at UM–St. Louis continued their record of exemplary service in securing obscure volumes through interlibrary loan. Marianne

Samayoa provided indispensable assistance in locating illustrations and translating the primary documents that enrich this book. I am grateful to the Consejo Superior de Investigaciones Científicas in Madrid, Spain, for permission to publish translations of documents from Richard Konetzke, *Colección de Documentos para la Historia de la Formación Social de Hispanoamérica 1493–1810* (3 volumes in 5 books, Madrid, 1953–1962). Thomas M. Leonard asked me to write this volume, and I appreciate his invitation. Carol Davis Burkholder lived with this project from its inception. I thank her for her continued support and good humor.

—Mark A. Burkholder

# ❖ INTRODUCTION ❖ TO THIS VOLUME

Between the 1550s and the 1820s, the Spanish and Portuguese colonies in the Americas evolved from a small number of European municipalities into independent countries. Profound transformations in the size and composition of the population during these centuries affected society, land ownership, economic production, and trade. The introduction of European plants and animals permanently altered landscapes and diets. Long-standing loyalty to an Iberian monarch ultimately gave way to a stronger desire for home rule on the part of many American-born Spaniards and Portuguese.

By the end of the 1550s, Iberians had imposed their institutions on even the richest and most sophisticated indigenous civilizations of the Americas. With a few notable exceptions such as Caracas, São Paulo, and Buenos Aires, by the 1550s they had already founded the major cities present in 1825. Aside from the Tribunal of the Inquisition in Spanish America, the Catholic Church and nearly all institutions used to administer the colonies were in place. The Crowns of Spain and Portugal had established the principle of trade monopolies with profits going to their benefit. Immigrants from Iberia continued to arrive in the Americas, and the importation of African slaves was under way. By 1560, Iberians had identified bullion and sugar as the most valuable colonial exports. The former, in particular, aroused the cupidity of the French, English, and Dutch and expanded European rivalries to include the New World.

By 1560, Spain had the institutional bases for colonial rule in place in Mexico City and Lima, both viceregal capitals. High courts (*audiencias*) and advisory councils were present in these capitals as well as several lesser regional capitals, including Guatemala City and Guadalajara. Treasury offices marked locales that promised significant revenue. Municipal councils were present in Spanish towns wherever located.

Demographic disaster for the indigenous populations accompanied European conquest, settlement, and

rule. The overall decline of the Native American population was approximately 90 percent, with highland areas suffering less than coastal lowlands. The timing of the low points varied, occurring in the 1620s in New Spain and a century later in Peru. While some Amerindian populations subsequently increased, none returned to precontact size.

While indigenous populations plummeted and then slowly increased in some cases, non-native populations expanded almost continuously. Immigration from Iberia occurred throughout the colonial era, but the New World descendants of Iberians (creoles and *brasileiros*) soon outnumbered and eventually dwarfed the immigrants (peninsulars). The arrival of African slaves added a third distinct group to the colonial mix, particularly in Brazil, where blacks soon outnumbered the white and indigenous populations.

Consensual or forced unions among indigenous peoples, whites, and blacks produced usually illegitimate offspring in sufficient numbers that contemporary legislation classified them according to the type of racial mixture. Mestizos, *mulatos*, and *zambos* were the original combinations, but subsequent mixing resulted in others; broader terms such as *castas* and *pardos* for people of mixed race included these as well. Population estimates for the early 19th century reveal the consequences of nearly 300 years of racial mixing. In Spanish America, Native Americans, the most numerous group, numbered about 5.7 million; *castas* totaled about 4 million; whites were some 2.4 million; and blacks were about 500,000. In contrast, in Brazil, which had a total population of just over 2 million, black and mulatto slaves were most numerous; whites numbered about the same as free blacks and mulattoes; and Amerindians made up only about 5.7 percent of the population.

Colonial society was hierarchical. In Spanish America, whites placed themselves at the apex; next came *castas*, who were ordered largely on perceived degree



of whiteness; the indigenous were followed by African slaves at the base. Native Americans living in villages had their own hierarchy and did not consider themselves part of the Spanish-defined *sistema de castas*.

The papal donation giving the Spanish Crown title to the Indies required converting native peoples to Christianity. By the 1550s, all the major religious orders except for the Jesuits were present in New Spain, Central America (Kingdom of Guatemala), and Peru. The Jesuits arrived in Brazil starting in 1550 and subsequently reached the Viceroyalties of New Spain and Peru. The diocesan clergy was also present in both the Spanish colonies and Brazil, and a number of bishoprics had been erected. While the Spanish Crown wanted to shift established indigenous parishes, or *doctrinas*, from the control of the orders to the diocesan clergy by the late 16th century, it required another effort, begun in 1749, to effect the transition.

The number of clerics available to convert the indigenous population was small. Consequently, the clergy supported an initiative to combine small native villages into new, larger villages as a way to effect conversion more efficiently. Royal officials appreciated this consolidation, or *congregación*, in New Spain as a means to improved labor allocation and tribute collection. Viceroy Francisco de Toledo in Peru (1569–81) forced the relocation of well over 1 million Native Americans into new villages called *reducciones*. Jesuits in Brazil consolidated indigenous peoples into new villages termed *aldeias*. Clerics on the frontiers similarly brought Amerindians together in missions, the most famous of which were the Jesuit missions in Paraguay.

The Spaniards recognized native possession of land, provided the Indians were using it, but considered lands that were simply held by preconquest states and communities to be available for reassignment. Additionally, and especially after dramatic population decline, the consolidation of indigenous villages opened up lands in the native peoples' former locations for grants to Spaniards. While the growth in Spanish and *casta* land ownership and development of large estates, or haciendas, were important characteristics of the colonial era, indigenous peoples still held significant amounts of communal land at the time of independence in the early 1800s. Sugar planters and ranchers in Brazil also amassed substantial estates, or *fazendas*.

The introduction of European plants and animals altered the use of land, changed diets, and created new demands for labor. Spaniards considered wheat, wine, and olive oil essential for civilized life. They planted wheat wherever they settled, and the combination of climate and topography made it possible. Although Spain tried to prevent wine from being produced in New Spain, settlers and clerics grew grapes and made wine in the coastal valleys of Peru, central Chile, and other South American locations. Olives transplanted to Peru flourished, and producers supplied Lima and other coastal markets. The

indigenous remained wedded to maize, beans, and, in the Peruvian Andes, potatoes. Cassava (manioc) in Brazil persisted as the major source of flour used in bread for native, slave, and free black and mulatto consumers. Sugar had already emerged as an important export for Brazil by 1560 and dominated the economies of Pernambuco and Bahia at the end of the 16th century.

By the 1550s, cattle, sheep, goats, and chickens were enriching native diets and providing Spaniards with more meat than their contemporaries ate in Spain. Cattle were important both for beef and as a principal source of leather and tallow. Furthermore, New Spain and, in the last decades of the empire, Buenos Aires and Montevideo also exported hides to Spain. Similarly, hides were important in the Caribbean, where ranchers in Cuba and Hispaniola traded them illegally with English and other foreign merchants. Colonists valued sheep for both wool and mutton. The former enabled the emergence of cloth factories, or *obrajes*, in New Spain, the Kingdom of Quito, and Peru. The rapid increase in the number of sheep, in particular, caused serious ecological damage in some locations.

Horses, donkeys, and mules transformed transportation in New Spain as they replaced human carriers. Although llamas remained an important means of transportation in Peru and Charcas (Bolivia), mule trains transported mercury, wine, and a wide variety of imports to the great silver mining center at Potosí and carried tons of the precious metal back to the coast. Mule trains also transported bullion across the Isthmus of Panama to Nombre de Dios and, from 1597, Portobelo, where merchants held great trading fairs from the 1560s into the 18th century. Such fairs occurred regularly into the 1620s. Subsequently, they were less frequent until their demise as register ships replaced the fleet system for South America in 1740.

Aside from the Atlantic fleet system designed to transport bullion safely from the colonies to Spain and to deliver European goods for colonial consumers, regular trade between Acapulco and Manila began in the 1560s. Commerce between Acapulco and Lima's port of Callao quickly followed. By the 1590s, the annual galleon or galleons were carrying more silver to Manila than was flowing to Spain. The Crown and the wholesale merchants in Seville found this intolerable; successive monarchs imposed a growing number of restrictions until 1631, when Philip IV banned all trade between New Spain and Peru. Not until the 1770s did the Crown finally again allow limited trade between the colonies.

In the 1550s, Spaniards in the New World still depended heavily on imports from Spain that included textiles, wine, hardware, paper, glass, iron, and a variety of other merchandise. The immigration of artisans and subsequent training of indigenous and black artisans reduced the need to import many products; textiles remained the most important goods sent to the colonies from both Spain and East Asia via Manila. By the 1620s, the colo-

nies' growing self-sufficiency was apparent; contraband trade, which expanded rapidly from that date, further reduced the colonies' economic dependence on Spain.

Foreigners tried to breach Spain's monopoly in the New World trade from the time of John Hawkins in the 1560s and Francis Drake's exploits in the 1570s and 1580s. Conditions had changed by the 1650s. By that time Dutch, French, and English colonies in the Caribbean served as bases for both attacks on coastal settlements and contraband trade. After Henry Morgan's famed devastation of Portobelo and the city of Panama in the late 1660s and early 1670s, respectively, English authorities slowly shifted from allowing buccaneers' raids to encouraging contraband trade, using Jamaica as a warehouse for merchandise, including slaves.

Bullion was smugglers' preferred item of trade. While silver from Potosí made the Viceroyalty of Peru the most important source of registered American silver for roughly a century, in the 1670s, registered production from the Viceroyalty of New Spain surpassed it, establishing a lead that would continue for the remainder of the colonial era. During the half-century between 1660 and 1710, when overall registered bullion production was less in every decade than from 1590 to 1599, some evidence indicates that the amount of bullion reaching Europe from Spanish America had never been higher. If true, these numbers suggest an enormous contraband trade that included unregistered bullion sent on the fleets. They also suggest that the colonies needed Spain far less than Spain needed the colonies.

In Brazil, gold discovered in the 1690s in Minas Gerais fueled unprecedented exports into the 1750s. The discovery of diamonds in the 1720s complemented the gold boom. Between gold and diamonds, Portugal reaped a stunning bonanza in the first half of the 18th century.

In contrast, Spain in the late 17th and early 18th centuries was sufficiently penurious that in late 1687, the Crown initiated the systematic sale of appointments to positions on the colonial *audiencias*, a practice that would continue until 1750. Coupled with the sale of appointments to provincial officials (*corregidores* and *alcaldes mayores*) from 1678 and the sale of appointments to treasury officials, at least in Lima, from 1633, the Crown yielded considerable power to prominent colonial families that understood the benefits of having representation in important administrative institutions. The sales resulted in an unprecedented number of creoles holding *audiencia* and treasury appointments. In 1750, creoles held a majority of *audiencia* positions in the Americas. Royal authority had never sunk lower. Conversely, formal American participation in royal administration had never been greater.

By the mid-18th century, the Spanish Crown had created a third viceroyalty for New Granada. It also had authorized trading companies with monopoly privileges in legal trade between Cuba and Spain and Venezuela and Spain. The latter, created in 1728, had prompted a

rebellion in Venezuela in 1749. After suppressing it, the Crown imposed measures that anticipated the reforms Charles III ordered elsewhere during his reign. The termination of the sale of appointments and a reduction in the number of creoles named to the *audiencias* presaged a broader effort to renew royal authority. The long-desired secularization of parishes held by regular clergy similarly indicated a reassertion of regal power. Rising registered bullion production also signaled the availability of new resources to the Crown.

The British seizure of Havana in 1762 shocked the Spanish government into a flurry of actions designed to strengthen colonial defenses, improve tax collection, increase revenue, and tighten administration. The Crown sent regular army units from Spain to the colonies and reformed the colonial militias. Tax income increased, in part because of the introduction of tobacco monopolies but also because the Crown expanded a policy begun earlier in the century of replacing tax farmers with government officials to collect taxes. In addition, the phased introduction of *comercio libre*, or "free trade," within the empire between 1765 and 1789 resulted in a significant expansion of legal and, thus, taxed trade. While bullion remained the most important single export, colonies dependent on agricultural and animal products for exportation (including indigo in Guatemala, cacao in Venezuela and the Kingdom of Quito, tobacco and increasingly sugar from Cuba, and hides from the Río de la Plata) became more important contributors to the imperial economy.

Spain's almost continuous involvement in European wars starting in 1793 resulted in both insurmountable fiscal problems and an inability to maintain *comercio libre*. Neutral trade for the colonies initially authorized in 1797 proved impossible to reverse. Economic independence anticipated political autonomy.

The French invasion of Portugal in 1807 led to the Portuguese royal family and 10,000 officials, families, and others sailing under British escort to Rio de Janeiro, where they arrived in 1808. In Spain, the spring of 1808 brought the fall of royal favorite Manuel Godoy, the abdication of Charles IV, and the ascension of Ferdinand VII. With French troops in Madrid, Ferdinand and his father abdicated to Napoleon in Bayonne; their abdications provoked a constitutional crisis that affected both Spain and its American colonies.

Spaniards' immediate response was to create juntas claiming to exercise sovereignty during Ferdinand's absence. Thus began governments of resistance against French rule. In several colonies between 1808 and 1810, creoles seeking greater political autonomy likewise established juntas to rule until Ferdinand returned to the throne. By the time combined English and Spanish forces drove the French out of Spain and Ferdinand returned in 1814, the Cortes of Cádiz had promulgated the Constitution of 1812, a document that reneged on earlier

promises of equality for the colonies, and autonomists in several colonies had declared independence.

Ferdinand immediately nullified all actions taken by the governments of resistance and, insofar as possible, restored institutions to their 1808 status. He responded to the colonies with military force rather than attempting reconciliation. This approach drove more members of the creole elites to support independence or, at least, to stand aside while those who wanted independence pursued it. The Riego Revolt not far from Cádiz restored constitutional government in 1820 and ensured that Spain would send no further reinforcements to the rebellious colonies. Armies under José de San Martín, Simón Bolívar, and Antonio José de Sucre conquered those areas in South America still under royalist control. In New Spain, a brilliant compromise embodied in the Plan of

Iguala brought independence in 1821 without any major battles.

Independence in Brazil grew out of the Portuguese monarch agreeing to return to Lisbon but leaving behind crown prince Pedro. When also ordered to return to Portugal, Pedro accepted the arguments of Brazilian autonomists, declared an independent empire of Brazil, and became Emperor Pedro I.

By the mid-1820s, Brazil and the former Spanish colonies on the American mainlands were independent. Brazil emerged with a political stability based on monarchy that the former Spanish colonies could only envy. Economic trauma dominated much of Spanish America; loans secured from British investors were quickly in default. While the euphoria of independence originally prompted great optimism, the reality was sobering.

# ❧ TIME LINE ❧

## (1550s TO 1820s)

### 1550s

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- Introduction of amalgamation process in New Spain
- Indigenous labor drafts initiated in New Spain

### 1556

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- Abdication of Charles I of Spain

### 1556–98

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- Reign of Philip II of Spain

### 1557–78

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- Reign of Sebastião I of Portugal

### 1559

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- Treaty of Cateau-Cambrésis
- Sale of offices begins in Spanish Empire.
- Audiencia of Charcas established

### 1560

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- Philip II marries Elizabeth of Valois, his third wife.

### 1561

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- Madrid becomes the capital of Spain.

### 1562

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- John Hawkins's first voyage to Caribbean islands

### 1563

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- Discovery of mercury at Huancavelica in Peru
- Audiencia of Quito created

### 1564

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- Miguel López de Legazpi expedition reaches Philippines.
- French attempt to establish a colony in Florida.

### 1564–66

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- Definitive organization of fleet system between Spain and Americas

### 1565

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- St. Augustine, Florida, founded by Pedro Menéndez de Avilés

### 1566

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- First trading occurs between New Spain and Philippines.

### 1567

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- Caracas, Venezuela, founded

### 1568

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- John Hawkins's fleet largely destroyed at San Juan de Ulúa
- Bernal Díaz del Castillo completes *True History of the Conquest of New Spain* (published in 1632).

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## 1569

- Jesuits arrive in Peru.

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## 1569–81

- Viceroy Francisco de Toledo holds office in Peru.

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## 1570

- Tribunal of Inquisition established in Lima

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## 1571

- Tribunal of Inquisition established in Mexico City

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## 1572

- Jesuits arrive in New Spain.
- Execution of Inca Túpac Amaru in Cuzco
- Francis Drake seizes treasure at Nombre de Dios, Panama.

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## 1572–75

- Viceroy Francisco de Toledo establishes *mita* for mines at Potosí, in Charcas.

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## 1574

- Ordenanza del Patronazgo seeks to subordinate religious orders to the bishops and viceroys and to replace regular clergy with secular clergy in rural areas.
- Introduction of *alcabala* in Viceroyalty of New Spain

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## 1576–79

- Devastating epidemic in New Spain with high indigenous mortality

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## 1578–80

- Cardinal Henry rules Portugal.

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## 1580

- Permanent foundation of Buenos Aires
- Philip II annexes Portugal and its colonies; becomes Philip I of Portugal.

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## 1583

- First founding of Audiencia of Manila

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## 1585–86

- Francis Drake destroys Santo Domingo and Cartagena.

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## 1588

- English defeat the Spanish Armada.

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## 1592

- Foundation of the General Indian Court in New Spain
- Highest registered silver yield at Potosí (7.1 million ounces)

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## 1596

- Spanish Crown's third bankruptcy

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## 1597

- Acapulco-Manila trade exceeds official transatlantic trade.
- Portobelo established to replace Nombre de Dios as terminus for galleons

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## 1598–1621

- Reign of Philip III of Spain (Philip II of Portugal)

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## 1604

- Treaty of London ends 20 years of war between Spain and England.

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## 1605

- Tribunal of Accounts established in Lima, Mexico City, and Bogotá

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## 1606

- Salable offices in Spanish America granted in perpetuity
- Definitive establishment of Audiencia of Chile
- First Jesuits reach Paraguay.

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## 1607

- English found Jamestown.

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## 1608

- French found Quebec.

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## 1609

- Santa Fe, New Mexico, established
- Twelve Years' Truce between Spain and the United Provinces
- Expulsion of Moriscos from Spain
- *Relação* established in Bahia

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**1610**

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- Tribunal of Inquisition established in Cartagena de Indias
- First Jesuit mission established among Guaraní

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**1612**

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- English colonize Bermuda.

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**1613**

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- Dutch establish a post on Manhattan island.

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**1618**

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- Fall of royal favorite (*válido*) duke of Lerma in Spain

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**1618–48**

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- Thirty Years' War in Europe

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**1620**

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- Pilgrims arrive at Cape Cod.

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**1621**

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- End of Twelve Years' Truce in Netherlands
- Dutch charter the West India Company.

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**1621–65**

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- Reign of Philip IV of Spain (Philip III of Portugal)

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**1622**

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- Count (later count-duke) of Olivares becomes *válido* of Philip IV in Spain.

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**1624**

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- Dutch capture Bahia and hold it until 1625.

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**1628**

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- Piet Heyn and Dutch West India Company fleet seize Spanish silver fleet off Cuba.

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**1630–54**

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- Dutch occupy Pernambuco, Brazil.

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**1631**

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- *Media anata* introduced as a new tax in Spain and its colonies
- Legal trade between New Spain and Peru ended

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**1632**

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- French settle Antigua and Monserrat in Caribbean.
- *Repartimiento* officially ends in New Spain, with a few exceptions.

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**1633**

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- Spain begins sale of appointments to treasury positions.

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**1634**

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- Dutch seize Curaçao.

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**1635–59**

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- France and Spain at war

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**1638**

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- Stamped paper required in Spain and the Indies for official business

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**1640**

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- Revolts of Catalonia and Portugal
- Combined Spanish and Portuguese fleet defeated by Dutch at Itamaracá off Pernambuco

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**1640–56**

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- Rule of John IV, first Braganza monarch of Portugal

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**1643**

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- Fall of count-duke of Olivares
- Spanish defeated by French at Rocroi

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**1648**

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- Spain recognizes independence of United Provinces in Treaty of Münster.

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**1652–54**

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- First Anglo-Dutch War

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**1654**

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- Dutch driven out of Recife, Pernambuco, Brazil

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**1655**

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- English take Jamaica as token result of Oliver Cromwell's "Western Design."
- Spain and England go to war.

- Robert Blake seizes part of Tierra Firme silver fleet near Cádiz, taking booty of some 2 million pesos.

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## 1656

- Robert Blake seizes most of New Spain silver fleet at Santa Cruz de Tenerife.

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## 1659

- Peace of the Pyrenees ends war between Spain and France.

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## 1660

- End of ad valorem levies on trade; lump sum system introduced

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## 1665–67

- Second Anglo-Dutch War between England and Holland with France entering in 1666

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## 1665–1700

- Reign of Charles II, last Habsburg monarch in Spain

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## 1667

- England receives Antigua, Monserrat, and St. Kitts from France and New Amsterdam from Holland, which gets return of Suriname by Treaties of Breda.

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## 1668

- Spain recognizes Portugal's independence.
- Henry Morgan's buccaneers take Portobelo.

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## 1668–1706

- Peter II serves first as regent of Portugal (1668–83), then as king until 1706.

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## 1670s

- Registered Mexican silver production exceeds that of Peru and continues to do so for remainder of colonial era.

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## 1670

- Treaty of Madrid, in which Spain recognizes effective English settlement in Americas

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## 1671

- Henry Morgan's buccaneers attack Portobelo and capture Panama.

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## 1672–78

- Third Anglo-Dutch War with England and France

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## 1678

- Spanish Crown begins sale of appointments to provincial administrative posts.

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## 1680

- Major monetary devaluation in Spain paves way for monetary stability.
- Portuguese establish Colônia do Sacramento.
- Pueblo revolt in New Mexico

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## 1683

- Buccaneers successfully raid Veracruz.

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## 1686

- Devaluation completed in Spain

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## 1687

- Systematic sale of *audiencia* appointments begins.

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## 1690s–1750s

- Gold boom in Minas Gerais

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## 1700–46

- Reign of Philip V, first Bourbon monarch in Spain

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## 1701–24

- In South America, 150 French ships trade on Pacific coast.

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## 1702–13

- War of the Spanish Succession

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## 1703

- Methuen Treaty between Portugal and England

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## 1704

- English seize Gibraltar.

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**1706–50**

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- John V, king of Portugal

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**1713**

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- Treaty at Utrecht confirms Philip V on Spanish throne.
- British gain *asiento* and annual ship for American trade.

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**1714**

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- Creation of Ministers of the Indies, War, Navy, Grace and Justice, Finance, and State
- Philip V marries Elizabeth Farnese.

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**1716**

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- *Nueva planta* ends *fueros* in Crown of Aragon.

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**1717**

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- Council of the Indies reduced in size to match reduced responsibilities
- Casa de Contratación (Board of Trade) moved from Seville to Cádiz

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**1720s**

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- Diamonds discovered in Brazil

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**1721–35**

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- Comunero Revolt in Paraguay

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**1724**

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- Abdication of Philip V to Louis I; Philip returns to throne after Louis's death.
- Spanish Crown assumes direct collection of *alcabala* and commercial taxes in Lima.

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**1728**

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- Creation of Real Compañía Guipúzcoana de Caracas

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**1739**

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- English admiral Vernon takes Portobelo; no further trading fairs
- Definitive creation of Viceroyalty of New Granada

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**1739–48**

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- War of Jenkins' Ear

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**1740**

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- Creation of Havana Company
- Use of register ships for Spanish South America begins.

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**1746–59**

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- Reign of Ferdinand VI in Spain

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**1749**

---

- Intendant system established throughout Spain

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**1750**

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- Treaty of Madrid between Spain and Portugal on boundary of Río de la Plata
- End of systematic sale of *audiencia* and other royal appointments

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**1750–77**

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- Joseph I reigns in Portugal.
- Marquês de Pombal is secretary of state to Portugal's Joseph I.

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**1751**

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- Abolition of Audiencia of Panama
- Creation of *Relação* of Rio de Janeiro

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**1754–56**

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- Guaraní war in Paraguay

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**1755**

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- Lisbon earthquake

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**1755–77**

---

- Companhia Geral do Comércio do Grão-Pará e Maranhão (General Commercial Company of Grão-Pará and Maranhão)

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**1756–63**

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- Seven Years' War

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**1759**

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- Portugal expels Jesuits from kingdom and colonies.

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**1759–88**

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- Reign of Charles III of Spain



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## 1761

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- Third Family Compact between Spain and France

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## 1762

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- Spain enters Seven Years' War as ally of France against Britain.
- British capture Havana.

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## 1763

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- Peace of Paris restores Havana to Spanish, but British get Florida; Colônia do Sacramento is returned to Portugal.
- Spain receives Louisiana from France.
- Rio de Janeiro becomes viceregal capital of Brazil.

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## 1764

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- First intendant for Cuba is named.

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## 1765

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- Initiation of *comercio libre*

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## 1765–71

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- José de Gálvez's *visita* to New Spain

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## 1766

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- Motín de Esquilache in Madrid forces Charles III to leave city.

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## 1767

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- Spain expels Jesuits from motherland and New World.

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## 1773

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- Council of the Indies declared equal in rank to Council of Castile

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## 1776

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- Creation of Interior Provinces in New Spain

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## 1776–87

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- José de Gálvez is minister of the Indies.

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## 1777–99

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- Maria I reigns in Portugal.

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## 1777

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- Pedro de Cevallos captures Colônia do Sacramento.
- Viceroyalty of Río de la Plata established, with capital in Buenos Aires

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## 1778

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- Expansion of *comercio libre*

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## 1779

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- Spain joins France in war against Britain.

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## 1780–81

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- Comunero Rebellion in New Granada

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## 1780–83

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- Túpac Amaru revolt in Peru

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## 1783

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- Treaty of Paris recognizes independence of United States of America; Spain regains Florida and Minorca.
- Creation of Audiencia of Buenos Aires and intendencies in Viceroyalty of Río de la Plata

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## 1784

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- Intendant system introduced in Peru

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## 1786

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- Intendant system introduced in New Spain and Central America
- Creation of Audiencia of Caracas

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## 1787

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- Creation of Audiencia of Cuzco and intendant system in Chile

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## 1788–1808

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- Reign of Charles IV of Spain

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## 1789

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- French Revolution begins.
- New Spain and Venezuela included in *comercio libre*

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## 1791–1804

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- Slave revolt in Saint Domingue leads to independent Haiti.

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**1792**

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- Royal favorite Manuel Godoy becomes secretary of state in Spain.

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**1793**

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- Execution of Louis XVI

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**1793–95**

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- Spain and revolutionary France at war

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**1795**

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- Peace of Basel ends war; France receives Santo Domingo.

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**1796**

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- Treaty of San Ildefonso between Spain and France provokes war with Britain.

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**1797**

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- British seize Trinidad.
- Spain initiates neutral trade.

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**1797–1800**

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- British blockade Cádiz.

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**1798**

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- *Consolidación de vales reales* begins in Spain.

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**1799**

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- Spain ends neutral trade.

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**1799–1804**

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- Napoleon is first consul in France.

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**1799–1826**

---

- John VI serves first as regent of Portugal (1799–1816), then as king until 1826.

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**1801**

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- Spain restores neutral trade.

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**1802**

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- Treaty of Amiens brings peace to Europe.

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**1804**

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- Spain and Britain resume war.
- *Consolidación de vales reales* extended to colonies
- United States annexes Florida.

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**1804–14**

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- First Empire in France; Napoleon is emperor.

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**1805**

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- British defeat combined Franco-Spanish fleet at Trafalgar.

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**1806–07**

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- Two British invasions of Buenos Aires; both defeated

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**1807**

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- Treaty of Fontainebleau allows French troops to cross Spain to reach Portugal.
- French capture Lisbon.
- Royal court and 10,000 Portuguese go to Brazil.

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**1808**

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- Riot at Aranjuez topples Manuel Godoy and Charles IV.
- Ferdinand VII becomes king of Spain.
- Rising in Madrid against French
- Abdications of Ferdinand VII and Charles IV to Napoleon
- Joseph I named king of Spain by Napoleon
- Juntas created throughout Spain
- British announce support of Spanish patriots; send army to Portugal.
- Spanish victory over French at Bailén
- Viceroy José de Iturrigaray ousted by peninsular coup in Mexico City
- Junta Central meets at Aranjuez; later flees to Seville.

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**1808–21**

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- Rio de Janeiro is capital of Portuguese Empire.

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**1809**

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- Junta Central calls for American representation.
- Creoles in Quito establish short-lived junta.

## 1810

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- Junta Central abandons Seville; appoints Council of Regency
- Creation of juntas in Caracas, Buenos Aires, Santiago de Chile
- Grito de Dolores begins Miguel Hidalgo's revolt in New Spain.
- Second rebellion in Quito
- American deputies present grievances to Cortes of Cádiz.

## 1810–12

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- French siege of Cádiz

## 1810–13

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- Cortes of Cádiz meets.

## 1811

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- Call to revolt in Banda Oriental
- Republic of Cundinamarca established in New Granada
- Miguel Hidalgo executed
- Paraguay declares independence.
- Venezuela declares independence and First Republic.

## 1812

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- Constitution of 1812 promulgated
- Collapse of First Republic in Venezuela
- Royalists reestablish control in Quito.
- Insurgents under José María Morelos take Oaxaca, Mexico.

## 1813

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- Joseph I and last French troops leave Madrid.
- Simón Bolívar declares war to the death on peninsulars.
- Second Republic established in Caracas
- Treaty of Valençay ends Spain's war with France.

## 1813–14

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- Peruvian force reestablishes royalist control in Chile.

## 1814

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- Ferdinand VII returns to Spain, nullifies all actions since 1808, and restores institutions of old regime.
- José Tomás Boves drives Simón Bolívar from Caracas.

## 1815

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- Pablo Morillo and Spanish army begin reconquest of Venezuela and New Granada.
- José María Morelos captured and executed

## 1816

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- Dr. Francia (José Gaspar Rodríguez de Francia) named perpetual dictator of Paraguay
- United Provinces of the Río de la Plata declare independence.
- Pablo Morillo completes reconquest of New Granada.

## 1817–18

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- José de San Martín and Army of the Andes defeat royalists in Chile.

## 1819

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- Battle of Boyacá ensures New Granada's independence.
- Congress of Angostura proclaims Republic of Colombia.

## 1820

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- Riego Revolt in Spain restores Liberals and constitutional monarchy.
- José de San Martín lands army in Pisco, Peru.

## 1821

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- Plan of Iguala in New Spain results in independent Mexico.
- Lima citizens declare independence of Peru.
- Superior Political Chief Juan O'Donojú recognizes Mexican independence.

## 1822

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- Agustín de Iturbide proclaimed emperor of Mexico
- Antonio José de Sucre defeats royalists at Pichincha and secures independence in Kingdom of Quito.
- Guayaquil interview between Simón Bolívar and José de San Martín
- San Martín resigns positions in Peru and leaves for Europe.
- Brazil declares independence from Portugal.

## 1823

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- Abdication of Agustín I of Mexico
- French invasion restores Ferdinand VII to full power.

## 1824

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- Patriots defeat royalists at Battles of Junín and Ayacucho in Peru.
- Execution of Agustín I of Mexico
- Federal constitution enacted for Republic of Mexico

## 1825

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- Antonio José de Sucre secures independence of Upper Peru.

## 1826

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- Capitulation of Callao ends Spanish resistance in Peru.

## 1830

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- Collapse of Gran Colombia
- Death of Simón Bolívar



✿ ENTRIES A TO Z ✿





**Abascal y Sousa, José Fernando de** (b. 1743–d. 1821) *Spanish army officer and viceroy of Peru* Born in Oviedo into a noble Asturian family, José Fernando de Abascal y Sousa entered the Spanish army as a cadet in 1762 and served tours of duty in PUERTO RICO, BUENOS AIRES, SANTO DOMINGO, and CUBA. His service was rewarded with a knighthood in the Order of Santiago in 1795.

On March 20, 1799, Abascal was named INTENDANT of GUADALAJARA and president of NEW GALICIA'S AUDIENCIA. Although named VICEROY of RÍO DE LA PLATA on May 15, 1804, he never served in the post, being appointed viceroy of PERU on November 10, 1804. Captured by the British while on route to this post, Abascal was released in the Azores, sailed to Buenos Aires, and then traveled by land to LIMA, where he arrived in July 1806 and served for 10 years.

Viceroy Abascal supported the introduction of the smallpox vaccine to Peru, prohibited burial in Lima's churches and created a public cemetery outside the city walls, rebuilt a school (Colegio of San Pablo) for Indians and mestizos, oversaw the establishment of a guild for attorneys (Colegio de Abogados), and set up a medical school (Colegio of San Fernando) (see COLEGIO; COLEGIO MAYOR). Additionally, he strengthened the MILITARY, increasing its size and improving training.

Abascal maintained Spanish control over the VICEROYALTY OF PERU at a time when advocates of autonomy and independence were overthrowing the viceroys of Río de la Plata and NEW GRANADA. Abascal, an absolutist, believed that steadfast opposition to both the changes represented by AUTONOMISTS on the one hand and the CONSTITUTION OF 1812 on the other was the best way to stay the course.

Abascal put down revolts in southern Peru, sent troops to QUITO and CHILE to quash autonomist movements, and annexed the Audiencia of CHARCAS to the Viceroyalty of Peru and retained it against rebels in LA PLATA and invading armies sent by the successive insurgent governments in Buenos Aires. He was a determined royalist and sought to undermine the Constitution of 1812, considering it a threat to viceregal authority and continued Spanish rule. Ironically, his decision not to implement the constitution helped to cause an uprising in CUZCO. In Lima, Abascal sought to control the implementation of the constitution and intervened in the selection of officials and representatives. He recognized, however, that the constitutional era had destroyed the authority he had previously enjoyed, making reliance on military force the only, and much less effective, course of action for maintaining royal rule. By 1816, Abascal was anxious to retire.

As a result of his efforts, Abascal turned over a viceroyalty still under royalist control to his successor, JOAQUÍN DE LA PEZUELA. Returning to Spain, he died in Madrid as the marqués de la Concordia, a title granted to him in 1812.

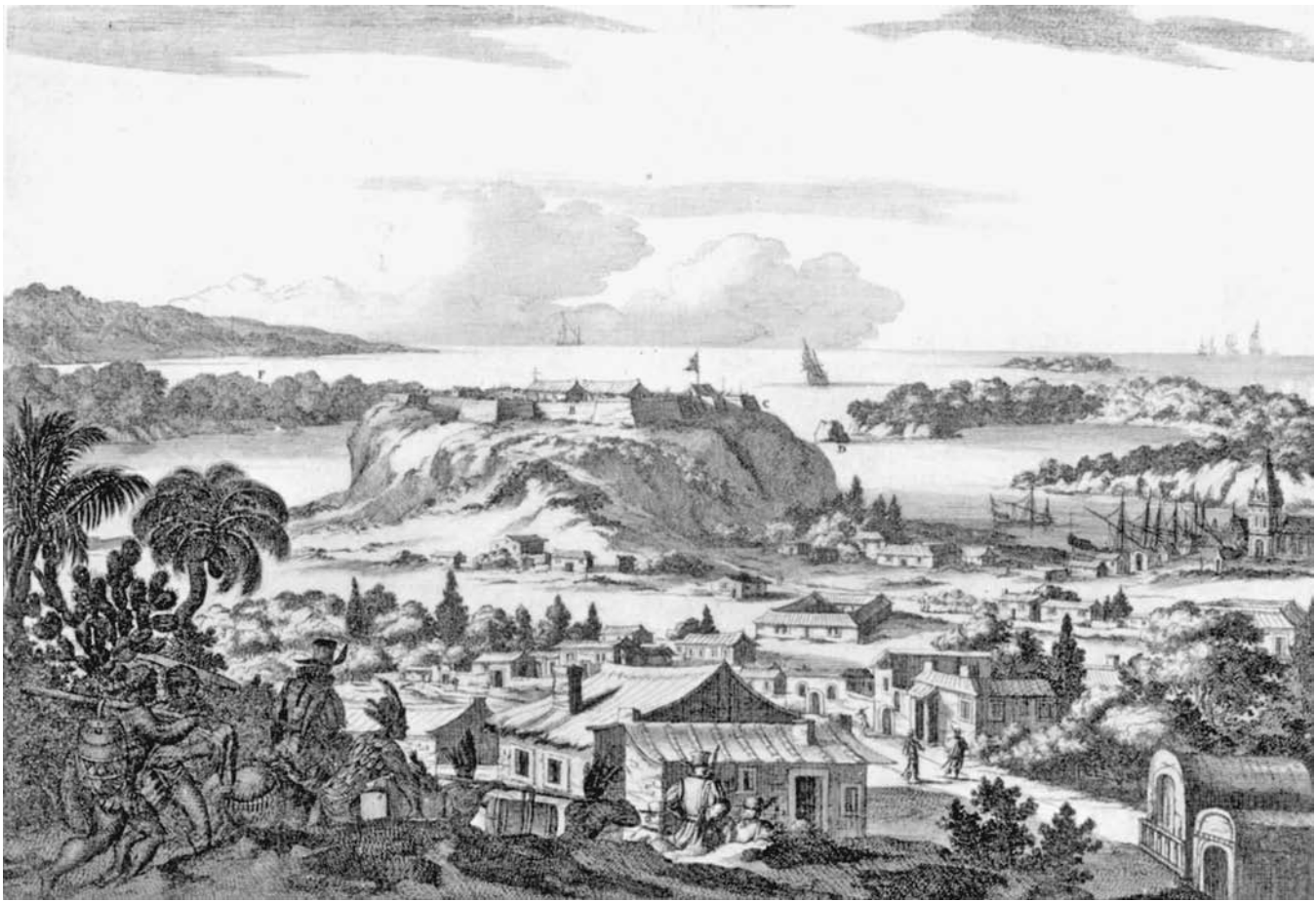
**Further reading:**

Timothy E. Anna. *The Fall of the Royal Government in Peru* (Lincoln: University of Nebraska Press, 1979).

———. "The Last Viceroys of New Spain and Peru: An Appraisal." *American Historical Review* 81, no. 1 (February 1976): 38–65.

**Acapulco** Located in the modern state of Guerrero, 190 miles (306 km) south of MEXICO CITY, Acapulco





The port of Acapulco, in New Spain, was the American terminus for trade with Manila. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

became the VICEROYALTY OF NEW SPAIN'S most important Pacific coast port. Returning from the PHILIPPINE ISLANDS in June 1565 with silks from China, Andrés de Urdaneta discovered the northern Pacific trade winds. This led to annual sailings of the MANILA GALLEONS, one or sometimes two ships that conveyed silver from PERU and New Spain via Acapulco to the Philippines to exchange for East Asian products, including silks, porcelain, precious stones, ivory, copper and other metal pots, spices, and lacquered goods.

The Spanish Crown tried to limit the volume and value of the commerce, while merchants sought freedom to TRADE as they saw fit. Legislation in 1582 and 1583 put restrictions in place, which were added to particularly in 1593 and hardened in 1620. Specifically, the Crown limited the trade to two ships annually, of up to 300 tons each, carrying goods worth no more than 250,000 pesos from Manila and 500,000 pesos from Acapulco to Manila. Additionally, Philippine residents were to be the traders and beneficiaries, and none were to be representatives of Mexico City merchants; direct trade from Manila to the American colonies was restricted to Acapulco and reexporting goods from Acapulco to other colonies was prohibited; and the trade was subject to the customary

taxes levied on the Atlantic trade (see TAXATION). By the end of the 16th century, the value of the Manila trade exceeded that of the fleets from Spain.

Legislation in 1604 allowed merchants to use three ships no larger than 400 tons each in trade between Mexico and PERU, and only American products were to be transported. The maximum tonnage of the two ships sailing from Acapulco to Manila was reduced to 200 tons. In 1631, the Crown banned all trade between Mexico and Peru, a provision restated in 1634 and maintained into the 18th century.

The profits available through the Manila trade proved irresistible, and creative merchants and, at times, their allies in administrative offices (occasionally including a VICEROY) worked to circumvent the restrictive legislation. Private cargo shipped from Acapulco may have been worth as much as 6 million pesos on at least one occasion, and amounts of more than 2 million pesos were commonplace during the first half of the 17th century.

Restrictions on trade and their frequent circumvention persisted into the 18th century. PHILIP V prohibited trade in Chinese silks in 1718 and reiterated the ban in 1720. Nevertheless, colonial representatives suc-

ceeded in having the restriction lifted in 1724. As *COMERCIO LIBRE* took root in the CARIBBEAN colonies in the 1760s, individual ships were allowed from 1765 to sail from Spain to the Philippines. A new commercial code addressed Manila's trade in 1769 and allowed for the creation of a merchant guild (*CONSULADO*) with considerable authority over the trade. The decision to establish the Royal Philippine Company in 1785 regularized direct trade between Spain and the Philippines. Manila was opened to foreign shipping in 1789, provided the traders dealt only in Asiatic goods. The company was authorized to send 800 tons of Asiatic goods annually to New Spain but did not enjoy the advantages of the early Manila galleons. The last galleon from Manila reached Acapulco in 1811 and returned to its port in 1815.

#### Further reading:

Louisa Schell Hoberman. *Mexico's Merchant Elite, 1590–1660: Silver, State, and Society* (Durham, N.C.: Duke University Press, 1991).

William Lytle Schurz. *The Manila Galleon* (New York: E.P. Dutton & Co., 1959).

**Acordada, Tribunal of the** In a unique effort to deal effectively with crime and especially banditry in the VICEROYALTY OF NEW SPAIN, in 1722, VICEROY Baltasar de Zúñiga y Guzmán, marqués de Valero, established a new institution, the Tribunal of the Acordada (see CRIME AND PUNISHMENT). Miguel Velázquez de Lorea, an effective scourge of bandits and already known for zealously applying exemplary if irregular justice, headed the new tribunal. With the consent (*con acuerdo*) of the Audiencia of Mexico (hence the name *Acordada*), the Acordada authorized Velázquez to arrest and sentence malefactors without right of appeal. The Spanish Crown approved the viceroy's action, as well as Velázquez's appointment as judge and captain of the tribunal.

Aided by as many as 2,500 agents scattered irregularly across New Spain, in the years from its creation until 1810, the Acordada processed more than 62,900 prisoners. Of this number, 19,410 were sentenced to labor in the *PRESIDIOS*, and 888 were executed.

Unlike many colonial institutions, the Acordada arose out of the specific circumstances of New Spain. Unlike other colonial judicial institutions, it had jurisdiction throughout New Spain, NEW GALICIA, and New Vizcaya and lacked administrative responsibilities. Thus, it moved closer than other colonial institutions to the modern notion of a separate judiciary.

#### Further reading:

Colin M. MacLachlan. *Criminal Justice in Eighteenth Century Mexico: A Study of the Tribunal of the Acordada* (Berkeley and Los Angeles: University of California Press, 1974).

**Acosta, José de** (b. 1540–d. 1600) *Spanish Jesuit author* The son of a successful merchant, José de Acosta was born in Medina del Campo, Spain, and entered the Society of Jesus in 1552 (see JESUITS). By the late 1550s, he had proven himself an excellent student, teacher, and writer. He spent eight years in the Jesuit *COLEGIO* at the University of Alcalá de Henares. After teaching assignments and his final profession of vows, he obtained an assignment in the VICEROYALTY OF PERU in early 1571.

Acosta reached LIMA on April 27, 1572. During his 14 years in PERU, he taught moral theology, preached, heard confessions, traveled widely, created new Jesuit *colegios*, served as provincial of the Society of Jesus in Peru, convoked its first provincial congregation, turned the *REDUCCIÓN* at Juli on the shore of Lake Titicaca into a model for the more famous Jesuit "reductions" in PARAGUAY, wrote and published, and participated in the Third Provincial Council of Lima of 1582–83 that created a catechism for the indigenous population still used after Peru's independence. Acosta's years in Peru overlapped to a large extent with the rule of VICEROY FRANCISCO DE TOLEDO, with whom he had a variety of conflicts.

Recalled to Spain, Acosta went via NEW SPAIN, where he spent nearly a year and consulted with colleagues, notably fellow Jesuit Juan de Tovar, about the pre-conquest civilization in Central Mexico. In 1587, he reached Spain, where he published works on theology and natural history, all related to his great passion, the salvation of the Amerindians. His most noted work, published in 1590, was *Historia natural y moral de las Indias*, which appeared in multiple editions and numerous translations, including one in English (*Natural and Moral History of the Indies*) in 1604.

Acosta's *Historia* included detailed descriptions of the cultures, climate, geography, flora, fauna, minerals, and various natural phenomena including volcanoes and EARTHQUAKES of the New World, as well as the origins and arrival of NATIVE AMERICANS. He thought that small groups had traveled either by land or across a narrow and yet undiscovered strait far to the north or south linking the Americas with another continent. His originality lay not in the idea of a land bridge but in rejecting European legend as to what that other continent was (for example, Atlantis). He further believed that the migration would have adversely affected cultural development. All subsequent writers during the colonial era were familiar with Acosta's influential work. Acosta concluded his sometimes controversial career as rector of the Jesuit college at the University of Salamanca.

#### Further reading:

Claudio M. Burgaleta. *José de Acosta, S.J. (1540–1660): His Life and Thought* (Chicago: Loyola Press, 1999).

**adelantado** The term *adelantado* originated in medieval Spain to refer to an office in which the incumbent

represented the king. The office still existed into the final stage of reconquest of the Iberian Peninsula from the Moors (the Reconquista), while its use in the colonies was confined to the 16th century, although occasionally the right to hold the title was hereditary.

The Crown employed the title irregularly in contracts (*capitulaciones*) with explorers and conquistadores, for example, Vasco Núñez de Balboa and Francisco Pizarro. Of some 70 *capitulaciones*, however, fewer than half granted the title to an expedition's leaders. Typically, men named *adelantado* were also appointed governor of the region to be settled.

*Adelantados* enjoyed administrative, legislative, and judicial authority. Their usual responsibilities included securing financing; overseeing the wide range of activities associated with discovery, exploration, conquest or "pacification," and settlement; and ensuring that the Crown received relevant taxes. The individual contracts spelled out the specific charges for each region and the time period within which they were to be accomplished. An *adelantado* received a salary from income drawn from the region assigned to him but also enjoyed the right to its choicest *ENCOMIENDA* and land.

#### Further reading:

C. H. Haring. *The Spanish Empire in America* (New York: Harcourt, Brace & World, 1963).

**agriculture** Most of colonial Latin America's settled population labored in farming: planting, tending, and harvesting crops, and maintaining the tools used in these activities. In addition to a variety of garden plants, the most important sources of food were MAIZE and beans in NEW SPAIN, potatoes and maize in PERU, and manioc in BRAZIL. Iberians, however, introduced an extensive variety of plant foods, as well as metal tools. Spaniards considered WHEAT, WINE, and olive oil essential to civilized life and quickly introduced grains, grape vines, and olive trees wherever the right growing conditions existed. Climate, altitude, availability of water through rain or irrigation, soil conditions, fertilizer, labor supply, and TRANSPORTATION either fostered or prevented the success of particular crops. Longer growing seasons than in Europe, staggered growing seasons as a result of diverse geographical and climatic conditions, and the rich soils of many locations enabled two or three crops to be grown a year in some areas, with a significantly higher seed-yield ratio.

By the 1550s, European crops had taken root in most important centers of Spanish settlement except POTOSÍ in CHARCAS, whose high elevation precluded all agriculture. Wheat production was well established in New Spain, notably in the Valley of Mexico, where by 1563, at least 114 farms produced the grain, and in the region surrounding PUEBLA. By the 1580s, Mexican merchants were transporting wheat, flour, and other agricultural products

to VERACRUZ for shipment to HAVANA. The development of mining districts in ZACATECAS and later GUANAJUATO, northwest of MEXICO CITY, stimulated wheat production in the BAJÍO and farther north. Since wheat would not grow at more than 12,000 feet (3,658 m) above sea level, conditions were not as favorable in Andean regions. Nonetheless, valleys near QUITO, CUZCO, and AREQUIPA, among many others, produced enough wheat to ship a surplus elsewhere. The Cochabamba Valley in Charcas supplied the Potosí market, as well as Oruro and La Paz.

In 1687, a devastating earthquake damaged the irrigation systems in valleys around LIMA. Soon the Peruvian capital was heavily dependent on wheat imports from CHILE, creating an important export market for its southern neighbor. Although some wheat was produced in Central America, most was consumed in Santiago de Guatemala and a few other Spanish towns; exports to Mexico, PANAMA, and Peru were modest.

In BRAZIL, some wheat was grown for local consumption by Portuguese immigrants and local elites, especially in BAHIA. More important, however, was the widespread cultivation of cassava (manioc) to be made into flour (*farinha de mandioca*), the staple of the Bahian diet.

The beverage of choice among most whites in the colonies was wine. No ships left Spain without wine for the crew, and many carried wine for the growing colonial market. Although colonists in Central Mexico, notably around Puebla, planted thousands of vines, the Spanish Crown responded with prohibitions rather than encouragement in order to maintain the tax-bearing TRADE in wine from Spain.

From at least the early 1540s, *encomenderos* and other landowners in Arequipa began growing grapes, and from the late 1550s, commercial viticulture was under way in coastal valleys west of the city (see *ENCOMIENDA*). The city's location on the main route between Lima and the Potosí mining district in Charcas was an advantage, and growers generally did well despite greater competition from producers in Ica, Pisco, and Nazca, a loss of control over marketing, overall declining prices as a consequence of overproduction, a scarcity of labor, and increased TAXATION until a volcanic eruption in 1600 covered fields for nearly 50 miles with ash. Wine production in 1601 plummeted by 95 percent, and the remaining 5 percent was not potable. Also about this time, Arica replaced Arequipa as the major waystation on the route from Lima to Charcas. Although production had largely recovered by the 1630s, the loss of markets in Lima and farther north forced producers to focus on buyers in Cuzco and Charcas. At the turn of the 18th century, producers in Arequipa turned to brandy, the higher-alcohol-content cousin of wine, as a way to turn a surplus of wine into a more profitable beverage. By the end of the century, they were distilling nearly all of their wine and sending brandy in large quantities to Charcas and Cuzco, although Moquegua and Lacumba dominated the Potosí market.

By the late 16th century, wine from Peru dominated the tables of Spaniards in GUATEMALA. The Crown forbade Guatemala to import Peruvian wine from 1615 to 1685, then relented in 1685, when limited amounts were permitted until 1713. The second ban was not removed until 1774.

Estate owners (*estancieros*) near SANTIAGO DE CHILE produced wine for their own needs and other consumers in the capital. By the late 16th century, producers in Mendoza (Argentina) were shipping wine to BUENOS AIRES and in the following century their wine displaced Paraguayan wine in the RÍO DE LA PLATA market.

Whites also wanted olive oil, a product imported from Spain from the beginning of colonization. Although the Crown rejected proposals to grow olive trees in Mexico, some landowners planted them and by the 1560s, were producing oil. Continued royal prohibitions, however, resulted in the continued importation of oil from Spain throughout the colonial period.

Settlers in the Arequipa region planted olive groves in the coastal river valleys and sent both olives and olive oil to Lima and farther north to Ecuador, Panama, and Central America; the travelers JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA noted in the mid-18th century that the coasts of Nazca and Pisco sent olives and oil to the capital. Olive production spread from Peru to Chile.

Farmers near CARACAS began exporting wheat to CARTAGENA DE INDIAS in the 1580s in response to demand from the SILVER fleet (see FLEETS/FLEET SYSTEM). The discovery of CACAO trees in the 1620s, however, led entrepreneurs to focus on growing cacao beans to meet demand from indigenous consumers in New Spain. For labor, growers quickly turned to African slaves, which affected the composition of the colony's society (see SLAVERY). Although cacao would be produced elsewhere, notably in the GUAYAQUIL region of the AUDIENCIA district of Quito in the 18th and early 19th centuries, the beans remained the heart of VENEZUELA's exports.

SUGAR was the most important agricultural export of the colonial era. Originally transported from the Canary Islands to HISPANIOLA, by the 1550s, sugarcane was an established crop in numerous New World locations. (Hernando Cortés may have introduced it into New Spain.) Sugar refining in Cempoala was already significant before 1535, for example. Inland production in the modern-day state of Morelos expanded notably between 1580 and 1630. Although the principal market was Mexico City, and access to credit there was critical for successful sugar estate ownership, until about 1650, Morelos sugar also competed at times in the international market. Stagnation and decline occurred after 1630, but another period of growth was seen after 1760. Although CUBA would become almost synonymous with sugar later on, its role as an important producer dates to the second half of the 18th century.

Sugar production in Peru began about 1540 and became common in coastal valleys, especially those in

which more profitable vineyards would not succeed. By 1800, nearly every valley between Lima and Lambayeque had one or more sugar estates. As in New Spain, Peruvian sugar was affected by international competition, especially after the mid-17th century. Local and regional consumption, however, remained high.

BRAZIL was the colony in which sugar was king. First in PERNAMBUCO, then in the region around SALVADOR DA BAHIA, and later in RIO DE JANEIRO, it was the dominant export to Europe. Sugar production in Brazil outstripped that of the Spanish colonies, although by 1650, it was suffering from competition by producers on Dutch, English, and French islands in the Caribbean. Brazilian planters persisted, however, and in the late 18th and early 19th centuries again enjoyed great prosperity.

INDIGO was a specialized agricultural product particularly important in Central America. Used by NATIVE AMERICANS prior to the arrival of Spaniards, the blue dye became the region's most profitable export between 1580 and 1620. Although the trade then stagnated for more than a half century, European demand for the dye formed the foundation of merchant fortunes in Central America during the second half of the 18th century.

TOBACCO was sold legally in the colonies and in Spain, yet there was also an illicit market marked by smuggling to other countries. Unlike sugar production, which required considerable capital, tobacco was a crop for the small producer. Cuba was the initial beneficiary. As European demand for smoking tobacco and snuff expanded in the late 16th century, Cuban production increased. Rising consumer demand provoked increased taxation by the Crown, and contraband sales rose as well. The creation of a royal tobacco monopoly in Spain in 1717 to benefit from the addictive weed failed to stem, and perhaps even increased, illegal sales. Since all of the Spanish colonies grew tobacco, intercolonial trade was unnecessary. At the same time, the widespread demand for a product whose use was optional made tobacco an ideal candidate for taxation. Accordingly, between 1717 and 1783, the Crown established ROYAL MONOPOLIES over tobacco in every colony. In Mexico City, this meant the construction of the largest manufactory in the colony, with almost 9,000 workers in 1796; the seven manufactories in the colony had a total of 13,316 workers in 1809.

Brazilians also grew tobacco for a domestic and, from the early 17th century, an export market. Grown in Bahia, where it on occasion surpassed sugar, in the late 17th century, it had gained importance in the trade between Salvador da Bahia and Lisbon. It also became significant as an item traded for African slaves. Although Bahia had a monopoly on legal tobacco production until the mid-18th century, subsequently the Portuguese Crown encouraged the spread of the industry. Pernambuco benefited from this change of policy, although the Crown taxed tobacco. It even exported some to Spain.

Initially, colonial agriculture in the Spanish colonies relied on indigenous laborers assigned in *encomiendas*

or enslaved and sometimes complemented with African slaves (see *MITA*; *REPARTIMIENTO*). By the eve of independence, workers included indigenous communities that tended communal holdings, self-employed owners or renters of small plots of land devoted to subsistence farming, residential and seasonal workers on *HACIENDAS*, and slaves who could number in the hundreds on the largest *PLANTATIONS* producing sugar for exportation. In the sugar-producing regions of Brazil, African slaves had replaced the native population as the dominant labor force by the early 17th century.

The types of landholding also varied. Into the 19th century, indigenous communities throughout the Spanish colonies retained significant amounts of land used for growing basic foodstuffs. Private holdings ranged from small plots used in subsistence farming and modest properties used for growing tobacco, vines, and olives to larger landholdings devoted to producing grains—wheat, barley, and oats—sugarcane, and cacao. In addition, domestic animals for food, breeding, or transportation were often raised on these holdings. Although some properties focused on production for export, most notably sugar plantations, owners of all large agricultural properties (*haciendas* and *fazendas*) sought to monopolize the local market (see *FAZENDA/FAZENDEIRO*).

See also *AGRICULTURE* (Vols. I, III, IV).

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- John C. Super. *Food, Conquest, and Colonization in Sixteenth-Century Spanish America* (Albuquerque: University of New Mexico Press, 1988).

***aguardiente de caña*** Cane liquor, or *aguardiente de caña*, is a distilled alcohol made from sugarcane. For most of the colonial era, consumers in *NEW SPAIN* depended on wholesale importers for the beverage or drank an illegally produced version called *chinguirito*, which was smuggled into the capital from factories in nearby jurisdictions. After domestically produced *aguardiente* was legalized and taxed in 1796, *MEXICO CITY* had a consumption rate for persons 15 years or older of between 2.5 and 4 gallons (9.5–15 l) annually between 1797 and 1804.

Although *CHARLES II* had prohibited the production and sale of *aguardiente* in 1693, arguments that this would affect the prosperity of *SUGAR PLANTATIONS* on the one hand and that a tax on the beverage would be a source of royal income on the other led him to relent. In *NEW GRANADA*, the Crown created an *aguardiente* monopoly in 1700, issuing franchises to distillers who paid a tax (see *MONOPOLIES, ROYAL*). A change in 1736 granted one individual in a specified locale the right to produce the liquor. The Crown sought 40 years later to eliminate private distillers and create royal distillers and sales outlets.

In 1780, it doubled the retail price of *aguardiente* and turned the monopoly offices into targets of destruction during the *COMUNERO REBELLION OF NEW GRANADA*. In 1765, *QUITO* had already had a popular revolt related to the manufacture and sale of *aguardiente*.

In the city of Santiago de Guatemala, one *aguardiente* producer was granted a monopoly in 1753, and from 1755, the distilled drink was legally available in only four taverns. Illegal stills continued to operate. The city council briefly enjoyed a monopoly over the production and sale of *aguardiente*, but in 1766, the Crown created a royal monopoly, a step that provoked antipathy from producers, retailers, and consumers alike and further stimulated the illegal production and sale of the beverage.

For Cuba, in 1764, the Crown imposed a tax of two pesos per barrel of *aguardiente*. The same year, Cuban producers sought authorization to ship the beverage to Louisiana and Yucatán. In 1768, the Crown granted Cuba the right to ship it to Louisiana.

Cane liquor was also produced in Brazil, where it was known as *cachaça*. While the elite enjoyed port wines from Portugal, commoners drank sugarcane brandy from small distillers.

See also *ALCOHOL* (Vol. I).

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- Allan J. Kuethe. *Cuba, 1753–1815: Crown, Military, and Society* (Knoxville, Tenn.: University of Tennessee Press, 1986).

***alcabala*** A sales tax dating back to medieval Castile during the reign of Henry III (1390–1406), the *alcabala* became a royal tax of 10 percent paid by the seller, although monarchs could exempt particular products, persons, and municipalities from paying it (see *TAXATION*). *PHILIP II* extended the tax to *NEW SPAIN* at a rate of 2 percent in 1574. Except for items produced by indigenous people, most merchandise was taxed, although some groups, notably the *JESUITS*, were not required to pay it. The *alcabala*’s introduction into the *VICEROYALTY OF PERU* in 1591 provoked riots, notably in *QUITO* in 1592–93, where the local elite confronted royal officials for a year and, as a consequence, lost the right to elect their municipal councilors for a century. The tax remained in effect throughout the colonial period. Basic foodstuffs in Peru—*MAIZE*, potatoes, and *WHEAT*—were exempt, as were items produced by artisans. In Peru in 1756, *corregidores* were to pay an *alcabala de tarifa* of 4 percent on goods distributed through the *REPARTO* (see *CORREGIDOR/CORREGIMIENTO*). Viceroy *MANUEL DE AMAT*

Y JUNYENT, in 1772, increased the *alcabala* from 2 to 4 percent. In 1780, JOSÉ ANTONIO DE ARECHE Y SORNOZA ordered the *alcabala* increased from 4 to 6 percent in the newly established customs house in AREQUIPA, an action that led to a short-lived revolt but not the abolition of the tax. For much of colonial history, however, towns and guilds often agreed to pay the Crown a fixed amount (*encabezamiento*) for the *alcabala* and then collected the tax themselves, a solution that reduced the effective rate.

See also *ALCABALA* (Vol. I).

#### Further reading:

C. H. Haring. *The Spanish Empire in America* (New York: Harcourt, Brace & World, 1963).

**alcalde del crimen** An *alcalde del crimen* was a minister of the Audiencias of Mexico and LIMA assigned to handle criminal cases that came to the court on appeal from lower magistrates or that arose within a restricted jurisdiction encompassing the capital cities and their immediate environs (see *AUDIENCIA*). Modeled on posts of the same name in Spanish chancelleries and some *audiencias*, the position was created in 1568 for both Mexico and Lima. On the remaining *audiencias*, *oidores* had responsibilities for both civil and criminal cases (see *OIDOR*). In 1808, there were five *alcaldes del crimen* on the Audiencia of Mexico and four on the Audiencia of Lima.

Where it existed, the position of *alcalde del crimen* served as a stepping-stone for advancement to the post of *oidor*; or civil judge, on the same courts.

#### Further reading:

Mark A. Burkholder and D. S. Chandler. *From Impotence to Authority: The Spanish Crown and the American Audiencias, 1687–1808* (Columbia: University of Missouri Press, 1977).

**alcalde mayor** In NEW SPAIN, *alcaldes mayores* were provincial administrators for territorial units known as *alcaldías mayores*. Their counterparts in PERU were known as *corregidores* (see *CORREGIDOR/CORREGIMIENTO*). Normally, men in Spain were granted five-year terms, while those already in the colonies served three-year terms.

In the 16th and much of the 17th centuries, VICEROYS appointed most *alcaldes mayores* within their jurisdictions. Thus, the position was an important source of patronage that enabled viceroys to reward both retainers brought from Spain as well as men already in the colonies; unscrupulous viceroys sold appointments as a source of personal gain. In 1678, however, the Spanish Crown began to sell appointments, restricting the viceroys to naming only a dozen each, aside from interim appointees.

Added to the costs of travel, purchasing an appointment meant that many *alcaldes mayores* reached their posts in debt. Anxious to pay off the obligation as well as make a profit, they resorted to a variety of means, including the

*reparto de mercancías* to extort either cash or goods from indigenous people in their district (see *REPARTO*). In some cases, however, their advances proved advantageous to native individuals who needed access to credit.

In the middle of the 18th century, there were 116 *alcaldes mayores* in the Audiencia of Mexico and another 33 in the Audiencia of New Galicia (see *AUDIENCIA*). About 300 lieutenants assisted them. The establishment of the intendancy system in New Spain replaced the *alcaldes mayores* with *SUBDELEGADOS* (see *INTENDANT*).

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Brian R. Hamnett. *Politics and Trade in Southern Mexico, 1750–1821* (New York: Cambridge University Press, 1971).

Christoph Rosenmüller. *Patrons, Partisans, and Palace Intrigues: The Court Society of Colonial Mexico, 1702–1710* (Calgary, Canada: University of Calgary Press, 2008).

**aldea** The first JESUITS, six in number, arrived in BRAZIL with the first royal governor, Tomé de Sousa, in 1549. Sent by the Portuguese Crown to convert and pacify the NATIVE AMERICANS, they quickly decided that this could be done best if the indigenous were moved into new villages, or *aldeias*, under Jesuit supervision. Father MANOEL DE NÓBREGA outlined the idea in 1550, and the first *aldeia* was established near BAHIA two years later. It was during the governorship of MEM DE SÁ (1557–72) that the Jesuits' use of *aldeias* reached full flower. By 1562, there were 11 *aldeias* averaging some 2,000 inhabitants in Bahia.

The Jesuits saw their efforts as saving the indigenous population from enslavement by colonists. They sought to indoctrinate their charges in a Christian way of life, creating villages with a central plaza, church, and houses in rows, an organizational form vastly different from that of the native peoples.

Ironically and unintentionally, the governor's declaration of a "just war" in 1562 against the Caeté damaged the *aldeias*, as colonists seized indigenous residents in the Jesuit villages. Although the declaration was soon retracted, its results combined with EPIDEMICS in 1562 and 1563 to reduce the number of Jesuit villages to five. The Indians' conditions worsened when the Crown placed lay captains in charge of the *aldeias* and again in 1570 authorized the enslavement of indigenous people captured in a just war or considered cannibals. By the time this law was modified, in 1574, the Jesuits' efforts, coupled with the actions of governors and settlers, had irrevocably damaged traditional native culture.

Nonetheless, the Jesuits continued to create *aldeias* with their own lands. By 1600, as many as 50,000 Indians resided in the villages and were thus available to work for the Jesuits and colonists. While native workers were to

be paid for their labor, the amount was typically less than pay received by whites, free blacks, or *MULATOS*.

In addition to the Bahia region, the Jesuits created *aldeias* in MARANHÃO, as did the FRANCISCANS. Following the expulsion of the Jesuits in the years 1755–58, their *aldeias* were turned into parishes, and parish priests replaced the missionaries.

In the Spanish colonies, the institutions analogous to the *aldeias* were the *reducciones* and *congregaciones* (see CONGRAGACIÓN; REDUCCIÓN).

#### Further reading:

Bailey W. Diffie. *A History of Colonial Brazil, 1500–1792* (Malabar, Fla.: Robert E. Krieger Publishing Co., 1987).

**Aleijadinho (Antônio Francisco Lisbôa)** (b. ca. 1738–d. 1814) *Brazilian architect and sculptor* Considered colonial BRAZIL's most outstanding architect and sculptor, Antônio Francisco Lisbôa was born in VILA RICA DO OURO PRÊTO (see ARCHITECTURE; ART). The illegitimate *MULATO* son of Portuguese architect Manuel Francisco Lisbôa and an African slave named Isabel, Antônio learned architectural design and construction from his father. Francisco Xavier de Brito, a Brazilian sculptor, taught him to carve soapstone; João Gomes Batista trained him in painting.

Because of his origins, the artisans' guild in Ouro Prêto, MINAS GERAIS, denied him membership, and Lisbôa had to rely on intermediaries for commissions. Nonetheless, he prospered in the region of Vila Rica and became recognized as Brazil's leading rococo artist prior to contracting probably either leprosy, syphilis, or a viral infection in 1777. As his afflictions worsened, he acquired the nickname *Aleijadinho* (little cripple). Despite reportedly losing fingers and toes and eventually his sight, he continued to work, being carried to the site and proceeding with tools tied to the stumps of his hands.

Aleijadinho's accomplishments include designing the churches of San Francisco in Ouro Prêto, Nossa Senhora do Carmo in Sabará, and Bom Jesus do Matosinhos in the town of Congonhas do Campo; carving magnificent 10-foot- (3-m-) high soapstone statues of the 12 prophets and 66 wooden figures at Bom Jesus do Matosinhos; and designing numerous chapels, doors, retables, statues, and altars. He worked repeatedly with painters Manoel da Costa Ataíde and Francisco Xavier Carneiro. Aleijadinho died in Brazil. His son Manuel Francisco Lisbôa was born of a slave and was also an artist.

#### Further reading:

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**Almadén** Mines at Almadén, Spain, about 165 miles (266 km) northeast of SEVILLE, were the most important

source of MERCURY, or quicksilver, used in processing SILVER ore in NEW SPAIN (see MINING). Mercury was used in the amalgamation, or patio process, which was introduced and perhaps invented at the mining site of Pachuca in the mid-1550s by the Spanish merchant Bartolomé de Medina. With modifications, the process was extended to POTOSÍ in the 1570s. Its advantage over smelting was that it enabled miners to process lower-grade ore.

Between 1646 and 1799, Almadén's mines produced just over a million registered quintals (hundredweight) of mercury. Output expanded in the 18th century as a result of improved administration and development of a new mine discovered in 1699. From 1700 to 1760, Almadén produced 331,430 registered quintals of mercury, a sum almost 90,000 quintals greater than at HUANCAMELICA, the mercury mining center in PERU. Production at Almadén was even greater between 1760 and 1799. In those four decades, Almadén produced 580,930 quintals of mercury compared to Huancavelica's approximately 167,000 quintals.

The major American consumers of mercury from Almadén were in New Spain, although some quicksilver went to miners in colonial Peru, especially in the first half of the 17th, the late 18th, and the early 19th centuries. Greater TAXATION and higher production expenses at Huancavelica explain, at least partly, the consistently higher price of mercury, regardless of provenance, the royal monopoly charged in Peru (see MONOPOLIES, ROYAL).

The decision to divert Almadén mercury from Mexico to Peru in the early 17th century was an important cause of a temporary decline in Mexican silver production. Increased amounts of mercury from Almadén were central to increasing Mexican silver production in the 18th and early 19th centuries and contributed to increased production in Peru and Upper Peru in the later 18th century. The Crown's reduction of the price of mercury it sold in New Spain by 50 percent (82 to 41 pesos) between 1767 and 1778 also stimulated unprecedentedly high levels of silver production.

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**almojarifazgo** Spain taxed colonial TRADE from the time of Columbus. Initially, the *almojarifazgo* was a customs duty of 7.5 percent levied on goods imported at American ports. In 1543, the Crown reduced this tax to 5 percent but began to collect a tax of 2.5 percent on goods exported from SEVILLE. Duties were doubled in 1566, and exports from American ports were taxed at

a rate of 2.5 percent. These assessments were levied on the basis of merchants' sworn declarations, rather than inspection of goods. In 1624, appraisals based on weight and sometimes size of boxes and bales began to be made on different kinds of exports to the colonies.

Extensive fraud led the Crown in 1660 to accept an annual lump sum of 790,000 ducats in lieu of the *almojarifazgo*. Volume, number of pieces, or size was used from 1680. In addition, in 1720, specified exported and imported articles were taxed according to a rate schedule. A 2 percent tax was levied on GOLD sent to Spain, and 5 percent was charged on SILVER. The *almojarifazgo* itself was abolished on Spanish goods traded between Spain and the colonies with the introduction of *COMERCIO LIBRE*, although it remained on foreign goods and intercolonial trade.

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C. H. Haring. *The Spanish Empire in America* (New York: Harcourt, Brace & World, 1963).

**Alzaga, Martín de** (b. 1755–d. 1812) *Spanish merchant and politician in Buenos Aires* Martín de Alzaga was born in the Valley of Aramayona, Alava, Spain. He left for the RÍO DE LA PLATA in 1767 and initially worked for the highly successful PENINSULAR merchant Gaspar de Santa Coloma. A decade later, he began setting up his own commercial ventures. He prospered and added service in municipal posts to his record.

Alzaga vigorously supported monopolistic trade with Spain and fervently opposed any trade with foreigners. Chairman (*alcalde del primer voto*) of the BUENOS AIRES *cabildo*, or MUNICIPAL COUNCIL, when the second British invasion took place in 1807, he organized a successful defense that contributed significantly to the surrender of General John Whitelocke on July 7, 1807, after the invaders had suffered heavy losses. Reelected *alcalde del primer voto* on January 1, 1808, he presided when the city council rejected the scheme to make Spanish princess Carlota, sister of FERDINAND VII, regent and also when it recognized the JUNTA SUPREMA DE SEVILLA.

On January 1, 1809, Alzaga led an unsuccessful attempt to overthrow Viceroy SANTIAGO LINIERS Y BREMOND and was exiled from Buenos Aires. After his return to the capital, he oversaw a plan to overthrow the First Triumvirate on July 10, 1812. Discovery of the conspiracy resulted in his arrest, along with that of some associates, and his execution in Buenos Aires.

#### Further reading:

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John Lynch. *The Spanish American Revolutions, 1808–1826*, 2d ed. (New York: W.W. Norton & Co., 1986).

**Alzate y Ramírez, José Antonio de** (b. 1737–d. 1799) *Mexican writer and publisher* Born in Ozumba de Alzate, NEW SPAIN, Alzate studied at the Colegio de San Ildefonso in MEXICO CITY, receiving a baccalaureate in theology in 1756. Although he was an ordained cleric, his many interests included science and medicine, and his importance rests on his popularization of modern, and especially applied, science through a series of periodicals. In 1768, he began publication of a weekly *Diario literario*, but it faltered by the end of the year. Likewise, *Asuntos varios sobre ciencias y artes* was published only briefly, in 1772–73. Alzate's most successful periodical was *Gaceta de literatura*, which was published between 1788 and 1797.

Alzate's encyclopedic interests focused in particular on scientific knowledge that could be useful in solving contemporary problems. This emphasis on useful knowledge characterized the ENLIGHTENMENT in Latin America, as did the dissemination of such knowledge through periodicals. Providing information about his home region, for example, its geography, also was typical of publications elsewhere in Spanish America at the time. Similarly, Alzate shared a disdain for Aristotelian philosophy and sought to publish news of scientific developments from Europe and even the United States, although Alzate mentioned only the scientist Benjamin Franklin from the latter.

Medicine, applied science, agronomy, general science, MINING, botany, geography, and chemistry were the areas covered most frequently in the articles and notes in Alzate's periodicals. Medicine received the greatest emphasis because it offered practical knowledge about improving health that readers could put into practice.

Alzate's interest in the history of New Spain documented a growing CREOLE self-awareness and pride in being creole that also was seen in other parts of the empire. Alzate died in Mexico City.

#### Further reading:

W. F. Cody. "An Index to the Periodicals Published by José Antonio Alzate y Ramírez." *Hispanic American Historical Review* 33, no. 3 (1953): 442–475.

**Amar y Borbón, Antonio** (b. 1742–d. 1826) *Spanish viceroy of New Granada* Born in Zaragoza, Spain, Antonio Amar y Borbón was a professional soldier who held the rank of captain when he entered the Order of Santiago in 1767 and that of field marshal when he was named VICEROY OF NEW GRANADA by royal order of July 26, 1802, to replace Pedro Mendinueta. He took office on September 17, 1803, and has been described as "indecisive, unimaginative, and probably too old for the job."

The Spanish government's decision to resume neutral TRADE in 1805 did little in New Granada other than strengthen contraband trade with British merchants. Amar's limited efforts failed to solve the problem of



Spain's inability to provide either the goods colonists sought or an adequate market for New Granada's exports. In late 1808, when the JUNTA CENTRAL in Spain and the government of England were allies, Amar agreed to open trade with England, even when the Junta Central disallowed it.

Amar had the misfortune to be viceroy when CHARLES IV and FERDINAND VII abdicated and juntas emerged in Spain and some colonies. Although QUITO was the first city in the viceroyalty to establish a short-lived junta, the collapse of the Junta Central and creation of a COUNCIL OF REGENCY in Spain in January 1810 had repercussions in New Granada. A coup in CARTAGENA DE INDIAS removed the governor there on June 14, 1810, and anti-government revolts took place in Cali, Pamplona, and Socorro in early July. Following a riot fomented by some prominent CREOLES in BOGOTÁ on July 20, Amar, who already knew that the Regency had named his replacement, abdicated to an OIDOR of the Audiencia of Santa Fé de Bogotá the following day, after temporarily presiding over the newly created junta. Briefly imprisoned by rioters, the viceroy and his wife were released by the junta and sent to Cartagena. Amar eventually reached Spain, where he died.

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Anthony McFarlane. *Colombia before Independence: Economy, Society, and Politics under Bourbon Rule* (New York: Cambridge University Press, 1993).

**Amat y Junyent, Manuel de** (b. 1704–d. 1782) *Spanish viceroy of Peru* Born in Barcelona, Spain, Manuel de Amat y Junyent followed a military career and saw action in North Africa and Naples, rising to the rank of field marshal. Named governor and president of the Audiencia of Chile in 1755, he assumed his post on December 28.

In CHILE, Amat oversaw the construction of fortifications and founded towns near them. He created a police force in SANTIAGO DE CHILE and undertook public works, including a market in the Plaza de Armas. He also facilitated the opening of the Royal University of San Felipe in 1758. His arrogant and arbitrary style of rule, however, antagonized some Chileans, and no tears were shed when in 1761 he sailed north from Valparaiso after being appointed VICEROY of PERU, replacing the long-serving count de Superunda.

Amat entered LIMA on October 12, 1761, and held his post there until July 17, 1776, when Manuel de Guirior, viceroy of NEW GRANADA, replaced him. Amat brought

with him from Chile relatives and clients, including José Perfecto de Salas as his legal adviser. Aided by Salas, Amat became associated with corruption throughout the viceroyalty. When the celebrated traveler JUAN DE ULLOA returned to Peru as governor of HUANCANELICA and refused to pay him an annual bribe of 10–12,000 pesos, Amat left Ulloa to his enemies.

Soon after his arrival in Lima, Amat received notification that Spain had renewed the Family Pact with France and was at war with Britain. He immediately took steps to strengthen Peru's defenses, concentrating initially on the defense of CALLAO and Lima. He expanded the number of men in arms by requiring all able-bodied males from 14 to 60 to report for duty, oversaw the completion of the fortress Real Felipe at Callao, built a new seawall, and secured the construction of an artillery factory. Amat's reorganization resulted in the militia of Lima growing from 6,643 to 16,784, and the total size of the militia for Lima, its vicinities, and the coastal provinces reached nearly 50,000. While the militia was not put to the test against the British, Amat's efforts and support of rewards for cooperative males of the CREOLE elite, such as membership in military orders and access to the military FUERO, elevated the status of the militia. Militiamen accompanied regular troops from Callao in arresting and expelling the JESUITS.

The expulsion of the Jesuits enabled Amat to create the Convictorio Carolino, an educational institution that became known for its modern curriculum (see EDUCATION). During Amat's long tenure as viceroy, he oversaw improvements in the cleanliness, lighting, and public order of Lima and of the important road to Callao. He also promoted the construction of a bullring and a new facility for cockfights in Lima and a new mint in POTOSÍ.

Amat sought to reduce tax evasion and soon after his arrival in Lima demanded that merchants pay back taxes owed on ALCABALAS; by the time he left office nearly half a million pesos had been collected. He also created a customs house, which opened in 1773, and raised the amount of revenue collected.

Amat's arbitrary approach and the rapacity that contemporaries thought he shared with his immediate supporters resulted in a RESIDENCIA with serious charges that included corruption, although Amat was ultimately absolved.

Unmarried while viceroy, Amat had a lengthy affair with the actress Micaela Villegas, better known as "La Perricholi." He married the Catalan María Francesca de Fivaller i de Bru after returning to Barcelona in 1777. He died there, leaving his widow the celebrated Palace of the Vicereine (Palau de la Virreina) on the Ramblas.

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**amigos del país, societies of** Spanish and Spanish-American economic societies often known as *amigos del país*, or “friends of the country,” were the descendants of the Basque Society of Friends of the Country that first met in Vergara, Guipúzcoa, in 1765. Between 1770 and 1820 about 70 economic societies were established in Spain; between 1780 and 1822, no fewer than 14 were founded or suggested in the overseas territories.

The first economic society in the empire was created in Manila in 1781. Others suggested or established in the 1780s were in MOMPONA, NEW GRANADA; Santiago de Cuba, CUBA; and VERACRUZ, NEW SPAIN. In the 1790s, societies appeared in LIMA, QUITO, HAVANA, and GUATEMALA, and a society was proposed in Mérida, Yucatán. In the early 19th century, societies were established or proposed in BUENOS AIRES, BOGOTÁ, CARACAS, PUERTO RICO, and Chiapas. Governmental favor, for example, by the count of Floridablanca, the count of Campomanes, and, later, the royal favorite MANUEL DE GODOY benefited the societies in Spain from the 1770s to 1808, although enthusiasm lessened after the outbreak of the French Revolution. Royal recognition of the overseas societies also stimulated membership, and some prominent royal officials assumed important roles.

As their Iberian counterparts, the American societies often focused on economic problems in their immediate region. Typically, they employed the ideas of the ENLIGHTENMENT and the use of critical reason, observation, exact data, and useful knowledge. They were concerned with poverty and prosperity, wanted improved TRANSPORTATION and better use of labor, and emphasized science, medicine, and EDUCATION for the benefits they conveyed.

The American societies were small in size. Perhaps a total of 600 to 700 persons, almost all males, participated, and well over half of them were in Havana and GUATEMALA. Literate and often well educated, members were associated with colonial elites and professions. While a majority were CREOLES born in the city of the society, PENINSULAR civil, ecclesiastical, and military officials also belonged.

The societies often published, at least for several years, periodicals containing information about the colony’s geographic conditions, ECONOMY, and population and disseminated helpful articles on medical issues and scientific discoveries. Together the societies and their publications helped promote a greater sense of local pride and awareness, or *conciencia de sí*.

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**Andrada e Silva, José Bonifácio de** (b. 1763–d. 1838) *Brazilian naturalist and statesman* Born in Santos, SÃO PAULO, José Bonifácio de Andrada e Silva received his early EDUCATION in BRAZIL, but the lack of a university in the colony forced him to go to Portugal for higher education. In 1783, he matriculated at the University of Coimbra and soon demonstrated his knowledge of major European intellectuals and publicists ranging from John Locke to Voltaire and Jean-Jacques Rousseau. In 1790, the Portuguese government sent him to Paris, Freiburg, and other European sites to study mineralogy. Traveling and studying for a decade, on his return he was named general intendant of mines and metallurgy in Portugal and taught at Coimbra. He married a Portuguese woman and remained in Portugal until 1819, when he returned to São Paulo and became involved in politics.

A man of exceptional talent and self-confidence, Andrada represented the junta of São Paulo in petitioning that prince-regent Pedro remain in Brazil. He quickly became Pedro’s leading minister. A monarchist who opposed the idea of popular sovereignty and initially wanted autonomy for Brazil within a larger Portuguese nation, Andrada carefully guided the prince through a shifting political morass, changing his own position to favoring independence along the way. By early September 1822, he responded to the Portuguese Cortes’s opposition to self-government in Brazil by urging Pedro to declare independence, which he did.

Undisputed first minister when PEDRO I was acclaimed emperor on October 12, 1823, Andrada’s fortunes soon waned. On July 16, 1824, both he and his brother Martim Francisco resigned from Pedro’s government after the emperor prepared decrees to free political prisoners, end ordered deportations, and terminate an inquiry into sedition in São Paulo.

Andrada went into exile in Europe but returned to Brazil in 1829, regaining influence with Pedro I and being named mentor to the future Pedro II.

See also PEDRO I (Vol. III).

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**Angostura, Congress of** (1819–1821) The Congress of Angostura was convened by South American independence leader SIMÓN BOLÍVAR in 1819. Its purpose

was to consolidate independence for the Andean region of South America by creating a large, unified republic of Colombia. The congress laid the foundation for a new constitution that established a system of government and a series of social reforms for the new nation.

The Congress of Angostura met after a series of victories by independence forces over the Spanish royalist army. Bolívar called the congress together in February 1819 with instructions to begin drafting a new constitution to unite the Andean region under one strong, centralized government. He also encouraged delegates to consider the failures of earlier attempts at establishing a republic in VENEZUELA. Venezuela's First Republic had been ruled under a triumvirate, and Bolívar believed the three-man rule had significantly weakened that initial attempt at securing independence. He also urged delegates to consider social reforms that had not been addressed earlier, such as agrarian reform and the abolition of SLAVERY.

In August of that year, Bolívar led his army to victory in the Battle of Boyacá, effectively securing independence for NEW GRANADA (present-day Colombia and PANAMA). Leaders from New Granada joined the Congress of Angostura, and the assembly proclaimed the creation of Gran Colombia, formally known as the Republic of Colombia or Greater Colombia. The legal basis for the union was articulated in the Fundamental Law of the Republic of Colombia, promulgated on December 17, 1819. Delegates had heeded Bolívar's wishes for a strong centralized government and included measures that called for a powerful executive; Bolívar was elected president of the new republic. The law called for the new republic to be divided into three departments—Venezuela, Cudinamarca, and QUITO—each to be governed by a vice president. It also provided a rough delineation of the territorial boundaries of the new republic and stipulated that debts from the component regions would be consolidated under one national treasury.

In a final measure, the Congress of Angostura called for the General Congress of Colombia to meet in Villa del Rosario de Cúcuta on January 1, 1821, to draft a new constitution for the republic. The Congress of Cúcuta met as stipulated and formalized the union of regions that made up Gran Colombia in the Constitution of 1821. The document spelled out the centralized form of government that Bolívar had advocated and called for progressive social reform. It allowed for slavery to be gradually eradicated by guaranteeing freedom to all children born of slaves and eliminated the indigenous labor and TRIBUTE system under the MITA. It also included provisions to limit the authority of the CATHOLIC CHURCH.

The experiment of creating a unified Gran Colombia failed, and the republic had disbanded by 1831. Nevertheless, the Congress of Angostura still holds importance as the first formal articulation of Bolívar's vision of a unified American nation after independence.

See also GRAN COLOMBIA (Vol. III).

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**Apodaca, Juan Ruiz de** (b. 1754–d. 1835) *Spanish viceroy of New Spain* Born in CÁDIZ, Spain, Juan Ruiz de Apodaca entered the navy as a *guardiamarina* in 1767, advanced through the ranks, and entered the Order of Calatrava in 1783. Promoted to lieutenant general on August 23, 1809, in November he was sent to London to negotiate an alliance against the French. Named captain general of CUBA by title of February 11, 1812, he succeeded FÉLIX MARÍA DE CALLEJA DEL REY as VICEROY of NEW SPAIN, replacing him on September 19, 1816.

Apodaca traveled in an armed convoy from VERACRUZ to MEXICO CITY in August and early September 1816. Attacks by rebel cavalry en route made the new viceroy aware that guerrilla bands dogged even the most important highway in New Spain and that the insurgency was not over.

At the same time, Apodaca wanted peace rather than war. He published announcements of royalist victories and issued pardons. Indeed, he went so far, in 1819, as to assure FERDINAND VII that he needed no reinforcements. The viceroy's "victory," however, was a delusion. Rebels had gone underground or moved to havens, but they had not disappeared.

The RIEGO REVOLT restored constitutional government, and Apodaca, now as *jefe político superior* rather than viceroy, led royal and local officials in Mexico City in swearing allegiance to the Spanish CONSTITUTION OF 1812 on June 1, 1820. Apodaca subsequently ordered elections, as specified in the constitution, and allowed freedom of the press. Only after the PLAN OF IGUALA was published in February 1821 did Apodaca, at the urging of PENINSULAR military officers, ban the free press. Refusing to endorse the plan, he belatedly tried to oversee a military response against its adherents but never sent an army against the rebels, for he could not count on the loyalty of the royal soldiers and officers. On July 5, 1821, hardline officers mutinied, and Apodaca resigned his position and turned power over to Field Marshal Francisco Novella.

Apodaca was able to leave New Spain only after it had become independent Mexico, departing from Veracruz in October 1821 (see MEXICO, INDEPENDENCE IN). Previously honored with the title count of Venadito in 1818, he received the Great Cross of Carlos III by decree on December 1, 1829. Named to the Spanish

legislature of 1834–35, Apodaca died shortly afterward in Madrid.

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**Araucanians (Mapuche)** Known to the Spaniards as the *araucanos*, or Araucanians in English, the indigenous peoples now referred to as Mapuche inhabited CHILE south of the Mapocho River, which flows through the city of SANTIAGO DE CHILE. The founding of Concepción, some 300 miles (483 km) to the southwest by Pedro de Valdivia in 1550, was the first Spanish effort to colonize Araucania. Valdivia's death in 1553 at the hands of his former groom, the famed Mapuche CACIQUE Lautaro, foreshadowed the resistance seen from 1554. Conflict punctuated with temporary peace characterized the remainder of the colonial era and beyond.

The Mapuche and other peoples in Araucania readily adopted Spanish plants, animals, and technology. For example, they grew WHEAT, peas, and apples; raised SHEEP and horses, which they quickly learned to ride and use in guerrilla warfare; and placed steel tips from Spanish swords on lances. They also learned to use nooses to pull Spanish soldiers from their horses.

A major revolt in 1598 followed the Spaniards' effort to place a garrison in support of the JESUITS south of the Bío-Bío River. The Mapuche captured and enslaved numerous Spanish women and children and destroyed all Spanish settlements between the Maule River, which runs east and west through present Talca, founded in 1692, and Osorno, south of Valdivia. For the remainder of colonial rule, the Bío-Bío south and southeast of Concepción marked the southern extension of colonial authority.

A state of perpetual WAR limited Spanish settlement and left the Mapuche south of the Bío-Bío free of the labor and tribute obligations that weighed on NATIVE AMERICANS north of the river and throughout much of Spain's empire. Ongoing war, however, brought advantages to some colonials. Beginning in 1600, the treasury in LIMA was required to send a financial subsidy (*situado*) to Chile to support the military effort. In 1608, PHILIP III authorized the enslavement of rebellious indigenous in Chile, thus legitimating a practice employed routinely from the 1570s. Selling Mapuche captured in war became a source of income for soldiers and unscrupulous bureaucrats alike. The Spaniards paid dearly for their incomplete conquest and continued wars against the Mapuche. Between 1541 and 1664, some 20,000 to 30,000 Spanish soldiers and settlers died in the wars.

Starting in 1716, the Spaniards tried to quell uprisings in western Araucania through formal treaties agreed to at meetings known as *parlamentos*. As many as 4,000 people participated, and the government assumed the

expense of feeding them and providing various TRADE items, for example, iron tools, as a means of securing peace. Repeated on a number of occasions, this approach maintained a reasonable level of peace on the western frontier for the remainder of the colonial era. In the war against Spain in the 1810s, Mapuche warriors sided with the royalists in the hope of keeping their territory.

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**architecture** Spanish and Portuguese settlement in the Americas was intimately tied to the location and construction of buildings. New churches, government buildings, and private shops and residences were built in each municipality founded in the aftermath of conquest. Their construction implied the destruction or replacement of earlier indigenous buildings or spaces, when they existed, sometimes by building on top of razed constructions, as was most spectacularly done in MEXICO CITY. New buildings looked European, their design being derived largely from European models as constructed in Spain and Portugal. In NEW SPAIN and PERU, in particular, the influence of indigenous workers can be seen in the decoration of the facades and interiors of churches.

The conquistadores and settlers consciously tried to replicate desirable characteristics of an urban environment from Iberia, while at the same time informing the Amerindian population about sacred and secular space. Sixteenth-century churches had arched doorways and classical facades with pilasters and moldings facing the street, whereas preconquest architecture lacked arches; secular buildings used horizontal lintels for doorways. Church bell towers also designated European origin. The quality of construction materials was important. Spaniards had only contempt for houses made of straw, while in the stone buildings of the Incas they saw great skill. Nonetheless, they considered true architecture to be classical, with columns, capitals, and arches.

Although not codified until 1573, the grid pattern around a central plaza with a building for municipal government, a church, royal offices as needed, a portico with commercial space, and straight streets intersecting at right angles was firmly established by 1560. The most desirable properties, those given to the first settlers, were the ones closest to the central plaza. The central plaza itself required a pillar of justice (*picota*) symbolizing the start of civil government and a cross either in the square

or where the church would be built; together, they symbolized Spanish order and justice.

The wealth of a region, the type of building materials available, population density, the mix of Europeans and non-Europeans, and geography and climate affected the size and appearance of buildings. The level of interaction with Spain or Portugal also affected the appearance of public buildings. Thus, LIMA was more Spanish than CUZCO; SALVADOR DA BAHIA, more Portuguese than VILA RICA DO OURO PRÊTO in MINAS GERAIS. Styles changed in belated response to architectural changes in Europe but also benefited from local experience and need. Originally, a severe and rational style was employed. By the late 17th and early 18th centuries, exuberance had taken over, with extensive and often exquisite decoration of both interiors and facades. The establishment of a school of architecture, the Royal Academy of San Carlos in Mexico City in 1785, saw the introduction of neoclassical rationalism, which replaced the previously freer approach.

By 1560 in Mexico, many friars were esconced in parishes (*DOCTRINAS DE INDIOS*), which typically included several indigenous villages or pueblos; native-built open-air churches with rectangular sanctuaries, usually with a single nave but some with three aisles; a residential area for the friars; and an expansive open area (*atrio*) with a large cross and enclosed only by walls, where religious services were held for the indigenous population. Some churches were very large, for example, the interior of one in Huejotzingo measures 203 by 50 feet (62 × 15 m). Church walls three feet (1 m) thick were usually constructed of adobe or a mixture of stone rubble and cement. Decoration on the facades was often a mixture of Christian and pre-Christian symbolism. In Oaxaca by 1600, there were 500–600 churches in at least 110 parishes that included an average of five villages. The AUGUSTINIANS typically built more ornate facilities than the other orders and followed European models most closely. Friars rather than trained architects designed most churches.

The cathedrals erected in every bishopric were monuments of the secular clergy. The cathedral in Mexico City was begun in 1563 and not completed until 1813. Lima's cathedral was begun in 1572, and PUEBLA's probably by 1575. The facades on later cathedrals such as that in ZACATECAS, completed in 1761, were completely covered with ornamentation. The interiors displayed a profusion of elaborate decoration.

Church architecture in Peru differed from that in Mexico because of more frequent and sometimes intense EARTHQUAKES. Walls were thicker, and buttresses were stepped; roofing was made of woven canes or reeds covered by plaster or stucco. As in Mexico, indigenous sculptors inserted preconquest references, although probably this was more common before 1560.

JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA commented both positively and negatively on the religious buildings in QUITO in the mid-18th century, noting,

for example, that the Convent of San Francisco, “being wholly of free-stone, must have cost a prodigious sum; and indeed the justness of the proportions, the disposition of the parts, the elegant taste and execution of the work, render it equal to most of the admired buildings in Europe.” The cathedral of Quito had rich furniture and was “splendidly adorned with tapestry hangings and other costly decorations.” Parish churches, in contrast, lacked paved floors in some cases and displayed “every other mark of poverty.”

Brazilian architecture lacked preconquest references because there was no indigenous labor force with an artistic tradition, as in Mexico and Peru. The carvers and painters of the main altar in the Jesuit Collegiate Church in SALVADOR DA BAHIA were all JESUITS.

The architecture of royal and municipal buildings was utilitarian and usually solid but uninspired. The two most obvious examples are the viceregal palaces in Mexico City and Lima. The former was replaced after its destruction in the riots and fire of 1692. The latter suffered significant damage in the earthquake of 1687, and repairs were not completed until the 18th century.

See also ARCHITECTURE (Vols. I, III, IV).

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**Areche y Sornoza, José Antonio de** (b. 1728–d. 1798) *Spanish visitor general of Peru* Born in Valmaseda, Vizcaya, Spain, José Antonio de Areche y Sornoza spent 11 years at the University of Alcalá de Henares and received a doctorate in canon law in 1756. A *colegial* of Los Verdes, he did some teaching while at Alcalá.

Although named *OIDOR* of the Audiencia of Manila in 1765, Areche never served in the post (see *AUDIENCIA*). As he was passing through NEW SPAIN, the VICEROY drafted him to fill a vacancy as criminal *FISCAL* on the Audiencia of Mexico, and in 1767, CHARLES III formally named him to this post. In 1774, Areche advanced to the position of *fiscal* for civil affairs. His position in Mexico enabled him to impress Visitor General JOSÉ DE GÁLVEZ. Weeks after becoming Minister of the Indies, on March 25, 1776, Gálvez secured a royal appointment for Areche as visitor general of PERU with instructions to examine, among other things, the administration of finances and justice, to improve MINING production, to end corruption and reform tribute collection, and to investigate the use of the notoriously abusive *REPARTO*.

During the late 1770s and early 1780s, Areche attempted to carry out his assignment. In the process, he

alienated nearly all authorities in Peru. His controversies with Viceroy Manuel de Guirior, whom he considered pro-CREOLE, and Agustín de Jáuregui, whom he considered inept, led to their replacement. Areche's anti-creole attitudes also alienated many local notables in LIMA.

Coupled with long-standing abuses of the *reparto de mercancías* by *corregidores*, Areche's implementation of fiscal reform—including the creation of new customs houses in the interior of the viceroyalty and an increase in the sales tax (*ALCABALA*) from 4 to 6 percent—and his order to register free persons of African descent as tributaries provoked local revolts, most notably in AREQUIPA in January 1780 and the more general and threatening TÚPAC AMARU II revolt, which began on November 9 that same year.

Replaced by Jorge de Escobedo as visitor general in 1781, Areche returned to Spain in 1783 and assumed his seat on the COUNCIL OF THE INDIES. Following the death of his patron, Gálvez, the former visitor general was retired and ordered to leave Madrid following the Council's conclusion that charges he had made against Viceroy Guirior had been false. Areche died in Bilbao in disgrace.

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**Arequipa** A municipality in PERU founded by Spaniards on August 15, 1540, Arequipa was located about 80 miles (129 km) from the Pacific Ocean on a fertile plain more than 7,700 feet (2,347 m) above sea level, at the foot of El Misti. The town was laid out adjacent to the Chili River, with the central plaza including royal and city offices, a cathedral, and a market. The first of numerous convents was founded in 1579, six years after the arrival of the JESUITS. The most significant municipality in southern Peru, Arequipa served as the major stop on the road from the MINING districts of CHARCAS to LIMA until the port of Arica replaced it as a way station about 1600.

By the mid-1550s, residents of Arequipa, including a number of *encomenderos*, had taken control of farmland near the municipality and were producing marketable livestock and European crops (see *ENCOMIENDA*). From the 1560s to the 1580s, commercial AGRICULTURE focused heavily on viticulture. By the end of the 16th century, production of WINE in the coastal valleys west of Arequipa was considerable. Markets included Charcas and Lima.

Through intermarriage, the descendants of *encomenderos* were at the apex of Arequipa's society in 1600. Wealth was important in identifying social status, and



Arequipa, Peru, was a major producer of wine and brandy for Peru and the mining districts of Charcas. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

in the 17th century, the elite expanded to incorporate immigrant nobles and officials. Fine urban residences, significant land ownership, and offices were signs of elite status.

By the end of the 16th century, Arequipa's wine producers had lost northern markets, including Lima, to producers in Ica, Pisco, and Nazca. Increased TAXATION and a shortage of workers were additional burdens. An earthquake and accompanying volcanic eruptions on February 18, 1600, were a further blow, reducing the wine yield in 1601 to only 5 percent of its previous annual level. Despite subsequent EARTHQUAKES in 1604 further damaging the industry, some producers remained. Debt, lower wine prices with few exceptions until the 1660s, competition, and taxation weakened the viticulturists. Landholdings became smaller, as the inheritance system divided properties not protected by entail (*MAYORAZGO*). Labor, however, was generally available during the 17th century. The 18th-century solution to overproduction of wine was to turn it into brandy, a fortified beverage in high demand in the mining districts of Upper Peru and an additional source of tax revenue for the Crown.

Although a few of the 40,000 or so Arequipans demonstrated autonomist and even pro-independence sentiments in the 1810s, the city was pro-royalist until independence became a reality following the BATTLE OF AYACUCHO in late 1824. Arequipans then joined other Peruvians in pledging allegiance to the republic in January 1825.

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**Argentina** See BUENOS AIRES; RÍO DE LA PLATA, VICEROYALTY OF; UNITED PROVINCES OF THE RÍO DE LA PLATA.

**Army of the Three Guarantees** Created in Mexico in 1821, the Army of the Three Guarantees was the combined forces of Agustín de Iturbide and Vicente Guerrero. Established by the PLAN OF IGUALA, issued on February 24, 1821, the army was to protect an independent Mexico marked by Catholicism as its only religion, a constitutional monarchy as outlined in the plan, and the equality of Spaniards and all Mexicans (*Unión*). The Three Guarantees, thus, were religion, independence, and union.

Iturbide promised that the army's officers would retain their prior ranks and welcomed volunteers. Unlike

patriot armies in South America, the Army of the Three Guarantees had to fight no major battles, and its ranks expanded as former royalists and patriots joined. By the end of July 1821, the army controlled almost every important site in Mexico; the exceptions were MEXICO CITY, VERACRUZ, ACAPULCO, and Perote. After the incoming captain general and superior political chief (the reduced, constitutional title of the office previously known as VICEROY) Juan O'Donojú and Iturbide signed the Treaty of Córdoba on August 24, 1821, the army accompanied the triumphant Iturbide into Mexico City on September 27, 1821.

Victory stimulated expectations in the army. In the months following the publication of the Plan of Iguala, some officers had received three or more promotions. The career officer Iturbide appreciated that support of the army was critical for his success.

Maintaining the army required financial resources. By spring 1822, these were unavailable, and the Mexican congress authorized reductions of 8 to 20 percent in the salaries of officers, soldiers, and civilian government employees. Only Iturbide, his father, and O'Donojú's widow were exempt from this decree.

After the elevation of Iturbide as Emperor Agustín I in May 1822, the Army of the Three Guarantees was known as the Imperial Army.

See also GUERRERO, VICENTE (Vol. III); ITURBIDE, AGUSTÍN DE (Vol. III).

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Colin M. MacLachlan and Jaime E. Rodríguez O. *The Forging of the Cosmic Race: A Reinterpretation of Colonial Mexico* (Berkeley and Los Angeles: University of California Press, 1980).

**art** The use of visual images was important to Europeans in America from the time of the conquest. Hernando Cortés distributed images of the Virgin Mary and crosses on his way to Tenochtitlán. Given the importance of visual images in 16th-century Catholicism, it is not surprising that the friars who followed the conquistadores used them in their efforts to convert the indigenous population.

The Spanish solved the immediate problem of supply of images by training NATIVE AMERICANS to paint them, employing Spanish artists who came to the colonies, and importing prints from Spain. FRANCISCAN and AUGUSTINIAN friars established schools for the indigenous that included instruction in painting using European prints as models and European equipment and techniques. Colonial painting of religious figures and scenes was established by the 1560s when the first significant European painter reached NEW SPAIN in the entourage of VICEROY Gastón de Peralta. Other immigrant paint-



An example of sculpture in New Spain, this equestrian statue of Spanish king Charles IV was cast by Manuel Tolsá in Mexico City in 1802. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

ers arrived subsequently, providing a pool of professional instructors as well as paintings in varied styles. The importation of European prints was also important in introducing particular styles. Some artists in Seville, for example, Juan de Luzón, painted exclusively for the American market, often producing at least 99 copies of a single work to be rolled up for shipping. A shipment of canvases he made in 1660 reveals the subjects he thought would sell: famous men (12), virgin saints (18), angels (24), child martyrs (36), and fruit still-lives (9). The emphasis on religious subjects was standard at the time. Copies of paintings by Francisco de Zurbarán, who also exported copies of his work to the colonies, Michelangelo Merisi da Caravaggio, and Peter Paul Rubens were among the most influential that reached the INDIES, but colonial artists picked, chose, embellished, omitted, and otherwise modified European models in painting for their local audiences.

The presence of painters and sculptors was most visible in CITIES with enough wealth to support them. These included MEXICO CITY, LIMA, PUEBLA, QUITO, CUZCO, POTOSÍ, SALVADOR DA BAHIA, RIO DE JANEIRO, and, in the 18th century, VILA RICA DO OURO PRÊTO. Patronage by CATHOLIC CHURCH authorities was of particular importance, and painters and other artists benefited from the

widespread desire to avoid undecorated space (*horror vacui*). By 1556, painters in Mexico City had established a guild; 32 painters in Lima tried unsuccessfully in 1649 to do so, but the effort documents a significant number of artists in the viceregal capital. Cuzco, known for its painters, in the 1680s had at least 47, of whom 35 were Andeans, seven were CREOLES OR MESTIZOS, four were PENINSULARS, and one was Italian. Until about 1650, Cuzco's painters used the techniques of the Renaissance; subsequently, they adapted baroque style to their work, although the subjects could be thoroughly local. In the 18th century, workshops in Cuzco produced large numbers of paintings by employing artists who specialized in particular features, for example, faces, hands, and landscapes. The statue of Charles IV in Mexico City is a fine example of locally produced sculpture.

*Casta* paintings became popular in NEW SPAIN in the 18th century; only one set is known for PERU (see *CASTAS*). Although the backgrounds changed over time, these paintings represented family scenes with parents of different racial lineages and the resulting child.

Decorative arts built upon preconquest and European skills and techniques and the commercial exchange with East Asia through Manila. The results were of such beauty that some found not only local and regional markets but also purchasers in Europe. By the early 17th century, Puebla replaced Mexico City as a major producer of ceramics. Blue and white ceramics inspired by Chinese imports appeared by 1630 and complemented the architectural tiles produced in Puebla from the 16th century onward. *Búcaros de Indias*, a type of earthenware that preserved scents and was even ingested in small amounts by women who could afford them, became extraordinarily popular among females of Spain's high nobility in the 17th century. Decorative screens modeled after Japanese folding screens became prominent in the same century. The use of mother-of-pearl in oil paintings (*enconchados*) was a unique contribution of artists in New Spain in the late 17th and early 18th centuries. Lacquerwares produced in limited regions of New Spain and Peru grew out of indigenous traditions using New World organic materials rather than the resin employed in East Asia. Pasto in present-day Ecuador was a major center for the production of lacquerware. A different set of materials was used in Pátzcuaro and at other Mexican sites.

Items made of silver were another form of art in colonial Latin America. Preconquest artists made decorative items of both GOLD and SILVER of such quality that an early friar in New Spain wrote, "they are better than the Spanish silversmiths." Early examples of indigenous craftsmanship similarly astonished viewers in Europe. The discovery of vast quantities of silver by the mid-16th century at ZACATECAS and Potosí soon resulted in its widespread use for both decorative and utilitarian purposes in churches and well-to-do secular society. Organized silversmiths were at the top of colonial guilds.



Drinking cups, monstresses, tableware, salvers, and other items were among the products made throughout the colonial period.

See also ART (Vols. I, III, IV).

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**Artigas, José Gervasio** (b. 1764–d. 1850) *creole leader of independence movement in Banda Oriental* Born in MONTEVIDEO, José Gervasio Artigas attended a Franciscan school in Montevideo and learned the skills of a GAUCHO. He rode horses, hunted cattle on his family's rural properties, and smuggled hides and other cattle products from the interior of the BANDA ORIENTAL for sale in Montevideo. In 1797, he joined a military unit (Cuerpo de Blandengues) charged with eliminating outlaws from the region, quickly winning promotion and becoming recognized as a prominent CREOLE soldier.

Artigas contributed little either when Montevideo became the base for SANTIAGO LINIERS Y BREMOND'S attack on the British forces that had taken BUENOS AIRES in late June 1806 or during Montevideo's unsuccessful defense against General Samuel Auchmuty's reinforcements in early February 1807. The British proceeded to occupy the city until September 1807. The long-standing rivalry between Montevideo and Buenos Aires intensified after word arrived on August 1, 1808, of the popular uprising in Spain against the French the preceding May. Under the leadership of Governor FRANCISCO JAVIER ELÍO of the Banda Oriental, Montevideo created a short-lived junta on September 21, 1808, and took a pro-Spanish position against Liniers's alleged pro-French sympathies; Liniers responded by sending an expedition to invade the capital (see JUNTAS). Newly arrived VICEROY BALDASAR HIDALGO DE CISNEROS removed Liniers from office, and the junta in Montevideo dissolved. Elío was rewarded with a promotion to inspector and second-in-command of the troops in the VICEROYALTY OF RÍO DE LA PLATA, although Cisneros sent him to Spain in 1810. When Buenos Aires created a junta on May 26, 1810,

and called for Montevideo to recognize it, the *CABILDO ABIERTO* of the city chose to recognize the government in Spain.

Between late 1807 and his long-delayed promotion as captain of the Blandengues in September 1810, Artigas devoted himself to dealing with outlaws in the interior of the Banda Oriental. Elío followed his return as governor with a declaration of war on February 12, 1811, against the junta of Buenos Aires. On February 15, 1811, Artigas, now a respected gaucho leader, abandoned his post at COLÔNIA DO SACRAMENTO, went to Buenos Aires, and promoted independence of the Banda Oriental. Named a lieutenant colonel by the junta of Buenos Aires and given 150 men, Artigas went to Entre Ríos, adjacent to the Banda Oriental, and gathered supporters. By May 1811, his forces of about 1,000 men had surrounded Montevideo. On May 18, they defeated a Spanish army at the Battle of Las Piedras in a victory that, nonetheless, left Elío with his naval forces in Montevideo, a base from which he negotiated an alliance with the Portuguese army in nearby Rio Grande.

The Portuguese invasion threatened both Montevideo and Buenos Aires; a treaty signed on October 20, 1811, brought a Portuguese withdrawal and a return of the Banda Oriental and part of Entre Ríos to Elío. When Artigas led a withdrawal of his forces, an estimated 80 percent of the population of the rural districts of the Banda Oriental gathered their possessions, scorched the earth behind them, and followed his 4,000 men to Entre Ríos. The arrival in Artigas's camp in June 1812 of Manuel de Sarratea of the First Triumvirate in Buenos Aires forced the incorporation of the patriot leader's forces into the Army of the North. Artigas almost immediately clashed with Sarratea, and over the succeeding months the centralist ambitions of Buenos Aires became unmistakable. Ordered to lead his men in support of the siege of Montevideo in December 1812, Artigas broke with Sarratea.

The government in Buenos Aires convoked a General Constituent Assembly of the UNITED PROVINCES OF THE RÍO DE LA PLATA for January 30, 1813. The assembly sought to impose centralist authority, but Artigas convoked his own congress for the Banda Oriental that met near Montevideo on April 5, 1813, to provide instructions for deputies to the assembly. The congress, with Artigas as president, established the Provincia Oriental made up of the people of the Banda Oriental. The congress also claimed the seven MISSIONS, as well as four more east of the Uruguay River, opened the ports of Maldonado and Colônia to free trade (Montevideo was still under Spanish control), and set forth a federalist system of government. In short, the congress called for independence from Buenos Aires and sought a complete break with Spain.

Not surprisingly, the General Constituent Assembly refused to seat the deputies from the Banda Oriental. On January 20, 1814, Artigas and more than 1,000 troops

abandoned the siege of Montevideo to the forces from Buenos Aires. In response, the Supreme Directorate that assumed authority in Buenos Aires on January 22, 1814, declared Artigas an outlaw. The surrender of Montevideo to the forces of Buenos Aires on June 23, 1814, ended Spanish rule in the Banda Oriental. It meant, however, that the Banda Oriental was divided between Montevideo under the rule of Buenos Aires and the rural areas. The rapaciousness of the new overlords soon led to renewed support for Artigas and fighting in the Littoral Provinces between his federalists and supporters of Buenos Aires. The latter gained the upper hand and in December launched a campaign to drive the federalists out of the Banda Oriental. A federalist victory at Guayabos in January 1815, however, drove the Argentine forces into Entre Ríos. On February 25, the *porteño* forces in Montevideo set sail for Buenos Aires. The Banda Oriental was independent, and the period known as the *Patria Vieja* began.

The *ECONOMY* of the Banda Oriental was moribund as a consequence of the civil war and *porteño* occupation. Royalists in general and *PENINSULARS* in particular were subjected to discrimination and confiscation of property then granted to patriots. Despite his proposals to restore prosperity to cattle raising and *AGRICULTURE*, Artigas, then at the height of his success, found the task impossibly difficult, even before the Portuguese invasion of August 1816.

Artigas's strong federalist stand gained support outside the Banda Oriental from other regions determined to avoid *porteño* domination. Buenos Aires, however, agreed to the Portuguese invasion of the Banda Oriental. In January 1817, the Portuguese entered Montevideo. In January 1819, Artigas's forces were defeated and crossed the Uruguay River into Entre Ríos. Defeat at the hands of erstwhile ally Entre Ríos in July 1820 definitively ended Artigas's years as an important federalist leader. He went into exile in *PARAGUAY*, where he died many years later.

Artigas was a strong leader whose federalism served as a counterpoint to the centralism of politicians in Buenos Aires desirous of controlling the old Viceroyalty of Río de la Plata. He gave the Banda Oriental a taste of independence but was unable to withstand the enmity of Buenos Aires on the one hand and the Portuguese army on the other.

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**asiento** The term *asiento* refers to a long-term, monopolistic contract between the Spanish Crown and an individual or company for the sale of licenses to export African slaves to Spanish America (see *SLAVERY*). The recipient of the contract (*asentista*) paid the Crown

an agreed sum and then sold licenses for amounts that together exceeded the payment the Crown received. Thus the *asentista* worked with both the Crown and slave merchants.

The Crown tried and then gave up the use of an *asiento* in the early 16th century. The union of the crowns of Castile and Portugal (1580–1640) provided another opportunity, for the Portuguese were the primary exporters of slaves from Africa. Licenses directed slave merchants to overseas regions that needed labor. The use of an *asiento* also provided predictability of income to a crown invariably facing serious fiscal problems. Nonetheless, the system had problems. The four *asientos* issued between 1595 and 1622 failed to provide either the contractors or the Crown the benefits anticipated; the next two were better but proved incapable of restraining slave merchants from exporting contraband slaves and *TRADE* goods. A 1663 *asiento* with the English joint stock company, the Royal Adventurers, failed miserably as the company could not provide the promised annual quota of 3,500 slaves. In 1701, the Spanish Crown agreed to a 10-year *asiento* with the French Guinea Company for 4,800 *piezas de Indias* (the standard slave unit). Although the agreement angered the English, it was never fully implemented.

The *asiento* included in the *TREATY OF UTRECHT* authorized the British to enjoy monopoly rights to export 4,800 *piezas de Indias* to Spain's overseas territories for 30 years upon payment of a specified tax to the Spanish Crown. The British also received permission to send an annual ship laden with merchandise to each of three colonial ports in order to ensure against financial losses resulting from the slave trade. On September 7, 1713, the British queen awarded the right to conduct the trade to the South Sea Company.

This *asiento* and the accompanying annual ships resulted in extensive contraband trade and Spanish recriminations. Three separate wars between 1718 and 1748 reduced the number of slaves legally exported. After 1719, Kingston, *JAMAICA*, became the principal entrepôt for slaves subsequently sent to the Spanish colonies. The South Sea Company ultimately created factories, or trading posts, at *CARTAGENA*, *BUENOS AIRES*, *VERACRUZ*, *HAVANA*, *SANTIAGO de Cuba*, *CARACAS*, *PORTOBELLO*, and *PANAMA*; all of these except Buenos Aires received slaves who had previously been sent to Kingston. Because of its location, Buenos Aires received slaves up to 1,200 *piezas de Indias* directly from Africa; many of the slaves it received were then sent to *CHARCAS*, and some were sent to *CHILE*. Abuses of the British *asiento* were such that they became a major source of antipathy between Great Britain and Spain. In 1750, the two governments agreed to end the *asiento*.

Following the demise of the *asiento* with the South Sea Company, the Spanish Crown kept slave trade contracts separate from international diplomacy. Instead, it made limited monopolies available to Spanish joint

stock companies, for example, the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS, to supply a specified region, in this case VENEZUELA. Finally, as part of *COMERCIO LIBRE*, in 1789, the Crown authorized Spaniards to purchase slaves for resale from any ally or neutral nation.

See also *ASIENTO* (Vol. I).

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**Asunción** Founded on August 15, 1537, by Juan de Salazar y Espinosa, the “Mother of Cities” was the base for the resettlement of BUENOS AIRES in 1580 and other municipalities including Corrientes, Santa Fe, and Santa Cruz de la Sierra. Located on the Paraguay River some 950 miles (1,530 km) from BUENOS AIRES, it served as the capital of PARAGUAY, covered a region of about 60,000 square miles (155,400 km<sup>2</sup>), and was home to the provincial governor, a MUNICIPAL COUNCIL, and a bishop. Its population numbered a little more than 3,500 by 1565, about 6,500 in 1761, and more than 7,000 when independence was declared on May 14, 1811.

Within two years of Asunción’s founding, GUARANÍ leaders planned an uprising against the Spaniards as a result of mistreatment. The plot was foiled after a Guaraní woman informed a Spaniard, and Governor Domingo Martínez de Irala hung 10 CACIQUES. Acting on royal orders, the governor subsequently assigned Indians in *ENCOMIENDAS* to Spanish settlers. In 1556, some 20,000 indigenous people, most in villages near Asunción, were held by 320 *encomenderos*. After the FRANCISCANS resettled the NATIVE AMERICANS in reductions, most of the Indians in *encomiendas* lived in the new villages (see *REDUCCIÓN*).

The JESUITS established their first secondary school (*COLEGIO*) in their province of Paraquariae—which included Paraguay, Buenos Aires, Tucumán, Santa Cruz de la Sierra, and part of Peru—in Asunción. They also established 30 MISSIONS along the Paraná and Uruguay Rivers, a source of conflict and rivalry with the notables of Asunción who came to the fore during the COMUNERO REVOLT OF PARAGUAY in the early 18th century. It took the expulsion of the Society of Jesus in 1767 to end the conflict.

With the creation of the intendency of Paraguay in 1783, the INTENDANT resided in Asunción and promoted an improvement program. The cathedral was restored, a public elementary school for Spanish and indigenous youth and a new hospital were constructed, streets were repaved and lit with lamps, and flood protection was erected.

When the crisis of empire began after the abdications of FERDINAND VII and CHARLES IV, Intendant Bernardo de Velasco convoked on July 24, 1810, a *CABILDO ABIERTO* of some 200 notables, who agreed to recognize the COUNCIL OF REGENCY in Spain. This provoked a military response by the junta of Buenos Aires, but, after two defeats, the invading army left Paraguay in 1811. On May 14, 1811, the CREOLE elite named two associates as cogovernors and three days later declared that Paraguay would not join with Buenos Aires or any foreign country. This de facto independence was confirmed with the creation of an independent republic on October 12, 1813, and ultimately led to the long dictatorship of José Gaspar Rodríguez de Francia.

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**Atahualpa, Juan Santos** (b. ca. 1710–d. ca. 1756) *indigenous guerrilla leader in Peru* In 1742, Juan Santos Atahualpa began an insurrection from the jungle region (*montaña*) on the eastern side of PERU’s central highlands that initiated what has been called the Age of Andean Insurrection (1742–82). Declaring himself a descendant of the executed Inca ruler Atahualpa, Juan Santos Atahualpa led guerrilla forces made up of both jungle peoples and migrants from the highlands in attacks that forced Spanish colonizers out of the area.

In his messianic mission, Atahualpa proclaimed himself Sapa Inca, or ruler of the Inca people; announced he was beginning a new era that would free the indigenous from Spanish rule and oppression; and set about trying to regain his ancestors’ kingdom. Starting from the *montaña*, he proposed to gain control of the highlands and then proceed to LIMA for coronation. He enjoyed success in the *montaña*, driving out FRANCISCANS and overcoming their MISSIONS and restored the area to indigenous control. Using highlanders who had fled Spanish rule as contacts, he appealed to other Indians living in the highlands. Although the rebels made forays into the highlands, ultimately, they were restricted to the *montaña*.

The rebellion alarmed authorities in Lima, but four military expeditions in 1742, 1743, 1746, and 1750 did not succeed in quashing it. Finally, the Spanish authorities decided to establish forts and a mobile sentry system along the border between the highlands and the jungle to keep rebel forces from penetrating the highlands.

Spanish authorities had reason to worry about the rebellion’s appeal in the highlands. Some highlanders had already joined the rebel forces, and others were interested in the messianic movement. For example, conspirators in

Huarocharí who wanted to restore Inca rule sought contact with the rebel leader. With the threat of a violent uprising in the highlands, colonial authorities worked to maintain tranquillity. The failure of the rebels to create a permanent base in the highlands after taking Andamarca in 1752 brought an end to military conflict. Several years later Juan Santos Atahualpa vanished.

The rebellion led by Atahualpa demonstrated the strength and weakness of anti-Spanish sympathies and the continued attractiveness of the idea of Inca rule among the indigenous peoples. That the movement restored control of the jungle region east of the central highlands to NATIVE AMERICANS and that this lasted into the mid-1750s confirm its strength. That it could not advance successfully into the highlands reveals its weakness in the face of Spanish determination to maintain the domination established in the 16th century.

See also ATAHUALPA (Vol. I).

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**audiencia** *Audiencias* were both regional tribunals and the name given to the areas of their jurisdictions. During their reign, Ferdinand and Isabella strengthened royal authority in Castile partly by improving the administration of justice and utilizing Roman law. They employed regional courts known as chancelleries in Valladolid and Granada and *audiencias* in Seville and La Coruña. Staffed with university-trained lawyers who served as judges and crown attorneys, these primarily appellate tribunals had overwhelmingly judicial responsibilities. As the tribunals were demonstrating their utility in Spain, the conquest and colonization of the New World was under way. In order to establish authority in the emerging colonies, the Crown turned again to *audiencias*, but distance and long delays in communication forced it to give the colonial tribunals significantly more authority than their Iberian counterparts.

Between 1511 and 1606, the Crown established the following colonial *audiencias*: SANTO DOMINGO, 1511, moved to Puerto Príncipe in 1799; MEXICO, 1527; PANAMA, 1538, reestablished in 1564; GUATEMALA, 1543; LIMA, 1543; GUADALAJARA, 1548; Santa Fe de BOGOTÁ, 1548; CHARCAS, or LA PLATA, 1559; QUITO, 1563; CHILE, 1563, reestablished in SANTIAGO DE CHILE in 1606; and Manila, 1583. *Audiencias* were usually referred to by the name of the capital city where the tribunal resided.

These tribunals had 76 authorized positions of *OIDOR*, *ALCALDE DEL CRIMEN*, and *FISCAL* in the late 17th century. In 1776, the Crown added the position of regent to each court and a second *fiscal* to those tribunals lacking one. Between the creation of the first *audiencia* in 1511 and 1821, more than 1,400 men were named judges and crown attorneys on the courts.

A court established in BUENOS AIRES in 1661 was abolished in 1672. In the 18th century, the Crown eliminated the Audiencia of Panama in 1751 and created new courts in Buenos Aires (1783), CARACAS (1786), and CUZCO (1787).

As the highest-ranking civil institution under the district's chief executive (VICEROY, president, or captain general), *audiencias* held power in judicial, executive, and legislative matters. They enjoyed first-instance jurisdiction for cases involving the royal treasury (REAL HACIENDA) and certain cases in their cities of residence. In addition, they were courts of appeal with final authority over criminal and most civil cases within their jurisdictions.

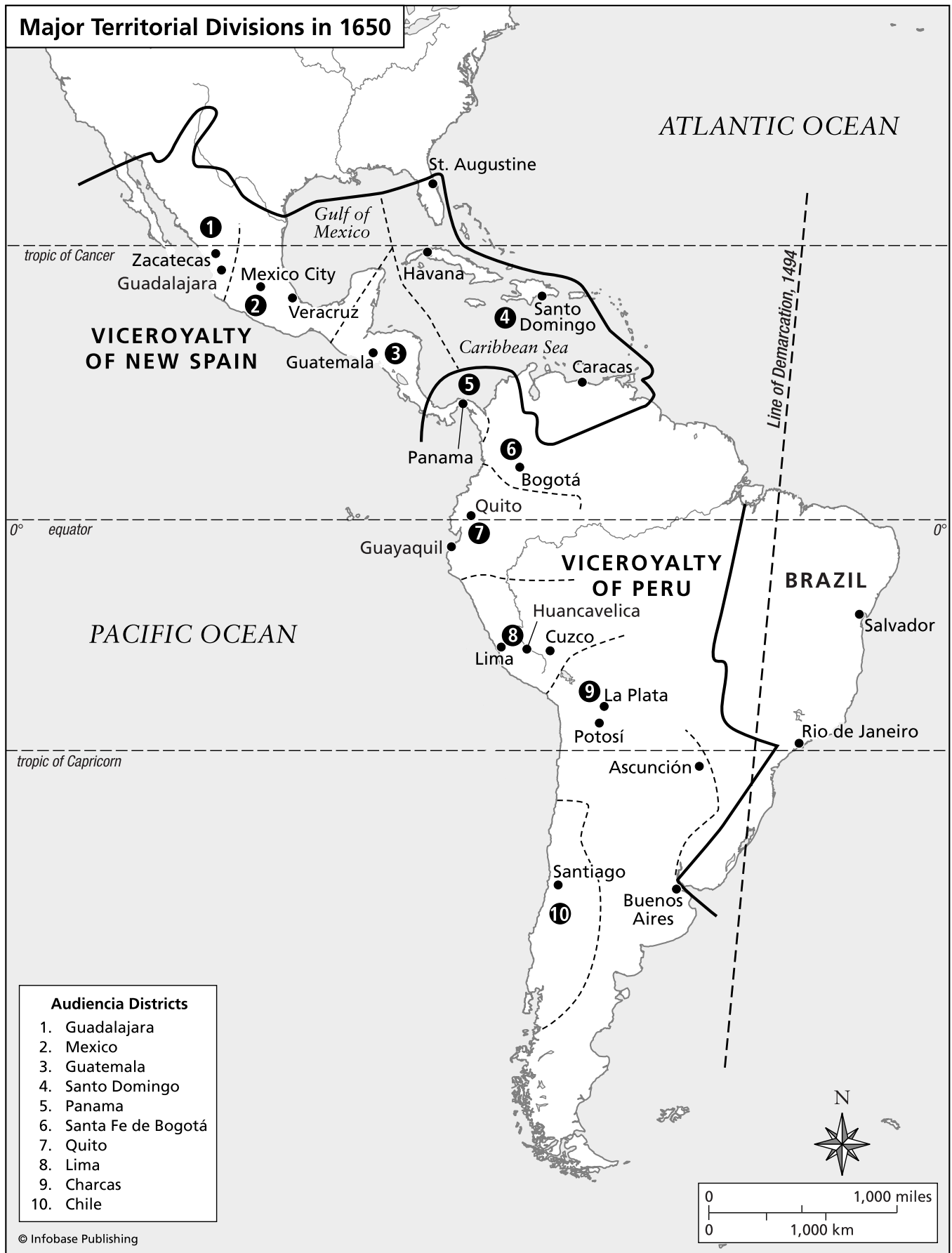
The tribunals also had legislative and executive responsibilities. They advised the chief executive on important questions, assumed his duties during his absence, and enforced laws. Ministers often were assigned to inspect conditions within their districts, and frequently a judge sat with corporate bodies, for example, the Consulado of Lima (see CONSULADO).

With rare exceptions, *audiencia* ministers held baccalaureate or higher degrees in civil law, canon law, or both. They served for life or at the pleasure of the king and thus often had longer tenure in a capital city than the chief executive, who, consequently, could ignore them only at his peril. With their far-reaching authority, the *audiencias* thus served, always in theory and often in fact, as an important check on other institutions of government. They also often served as a mouthpiece for important factions of local elites.

Although initially ministers named to *audiencias* in the INDIES were of PENINSULAR birth, CREOLES (American-born Spaniards) obtained a substantial number of appointments from the early 17th century. When the Crown began to sell appointments systematically in 1687, creoles rushed to purchase them, especially if available to the court in the district of their birth. When sales ended in 1750, native sons held more than 20 percent of the posts, and long-serving ministers (*radicados*) accounted for nearly 60 percent. For decades the Crown sought to reduce this direct and indirect local influence in the *audiencias*. With the expansion of the tribunals in 1776 and the accompanying appointment of almost exclusively peninsular ministers, local influence reached its nadir in 1777 and never again rivaled that which followed the sale of appointments.

In the latter part of the 18th century, promotion of ministers with extensive experience on American *audiencias* to the COUNCIL OF THE INDIES became routine. The creation of the office of regent for each tribunal in 1776 resulted in their incumbents regularly gaining advancement to the Council from 1783.

As symbols of royal authority, *audiencias* were targets for AUTONOMISTS in the crisis of authority that arose in 1808. By the end of 1810, *audiencia* ministers had been expelled from tribunals in Buenos Aires, Caracas, Santiago, and Bogotá. The wars of independence brought



an end to the *audiencias* of the American mainlands. In the new states, supreme courts were restricted to judicial matters as one branch of divided government.

See also *AUDIENCIA* (Vol. I).

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**Augustinians** The third mendicant order to reach NEW SPAIN, seven Augustinians arrived in MEXICO CITY on June 7, 1533, behind the FRANCISCANS and the DOMINICANS. By 1559, there were 212 Augustinians in New Spain, distributed principally among convents located south of Mexico City, in the present state of Hidalgo and the northern parts of present-day Puebla and Veracruz, and westward in Michoacán.

The Augustinians allowed Amerindians to receive mass prior to baptism, which they administered to adults only four times a year. Unlike the Franciscans and Dominicans, they had considerable confidence in the indigenous peoples' ability to comprehend Christianity.

The Augustinians proved particularly adept at founding "villages of evangelization" organized in the Spanish manner around a central plaza that served as a market area and site for a fountain as well as frontage for a church, schools, and a municipal building. These congregations of individuals from various Indian villages enabled more efficient instruction and provision of the sacraments (see *CONGREGACIÓN*). Friars lived in the new villages and typically planted gardens and orchards that included plants and trees of Spanish origin; they also raised domestic animals.

Large and well-appointed churches and convents, complete with organs, were characteristic of the Augustinians, although not all of their buildings achieved this high standard (see *ARCHITECTURE*; *ART*). NATIVE AMERICANS provided the labor for churches and convents, large and small. Talented indigenous musicians were even sent to Mexico City for training at the expense of the order. Nonetheless, the Augustinians, like the Franciscans and the Dominicans, did not train Amerindians for the clergy.

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**auto de fe (auto-da-fé)** The *auto de fe* (act of faith), rendered *auto-da-fé* in Portuguese, was either a private or public event that resulted from a guilty verdict by a bishop

in the role of inquisitor or the Tribunal of the INQUISITION after its introduction in LIMA in 1570, MEXICO CITY in 1571, and CARTAGENA DE INDIAS in 1610. The *auto de fe* made public who—other than NATIVE AMERICANS who were exempt from the tribunal's jurisdiction—threatened the morality and religious beliefs of the righteous. It was the occasion at which the Inquisition decreed penance, that is, punishment, for the guilty, and publicly demonstrated its hatred of heresy in its many forms.

Public *autos de fe* were enormously popular spectacles. Between 1574 and 1596, seven important ones were held in Mexico City. The first was on February 28, 1574. At this event, 74 convicts wearing the yellow garb (*san benito*) that identified them heard their punishments. Included in their number were a number of the English corsairs captured with JOHN HAWKINS in 1568. Their crime was heresy, specifically Protestant beliefs. As Protestants, French Huguenots captured during a piratical raid received similar treatment by the inquisitors.

As in Mexico City, public *autos de fe* in Lima were held in the central plaza. Invitations were sent in advance to the VICEROY and to the *AUDIENCIA*, city council, university, and other corporate bodies. Public criers made the general populace aware of the event. A mass opened the ceremony at 6:00 A.M. at the offices of the Inquisition. Joined by the corporate bodies, the inquisitors went to the *PLAZA MAYOR* as part of a great procession, which included the convicts. Following a sermon, penance was announced for each convict, male and female. The convicts then had the opportunity to abjure their transgressions before penance was administered. For nonrepentant heretics, the punishment was death by burning, a sentence administered by a civil official. This sentence, however, was highly unusual; not infrequently, the effigy of a deceased convict was burned.

The public *autos de fe* reminded viewers of the values the CATHOLIC CHURCH sought to inculcate while also warning them of the consequences of ignoring them. The largest *autos de fe* were in the late 16th and the 17th centuries. Thereafter, they were infrequent and smaller. The CORTES OF CÁDIZ abolished the Inquisition by decree on February 22, 1813. Although FERDINAND VII reestablished the tribunals soon after his return to the throne in 1814, the age of large, public *autos de fe* was over.

Although representatives of the Inquisition were occasionally sent from Portugal to Brazil, no Tribunal of the Inquisition was established in the colony. Arrested persons were sent to Lisbon for trial. Thus Brazil was spared the spectacle of *autos de fe*.

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Lesley Byrd Simpson. *Many Mexicos*, 4th rev. ed. (Berkeley and Los Angeles: University of California Press, 1974).

**autonomists** In the late 18th and early 19th centuries, the call from particularly CREOLES in Spain's colonies

for equality with PENINSULARS in terms of income, office, social status, and influence became more strident. The number of these autonomists increased as Spain's European wars and alliances drained colonial financial resources while returning no discernible benefits. Still loyal to the Spanish Crown, the autonomists wanted greater local participation in determining the economic and social policies that affected their native regions, for example, CHILE, VENEZUELA, and NEW SPAIN.

The extension of the consolidation of royal bills (*CONSOLIDACIÓN DE VALES REALES*) to the colonies in 1804 explicitly and expensively made the autonomists' point. The Crown's demand for cash threatened serious economic damage to property owners with outstanding loans from ecclesiastical bodies. Thus, it clearly and adversely affected residents in the colonies, regardless of place of birth, and underscored the second-class status of the colonies.

Again, the Crown's vacillation between allowing and prohibiting neutral trade starting in 1797 emphasized its willingness to favor merchants in Spain at the expense of producers and merchants in the colonies, such as, for example, INDIGO producers in GUATEMALA.

The constitutional crisis following the abdications of FERDINAND VII and CHARLES IV in 1808 turned autonomists into identifiable political groups. The response to the crisis in Spain was the rapid appearance of JUNTAS claiming to represent a region, for example, Seville, Murcia, and Oviedo, in the absence of the legitimate monarch. In a number of colonies, Spaniards, mostly of American birth, quickly sought to emulate their peninsular cousins. Thus, in Mexico, an autonomist group based primarily on the capital's city council argued that the absence of the monarch meant that sovereignty returned to the people, that is, themselves as the people's representatives. The argument was similarly employed in CARACAS, BUENOS AIRES, SANTIAGO DE CHILE, QUITO, La Paz, and elsewhere.

The call by the JUNTA CENTRAL in Spain for elected representatives from the colonies encouraged autonomists to believe that real change was possible within the empire. The COUNCIL OF REGENCY's proclamation calling for the election of deputies to the Cortes from the colonies as part of a "Spanish nation" suggested that the day of a new equality was at hand and resonated favorably with autonomists.

Although the formula employed to determine the number of deputies from the overseas territories revealed the distance from true equality, the very presence of American deputies documented progress. Similarly, how the term *citizen* was defined in the Spanish CONSTITUTION OF 1812 testified to peninsular unwillingness to grant equality based on total population, an unwillingness grounded in the smaller population in Spain. This carefully worded discrimination against persons who *originated* in Africa, however, did have support from some overseas deputies.

The implementation of constitutional provisions for the establishment of constitutional MUNICIPAL COUNCILS and PROVINCIAL DEPUTATIONS furthered the cause of autonomists. Their ephemeral existence frustrated this tangible move toward greater local and regional autonomy.

More than anything else, Ferdinand VII's nullification of all acts taken by the governments of resistance in Spain, including the Constitution of 1812, and his resort to military force, most notably in the expeditionary force led by PABLO MORILLO to Venezuela and NEW GRANADA, turned autonomists into supporters of political independence. Although the restoration of the Constitution of 1812 in 1820 resulted in the election of American deputies to the Cortes, it was quickly apparent that the limitations placed on the overseas territories and an unwillingness to consider seriously the possibility of separate monarchies within the Spanish nation meant they were wasting their time. Persons interested in greater autonomy decided political independence was the only remaining course of action for achieving home rule.

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**Avis dynasty** The House of Avis ruled Portugal from 1385 to 1580, when PHILIP II of Spain became Philip I of Portugal. Under the Avis dynasty, Portugal emerged as a leader in exploration. Its expeditions followed the Atlantic coast of Africa, encountered and colonized the Madeira Islands, Azores, and Cape Verde Islands, established factories and a trade in slaves, rounded the Cape of Good Hope, and reached and established bases in India and Southeast Asia, as well as a major colony in BRAZIL.

The marriage of the aged Portuguese monarch John II (r. 1481–95) to Juana of Castile, the daughter of Castilian monarch Henry IV, according to her supporters, but of a royal favorite to her opponents, briefly provided an opportunity to unite Portugal and Castile. Yet, the success of Ferdinand and Isabella and John II's death left the two monarchies independent.

Although Portugal had established a base at Ceuta in 1415 and subsequently at other coastal sites in Morocco, its hold was tenuous. By 1550, it retained only Ceuta, Tangier, and the fortress of Mazagão. The final Avis monarch, Sebastian I, was declared of age in 1568. Obsessed with WAR and RELIGION, he combined them in a fatal crusade in Morocco launched in 1578. His death opened the way for Philip II of Spain to assume the Crown of Portugal in 1580 through a claim based on his mother Isabella, eldest daughter of Manuel I.

See also MONARCHS OF PORTUGAL (Vol. I).

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**Ayacucho, Battle of** (December 9, 1824) In June and July 1821, VICEROY José de la Serna moved the royalist army and all of the SILVER he could obtain from LIMA into the interior of PERU. This allowed JOSÉ DE SAN MARTÍN to lead his army into the city, to finance and supply his army, and to intimidate Lima's inhabitants into a declaration of independence, signed in July 1821. The viceroy used Huancayo as his headquarters at first but moved to CUZCO in December. General José Canterac, whom La Serna had sent from Lima in June 1821, moved near to the city in September but then withdrew. For his part, San Martín met with SIMÓN BOLÍVAR and then left Peru in September 1822. On June 18, 1823, Canterac moved his army into Lima but remained only until July 16.

Royalist forces returned to the capital in February 1824 and remained until December. However, it was battles in the Andes rather than possession of the capital that determined independence. On August 6, 1824, Canterac's army was defeated at the BATTLE OF JUNÍN; he was able to lead his forces to Cuzco, however, where he joined de la Serna and his army.

The defeat of the combined royalist forces of some 9,300 men near Ayacucho on December 9, 1824, by a republican army of about 5,800 men led by Bolívar's celebrated lieutenant Antonio José de Sucre ensured that Peru and the rest of Spanish South America would be independent. Sucre's forces captured Viceroy de Serna, and royalist general Canterac surrendered unconditionally. While some staunch royalists remained in Upper Peru and the besieged royalists in the fortress at CALLAO did not surrender until January 23, 1826, the defeat at Ayacucho was irreversible. Spain's mainland empire had effectively come to an end.

Sucre's victory at Ayacucho and subsequent victories in Upper Peru resulted in his election as president of Bolivia, named in honor of Bolívar. Sucre's chief of staff at Ayacucho, General Agustín Gamarra, later became president of Peru, as did his general of the second division, José de la Mar.

See also SUCRE, ANTONIO JOSÉ DE (Vol. III).

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**Aycinena y de Yrigoyen, Juan Fermín de** (b. 1729–d. 1796) *Spanish merchant in Guatemala* Born in Ciga, Baztán, Navarre, as a young man Juan Fermín de Aycinena y de Yrigoyen left Navarre for MEXICO CITY, where he remained briefly before “running mules in Oaxaca” for some four years and emerging with the tidy sum of nearly 20,000 pesos. By 1754, he was in Santiago de Guatemala, where he remained until his death. In the next 20 years, he emerged as Central America's most important wholesale merchant and banker and an important officeholder. In 1783, he entered the Order of Santiago and acquired the title marquis of Aycinena, becoming the only titled noble in the Kingdom of GUATEMALA. He served as the initial presiding officer of the Consulado (merchant guild) of Guatemala following its creation in 1794 (see CONSULADO). Just prior to his death, he created an entailed estate (*MAYORAZGO*), a legal device for preserving the family's fortune.

Aycinena's marriage in 1755 to Ana María Carrillo y Gálvez brought him an enormous dowry of more than 178,000 pesos, as well as ties to a powerful FAMILY network long involved in offices and trade. The marriage underscored the importance of ambitious and successful PENINSULARS joining and rejuvenating established elite families. After Ana María's death in 1768, Aycinena married María Micaela Nájera Mencos in 1771 and, following his second wife's death, Micaela Piñol Muñoz in about 1785. These marriages and then those of his children placed his own extended family at the center of Guatemala's elite. Son José Alejandro went to Spain in 1813 after being appointed to the Council of State erected by the CONSTITUTION OF 1812. Subsequently, he was named to the COUNCIL OF THE INDIES.

Successful in all he touched, Aycinena amassed through TRADE and office a fortune of well over 1 million pesos, a sum placing him above contemporaries in Central America and on a par with many of the wealthiest families of NEW SPAIN. He was undoubtedly one of the most powerful men in colonial Central America.

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**ayuntamiento** See MUNICIPAL COUNCIL.



# B

**Bahia** Originally a donatary province of BRAZIL, Bahia became a royal province with the arrival of Governor Tomé de Sousa in 1549. The lands surrounding the city of SALVADOR DA BAHIA and its bay were known as the Recôncavo and became the location of innumerable SUGAR PLANTATIONS that used water from the bay and the rivers that entered it.

The export market for sugar drove economic growth in the captaincy general of Bahia (see CAPTAINCIES GENERAL). By the 1580s, the province of Bahia had about 40 ENGENHOS and was second to PERNAMBUCO in sugar production. Production grew rapidly until the 1620s, when sugar prices declined briefly. Between 1630 and 1680, the sugar trade was sufficiently profitable that planters were able to continue to replace slaves, a major expense (see SLAVERY). In contrast, much of the century from the 1680s to the 1780s was marked by difficult times, although sugar, mostly grown on plantations, remained Bahia's dominant export.

TOBACCO became the second-ranking export crop. Bahia supplied about 90 percent of Portugal's tobacco in the 17th and 18th centuries and increased this share between 1796 and 1811. The lowest quality tobacco was used in the African slave trade. The local market for foodstuffs also became substantial; cassava (manioc) flour was the central staple in the region's diet. At the end of the 18th century, Bahia exported more sugar than any other captaincy and dominated tobacco sales to Europe as well.

The importation of African slaves profoundly affected the composition of the population of Bahia. By the 1570s, planters were shifting from indigenous to black labor, a shift completed by the 1620s. Between 1570 and 1630, some 4,000 African slaves were imported annually. This

increased to 7,000–8,000 annually until about 1680, at which time about 150,000 slaves were in the captaincy. The cumulative effect of slaves replacing the indigenous population on the sugar plantations was apparent at the end of the colonial period. Of nearly 360,000 persons, whites made up just under 20 percent and Amerindians less than 2 percent, while the remainder consisted of free MULATOS and blacks (about 32 percent), and black slaves (47 percent).

See also DONATARY CAPTAINCIES (Vol. I).

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**Bajío** The Bajío is the plain of the Lerma River at an altitude between 5,500 and 5,900 feet (1,676–1,798 m) above sea level and located between León and Querétaro in the modern state of GUANAJUATO, Mexico. The region was outside the Aztec Empire and inhabited by unpacified CHICHIMECAS prior to the arrival of the Spaniards. In popular colonial usage, the Bajío included the mountains to the north, home to the great MINING district of Guanajuato.

Most early Spanish settlement in the Bajío consisted of fortified towns established from the mid-1550s to the mid-1580s along the royal road that ran from Mexico City to ZACATECAS and beyond. Towns that would become most important included Querétaro, León, Celaya, San Miguel el Grande, and San Luis de La Paz. The mining camp of Guanajuato, founded in the 1550s, would ultimately surpass the region's other municipalities; the Crown elevated it to the rank of city in 1679.

Normally receiving adequate rainfall for crops, the Bajío became an important agricultural region (see AGRICULTURE). Its originally forested mountains were a critical source of timber and charcoal for the mines. The region also became a prominent location for *obrajes* producing woolen textiles.

By the 18th century, the Bajío had emerged as a region distinct from the relatively unpopulated areas to the north and without the majority indigenous population of the viceroyalty as a whole. The population had a mestizo majority and was predominantly located in the region's towns and cities (see *MESTIZAJE/MESTIZO*).

A diversified economy provided economic strength and employment opportunities. Guanajuato was NEW SPAIN'S most important SILVER producer. Woolen textiles were made in the *obrajes* of Querétaro and San Miguel el Grande, while residents of Celaya and Salamanca wove cotton cloth. León specialized in leather goods. Agriculture in the Bajío found markets in the towns of the Bajío as well as in GUADALAJARA.

Employment attracted workers from elsewhere in New Spain and added to a robust rate of reproduction, the population of the intendency of Guanajuato between 1742 and 1792 grew at a rate of over four times greater than the viceroyalty as a whole, despite periodic famines and EPIDEMICS. The availability of a larger workforce enabled property owners in the late 18th century to place more pressure on workers and families that rented land. One consequence was receptiveness to calls to rebellion, starting with MIGUEL HIDALGO Y COSTILLA'S revolt in 1810.

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**Banda Oriental** Situated along the eastern shore of the RÍO DE LA PLATA, the Banda Oriental was the colonial ancestor of the region that became Uruguay. The terrain offered outstanding pasture, and CATTLE left by early Spanish explorers flourished. In 1680, the Portuguese established COLÔNIA DO SACRAMENTO in a deliberate move to facilitate contraband trade, especially with the SILVER-producing region of CHARCAS. Growing concern over Portuguese expansion and a 1723 landing on the eastern shore provoked the governor of BUENOS AIRES, Bruno Mauricio de Zavala, to lead a small group of soldiers and a larger number of Indians there in 1724. The Portuguese withdrew, and Zavala ordered a fortress to be constructed. Two years later, Zavala returned with a small

group of families originally from the Canary Islands and in 1726 founded San Felipe y Santiago de MONTEVIDEO not far from the original fortress. Montevideo's MUNICIPAL COUNCIL began meeting in 1730.

The Spaniards founded several towns in the Banda Oriental. Montevideo was intended to provide a defense against the Portuguese; Spain constructed a large stone fortress with 300 cannon and a moat between 1742 and 1782. The first political and military governor of the Banda Oriental, José Joaquín de Viana, was appointed in 1749 and took up residence in Montevideo. The second Spanish town established in the Banda Oriental was Maldonado, the most eastern port of the estuary of the Río de la Plata, created between 1755 and 1757. A third Spanish town, Las Minas, was created in 1783.

When the VICEROYALTY OF RÍO DE LA PLATA was created in 1776, the Banda Oriental was included in it as a governorship. The population of the Banda Oriental in 1810 was perhaps 60,000–70,000.

Montevideo became home to landowners who had grown wealthy by exporting hides and then salted beef prepared for export at processing factories, or *saladeros*, first introduced in 1780. Large estates were common, and by 1810, most of the Banda Oriental was privately held. The major landowners were also merchants in Montevideo. Their rural workforce included GAUCHOS and indigenous people.

See also BANDA ORIENTAL (Vol. III); URUGUAY (Vols. I, III, IV).

**bandeiras** Trailblazers and indigenous fighters from the small inland settlement of SÃO PAULO were known as *bandeirantes* because of their participation in armed quasi-military expeditions known as *bandeiras*, *entradas*, or *companhias*. These were undertaken to explore the interior of BRAZIL (*SERTÃO*), looking for Amerindians to enslave, GOLD, SILVER, and emeralds and other precious stones. Most *bandeirantes* were MAMELUCOS of both Portuguese and indigenous ancestry, could speak a form of Tupí-GUARANÍ known as *lingua geral*, and acquired native skills, dress, and weapons, which enabled them to survive in the wilderness. Some used guns, but spears and bow and arrows were more common.

Groups of *bandeiras* varied in size, ranging from less than 100 to some 3,000 men. One expedition in 1629 included 69 men from São Paulo (*paulistas*), 900 *mamelucos*, and some 2,000 NATIVE AMERICANS as both fighters and porters. A *bandeira* traveled on foot until the MINING boom of the first half of the 18th century forced the use of horses and mules and from 1720 brought regular river travel. Expeditions ranged from several months in length to several and sometimes many years; allegedly one continued for 18 years. *Bandeirantes* lived off the land, carrying only salt and sometimes flour with them. Occasionally, they planted seeds to harvest crops later and traveled with hogs and CATTLE. Leaders were often

from a single or extended FAMILY and on occasion worked for the Crown. Into the 18th century, participants shared in the expenses of a *bandeira* and expected a corresponding share of any profits.

The JESUIT MISSIONS that brought together thousands of indigenous people in the early 17th century were obvious targets for the *bandeirantes*. Missions established by 1610 in Guairá were struck repeatedly and destroyed between 1628 and 1632; reportedly one raid took more than 4,000 Indians. By 1641, *bandeiras* had driven the Jesuits into the region known as Misiones. These and related actions ended missionary activities east and north of PARAGUAY while undermining Spanish claims to Brazilian territory based on the Treaty of Tordesillas.

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**Basques** Persons born in or descended from persons born in the north-central Spanish provinces of Vizcaya, Guipúzcoa, Alava, and Navarre, as well as three adjoining French provinces—Basse Navarre, Soule, and Labourd—are known as Basques. Today, *Euskadi* is the Basque term applied to the autonomous region of Spain made up of these provinces. During the colonial era, Basques born in these Spanish provinces grew up speaking Basque (Euskera), although many became bilingual, speaking Castilian as well.

Experience in whaling, fishing for cod, and SHIP-BUILDING prepared Basques to participate in the early exploration of the Western Hemisphere. Basques sailed with Christopher Columbus and his successors and quickly engaged in conquest, settlement, missionary work, MINING, and commerce (see TRADE). Some returned home with MAIZE, which flourished and became a dietary staple in the Basque provinces. Others settled, prospered, and routinely attracted relatives, often nephews, to join them as wholesale and retail merchants. Between 1520 and 1580, Basques controlled a substantial majority of shipping between Spain and its overseas territories.

While regional origins were important for all immigrants in the New World, no group had more cohesion than the Basques. Common origin, ethnicity, and language were important, but Basques also claimed noble status by virtue of being Basque. CHARLES I in 1526 recognized the nobility of all Vizcayans; all Guipuzcoans were noble, and Navarrese and Alavans asserted that they were nobles as well. Noble status elevated them above those from elsewhere on the Iberian Peninsula and bestowed enviable rights related to TAXATION, military service, commercial activity, and access to office. In 1754, the privilege of those born in Vizcaya to be exempt from *penas infames* was reiterated in Spain and extended to Basques in the colonies.

Personal ties made a difference. The Basque bishop Juan de Zumárraga went to NEW SPAIN surrounded by relatives of compatriots. Two of his relatives, Diego de Ibarra and Juan de Tolosa, were cofounders of ZACATECAS, site of the most valuable SILVER mines in 16th- and 17th-century New Spain. Basques were also prominent at POTOSÍ in CHARCAS. Beginning in 1582, Basques at Potosí fought with Extremadurans, other Spaniards, and CREOLES in intermittent conflicts that lasted into the 1620s.

In 1728, the Spanish Crown established a joint stock trading company called the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS, which enjoyed a legal monopoly of trade with VENEZUELA into the 1780s. Merged with the Havana Company as the foundation of the Philippines Company, the new entity monopolized trade with the Philippines for nearly a quarter of a century. In its original form, however, the Basque presence in both the company and prominent administrative posts in Venezuela led to a rebellion against the company, focused on the Basques.

The importance of Basque merchants in New Spain was evident in the 18th-century division of the merchant guild (*CONSULADO*) of MEXICO CITY into parties of Basques and merchants of Santander (*montañeses*). Their confraternity of Our Lady of Aranzázu in Mexico City, established in 1671, completed a magnificent building in 1754 to serve as an orphanage for girls of Basque descent. Basques in LIMA, PERU, created a confraternity of Our Lady of Aranzázu in 1612 that existed until the mid-1860s.

Successful Basques in the New World occasionally returned to their homeland. More frequently, they sent money, sometimes large sums, that ultimately brought substantial change, as in the well-documented case of the Oiartzun Valley.

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**Belgrano, Manuel** (b. 1770–d. 1820) *creole insurgent general in Río de la Plata* Born in BUENOS AIRES, Manuel Belgrano studied at its Real COLEGIO de San Carlos and then at the University of Salamanca in Spain. During his years in Spain, he read widely authors of the ENLIGHTENMENT and followed the revolutionary events in France. He also published *Máximas generales del gobierno* (1794), a translation of the Physiocrat François Quesnay's *Maxime générales du gouvernement agricole le plus avantageux au genre humain*. Considered the first economist in the VICEROYALTY OF RÍO DE LA PLATA, Belgrano was named permanent secretary of the new *CONSULADO* in Buenos Aires in late 1793 and returned to his natal city early the following year to assume the post.

When British soldiers landed near Buenos Aires on June 27, 1806, and captured its fortress, Belgrano sought to join the resistance. Unlike members of the Consulado of Buenos Aires who swore allegiance to Britain, however, he fled to the BANDA ORIENTAL, returning only after SANTIAGO LINIERS Y BREMOND had led a successful counterattack. When the second British invasion of Buenos Aires took place in June 1807, Belgrano quickly joined Liniers in the successful defense of the city.

The abdications of CHARLES IV and FERDINAND VII in May 1808 provoked a crisis in Buenos Aires, as elsewhere in the empire. At first Belgrano supported the idea of Princess Carlota Joaquina, sister of Ferdinand VII and resident in BRAZIL as the wife of Prince Regent John, becoming queen of an independent constitutional monarchy. With the failure of this scheme, he embraced the idea supported by the city council of a government ruling in the name of Ferdinand.

French military success in Spain forced the JUNTA CENTRAL to flee Seville to the Isle of León. On January 29, 1810, it named the COUNCIL OF REGENCY to oversee resistance to the French and to convoke the Cortes. The new government assumed power on February 1, 1810, and two weeks later instructed the “kingdoms” to elect representatives to the Cortes. News of the demise of the Junta Central reached MONTEVIDEO on May 13. VICEROY BALTASAR HIDALGO DE CISNEROS publicly announced the change of government on May 18, 1810. A week later, a CABILDO ABIERTO in Buenos Aires elected Belgrano to the seven-member Provisional Governing Junta of the Provinces of the Río de la Plata.

Although Belgrano lacked a formal military background, the Provisional Governing Junta named him, in August 1810, to lead a military campaign into PARAGUAY, where the MUNICIPAL COUNCIL of ASUNCIÓN had voted to recognize the Council of Regency as the legitimate government acting in the name of Ferdinand VII. Despite what appeared to be an early victory, Belgrano’s forces were defeated on January 15 and March 9, 1811, and the effort in Paraguay failed.

After a review cleared Belgrano of blame for the losses, he was named commander of the Army of the North in a second effort by Buenos Aires to gain control of CHARCAS. On September 24, 1812, Belgrano’s forces defeated PERU’s royalist army at Tucumán. In Charcas, however, the viceregal forces triumphed over the Army of the North on October 1, 1813, and again on November 14, 1813. These victories raised the specter of a royalist invasion from the north, and JOSÉ DE SAN MARTÍN replaced Belgrano in command. San Martín, however, believed that CHILE, not Charcas, was the route to liberating Spanish South America and resigned his appointment in April 1814.

Sent to Europe with Bernardino de Rivadavia in 1814 to ascertain British reaction to the idea of independence of the Río de la Plata, Belgrano’s proposal to place an Inca on the throne with a parliamentary form

of government fell on deaf, if not incredulous, ears. On his return to Buenos Aires, Belgrano was again given military commands, and he led the Army of the North to Tucumán, where on March 24, 1816, the Congress of the UNITED PROVINCES OF THE RÍO DE LA PLATA began meeting. There, Belgrano was a clear voice supporting an absolute declaration of independence. Many colleagues in the assembly, however, greeted with derision his recommendation of a constitutional monarchy with a parliament and a descendant of the Inca as monarch. Nonetheless, on July 9, 1816, the Congress agreed on a complete declaration of independence.

In June 1819, Belgrano turned over command of the Army of the North to General Tomás Godoy Cruz. In March 1820, he returned to Buenos Aires, where he died of dropsy, poor and virtually unnoticed on a day when the government of Buenos Aires changed hands three times.

In 1812, Belgrano designed the light blue and white flag now used by Argentina, although the smiling sun in the middle white stripe was added in 1818. In 1938, the anniversary of Belgrano’s death became the country’s flag day, a national holiday.

See also ARGENTINA (Vols. I, III, IV).

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**Belize (British Honduras)** Located on the CARIBBEAN Sea and extending into Yucatán to the north and GUATEMALA to the west, present-day Belize began to attract settlement by English sailors and BUCCANEERS no later than 1638. Initially, they used the coast of the Bay of Honduras as a base for raids on Spanish ships carrying dyewood, but by the 1650s, they had started cutting dyewood themselves for the woolen industry in Europe. By the last quarter of the 18th century, mahogany had replaced dyewood as the region’s most important export, a status it held into the early 20th century.

Although Spain recognized England’s occupation of JAMAICA and other West Indies islands in the TREATY OF MADRID (1670), it did not do the same for Belize and continued to consider the baymen, or English loggers, intruders. Moreover, as England and France joined Spain in ending the age of buccaneers, some erstwhile pirates and privateers went to Belize where they cut dyewood and joined in a generally disorderly existence. Beginning in 1724, the baymen imported slaves to provide the hard labor required in logging (see SLAVERY). Several times in the 18th century, the Spaniards expelled the loggers, but they invariably returned. The 1763 Treaty of Paris confirmed Spanish sovereignty over the region but allowed the British to cut and export dyewood. Expelled again during the Revolutionary War in the thirteen colonies,

the loggers returned after the Treaty of Versailles in 1783. After a final unsuccessful effort to expel the British and their slaves in 1798, the Spaniards gave up. Although Britain formally claimed the territory of Belize in 1828 and organized it as the Crown Colony of British Honduras in 1862, Guatemala continued to oppose British occupation of Belize.

See also BELIZE (Vols. I, III, IV).

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**bienes de difuntos** When a Spaniard died in the Americas or in transit to or from there, or a Spanish intestate left assets that needed to be sent to Spain for distribution to heirs or charitable foundations, an *OIDOR* of the *AUDIENCIA* in whose jurisdiction the death occurred was named probate judge and assigned to handle these cases. The property of the deceased in these cases was referred to as *bienes de difuntos*.

Funds of the deceased were sent to the *CASA DE CONTRATACIÓN* in Spain, where officials sought to contact and inform beneficiaries about legacies. In the 16th century, in particular, the sums remitted were often substantial. The aggregate amount of *bienes de difuntos* tempted the Crown to borrow from them repeatedly, an action that resulted in many testators leaving special instructions with trusted agents to oversee the remission of funds without involving the judiciary.

Numerous successful first-generation immigrants left legacies for relatives and various religious and charitable causes in Spain. For example, successful *BASQUES* from the Oiartzun Valley in Guipúzcoa sent funds home both while alive and through their wills. They contributed to hospitals, homes for orphans, chapels, and altarpieces, among other things. Emigrants from Brihuega, Spain, to PUEBLA, in NEW SPAIN, similarly remembered heirs in their original home.

The *bienes de difuntos* reveal both the Crown's acceptance of responsibility to provide an important service to those who went to the overseas territories and the strength of FAMILY and home ties among the emigrants.

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**Black Legend** The term *Black Legend* was employed by Julián Juderías in a 1914 book title. It refers to a body of LITERATURE that maintains Spaniards were uniquely

cruel, greedy, and fanatical in the conquest and colonization of the New World, as well as in their behavior in Europe. The origins of this anti-Hispanic propaganda lie in Spain's war against France fought in Italy during the 1490s, but a more generalized hostility toward Spain fueled its development elsewhere. The emergence of Protestantism, notably in England and the Netherlands, added anti-Catholicism to the mix. Spain's long preoccupation with the Revolt of the Netherlands and the overlapping conflict and competition with England spawned innumerable 16th- and 17th-century anti-Spanish publications that repeated and expanded on their predecessors' calumnies.

While English and Dutch propagandists outdid themselves in attacking Spaniards, the celebrated Spanish Dominican Bartolomé de Las Casas provided ammunition in his widely distributed condemnation of Spanish actions in the New World. His *Short Account of the Destruction of the Indies* (*Brevísima relación de la destrucción de Las Indias*) was illustrated with engravings by the Dutch artist Theodor de Bry that purported to portray Spanish atrocities against the indigenous population.

ENLIGHTENMENT authors, including Voltaire, used Spanish culture as an example of national ignorance and superstition, and anti-Spanish propaganda was widely distributed during the Spanish-American War. Many negative stereotypes of Latin Americans grew out of the Black Legend.

See also LAS CASAS, BARTOLOMÉ DE (Vol. I).

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**Bogotá** Known in the colonial period as Santa Fe (or Santafé) de Bogotá or simply Santa Fe, Colombia's capital city is today called Bogotá, a name that gained favor after the success of republicans in New Granada's war of independence. The Audiencia of Santa Fe was the name of the territorial unit of which Bogotá was the colonial capital (see *AUDIENCIA*).

Located on a fertile plateau in the eastern cordillera of the Andes, nearly 8,700 feet (2,652 m) above sea level, Bogotá was formally established on April 27, 1539. Although difficult to access from the coast, the region of which it was a part was the most populous area of New Granada, and Bogotá emerged as the major city of the Kingdom of New Granada, an area roughly encompassing modern Colombia.

The principal lure of the district was GOLD, especially since indigenous people allocated by *ENCOMIENDA* could provide the labor to mine it (see MINING). Indeed, gold was New Granada's only significant export throughout the colonial era. The lands to the northeast around Bogotá were conducive to AGRICULTURE and livestock, but the market remained local due to the difficulties of TRANSPORTATION.

The Audiencia of Santa Fe was established at Bogotá in 1548. The city became the seat of a bishopric in 1553 and an archbishopric in 1564. A mint was established in 1620, and in 1653, the COLEGIO MAYOR del Rosario was founded as a complement to seminaries already present. Bogotá became a viceregal capital when the Spanish Crown definitively established the VICEROYALTY OF NEW GRANADA in 1739. The census of 1779 revealed a population of 16,420, mostly consisting of whites and freedmen of color. By the end of the 18th century, some 30,000 people, including about 1,200 clerics, resided within the city's jurisdiction.

Aided by its merchants, *encomenderos*, and *audiencia*, Bogotá emerged, despite its location, as the distribution center for imports funneled through the Caribbean port of CARTAGENA DE INDIAS and via the Magdalena River port of Honda. Travel from Cartagena to Honda easily took a month; several days to a week or more were then needed to reach Bogotá, which was about 75 miles (120 km) away. Merchants based in Bogotá and with representatives in Honda developed a trading network throughout the eastern cordillera, gaining access to the gold-producing regions of Antioquia and the CHOCÓ.

Despite its importance as a commercial, administrative, and ecclesiastical center, Bogotá lacked the wealth and prosperity of LIMA. Tailors, masons, cobblers, and carpenters were the most numerous groups of artisans in the late 18th century, but as a whole, artisans were not prosperous. VICEROY Manuel de Guirior in 1777 considered them almost beggars in appearance.

Narrowly escaping an attack by the *comuneros* in 1781, Bogotá was the location of one of the JUNTAS created in 1810 and became the capital of the short-lived Republic of Cundinamarca. Restored to royalist rule by PABLO DE MORILLO, the victory at nearby Boyacá by SIMÓN BOLÍVAR's forces in 1819 ended Spanish rule in the city and, with brief exceptions, effectively throughout the viceroyalty.

See also BOGOTÁ (Vols. I, III, IV).

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**Bolívar, Simón (the Liberator)** (b. 1783–d. 1830) *creole hero of South American independence* Born in CARACAS into an aristocratic FAMILY (*mantuano*) that traced its

American origins back seven generations, Simón Bolívar lost his father at the age of two and his mother at the age of nine. Nonetheless, he had the advantages of wealth and important familial ties and added to them EDUCATION, social graces, and European travel that began when he was 15. In Madrid, he met María Teresa Rodríguez del Toro. After a rapid courtship, they wed in 1802 and took up residence in VENEZUELA. María Teresa died after eight months of marriage; the distraught widower would have numerous mistresses in future years but would never remarry.

Bolívar returned to Europe and completed his largely autodidactic education, reading widely in political philosophy and ENLIGHTENMENT thought, living in Paris, traveling in Italy, and vowing at Monte Sacro that he would not rest until he had “broken the chains with which Spanish power oppresses us.” In 1806, he left Europe, briefly stopped in the United States, and returned to Venezuela in 1807, convinced that it would inevitably become independent.

The political crisis that erupted with the abdications of CHARLES IV and FERDINAND VII in May 1808 stimulated some in Caracas to suggest the creation of a



Portrait of the Liberator, Simón Bolívar, hero of the wars of independence (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

junta to rule in Ferdinand's name until he returned to the throne (see *JUNTAS*). Bolívar refrained from supporting either the petition or two attempts to depose Captain General Vicente Emparán. When a junta was created on April 19, 1810, he offered to go to London at his own expense to seek British support and to find the aging advocate of independence FRANCISCO DE MIRANDA. He succeeded in the latter but did not win the support of the British foreign minister, Marquess Wellesley.

Back in Caracas, Bolívar worked to get the national congress that opened on March 2, 1811, to support independence, which it did on July 5. The republic (subsequently called the First Republic) had a short and inauspicious existence. Federalist and racist, it provided but a smidgin of equality for *pardos*, as *castas* were known in Venezuela, and nothing for slaves despite the junta's earlier abolition of the slave trade in 1810 (see *SLAVERY*). Controlled by the *creole* elite of Caracas, the republic's actions induced *pardos* to support the royalists and forces led by Domingo de Monteverde. Following an earthquake that struck Caracas on March 26, 1812, not even the appointment of Miranda as commanding general could resurrect the republican cause. After Bolívar's loss at Puerto Cabello and Miranda's treaty with Monteverde, Bolívar oversaw the general's delivery to the Spaniards, an action that resulted in the old man's transport to Spain and death in prison. The First Republic was over, and Bolívar fled to Curaçao, borrowed some money, and sailed in October to CARTAGENA DE INDIAS, one of the competing centers that had established its independence from Spain.

In Cartagena, Bolívar issued the first of his major pronouncements on revolution and government. The *CARTAGENA MANIFESTO*, dated December 15, 1812, and published in 1813, analyzed the reasons for the failure of the republic and warned the New Granadans to heed them. A weak federal republic, criminal clemency and toleration when the sword was needed, a lack of disciplined troops, a flawed electoral system, traitorous priests, and internal factions all bore responsibility, according to Bolívar. He also called for the reconquest of Caracas in order to secure the former VICEROYALTY OF NEW GRANADA from royalist reaction: "Thousands of valiant patriots await our coming in order to throw off the yoke of their tyrants and unite their efforts with ours in the defense of liberty."

The Cartagena junta gave Bolívar command of a small military unit, and he quickly opened the Magdalena River to navigation. Overcoming rivalries with other commanders and subordinates, he demonstrated his leadership skills, earned military credit, and was promoted to brigadier general. With a small army he left New Granada in May 1813, took Mérida on May 23 without a fight, and gained the name *El Libertador* (the Liberator). On June 15, he sought to terrorize *peninsulars* by issuing a decree ordering war to the death against them and Canarians if they did not actively collaborate with his

forces; Americans, however, would be spared even if they fought with the royalists. The consequence was increased violence. Bolívar's forces took Valencia on August 2, and four days later, he entered Caracas, a city ravaged by the depredations of Monteverde, as the culmination of the "Admirable Campaign" to restore republicanism and independence to Venezuela. This time the government, known as the Second Republic, was centralized, and Bolívar was, for the first but not the last time, effectively a dictator in command of the country's civil and military resources wherever his writ was obeyed. An assembly of notables in Caracas granted him the title *Liberator of Venezuela*. In February 1814, he responded to undoubted royalist atrocities by JOSÉ TOMÁS BOVES and others by ordering the execution of 800 peninsular and Canarian prisoners at La Guaira.

Civil war precluded victory in 1814. Venezuelans made up many, if not a majority, of the royalist forces. In the Llanos, Boves assembled into an effective cavalry black and *pardo* cowboys, bandits, and fugitives, Canarians, and others willing to fight for plunder taken from *creoles*. By December, he had an army of 7,000 men with no more than 50 white officers and 80 white soldiers. Although ostensibly fighting for the royalists, he and his army were fighting mostly for spoils and the joy of violence against the whites who disparaged them.

In addition, Bolívar had rivals within the republic. Defeated and desperate, in early September, he was allowed to leave for New Granada, where he was still respected. There, he received a command and fought his way into BOGOTÁ, which he occupied on December 12, 1814. Civil war scarred New Granada as well. An unsuccessful campaign to force Cartagena into a broader state failed, and Bolívar resigned his commission, departed on a British merchant ship, and arrived in JAMAICA on May 14, 1815, just 10 days shy of Ferdinand VII's return to Spain.

Ferdinand was determined to restore Spain as it was prior to his abdication. As for the colonies, he turned to military force rather than compromise or conciliation. On February 16, 1815, General PABLO MORILLO sailed from CÁDIZ toward Venezuela with a force of about 10,500 conscripts. He quickly took the island of Margarita and then moved to the mainland, where he entered Caracas in May. Turning west, he reestablished royalist authority by October. In 1816, the pacification program in New Granada had thoroughly dismembered the aristocratic elite that had supported independence. In Venezuela, the Sequestration Committee confiscated more than 200 *haciendas*, most of them belonging to elite families, including that of Bolívar.

While Bolívar's sword had again failed, his pen persisted. Dated September 6, 1815, his famous "Letter from Jamaica" was another effort to justify rebellion by analyzing what he considered Spain's unjust policies and practices in administration, TRADE, and other areas. In addition, the letter sought to explain the nature

of civil war as between “conservatives and reformers.” Once more, he argued for strong, centralized authority, concluding that Venezuela and New Granada were not ready for fully representative institutions as a result of the Spanish heritage. He did not release the letter to his compatriots, however; it appeared first in English in 1818 and then in Spanish in 1833.

International complications precluded using Jamaica as a base, so Bolívar went to HAITI where the mulatto president Alexandre Pétion agreed to provide arms, ammunition, transport, and cash for an invasion of Venezuela in return for the Liberator’s promise to abolish slavery there. Bolívar’s homeland was then under royalist rule, but José Antonio Páez in the western llanos and guerrilla leaders elsewhere had kept alive resistance to the royalists, as well as conflicts among themselves. In the absence of a national state to support him, Bolívar’s challenge was to gain the respect and allegiance of enough of these regional caudillos, or strongmen, to drive the royalists out of Venezuela. His first attempt to return from Haiti, however, was a disastrous failure that led two of the caudillos to declare him a deserter and traitor. Following a second failure, he gave up on taking Caracas and went to Guiana early in 1817, a leader without an army in an environment dominated by military strongmen.

The Orinoco plains offered advantages, including endless CATTLE and a river dominated by republican craft. Bolívar’s first challenge was Manuel Piar, a *pardo* caudillo who went out of his way to kill Spanish prisoners. The Liberator wooed other caudillos, gained control over the river, and defeated royalist forces at Angostura. When the moment was right, he charged Piar of conspiracy and ordered him captured, tried, and executed. As the Liberator knew, racial harmony was preferable to racial warfare. Emancipation was a reward for slaves who served him militarily, but few joined his campaign. Nonetheless, slaves no longer fought against the republicans as they had earlier.

Guiana offered Bolívar the time and space to turn the collection of caudillo forces into a professional army, and he sought to do so, creating a general staff that rewarded men of proven ability. Thus caudillos became generals, and their men, soldiers; at the top was the Liberator. Yet, the structure lacked one major caudillo—Páez, leader of a cavalry of *LLANEROS* in the west, until he, too, agreed to serve under Bolívar. The two men met on January 30, 1818, after the Liberator had marched his army of 3,000 men nearly 200 miles (322 km) from Angostura to the plains of Apure, only some 30 miles (50 km) from royalist forces. In return for his men receiving a share of properties taken from the royalists, Páez agreed to put his thousand *llaneros* into the combined force of some 4,000 or more, including some British volunteers. After a defeat by Morillo at La Puerta on March 16, Bolívar led his remaining army back to Angostura, where he set about calling a congress and planning his next offensive (see ANGOSTURA, CONGRESS OF).

The congress met at Angostura with 26 delegates on February 15, 1819. There, the Liberator presented his recommended constitution for a state that would have four powers: executive, legislative, judicial, and moral. The congress elected Bolívar president and adopted a constitution that omitted his proposed hereditary senate modeled on England’s House of Lords and the moral power. Only victory was lacking.

The Liberator’s army benefited from the arrival of enormous quantities of British weapons and ammunition, as well as some unemployed British veterans of the Napoleonic Wars and other foreigners. They proved valuable in the campaign that soon moved into New Granada. In August 1818, Bolívar sent General Francisco de Paula Santander to Casanare; in May 1819, he had cleared it of royalists. When the Liberator received the news, he decided to act on an earlier idea of moving into New Granada. Although Páez refused to participate, Bolívar led his army of 2,100 across the Andes in extremely difficult conditions. Having met with Santander’s forces before crossing the Andes, the army, augmented by some British reinforcements, defeated the royalists at Boyacá. The victory opened the way to Bogotá and independence for New Granada.

The congress at Angostura celebrated on October 17, 1819, by creating the Republic of Colombia, incorporating Venezuela, New Granada, and the Kingdom of QUITO as three departments, and electing Bolívar as president. Of course, the departments mentioned needed to approve the action, and a constituent congress was called to meet at Cúcuta on January 1, 1821.

Meanwhile the RIEGO REVOLT of January 1, 1820, reinstated constitutional government in Spain. Two consequences affected Bolívar. First, no reinforcements would be leaving Spain for America. Second, Morillo was ordered to negotiate with Bolívar on the basis of accepting the constitutional monarchy in Spain. A six-month armistice was arranged on November 25, 1820, and Morillo promptly retired to Spain.

The armistice broke down when Maracaibo revolted on January 28, 1821, and declared independence from Spain. The Liberator sent Antonio José de Sucre to take a small force to GUAYAQUIL and bring about the incorporation of the *AUDIENCIA* district of Quito into Colombia. Then he took advantage of the armistice to organize his army for the final march into Caracas. Victory at the BATTLE OF CARABOBO on June 24, 1821, opened the way to Caracas, where Bolívar was warmly received on June 29. The remaining centers of royalist resistance—Maracaibo, Coro, Cartagena, Cumaná, and Santa Marta—fell by the end of the year, and PANAMA declared its independence on November 28 as a province of Colombia.

The third department of Colombia, the *audiencia* district of Quito, was still to be liberated. In May 1821, Sucre reached an agreement with Guayaquil, which had declared its independence on October 17, 1820. This



enabled him to move toward the city of Quito while Bolívar headed toward the capital through Popayán and Pasto, winning a battle but with many losses near the latter. On May 24, 1822, Sucre defeated the royalists at the Battle of Pichincha, opening the way to the capital; the Liberator arrived on June 15, 1822. Only PERU and CHARCAS remained under Spanish rule.

Bolívar met with JOSÉ DE SAN MARTÍN at Guayaquil on July 26 and 27, 1822, to discuss a variety of political issues that resulted in the latter's withdrawal from Peru and self-exile to Europe. The Peruvians would have to convince the Liberator to bring an army to free them; moreover, there was no longer any question that a new government would be republican, albeit as seen through the eyes of Bolívar.

Recognizing their lukewarm support for independence, Bolívar made the creoles of LIMA beg for his assistance, first sending Sucre and an army in April 1823 and then, after the royalists had reoccupied the city for a month, finally arriving himself on September 1. Bolívar led the army of nearly 9,000 to Pasco. It met and defeated the royalist army in the Andes at JUNÍN on August 6, 1824. Turning command over to Sucre, the Liberator went to Huancayo, then to the coast and Lima. In the Andes, on December 9, Sucre defeated the remaining royalist army in Peru at AYACUCHO, between CUZCO and Lima. On August 6, 1825, Charcas, or Upper Peru, became independent.

Even before the victory at Ayacucho, Bolívar was faced with an order that congress had transferred to Santander the Liberator's extraordinary authority because he had accepted Peru's appointment as dictator. Another order required him to turn over command of Colombian troops to Sucre, which he did.

Following the victory at Ayacucho, Bolívar resigned as president of Colombia, only to have its congress reject it. He followed this by convening Peru's congress and resigning as dictator. This, too, was rejected. When Charcas's assembly declared independence, it named the Liberator its chief executive and asked him to write a constitution for the new republic named in his honor, subsequently changed to Bolivia. Bolívar journeyed to the new country, arriving at La Paz on August 18 and then proceeding to the city of LA PLATA, where he met with the assembly, delivered a draft constitution that assigned executive authority to a president for life who could also select his successor, and quickly delegated supreme executive authority to Sucre.

The Liberator spent most of the rest of his life trying to achieve transnational unity among the newly independent states and stability within them. In 1828, he escaped an assassination attempt in Bogotá. It was increasingly clear, however, that his dream of a united multidepartment Gran Colombia was not going to come to fruition. Regional sentiments, personal ambitions, fiscal woes, social divisions, and political differences all stood in the way. Resigning as president of Colombia on March 1,

1830, Bolívar left Bogotá in May in voluntary exile and died on December 17 near Santa Marta. By that time, Colombia had broken into its three constituent states of Venezuela, New Granada, and Ecuador.

Bolívar was the most important political and military leader in the wars of independence in Spanish America. More a political theorist than a practitioner, despite his many offices, he perceived the difficulties that the new states faced and believed only a strong executive could surmount them. Although a republican, he proposed a lifetime president who could select his successor as the supreme executive for Bolivia. The Liberator's lament of 1830 summarizes his frustration with the independent states he had helped to create: "Those who served the Revolution have plowed the sea."

See also PAÉZ, JOSÉ ANTONIO (Vol. III); SANTANDER, FRANCISCO DE PAULA (Vol. III); SUCRE, ANTONIO JOSÉ DE (Vol. III).

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**Bolivia** See CHARCAS.

**Bonaparte, Joseph** See JOSEPH I.

**books** Early explorers, conquistadores, and settlers traveled to the New World with books in their luggage. The reading populace was sufficiently large that an enterprising German printer and bookseller named Jacob Cromberger, who had set up shop in Seville in 1500, secured a monopoly on the sale of books in NEW SPAIN in 1525. His son Juan subsequently arranged for the first printing press in the colony, in about 1539. Bishop of Mexico Juan de Zumárraga amassed a library of some 400 volumes.

At least four men who accompanied Francisco Pizarro on his expedition of conquest in PERU carried books with them. In 1584, the first press in LIMA opened its doors. In both NEW SPAIN and Peru, clerics, lawyers,

students, and other literate colonists demanded books from Europe. Religious writings typically outnumbered other kinds of books, but romances of chivalry, including the popular *Amadis of Gaul*, plays, poetry, and nonfiction that included works of history and medicine and instructional manuals circulated as well. Indeed, the heroes of the romances of chivalry stimulated some young Spanish males to seek their fortunes through a life of adventure.

The erection of tribunals of the INQUISITION in Lima and MEXICO CITY in 1570 and 1571 led to the implementation of the *INDEX OF PROHIBITED BOOKS* (*Index librorum prohibitorum*, 1551, 1559, 1583, and so on), under which specific books could not be imported and read. Nevertheless, individual libraries not only owned prohibited books but also held New World editions of some, and pernicious works circulated throughout the colonial era. Heretical works were the Inquisition's primary concern, but its agents also censored books prior to publication in the colonies.

In 1605, the galleons sailing to CARTAGENA DE INDIAS and PORTOBELLO carried at least 184 copies, probably of the first edition, of Miguel de Cervantes's *Don Quixote de la Mancha*. By June 1606, at least 72 copies were for sale in Lima, and soon afterward nine copies were on the way to CUZCO.

The high cost of books meant that primarily professionals, clerics, nobles, some merchants, *COLEGIOS*, and convents had libraries. In mid-17th-century Lima, cleric Dr. Francisco de Ávila had a library of more than 3,000 volumes, probably the most extensive colonial collection assembled to that time. An analysis of this library reveals works on "theology, law, and humanities; books on scientific and technological matters; and books on American and Peruvian topics in particular." Overall, probably 70 percent of books in the colonies before 1700 were religious in character. The remainder included fiction, poetry, drama, legal compilations, medicinal texts, and classical humanities.

The nature of individual collections varied. Jurists owned a variety of law books and legal compilations. Clerics collected the Scriptures, works of theology, catechisms, hagiographies, breviaries, books of hours, missals, and sometimes dictionaries and books of sermons in native languages. Physicians collected books on medicine and natural science. Books on MINING and defense found readers as well. Greek and Roman classics might appear in any collection, as might the extraordinarily popular novel *La Celestina* by Fernando de Rojas or, later, Cervantes's *Don Quixote* and Mateo Alemán's *Guzmán de Alfarache*.

Particularly after the mid-18th century, readers were able to obtain almost any book they wanted, despite the continued presence of the Inquisition. Thus, they read works by Montesquieu, Voltaire, Jean-Jacques Rousseau, and other contemporary European writers. In the closing years of the colonial era, political writings such as the American Declaration of Independence and the French Rights of Man were also available.

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**Bourbon dynasty** At his death in 1700, CHARLES II left the realms associated with the Spanish monarchy to Philip of Anjou, grandson of France's monarch Louis XIV and Maria Theresa of Spain. Charles's action replaced the Habsburg dynasty with a Bourbon ruling family (see HABSBURGS). The WAR OF THE SPANISH SUCCESSION resulted in PHILIP V losing the monarchy's possessions in Italy and the Spanish Netherlands but retaining Spain and its overseas territories. His victory in the civil war in Spain, moreover, enabled him to eliminate the long-standing rights and privileges (*FUEROS*) enjoyed by the Kingdom of Aragon.

Philip V's marriage to Maria Louisa of Savoy in 1701 resulted in four sons, including Louis and Ferdinand, prior to her death in 1714. The king quickly married Elizabeth Farnese, with whom he had seven children. Philip abdicated to his son Louis in 1724 but returned to the throne following Louis I's death on August 31 of that year. Son FERDINAND VI succeeded Philip to the throne in 1746.

Following Ferdinand's death in 1759, his half brother Charles inherited the throne. CHARLES III, previously duke of Parma (1732–35) and king of Naples and Sicily (1735–59), served until his death in 1788. Married to Maria Amalia of Saxony in 1738, Charles left as heir their second son, CHARLES IV.

Charles IV married his cousin Maria Luisa of Parma in 1765. Seven of their children reached adulthood, including heir Ferdinand. Following an orchestrated riot at the royal residence at Aranjuez, Charles abdicated to FERDINAND VII on March 19, 1808. Lured to France by Napoleon, Charles abdicated to the French emperor on May 5, 1808, and Ferdinand VII abdicated to Charles on May 6, thus leaving the vacated throne of Spain in Napoleon's hands. Charles would die in exile in Rome in 1819.

Following the Spanish war of independence against the French, Ferdinand VII returned to Spain and his crown in 1814. Save for the years 1820–23, he ruled as an absolute monarch until his death in 1833. Despite some breaks in tenure, the Bourbon dynasty retains the Spanish throne today.

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**Bourbon Reforms** The term *Bourbon Reforms* is often applied to the administrative and economic changes decreed by the Bourbon monarchs of 18th-century Spain, especially those associated with the reign of CHARLES III (1759–88) (see BOURBON DYNASTY).

The Crown undertook reforms to secure additional revenue for remission to Spain and to strengthen defense in the Americas with funds resulting from more effective colonial administration, improved tax collection, and additional sources of revenue (see TAXATION). Among the best-known reforms were the creation of the INTENDANT system in all Spanish colonies in the Americas except NEW GRANADA; modification of taxes and their collection; regular mail service; introduction of COMERCIO LIBRE; establishment of TOBACCO monopolies; expansion of existing AUDIENCIAS and creation of new ones in BUENOS AIRES, CARACAS, and CUZCO; increased appointments of PENINSULARS to high office; expansion of royal authority over the CATHOLIC CHURCH; and the reform of militias and expansion of colonial armies.

The fiscal changes and modification of TRADE policy produced more income and enabled the expansion of colonial administration and the MILITARY. At the same time, greater emphasis on the appointment of high-ranking officials and military officers who had been born in Spain irritated many ambitious CREOLES. Many historians consider the vigorous demand for more native-born appointees to be an important component of the anti-peninsular sentiment fanned by supporters of political autonomy and independence in the years after 1808 (see AUTONOMISTS).

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**Boves, José Tomás** (b. 1782–d. 1814) *Spanish royalist leader of llaneros in Venezuela* An Asturian who had been a sailor and smuggler, José Tomás Boves moved to the Llanos (plains) of Venezuela, where he bought and sold horses and emerged as a powerful local leader. The Ordinances of the Plains issued by the First Republic in 1811 threatened the Venezuelan cowboys (LLANEROS) with fines and whipping for rounding up or hunting CATTLE without the owner's permission. This threat to their income and freedom galvanized their opposition to republicans.

In 1814, Boves and his mounted followers supported the royalist cause against the Second Republic and brought it success. Victorious in the Battle of La Puerta

on June 15 against the forces led by SIMÓN BOLÍVAR and Santiago Mariño, Boves's forces took Valencia on July 10 and then CARACAS from the republicans on July 16. This victory was the death knell of the Second Republic created by the Liberator Bolívar. With little but Margarita under republican rule on his arrival, General PABLO MORILLO was quickly able to lead the royalist army of reconquest into NEW GRANADA.

Boves and his men showed no compunction in terrorizing both republican soldiers and civilians. He followed victories by sacking conquered towns, making his name synonymous with savagery as his men executed prisoners. His death in Urica, Venezuela, by an enemy lance resulted in Francisco Tomás Morales assuming control of the *llaneros*.

Despite Boves's critical assistance to the royalist cause, Spanish authorities withheld the rewards the *llaneros* expected, even demoting some of their leaders. As a result, the *llaneros* shifted their support to the republicans.

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**Braganza dynasty (Bragança)** The Braganza dynasty originated in 1442 when Afonso, an illegitimate son of Portuguese monarch John I, received the duchy of Braganza. The House of Braganza ruled Portugal from 1640 to 1910 and Brazil from 1640 to 1889.

Under Spanish rule from 1580, the Portuguese followed the example of Catalonia, revolted against PHILIP IV on December 1, 1640, and proclaimed the duke of Braganza as King John IV. The Spanish Crown considered Portugal in revolt and only in 1668 recognized its independence. By this time, John IV's immediate successor, Afonso VI (1656–67), had been exiled and replaced by his younger brother Pedro as regent (1667–83) and then king, as Pedro II (1683–1706).

Pedro's son succeeded him as John V, ruling from 1706 to 1750. John's son Joseph inherited the throne in 1750 and reigned until 1777; during Joseph's reign, the dominant political figure was Sebastião José de Carvalho e Melo, MARQUÊS DE POMBAL from 1770. Joseph's insanity led to his wife, Mariana, becoming regent in 1774. Their daughter Maria served as queen from 1777, but her insanity led to her son John becoming regent in 1792 and then monarch, as JOHN VI from 1816 to 1826. Having fled to BRAZIL with the rest of the court in 1808, John departed for Portugal in April 1821, turning over Brazil to his son, Pedro I, who soon led the colony to independence.

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**Brazil** Reached initially by sailors under the Portuguese flag in 1500, Brazil was immediately claimed by Portugal as within its jurisdiction by the terms of the Treaty of Tordesillas. Brazil quickly became a source of dyewood, which was exported to Europe by both the Portuguese and French poachers, the latter proving to be a problem throughout the 16th century. Permanent Portuguese settlement of Brazil was slow. An effort begun in 1534 to promote settlement through the use of donatary captaincies, other than that of PERNAMBUCO, largely failed. Consequently, the Portuguese Crown turned to royal officials to colonize Brazil, starting with Tomé de Sousa, whom it sent to SALVADOR DA BAHIA as governor general in 1549 with a substantial expedition that included six JESUITS and some secular priests, 400 criminals (*degredados*), perhaps 600 soldiers, some artisans and officials, and livestock including CATTLE, horses, burros, SHEEP, goats, pigs, and chickens. On arrival, Sousa founded the city of Salvador and made it the capital of the captaincy general (see CAPTAINCIES GENERAL).

The immensity of Brazil, even before settlers crossed the line created at Tordesillas in 1494, and its system of rivers draining into the Amazon or, in the south, into the Paraná and Paraguay, deserve emphasis. Size and location affected TRANSPORTATION and communication; indeed, it was easier to communicate between Pernambuco's port of Recife and Lisbon than Recife and RIO DE JANEIRO. Size also left an enormous interior (*SERTÃO*) available to prospectors, cattle ranchers, and, beginning in the late 16th century, expeditions looking for indigenous people to enslave. Rivers made it possible to transport SUGAR economically to coastal ports.

Administration of Brazil rested with governors general starting with Sousa; by the early 17th century, all captaincies were directly administered by the Crown through a governor general for BAHIA and *capitães mores*, or governors for the other captaincies. Beginning in 1697, the title *governor* and *captain general* was being used for governors of Rio de Janeiro; its usage expanded so that by 1772 there were nine governors and captain generals. In 1720, the governor general in Bahia became a VICEROY, but the new title brought no additional major responsibilities. A high court of appeals, or *RELAÇÃO*, was established at Bahia initially in 1609; a second court was finally created in Rio de Janeiro in 1751. At the provincial level (*comarca*) and district or town level (*município*) were royal officials (*ouvidores* and *juizes de foro*) who, as in Spanish America, had a mix of judicial and administrative duties. Town councils (*senados da câmara*) dealt with local affairs.

In the absence of a native culture comparable to the Aztecs or the Incas in size or sophistication, colonists

started enslaving indigenous people to provide labor if they would not work voluntarily. Clerics, notably the Jesuits, tried to Christianize, resettle, and protect the NATIVE AMERICANS. Nonetheless, the indigenous population declined from diseases that were often more deadly because victims had suffered abuse at the hands of the Portuguese. Based on their prior experience with SLAVERY, the settlers turned to importing African slaves for labor. In 1559, the Crown allowed every owner of a sugar mill (*senhor de ENGENHO*) to import from Portugal's island of São Tomé off the African coast 120 slaves at a reduced rate of TAXATION. By 1580, slavery was the main form of labor on PLANTATIONS and in the mills, and by 1630, more African slaves were used than Indians.

What started as a trickle turned into the largest migration, involuntary to be sure, to the Americas prior to independence. By 1600, Brazil had an estimated 50,000 slaves; 560,000 more were imported in the 17th century, and almost 2 million between 1701 and 1810, the last figure representing about 19,000 annually.

The introduction and expansion of sugarcane starting in the early 16th century turned the sweetener into the colony's most important export. Produced particularly in the captaincies of Pernambuco and Bahia, sugar was responsible for the growth of Bahia's administrative and commercial center, Salvador da Bahia. The city also served as the most important port for the exportation of sugar and the importation of African slaves and Portuguese and European goods sent from Lisbon.

Legal TRADE with Portugal was handled by merchants in Lisbon working with their representatives in the colonies. British traders in particular sent goods via Lisbon to Brazil, some of which were reexported to the Spanish markets available through the RÍO DE LA PLATA. Having long been trading partners, the British and Portuguese tightened their bond with the METHUEN TREATY in 1703. Although the MARQUÊS DE POMBAL, Portugal's omnipotent minister from 1750 to 1777, tried to strengthen Portuguese and colonial trade and thereby reduce the British presence, his efforts were only partly successful. A fleet system operated until 1766, although joint stock trading companies operated from the 1750s until their abolition after the fall of Pombal (see FLEETS/FLEET SYSTEM).

Brazil's sugar production came from 60 mills (*engenhos*) in 1570, 115 in 1583, and 346 in 1629, at which time 150 were located in the captaincy of Pernambuco, 80 in Bahia, and 60 in Rio de Janeiro. Although Pernambuco had more *engenhos*, Bahia produced more sugar, and by 1630, it had more slaves and had become the most important sugar-producing region in Brazil. In 1710, 528 *engenhos* produced more than 40,000 tons of sugar, but competition from the sugar islands of the Caribbean had reduced its value while rising prices for slaves further squeezed planters. Nonetheless, sugar remained an important Brazilian export, and toward the end of the century, SÃO PAULO became an additional major region of production.

The profits associated with sugar stimulated the Dutch to attack and capture Salvador in 1624, although they could hold it for only a year. They returned to Brazil in 1630 and occupied Recife and Olinda, making the former their capital until driven out of the captaincy of Pernambuco in 1654.

While sugar production dominated the 17th century, the discovery of GOLD in MINAS GERAIS in 1695 led to an unprecedented rush of miners and adventurers into the region and subsequently into MATTO GROSSO and Goiás. Gold production in Brazil far exceeded that in Spanish America. It also created another market for slaves and a new market for beef and, at the same time, created unheard-of wealth for the Portuguese Crown, which taxed registered gold at a rate of 20 percent. The expeditions of the *bandeirantes*, the expansion of MINING areas, and the need for beef and hides also strengthened Portugal's interest in expanding Brazil's borders to the estuary of the River Plate (see *BANDEIRAS*).

Lust for the SILVER of CHARCAS led the Portuguese to establish a fortified trading post and contraband center at COLÔNIA DO SACRAMENTO in 1680. Its presence also stimulated Portuguese expansion and settlement in Rio Grande do Sul. For nearly a century, the existence of Colônia plagued Spanish-Portuguese relations.

By the turn of the 19th century, Brazil was organized into nine captaincies general with a population of just over 2 million, a half million more inhabitants than in the mid-1770s. Minas Gerais, Pernambuco, Rio de Janeiro, and Bahia accounted for almost two-thirds of the population. The largest cities in the early 19th century were Salvador (51,000 in 1807), Rio de Janeiro (47,000 in 1803), Recife (25,000 in 1810), São Paulo (24,000 in 1803), and São Luís do MARANHÃO (20,500 in 1810).

The composition of Brazilian society varied substantially from captaincy to captaincy. In the four most populous captaincies general, whites made up 33.6 percent of the population in Rio de Janeiro; Bahia had 19.8 percent; São Paulo, the fifth-largest captaincy-general, had 56 percent whites. The free black and *MULATO* (mulatto) population varied from a high of 42 percent in Pernambuco to a low of 18.4 percent in Rio de Janeiro. The slave population ranged from 47 percent in Bahia to 26.2 percent in Pernambuco. Overall, the number of whites was approximately the same as the number of free blacks and mulattoes; black and mulatto slaves were significantly more numerous than either of the free groups; Amerindians made up a miniscule 5.7 percent of the population.

Brazilian society was hierarchical. At the top were successful white planters, merchants, and a small number of officials; most other whites formed a second group; a few whites and free persons of mixed racial background constituted a third group; slaves and indigenous people made up the final two groups. Unlike in Spanish America, however, colonial Brazil had neither a university nor a printing press. Ambitious young Brazilians of good fam-

ily had to go to the University of Coimbra or another European university for advanced EDUCATION.

While most of Europe was involved in the wars of the French Revolution, Portugal remained neutral, and thus, its trade with Brazil remained uninterrupted. The Haitian Revolution, moreover, had benefited sugar producers as it eliminated the single largest producer of sugar. Increased amounts of TOBACCO, cotton, coffee, rice, and some WHEAT were exported as well. British manufactures reached Brazil either through Lisbon or Oporto or illicitly by direct smuggling.

The flight of the Portuguese Court and some 10,000 other emigrants from Lisbon in November 1807 and their arrival in Rio de Janeiro in March 1808 created a new political environment in Brazil, which ultimately resulted in independence (see BRAZIL, INDEPENDENCE OF).

See also BRAZIL (Vols. I, III, IV); TORDESILLAS, TREATY OF (Vol. I).

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**Brazil, independence of** BRAZIL's independence was intimately linked with the French invasion of Portugal and the flight, long planned, of the royal family and Court to Brazil, recognized as more important than Portugal itself for the survival of the monarchy and empire. The arrival of Prince Regent John; his mentally disturbed mother, Queen Maria I; his wife, Princess Carlota Joaquina, sister of Spain's FERDINAND VII; 10,000 or more *REINÓIS*; and a printing press put extraordinary demands on the capital city of RIO DE JANEIRO, whose population doubled within a decade, and provoked an unprecedented amount of political discussion.

Unlike the Spanish colonies that together were substantially more populous than Spain, Portugal in 1808 was still larger than Brazil, although probably only by a million or so inhabitants. Its rate of growth, however, was slower, and Brazil was poised to overtake the mother country. The colonial heyday of Brazilian production of SUGAR and other agricultural exports as well as MINING of GOLD and DIAMONDS may have already passed, but they still provided Portugal with income to purchase primarily British textiles and other imports.

Ties between Brazil and Portugal were closer than those Spain had with its colonies. University-educated clerics and officials knew each other from their years at Coimbra, and not uncommonly, Brazilians married in Portugal and made a career there. Communication time was shorter from Brazil to Lisbon than from most of the Spanish colonies to Madrid. Governors communicated directly with Lisbon rather than through other execu-

tives. Even in the late 18th century, the number of regular troops in Brazil was more modest than that of Spanish troops in NEW SPAIN. Indeed, the scale of Portugal's entire colonial enterprise was more modest than Spain's. The fact that nearly 40 percent of Brazil's population was enslaved and nearly 30 percent more was free descendants of slaves made the elites in the few Brazilian CITIES nervous about any sudden political change, although there were only two significant conspiracies against Portuguese rule before 1808 (see SLAVERY).

As the Portuguese Court re-created the institutions of state in Rio de Janeiro, it became obvious that no Brazilians held office. No one could have doubted, however, that neither Rio nor the rest of Brazil would turn the clock back to before the arrival of the Court. State decisions were now made in Rio. Lisbon was no longer the major port for Brazilian goods. Since the government was dependent on revenue from TRADE, Prince Regent John immediately opened up Brazil's ports to commerce with all friendly nations, of which Britain was the most important. Trade with Portugal promptly plummeted; it remained dominant only in the slave trade.

The French withdrawal from the Iberian Peninsula and defeat of Napoleon cleared the way for John to return to Portugal. After six years in Rio, however, neither the prince regent nor many people who had arrived with him wanted to go back to the problems of war-ravaged Portugal. On December 16, 1815, John declared Brazil a kingdom equal in rank to Portugal. Upon the death of his mother in February 1816, the prince regent became JOHN VI, monarch of an empire centered in Brazil.

The monarch's interests did not always correspond with those of the Brazilian elite. The latter, although delighted to receive titles of nobility, grew increasingly resentful of the favors and offices granted to *rinóis*. Plantation owners were concerned that the monarch had sold out to the British in agreeing in 1815 to work to end the slave trade; the addition in 1817 of an agreement giving the British the right to search Portuguese vessels north of the equator for possible slaves was another aggravation. The only rebellion, however, was one in PERNAMBUCO, which was as much if not more against Rio than Portuguese rule.

Just as events in Portugal had triggered the transatlantic voyage of the Court in 1807–08, liberal military rebellions in Oporto and Lisbon in the summer and fall of 1820 initiated the chain of events that led to Brazilian independence. Modeled on events in Spain, liberals in Portugal created a governing junta to rule until John returned (see JUNTAS). The junta demanded that he return immediately and support the Spanish CONSTITUTION OF 1812 until a constituent Cortes in Portugal could write its own. The call for deputies gave Brazil a significant minority of seats, but clearly a minority. Although not fully revealing their plans, the liberals intended to turn the colonial clock back to 1807.

For members of Brazil's "co-kingdom" elite, the critical question had to do with where the monarch resided.

No change was far more preferable than acceding to the junta's demand. Since the transfer of the monarchy, Brazilians had received political equality (reversed in the call for elections to the Cortes) and free trade; John's return to Portugal could end both. Brazilians of a more liberal persuasion, however, wanted more changes than any monarchy would provide and thus saw some potential benefit in the monarch departing. As for John VI, habitually unable to make decisions, the choices were difficult. Leaving might cost Brazil; not leaving would cost Portugal. On March 7, 1821, he decided to leave; encouraged by a political crisis in Rio, he departed on April 26 with some 4,000 Portuguese and the treasury, arriving in Lisbon on July 4. Prince Regent Pedro stayed behind.

The Cortes meeting in Lisbon from late January 1821 failed to understand the changes wrought by the monarchy's 13 years in Brazil. In a series of ill-advised actions, many taken before a majority of Brazilian deputies assumed their seats, it sought to revoke the trade agreement with Britain, sent troops to Brazil, ordered that all government offices established in Rio from 1808 onward be closed and moved to Lisbon, and, on October 18, 1821, demanded that Prince Regent Pedro return to Portugal. The Cortes approved the Constitution in 1822, but Brazilian deputies started to flee rather than sign it.

When word reached Rio on December 11, 1821, that Pedro was to return to Portugal, Brazilian resistance was immediate. Several weeks of pressure from politicians, including JOSÉ BONIFACIO DE ANDRADA E SILVA, a Coimbra-educated member of a wealthy Santos family, followed. On January 9, 1822, Pedro announced he would stay in Brazil. A week later he named Andrada e Silva head of a new cabinet. On October 12, 1822, Pedro was acclaimed constitutional emperor and perpetual defender of Brazil. He was crowned in Rio de Janeiro on December 1, 1822. The new emperor's comment to his father is instructive: "Portugal is today a fourth-class state and needful, therefore dependent; Brazil is of the first class and independent."

See also PEDRO I (Vol. III).

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**brazilwood** Portuguese explorers who reached the lands soon known as BRAZIL found that the dense wood of the coastal trees (*Caesalpinia echinata*) yielded a valuable bright red or deep purple dye similar to that from an East Asian tree (*Caesalpinia brasiliensis*) responsible for the name *Brazil*. Pedro Álvares Cabral ordered numerous tree trunks immediately sent to Portugal. Christened

*brazilwood*, the trees were soon placed under a royal monopoly and harvested for exportable dyewood in the first great export boom in Brazil's history (see **MONOPOLIES**, **ROYAL**).

Initially, the Portuguese established fortified trading posts as bases for their **TRADE** with the indigenous people who conveyed the felled trees to them. Barter yielded to forced labor as the Portuguese sought to expand exports while the indigenous population was declining.

Prior to 1567, when Governor **MEM DE SÁ** expelled them, French merchants were active in obtaining brazilwood for shipment to textile producers at home. The market peaked by the end of the century, and exports by the mid-17th century had declined by about half. Illegal trade continued, as rich stands remained in Porto Seguro, Ilhéus, and Espírito Santo.

See also **DYES AND DYEWOODS** (Vol. I).

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**buccaneers** A synonym for European *pirates* in the 17th century and often applied to privateers licensed to attack Spanish settlements and shipping, the term *buccaneer* derives from the French word *boucanier*, meaning “one who hunts wild cattle.” *Boucanier*, in turn, comes from *boucan*, a Taino term referring to a wooden grill on which meat was dried and smoked. Unlike the corsairs who preceded them and typically returned to Europe after a successful expedition, the buccaneers who raided Spain's colonial ports, towns, and ships usually remained in the Americas.

Spain never effectively settled all of the **CARIBBEAN** islands. Nevertheless, by the middle of the 16th century, the indigenous populations had largely perished, while the large-scale importation of African slaves had not yet begun. Feral offspring of livestock, especially **CATTLE** and pigs, left by sailors from Europe provided food and hides for castaways, renegades, fugitives, and others seeking asylum or, increasingly, a base from which to raid, loot, and pillage towns along the Caribbean coast and sometimes beyond. England took St. Kitts in 1623, Barbados in 1627, and **JAMAICA** in 1655. French and English buccaneers turned Tortuga, a small island northwest of **HISPANIOLA** used as a base from the early 1600s, into a major center of operations from the 1630s into the 1670s.

Operating from Tortuga, Jamaica, and other islands, bands of 700 or more men wreaked havoc on hapless ships and coastal towns in the Caribbean, occasionally struck the Pacific coast of Spanish America, and sometimes moved inland. During the years 1665–71 alone, buccaneers assaulted 57 villages, towns, and cities. Some locations suffered repeatedly: Buccaneers struck Tolu eight times, Río de la Hacha five, and Maracaibo twice.

Among the more notorious buccaneers were the Frenchman Jean-David Nau (better known as François l'Olonnais), who in 1667 raided Maracaibo, and the Englishman Bartholomew Sharp, who plundered and sacked La Serena, **CHILE**, in 1680. The worst scourge of Spanish settlements was the Welshman **HENRY MORGAN**, who operated out of Jamaica in the 1660s and early 1670s. His capture of **PORTOBELLO** and the city of **PANAMA** were among the buccaneers' most celebrated successes.

The spoils seized by buccaneers, which included ransoms paid by captured and imprisoned victims and their families, could be substantial. L'Olonnais's expedition captured a Spanish ship carrying 50,000 pesos, jewels, and 120,000 pounds of **CACAO**. Morgan's expedition to Portobello seized plunder worth perhaps 250,000 pesos, a sum that gave each surviving buccaneer more than 600 pesos, about 10 times what a day laborer earned in a year and more than enough for gambling, drinking, and wenching in **PORT ROYAL**.

Although Anglo-American pirates remained, the age of buccaneers ended symbolically in 1692 when an earthquake literally carried their sanctuary of Port Royal into the sea. By the mid-1680s, however, the English government had already decided that it would benefit more from trading than raiding in the Spanish Empire and was actively involved in suppressing piracy.

See also **PIRATES AND PIRACY** (Vol. I).

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**Buenos Aires** Abandoned in 1541 by settlers who had arrived with Pedro de Mendoza, the present-day capital of Argentina was permanently refounded in 1580 by Juan de Garay and followers from **PARAGUAY**. Although the residence of government and ecclesiastical authorities from the creation of the governorship of Río de la Plata in 1618, Buenos Aires became the official capital only in 1695.

Located far from the route of the galleons sent to **CARTAGENA DE INDIAS** and **PORTOBELLO**, the municipality was irresistibly close to **BRAZIL**. Within the decade, ships were sailing from the new settlement to Brazil, carrying **SILVER** from **POTOSÍ** to exchange for **SUGAR** and merchandise that could be sold in Tucumán and the **MINING** camps of **CHARCAS**. This breach in the official monopoly was illegal, but the absence of regular **TRADE** with Spain left settlers without many of the necessities of civilized life.

Despite the opposition of the **Consulado** of Seville, in 1618 the Crown allowed two small ships a year to sail

from Spain to Buenos Aires and permitted reexport of part of the cargo to Charcas upon payment of a 50 percent additional customs duty at the *dry* port of Córdoba (see *CONSULADO*; *SEVILLE*). Spanish merchants made the best out of the two legal vessels, however, loading them with large quantities of contraband and thus untaxed merchandise. Portuguese merchants also engaged in clandestine trade, even erecting in 1680 a trading post at COLÔNIA DO SACRAMENTO on the RÍO DE LA PLATA to facilitate it. The primary lure for all concerned was access to silver from POTOSÍ and other mines in Upper Peru.

Buenos Aires and its hinterland benefited from the introduction in 1778 of *COMERCIO LIBRE*. Serving as a center for goods sent to Charcas in exchange for silver, the city's major export remained silver, although merchants also exported hides and later jerked beef.

The city's population grew substantially in the 18th century. In 1744, it numbered only 11,600; this increased to 26,125 in 1778 and 42,540 by 1810. While in 1744 almost 60 percent of white male heads of households were born in Buenos Aires, this number plummeted to 30 percent by 1810, at which time immigrants from Spain were slightly more numerous and the number of Spaniards from elsewhere in Spanish America was about the same.

Population growth was directly related to the arrival and success of a large army under PEDRO DE CEVALLOS in 1776, sent to address the Portuguese challenge in the borderlands and to eliminate Colônia do Sacramento; the elevation of Buenos Aires to capital and bureaucratic center of the new VICEROYALTY OF THE RÍO DE LA PLATA in 1777; and the commercial expansion that fol-

lowed the introduction of *comercio libre*. The population in 1810 included more than 1,900 artisans and skilled workers, almost 1,600 men involved in commerce, and nearly 1,600 professionals associated with the MILITARY, CATHOLIC CHURCH, and government. Two-thirds of the population was considered Spanish and one-third was of African ancestry (86 percent of them slaves). The number of Amerindians and mestizos was less than 1 percent (see *MESTIZAJE/MESTIZO*).

British invasions in 1806 and 1807 and the inhabitants' success in repelling them was quickly followed by the formation of a junta in 1810 to rule in the name of FERDINAND VII during his imprisonment in France (see *JUNTAS*). Accompanying this statement of autonomy, which amounted to de facto independence, the junta and its successors embarked on a series of unsuccessful military efforts to retain control over the entire viceroyalty. JOSÉ DE SAN MARTÍN, who had the backing of the government in Buenos Aires for his celebrated campaign that freed CHILE, achieved the one major victory. Although Buenos Aires was dominant in the misnamed UNITED PROVINCES OF THE RÍO DE LA PLATA, which declared independence from Spain in 1816, political stability was elusive prior to the emergence of Juan Manuel de Rosas as caudillo in the 1820s.

See also ARGENTINA (Vols. I, III, IV); BUENOS AIRES (Vols. I, III, IV); ROSAS, JUAN MANUEL DE (Vol. III).

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**cabildo** See *CABILDO* (Vol. I); MUNICIPAL COUNCIL.

**cabildo abierto** Modeled on precedents in Castile, the *cabildo abierto* was a meeting of a municipality's citizens (*VECINOS*) or a select portion of them to discuss with officials matters of general importance, for example, possible responses to a crisis. Thus, it could include government, ecclesiastical, and military officials; merchants; resident estate owners; lawyers; and others.

There are numerous examples of *cabildos abiertos* in the colonial era. In ASUNCIÓN, PARAGUAY, a *cabildo abierto* elected a governor when the incumbent died without royal provision of a successor. In 1590, the citizens of POTOSÍ met to vote an additional contribution to the treasury of PHILIP II. The citizens of Santiago de Cali in NEW GRANADA met in 1664 to protest the arrival of a commissioner sent to examine the royal accounts. QUITO used a similar meeting in December 7, 1764, to discuss the reorganization of the *AGUARDIENTE DE CAÑA* monopoly. The constitutional crisis that rocked the Spanish Empire in the aftermath of the abdications of CHARLES IV and FERDINAND VII in 1808 led to the most celebrated use of *cabildos abiertos*.

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**cacao** Probably domesticated by the Olmecs, cacao was consumed by nobles and warriors of Mesoamerica before the Spanish conquest as a beverage often mixed

with other ingredients, such as chili or MAIZE flour. The bean also served as a medium of exchange. While Spaniards originally scorned the beverages made from cacao, some entrepreneurs perceived the economic opportunities it offered and soon *encomenderos* required indigenous people to provide specified quantities as TRIBUTE (see *ENCOMIENDA*). Central American sources, for example, along the Pacific coast from Soconusco into NICARAGUA, were especially important in the 16th century, but as the consumption of chocolate by commoners in NEW SPAIN and elsewhere in the colonies grew, other colonial producers entered the market.

Spaniards started drinking substantial amounts of chocolate in the 1590s and preferred the flavor of Central American beans. Cacao produced in quantity in VENEZUELA from the 1620s was sent to VERACRUZ and from there into highland Mexico or to Spain or the Netherlands. Producers in GUAYAQUIL also entered the market, but the ban on trade between PERU and New Spain in 1634 meant that it went to the port of Acajutla and then to Mexico via mule trains. By the late 17th century, shippers in Guayaquil sent illicit cacao to Mexico via PANAMA, where it was transported by land to PORTOBELLO and then by sea to Veracruz.

Benefiting from plants native to the region around Caracas, Venezuela emerged as a prominent producer of cacao in the early 17th century, and by 1650, the bean had become its most important export. *Encomenderos* were early beneficiaries, but a modest and declining population stimulated them and other entrepreneurs to seek African slaves as a more productive and dependable form of labor (see *SLAVERY*).

The initial CARACAS boom in cacao ended around 1650 due to blight, a severe earthquake in 1641, and

a collapse in prices that probably reflected the rapid expansion of Guayaquil's production in the 1640s. By the 1670s, a second boom in Venezuelan production was under way, which included significant expansion in the Tuy River region in the south and east of Caracas. The number of cacao trees in the province exceeded 2 million in 1720 and more than 5 million in 1744; more than half were on HACIENDAS in the Tuy area.

The creation in 1728 of the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS, the first of several royally chartered companies to enjoy commercial monopolies in the empire, restricted the legal sale of cacao to company officials. Although the slave market collapsed in the 1730s, the expansion of cacao production continued until 1749, when pent-up hostility toward the company and its government allies burst into a short-lived rebellion. Subsequently, cacao production grew more slowly as cacao elites sought alternatives to slave labor.

From the mid-17th century, the province of Guayaquil in the Kingdom of QUITO benefited from the exportation of cacao, especially to the market of New Spain. The official opening of legal TRADE among colonies in the 1770s saw production in Guayaquil grow by 50 percent between the 1780s and the late 1790s. In 1822, it was nearly 250 percent greater than in the 1780s. While colonial connoisseurs preferred cacao from Venezuela and Central America, large numbers of consumers were content with that from Guayaquil.

When cacao was introduced in Spain is unknown, although verifiable evidence exists of its shipment from Veracruz to SEVILLE no later than 1585. In the first half of the 17th century, it was being served to a growing market as a hot chocolate drink that included vanilla, cinnamon, and SUGAR and was consumed in social settings. Its use subsequently spread among the well-to-do elsewhere in Europe and together with substantial colonial demand account for the expanding market for colonial production. Consumption in England grew rapidly after the English seized JAMAICA in 1655 and founded cacao plantations there.

See also CACAO (Vols. I, III).

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**cacique** Spaniards adopted the term *cacique* from the Arawak islands of the West Indies, where it referred to

a hereditary indigenous chieftain, and used it routinely (and interchangeably with *señor*) in Mexico instead of the Nahuatl term *tlatoani*. Early grants of Indians to provide labor and TRIBUTE (*ENCOMIENDAS*) were typically comprised of a cacique and the indigenous people under his rule.

Caciques and *principales*, the nobles and most important people under them, were central to Spanish rule. Their positions enabled Spaniards to use them as cultural brokers and middlemen with indigenous commoners. Caciques held traditional rights and exemptions that continued after the conquest, for example, the collection of tribute and use of labor. As leaders, they were the Indians most apt to learn Castilian, dress in European-style clothing, and adopt various Spanish customs. Their *cacicazgos* (rights and properties of the cacique) included land, often labor, and other resources.

By the middle of the 16th century, the wealth and power of many caciques was in rapid decline in many villages as recurring EPIDEMICS significantly reduced the number of Amerindians under their jurisdiction. The replacement of *encomenderos* by a provincial official (*ALCALDE MAYOR*) as recipients of tribute, however, did not improve the caciques' lot. They were personally responsible for turning over a specified amount of tribute to Spanish recipients; at the same time, they derived income from the difference between what they collected and what they paid to the *alcaldes mayores*. Since readjustment of assessed tribute lagged behind changes in population, declining numbers of tributaries meant that caciques had to raise the amount collected from each tributary, reduce the amount they retained, or both. Failure to provide Spanish officials with the assessed amount could lead to the loss of property and imprisonment. Thus, the position of cacique carried potentially serious liability during a time of declining population. Within a diverse colonial setting, however, some caciques retained considerable land and wealth.

Despite caciques' often deteriorating financial circumstances and sometimes outward appearance of being indistinguishable, to Spaniards, from indigenous Indian commoners, the title of *cacique* retained some value at the village level in parts of NEW SPAIN. In indigenous villages in Cuernavaca, for example, caciques or caciques and *principales* regularly held municipal governorships from the 16th into the 18th century and continued to enjoy use of the title *don*, a Spanish term recognizing nobility, into the 19th century. Caciques were also often leaders in *COFRADÍAS*, or religious confraternities. Thus, there was an identifiable link between social status and political rank.

The meaning of *cacique* changed over the colonial era. Originally applied only to a sole possessor of a *cacicazgo*, in the 18th century, all children of a cacique might claim the title. In Santiago Tecali, located not far from PUEBLA, the percentage of persons identified as caciques and *principales* at the time of marriage increased more than tenfold between 1672–1715 and 1767–1823 as the older

terms, *don* and *doña* and *principal*, disappeared from the records. More important, the absolute number of indigenous nobles in Tecali had grown substantially. While some were, in fact, mestizos, the caciques were anxious to preserve access to *cacicazgos* that was dependent on their legal recognition as Indians (see *MESTIZAJE/MESTIZO*).

See also *CACIQUE* (Vol. I).

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**Cádiz** Located on an island in the Bay of Cádiz, the Andalusian city of Cádiz became increasingly important as the colonial era progressed, especially as the silting and sandbars of the Guadalquivir River and increased size of transatlantic ships made SEVILLE and, later, SANLÚCAR DE BARRAMEDA unsuitable for the FLEETS sent to the American colonies. Repeatedly a target for enemy attacks, especially by the English from the late 16th to the early 18th centuries, the city and port became the official destination of goods from the Americas on the transfer of the CASA DE CONTRATACIÓN (House of Trade) and the CONSULADO (merchant guild) from Seville in 1717, decades after they starting serving as a de facto terminus.

The 18th century was the golden age of Cádiz. It was the leading Spanish naval base, the most important Atlantic port, and a center of international TRADE. Although other ports were authorized to trade directly with the colonies under the expansion of *COMERCIO LIBRE* beginning in 1778, Cádiz merchants dominated the American trade and exuded prosperity. The population of the city mirrored its growing importance, increasing from about 23,000 in the mid-17th century to some 41,000 around 1700, and 77,500 in the early 1790s, a figure lower than only those for Madrid, Barcelona, Seville, Valencia, and Granada.

With the end of the WAR OF THE SPANISH SUCCESSION, PHILIP V and his ministers turned Cádiz into Spain's most important naval base, creating the General Naval Intendency (Intendencia General de la Marina) and the Real Compañía de Guardias Marinas. The presence of foreigners was impressive. Nearly 800 were identified in 1713; by 1791, the number exceeded 5,000.

Cádiz's period of splendor began to crumble after Spain became an ally of France with the TREATY OF SAN ILDEFONSO. Great Britain established a blockade of the port by April 1797 that lasted three years and paralyzed Cádiz's trade with the colonies. The Peace of Amiens in 1802 allowed for a temporary return to the prewar trading system, but a renewal of conflict between France and Britain in 1804 again severely disrupted trade between Cádiz and the colonies.

The French invasion of Spain and Portugal that began in 1807 initiated years of war and crisis that ended with the loss of Spain's mainland colonies. Despite a long French siege, the city was home to Spain's government of resistance, including the celebrated CORTES OF CÁDIZ. The monopolistic merchants of the city's *consulado* used their presence and unmatched access to capital to prevent the genuine free trade sought by numerous colonial representatives to the Cortes. After FERDINAND VII's return, they continued to serve as financiers for Spanish efforts to regain control in the overseas territories. With the loss of empire, however, Cádiz's heyday was over.

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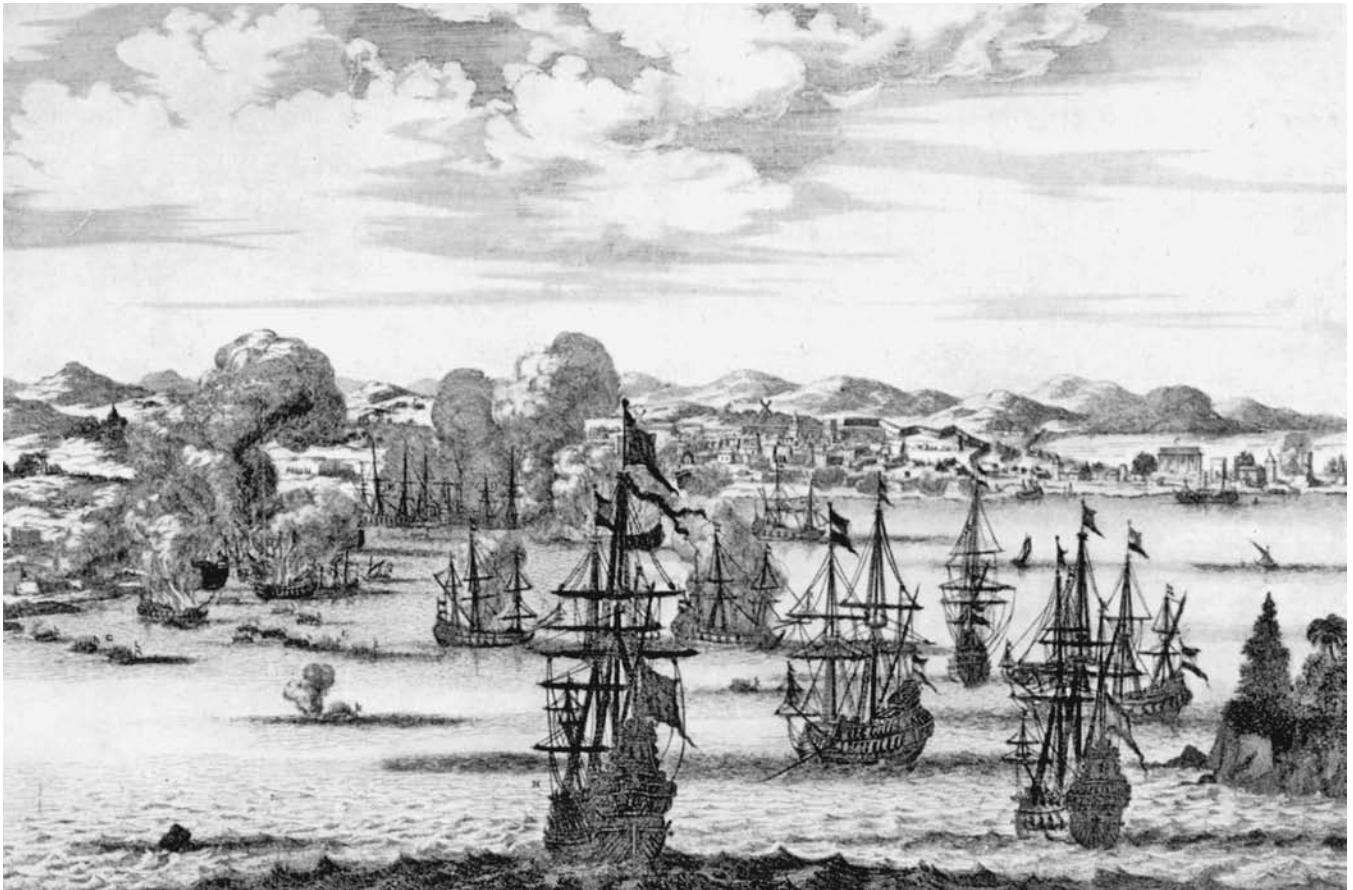
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**Callao** Since its founding in 1537, Callao has been PERU's principal port. Located on the Pacific coast about 10 miles (16 km) from downtown LIMA, it quickly became the gateway through which flowed conquistadores and settlers, indigenous slaves, horses and other domestic animals, weaponry, food stuffs, and accoutrements of daily life shipped from Central America, NEW SPAIN, and Spain.

With the establishment of the fleet system in the 1560s, Callao served as the maritime terminus for goods sent by monopolistic traders in SEVILLE, and later SANLÚCAR DE BARRAMEDA and CÁDIZ, as well as the port through which Peruvian SILVER passed on its way to New Spain, the PHILIPPINE ISLANDS, Spain, and illegal destinations in Europe and elsewhere (see FLEETS/FLEET SYSTEM). The port was also home to Spain's Pacific Fleet (Real Armada del Sur) consisting of, during the 16th and 17th centuries, several ships constructed at Pacific ports such as GUAYAQUIL and Realejo, NICARAGUA. The fleet's responsibilities included protecting silver being transported to PANAMA and MERCURY from HUANCAVELICA being shipped from Chíncha to Arica, carrying soldiers and supplies to garrisons in CHILE, and providing defense against foreign marauders.

Foreigners assaulted Callao on several occasions. For example, in 1579, Francis Drake sacked the city, and in 1624 a Dutch fleet blockaded Callao, remaining from early May until late August but capturing little of worth.

A catastrophic earthquake and tsunami struck Callao on October 28, 1746, and left nearly 5,000 persons dead, 23 ships sunk, and the port city destroyed. This event is considered the worst natural disaster to befall colonial Peru. On the ruins of the port were constructed a new fortress and city. The fortress, Real Felipe, was virtually impregnable. During Peru's war of independence, it served as the final coastal holdout through a long and devastating blockade and siege, surrendering in 1826.



Dutch ships blockading Peru's principal port of Callao in 1624 (From the collections of the Mercantile Library at the University of Missouri-St. Louis)

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**Calleja del Rey, Félix María** (b. 1757–d. 1828) *Spanish general and viceroy in New Spain* Born in Medina del Campo, Spain, Félix María Calleja del Rey entered the infantry regiment of Savoy as a cadet in 1772. He served in the failed expedition to Algiers in 1775, was present at the successful reconquest of Menorca, and participated in the 1782 siege of Gibraltar. He advanced to the rank of captain and on March 31, 1789, was given command of a company in the Regiment of PUEBLA. He accompanied VICEROY COUNT OF REVILLAGIGEDO TO NEW SPAIN later in the year.

Calleja served commissions in the frontier districts of New Spain from 1790 to 1797, receiving promotion to lieutenant colonel in 1792 and to colonel in 1798. He was named commander of the 10th militia brigade

based in San Luis Potosí on September 20, 1800, part of Viceroy marqués de Branciforte's effort to decentralize army organization as endorsed by the Crown in 1788. The post enabled Calleja to become an important figure in the intendency, while also convincing him that civilians and officials in MEXICO CITY were keeping the MILITARY weak.

Although surprised by the revolt led by MIGUEL HIDALGO Y COSTILLA in September 16, 1810, which initiated a decade of insurrection, Calleja soon demonstrated he was the royalists' most effective officer. The revolt provoked Calleja to take charge of the intendency and its resources. He recruited new military units, increased the supply of arms, created taxes, confiscated CATHOLIC CHURCH income, and turned the Army of the Center into a force loyal mainly to himself. Victories at Aculco (November 7, 1810), GUANAJUATO (November 25, 1810), and Puente de Calderón (January 17, 1811) quickly ended Hidalgo's aspirations and led to his capture and execution (July 30, 1811).

Under Calleja's leadership, royalist officers altered the relationship between civilian institutions and the military. By 1812, the army was the most powerful political, economic, and social institution in the colony, and Calleja, who marched and suffered with his men

while turning them into professional soldiers, was its most prominent officer. He understood the grievances against “egotistical and greedy” PENINSULARS and considered reforms necessary for Spain to maintain its richest mainland colony.

Faced with insurgency, Calleja mixed pardons with exemplary punishment, including decimation. He was less sanguinary than some royalists, however, including the commander of New Galicia, Brigadier José de la Cruz, who reached Mexico within days of Hidalgo’s revolt and practiced “harsh and repeated justice.” In June 1811, Calleja issued a *Reglamento político militar* that declared the revolt ended and classified all remaining insurgents as “bandits, thieves, and delinquents” unworthy of pardon. This provided the context for a counterinsurgency strategy that made communities responsible for their own defenses, both in terms of raising military companies and paying for them so that the army Calleja commanded could focus on the largest rebel forces wherever they were located. As repeated insurgent attacks in 1811 and 1812 demonstrated, the premise was flawed. The insurgents were more than “bandits, thieves, and delinquents” and urban and rural populations were not necessarily willing to pay the price of fighting them. Desertion from his Army of the Center, moreover, made Calleja reluctant to leave the BAJÍO provinces. Indeed, in August 1811, Calleja noted that some 80 percent of the region’s population favored the insurrection.

After Hidalgo’s death, leadership of the insurgency devolved to Ignacio Rayón and JOSÉ MARÍA MORELOS Y PAVÓN, while small locally based groups of guerrillas and bandits continued to harass property owners and impede TRANSPORTATION. Calleja turned first to Zitácuaro, where his forces overwhelmed Rayón’s supporters in January 1812. Next, he moved the Army of the Center to Cuautla to confront Morelos and his army. Only after a siege lasting 72 days did the royalists succeed in taking the town, but Morelos escaped, kept the revolt alive, and on November 25, 1812, took the city of Oaxaca.

Named VICEROY of New Spain by the COUNCIL OF REGENCY in Spain, Calleja assumed the post on March 4, 1813, and held it until September 19, 1816. During his tenure, royalist forces captured Morelos in 1815, leaving the insurgency to scattered, uncoordinated bands of guerrillas. Throughout, Calleja faced an ECONOMY devastated in many places as a result of rebellion and civil war and a continued desire for political autonomy by prominent CREOLES strengthened by actions by successive governments of resistance to French rule in Spain. Such actions included mandated elections, a free press, the creation of numerous new towns and provincial deputations, and the reduction of the office of viceroy to that of *jefe político superior*. Although FERDINAND VII in spring 1814 expunged the CONSTITUTION OF 1812 and the legislative mandates of the CORTES OF CÁDIZ, the actions did not solve many of the problems Calleja faced.

By the time Viceroy JUAN RUIZ DE APODACA replaced him, Calleja had erroneously claimed to have won the war against the insurgents, a claim that bolstered his career but ignored the strength of insurgents throughout much of New Spain. Calleja returned to Spain, where in 1818 he was granted the title count of Calderón. Named captain general of Andalusia, governor of CÁDIZ, and general of the expedition being prepared for dispatch to the Americas, Calleja was arrested following the successful RIEGO REVOLT in early 1820. Following Ferdinand’s return to absolutism in 1823, Calleja went to Valencia, where he died.

A strong personality and decisive leader continuously plagued by ill health, Calleja was the most important royalist in New Spain in the decade 1810–20. He repeatedly defeated major insurgent forces, eliminating the threats posed by Hidalgo and Morelos. Despite his rhetoric of victory, the insurgency was not reduced to a few bandits in 1816, and the financial drain on rural villages required to provide their own protection under the counterinsurgency program remained. As important as Calleja was, he neither ended nor triumphed over the increasingly entrenched insurgency.

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**captaincies general** The territorial division of a viceroyalty in Spanish America known as a captaincy general was in many ways an independent subunit whose chief executive held the title of captain general, as well as president of the *AUDIENCIA* and governor. Since captain general was a military rank, a VICEROY normally held it within the *audiencia* district of which he was president. Presidents of subordinate *audiencias* sometimes held the title as well; in these cases, it indicated a high level of independence from the viceroy and the ability to communicate directly with the COUNCIL OF THE INDIES and the monarch.

Aside from the viceregal tribunals, *audiencias* originally had presidents who were *LETRADOS*. Over time, however, men of military background (*de capa y espada*) received appointments as president and governor and, in some regions, captain general. By 1808, there were captains general for CUBA, GUATEMALA, the PHILIPPINE ISLANDS, PUERTO RICO, SANTO DOMINGO, VENEZUELA, and Yucatán.

In BRAZIL, governors general in SALVADOR DA BAHIA held the title of captain general before 1697 in recognition of their military responsibilities. In that year, the governor of RIO DE JANEIRO also received the title captain general; by 1715 the governor of PERNAMBUCO enjoyed

the formal title of governor and captain general. In both areas, the territorial jurisdictions were called captaincies general. By 1772, Brazil had nine captaincies-general: GRÃO PARÁ, MARANHÃO, PERNAMBUCO, BAHIA, RIO DE JANEIRO, SÃO PAULO, MATO GROSSO, MINAS GERAIS, and Goiás. In the 18th century, Brazil's viceroys could only rarely exercise authority outside their own captaincy general.

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**Carabobo, Battle of** (June 24, 1821) The RIEGO REVOLT that brought liberals to power in Spain in 1820 meant that royalist commanders in the colonies would receive no reinforcements. In addition, the new government ordered PABLO MORILLO, the royalist commander in VENEZUELA, to negotiate with the patriots led by SIMÓN BOLÍVAR and specifically to offer an end to hostilities in return for recognizing Spain's constitutional monarchy.

While Morillo and the royalists were still absorbing the implications of the patriots' victory at Boyacá in 1819, Bolívar stalled meeting with Morillo, using the delay to position his forces more effectively. Their representatives agreed, on November 25, 1820, to a six-month armistice, and the two leaders met the following day. The armistice recognized the independent existence of Colombia and gave Bolívar an opportunity to spread pro-independence propaganda, as well as to prepare for a final campaign against the royalists.

The agreed-upon six months of peace did not last, as Maracaibo revolted on January 28, 1821, and joined the rebellion. Three months later, Bolívar began to bring republican units together from locations in the Andes, the Llanos, and Maracaibo. On May 14, 1821, the republicans took CARACAS. Six weeks later, on June 24, 1821, at Carabobo, the republican forces of 6,500 defeated the royalist army of 5,000 men under the leadership of Miguel de la Torre following Morillo's return to Spain. Although royalist survivors fled to Puerto Cabello and held out there until November 10, 1821, the Battle of Carabobo had determined the fate of the war. With the victory, Bolívar and his republican forces had definitively liberated Venezuela. The Liberator could direct his attention to driving the Spaniards from the regions that became the countries of Ecuador, PERU, and Bolivia.

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**Caracas** After two earlier efforts to establish Spanish towns in the area, in 1567 Diego de Losada and 136 followers founded the town of Santiago de León de Caracas some 3,000 feet (914 m) above sea level in a rich valley south of the Coastal Range. The nearby indigenous peoples were distributed in ENCOMIENDAS, but by 1578, only about 4,000 tributaries remained, roughly a third of the original number. Lacking significant precious metals or a large settled population, Caracas and the rest of VENEZUELA were unpopular destinations for Spanish emigrants. WHEAT production and exportation through the CARIBBEAN port of La Guaira several miles to the north of the Coastal Range were the most important economic activities in these early days, as Caracas sent supplies to the port city of CARTAGENA DE INDIAS.

By the late 17th century, Caracas was poised to emerge as the leading city of the region as a result of several advantages: a prosperous local ECONOMY and export TRADE in CACAO and wheat funnelled through La Guaira; a location that spared it from the level of depredations by pirates suffered by some of its rivals; fertile lands; and a hospitable and disease-free climate. In addition, it was able to secure a labor supply made up mainly of black slaves (see SLAVERY). As an outpost of the empire distant from major institutions of royal government other than a provincial governor until the 18th century, the city ran its own affairs through a MUNICIPAL COUNCIL (*cabildo*).

Caracas's population was modest in size for most of the colonial era. Perhaps 2,000 Spaniards resided there in 1600. A household census in 1759 placed the total at 21,683, of whom 574 made up the city's elite, or *mantuanos*. At the beginning of the 19th century, the city of Caracas had a population of 31,000, the largest in Venezuela; the province of Caracas in 1810 had a population of some 455,000.

The 1728 creation of the joint stock REAL COMPAÑIA GUIPÚZCOANA DE CARACAS, which held monopolistic trading rights for the whole of Venezuela, had a profound impact on the region. The company sought to significantly increase production of cacao, without success, and to reduce contraband trade. A rising slave trade provided the labor for cacao producers. With officials in Caracas, the company also strengthened the city's importance as a center for regional administration.

The company's control of the terms of trade angered Venezuelan producers of cacao, and a revolt ensued in 1749. The Spanish Crown supported the company and sent troops to quell the disturbance. It subsequently took a number of actions to strengthen royal authority and income that anticipated the reforms usually attributed to the reign of CHARLES III. In addition, changes were made by the Guipúzcoana Company and the era of Basque governors who had worked closely with it came to an end (see BASQUES). During the years of the Guipúzcoana Company, the Venezuelan treasury enjoyed unprecedented income and was actually able to remit a surplus to Spain for the first time in its history.

Caracas was home to the only university in Venezuela from 1717. The elevation of Caracas to an intendency in 1776 and a captaincy general in 1777 gave it the highest-ranking officials in Venezuela (see CAPTAINCIES GENERAL). The creation of an *AUDIENCIA* in Caracas in 1786 solidified the city's administrative and political importance. The establishment of a *CONSULADO* in 1793 and elevation of the episcopal see moved from Coro in 1636 to archiepiscopal status in 1803 further enhanced the capital's importance.

Caracas became the center of the first efforts in Venezuela to gain greater autonomy in response to the constitutional crisis that began in Spain in 1808. The creation of the Junta Suprema Conservadora de los Derechos de Fernando VII, ejection of royal officials from the city on April 19, 1810, and refusal to give allegiance to the COUNCIL OF REGENCY in Spain resulted in the Regency blockading much of the Venezuelan coast in January 1811. The AUTONOMISTS responded with a declaration of independence and the installation of the First Republic on July 5, 1811. Struck by a devastating earthquake in 1812, the city quickly succumbed to royalist rule. It became the capital of the Second Republic on August 6, 1813, but was again taken by the royalists in June 1814. In the aftermath of his victory at CARABOBO on June 24, 1821, SIMÓN BOLÍVAR soon entered Caracas in triumph. It has remained the most important city in Venezuela to the present.

See also CARACAS (Vols. III, IV).

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**Caribbean** The area known as the Caribbean encompasses the numerous islands extending from southern Florida to the northeastern coastline of South America. Also included in the Caribbean are several mainland sites: BELIZE in Central America, and GUYANA, SURINAME, and FRENCH GUIANA in South America. The Greater Antilles are the several relatively large northern islands: CUBA, JAMAICA, HISPANIOLA (divided between Haiti and the Dominican Republic), and PUERTO RICO. The Lesser Antilles are the islands between Puerto Rico and Trinidad, including Antigua, Guadeloupe, Martinique, Santa Lucia, and Grenada. The Caribbean Sea extends from the Antilles in the north to the coast of South America and

west to Central America and Yucatán; it is slightly more than 1 million square miles (2.59 million km<sup>2</sup>) in size.

By the mid-16th century, the Spaniards had explored, conquered, settled, and in some cases already virtually abandoned what they had considered the most desirable Caribbean islands, those with a combination of indigenous labor and GOLD. They had also established themselves in the most desirable locations on the adjoining mainlands. The Spanish population of the Antilles numbered perhaps 7,500; Amerindians were perhaps triple that number; Africans, mestizos and mulattoes totaled about 56,000 (see MESTIZAJE/MESTIZO; MULATO). With the principal exception of HAVANA, favored by its location and defensive importance, the Spanish possessions in the Caribbean were outside the economic centers of empire. Indeed, the expensive construction of defensive fortresses in Cuba and Puerto Rico was dependent on financial subsidies (*situados*) from NEW SPAIN.

The Caribbean Sea, its islands, and adjoining mainland coasts became the colonial area most contested by foreign governments, merchants, and contraband traders, privateers, and pirates. The French, the Dutch, and the English established themselves on islands that usually had few if any Spanish inhabitants but enough feral CATTLE and pigs to be important sources of meat and hides. The English took Barbados in 1627, Nevis in 1628, and Antigua and Montserrat in 1632; the Dutch joined the English on St. Croix in 1625, and in the 1630s took St. Eustatius and Curaçao. The French took Martinique and Guadeloupe, among other islands, and the western portion of Hispaniola. In 1648, PHILIP IV recognized the Dutch colonies. In the Treaty of Madrid of 1670, Spain recognized English possession of Jamaica and its other New World colonies. Spain ceded western Hispaniola to France in the Treaty of Ryswick in 1697.

Operating from often primitive bases, 17th-century pirates scourged Spanish shipping and ports in the Caribbean. After capturing Jamaica, the English converted it into both a center for contraband TRADE and, until nearly the end of the 17th century, a base and sanctuary for BUCCANEERS.

As France and England perceived that the benefits of production and trade outweighed those of sanctioned and unsanctioned raiders, their focus shifted to converting their Caribbean colonies into centers of settlement and production. Efforts to populate them with free or semi-free (indentured) labor met with limited success. Consequently, the governments in Paris and London encouraged PLANTATION economies based on slavery and the production of exportable staples, including SUGAR, TOBACCO, and cotton.

In the 17th century, over half of all slaves imported from Africa went to Caribbean colonies. English colonies received about 263,000, French colonies some 156,000, and the Dutch islands about 40,000. Sugar production rose with the expansion of the labor force. By 1670, the French Antilles were producing about one-third of the

amount of BRAZIL, long the major source of American sugar. Barbados emerged as a major producer by 1680, only to be surpassed by Jamaica by 1750. The French colony of Saint Domingue (Haiti) was the most important single sugar colony by 1780, but the slave revolt that began in 1791 quickly eliminated its preeminence. Cuba in particular benefited from its rival's demise; gross production grew from 10,000 to 70,000 tons between 1774 and 1827.

The number of slaves imported reached new highs in the 18th century, with almost 4 million sold in the Caribbean. Over 1.4 million went to the English Antilles; over 1.3 million to the French Antilles; nearly half a million to the Dutch possessions; and almost 600,000 to Spanish planters. By 1791, Saint Domingue had 480,000 slaves, more than double the 206,000 in 1764. Jamaica's slave population increased from 74,500 in 1730 to 324,000 in 1808. Cuba's slave population expanded from 44,300 in 1774 to 286,000 in 1827.

Slaves in the Caribbean vastly outnumbered Europeans and American descendants born to European wives. Among the Caribbean colonies, however, there were significant differences. The Caribbean colonies of England and France in the early 19th century had white populations as low as 3 percent and as high as 48 percent, the latter case in Bermuda. At that time, the Spanish colonies of Cuba and Puerto Rico had 44 percent and 51 percent, respectively. Whites in the Dutch trading entrepôts of St. Eustatius, St. Martin, and Curaçao totaled just over 17 percent, compared to about 4 percent in Suriname, a colony devoted to plantation agriculture.

In every slave society of the Caribbean, miscegenation created a new intermediary group between owners and slaves. Mulattoes in the first mixed generation could be slaves or free persons of color, depending on whether the mother was free or enslaved. Over time, the number of free persons of color expanded; growth in the slave population depended on the importation of additional slaves.

Skin color served as the primary determinant of social status and occupation. In general, the darker the complexion, the more apt the individual was to be engaged in manual, menial labor. Those of mixed ancestry tended to concentrate in urban areas where they often were employed in domestic service, in the artisanal trades, and as skilled labor. Free nonwhites also concentrated in urban centers. Lighter skin color was thus associated with upward social mobility.

Some free nonwhites owned plantations and slaves, for example, in Jamaica, Puerto Rico, Saint Domingue, and Trinidad. The extent of free nonwhites varied by colony. Saint Domingue had but 5 percent in 1791, while Jamaica had 10 percent in 1800. Cuba had 15 percent in 1827, while Puerto Rico had about 40 percent. In Curaçao in 1833, the percentage was over 43 percent. Whatever the percentage, the proportion of female free nonwhites exceeded that of males.

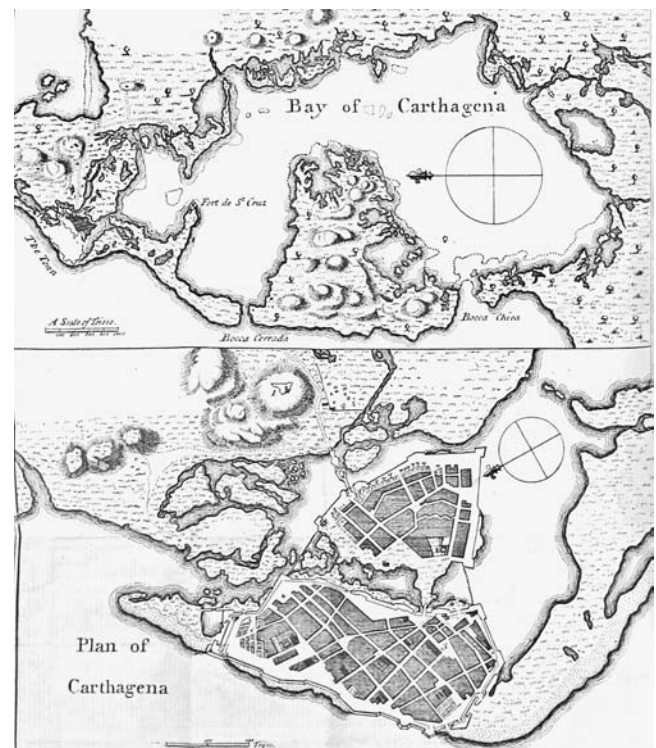
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**Cartagena de Indias** The city of Cartagena de Indias, located on an island and adjacent mainland near the mouth of the Magdalena River on the CARIBBEAN coast of NEW GRANADA, was founded in 1533 by Pedro de Heredia. Seat of a bishopric established the following year, it quickly became a major port through which flowed GOLD to Spain and merchandise and foodstuffs for the city and its garrison. The fleet system established in the 1560s made Cartagena the first stop of the galleons on route to NOMBRE DE DIOS and, later, PORTOBELLO (see FLEETS/FLEET SYSTEM).

The port's strategic location and centrality to the commerce of northern South America made it a target for pirates, interlopers, and military invasion. French pirates sacked the city in both 1543 and 1559. An expedition led by JOHN HAWKINS entered the bay in 1568 but left after an eight-day blockade and bombardment. Francis Drake and his fleet occupied the port in 1586 and extracted a ransom of 107,000 ducats. French forces



Map of Cartagena de Indias and the surrounding bay. Cartagena was an important stop for the galleons sailing to collect Peruvian silver in Panama. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)



and BUCCANEERS from HISPANIOLA, under the command of Jean-Bernard-Louis Desjeans, baron de Pointis, captured Cartagena in 1697, and the British twice besieged it, in 1727 and 1741. Cartagena's most celebrated victory was in 1741, when its defenders defeated British admiral Edward Vernon after 35 days of bombardment by his force of more than 23,000 men. Foreign threats induced Spain to invest substantial sums in the defense of Cartagena, and it was one of a small number of heavily fortified ports in the Spanish colonies.

By the late 18th century, the city and its environs had a population of about 16,000. Of this number, some 4,400 were white and slightly more than double that number were *CASTAS*; slaves numbered just over 3,000, and there were fewer than 100 Indians. The population consumed a number of local products, although MAIZE, WHEAT, and beef were imported from elsewhere in New Granada or, especially in the case of wheat, from overseas.

In June 1810, a *CABILDO ABIERTO* removed the governor and established a junta that promptly recognized the COUNCIL OF REGENCY in Spain (see *JUNTAS*). In November 1811, a popular uprising with some military support forced the junta to declare independence from Spain. Insurgents still controlled the city when General PABLO MORILLO besieged it for 106 days in 1815. Under royalist control from December 1815, it served as the administrative center of New Granada, save from mid-1818 to August 1819, until late September 1821 when it surrendered to republicans. By that time, the city was a bankrupt shell of its former self; more than 1,300 people left for HAVANA rather than remain under republican rule.

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**Cartagena Manifesto** Several months after the collapse of VENEZUELA's First Republic in July 1812, SIMÓN BOLÍVAR borrowed money to sail to CARTAGENA DE INDIAS, the major port of NEW GRANADA and effectively independent from Spain since November 1811. There, he wrote a statement directed to the populace of New Granada, which appeared as a printed pamphlet in 1813. Known as the *Cartagena Manifesto*, the document outlined reasons why the First Republic had failed and what now needed to be done.

There were several reasons for Venezuela's downfall. The form of government it adopted, a federal republic,

was inappropriate, as it fostered internal divisions among CITIES and provinces. Moreover, the lack of political experience among the citizens, a consequence of Spanish absolutism, meant that they did not have the "political virtues" necessary for effective government during a time of internal strife and external threats. Centralized government was required to overcome civil turmoil.

Reliance upon a militia rather than a professional army was another failing. Inexperienced citizen soldiers did not persist after the first defeat. The result was widespread discouragement among men and officers despite the fact that payments to the latter exhausted the treasury.

Misplaced tolerance of opposing opinions and a reluctance to punish "crimes against the State" severely and immediately further weakened the republic; pardoned enemies simply returned to their treasonous conspiracies. The earthquake that struck CARACAS on March 26, 1812, was used by the clergy to inveigh against republicans. Again, the religious were allowed to condemn their opponents with impunity. Finally, internal divisions plagued the republic, as the royalism in Coro demonstrated.

More threats lay ahead. Assuming that the French would win the war on the Iberian Peninsula, Bolívar warned that hordes of émigrés would be coming to Venezuela, where they would enter freely through royalist ports. They would then raise and train a substantial army of 15,000–20,000 men before being followed by a plague of government officials, clerics, and nobles of the highest rank. New Granada would be threatened as well. The answer? New Granada must help to free Venezuela.

An early political comment by Bolívar, the *Cartagena Manifesto* reveals both his belief that his fellows were politically naive as a result of their exclusion from politics during Spanish rule and his belief in the importance of strong, centralized authority. It also reveals his broad vision that independence from Spain could not be maintained as long as bastions of loyalty could serve as entry points for royalists.

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**Carvalho e Melo, José de** See POMBAL, MARQUÊS DE.

**Casa de Contratación (House of Trade; Board of Trade)** The first institution dedicated to governance of the colonies, the Casa de Contratación was created in 1503 to oversee a monopoly of commerce between Spain and its overseas territories. It was located in SEVILLE, an inland port on the Guadalquivir River about 70 miles (113 km) from the Bay of Cádiz. Although CÁDIZ had a better port, Seville's location offered protection against foreign rivals as well as access to supplies of WHEAT, WINE, and oil. With the monopolistic benefits provided by the Casa de Contratación and, after 1543, the Consulado (merchant guild) of Seville, the inland town soon outstripped its rival (see CONSULADO).

The Casa de Contratación served as the government's office for maintaining a map of discoveries, licensing ships and passengers, receiving treasure from the colonies, taxing cargoes, and, after the fleet system was implemented in the 1560s, arranging for the FLEETS' sailings. The Casa also had a judicial function, with judges presiding over civil cases arising from the INDIES' TRADE and criminal cases resulting from incidents that occurred during passage to or from the colonies. Over time, the Casa was expanded with a board of audit, a postmaster general, and a nautical school.

The Casa de Contratación's many responsibilities and its officials' contact with the wealth of the Indies resulted in corruption that reached massive proportions in the 17th century. By the early part of that century, Spanish merchants and foreign merchants working through them had emerged as the dominant parties in the Indies' trade. They assumed control not only over the trade but also over many of the Casa's fiscal and organizational functions, for example, filling important posts in the fleets.

By the end of the 17th century, the Crown's control over legal, monopolistic trade between Spain and the colonies was a shambles. The tacit permission PHILIP V granted to French merchants to export goods to the colonies during the WAR OF THE SPANISH SUCCESSION further undercut the monopolistic trading system.

In 1717, Philip V moved the Casa de Contratación to Cádiz in belated recognition that the coastal city, its merchants, and their foreign partners had displaced Seville at the center of the Indies trade. The regular use of single ships with registered cargoes for trade with the South American colonies from the 1740s and the progressive expansion of COMERCIO LIBRE from 1765 to 1789 left the Casa's responsibilities significantly diminished. In 1790, the Crown abolished the Casa de Contratación, bringing its almost three centuries of labors to an end.

See also CASA DE CONTRATACIÓN (Vol. I).

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**castas** The term *castas* refers to persons in Spanish America of mixed racial ancestry or suspected of some

African ancestry because of illegitimate birth. In NEW SPAIN, only four combinations among the *castas* were perceived as distinct racial groups: mestizo (Indian and Spaniard), mulatto (black and Spaniard), *castizo* (Spaniard and mestizo), and *morisco* (Spaniard and mulatto) (see MESTIZAJE/MESTIZO; MULATO). Social perception rather than strict racial combination, however, placed a *casta* within a social hierarchy that ran in two lines, one from Spaniard to Amerindian, with *castizo* and mestizo between; the other from Spaniard to black, with *morisco* and *mulato* between. While terms in other parts of the empire varied, for example, the use of *PARDO* in some locations, the overall social structure of every colony had a similar hierarchy based heavily on perception of race.

By the middle of the 16th century, a growing number of *castas* were present throughout the colonies and perceived as causes of crime, corruption of morals, and disruption and abuse in villages where only NATIVE AMERICANS were meant to reside. The size of the *casta* population increased throughout the colonial period. An estimate for Spanish America around 1570 placed the number at 230,000. Only in New Spain and Central America were there more Spaniards than *castas*; both areas had about 5,000 more Spaniards. An estimate for the mid-17th century placed the *castas* at a conservative 584,000. New Spain alone in 1793 had an estimated 788,000 *castas*, a figure more than 100,000 greater than that of whites, but only about one-third the number of Indians. With about two-thirds of VENEZUELA's population, the bishopric of CARACAS in the early 19th century had a *casta* population (termed *pardos*) of 163,000; this total made *pardos* the largest single racial group, outnumbering whites by more than 50 percent. For Spanish America as a whole, about one-third of the population at the beginning of the 19th century were *castas*.

An examination of occupations for adult males in MEXICO CITY in 1753 demonstrates that *castizos* were predominantly artisans, as were a majority of mestizos. Over 40 percent of free *mulatos* were artisans; nearly 50 percent were servants. Although 17 percent of mestizos were laborers, no other group of *castas* reached even 10 percent. In contrast, almost half of the indigenous were laborers.

The legal status of *castas* differed from that of Spaniards, Amerindians, and black slaves in a variety of ways. Soon after the first generation of *castas* reached adulthood, in 1549, the Spanish Crown ordered that *mulatos*, mestizos, and men of illegitimate birth were ineligible for royal or public office. *Mulatos*, mestizos, Indians, and the offspring of Indians and blacks (*ZAMBOS*, or *zambaigos*) were prohibited from having firearms in the 1560s. Mestizos could be licensed to have firearms starting in the 1570s, but in that decade, they were prohibited from receiving religious orders or becoming notaries (*escribanos*), although the Crown subsequently allowed dispensations from the prohibition. In the 1570s, the Crown ordered that children of free or enslaved blacks

who married Indian women were to pay tribute “*como los indios*” (like the Indians). Mulattoes were prohibited from becoming *escribanos* in the 1620s, an indication that some were literate by that time. A 1636 order prohibited ordination of mulattoes, mestizos, and men of illegitimate birth, but a 1696 order enabled Indians and mestizos, presumably of legitimate birth, to become clerics.

Although indigenous people and *castas* were explicitly allowed admission to minor orders in NEW SPAIN in 1539, the First Mexican Provincial Council of 1555 reversed this and specified that Indians, mestizos, and mulattoes were to be excluded. PHILIP II in the 1570s decreed that mestizos could not be ordained for “lack of suitability.” The Third Mexican Provincial Council, which met in 1585, intended to continue the exclusion approved in 1555, but language ultimately approved in 1591 allowed Amerindians to be ordained and gave “qualified approval” of ordination of mestizos and mulattoes.

The use of *castas* in militia units began in the 1550s in New Spain and continued until the 1790s (see MILITARY). Free colored units were also used in other places, including CUBA, PERU, and NEW GRANADA. In the wars of independence, *pardos* were extremely important in a number of regions, with Venezuela a particularly notable case.

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**Castile** Located in central Spain, the Kingdom of Castile in 1560 included Old Castile (Castile and León), New Castile (La Mancha and Extremadura), the Basque provinces, Asturias, Galicia, Andalusia, and Murcia. It was the most populous kingdom on the Iberian Peninsula throughout the colonial era. The overseas territories belonged to Castile rather than Aragon or Navarre, although both of those kingdoms were the king of Castile’s patrimony. CHARLES I inherited what became the Low Countries as well as significant parts of Italy; Castilian resources provided the armies used in the conflicts arising from the Protestant Reformation.

In the mid-16th century, Castile’s major export was high-quality wool from merino SHEEP, as had been the case since medieval times. Although the kingdom suffered from inflation, at least in part because of the influx of SILVER from the colonies, TAXATION in Castile was the backbone of royal revenue.

During the reign of PHILIP II (1556–98), Castile began to receive significant income from the colonies. Both the amount and the fact that it arrived as cash not committed to a specific expenditure provided muscle for Spain’s armies in the Spanish Netherlands and elsewhere in Europe. By the end of the 16th century, however, the Crown had gone bankrupt on three occasions and lost an enormous fleet to the English in 1588. Inflation had also taken its toll, and wool exports had declined.

From 1596 to 1602, the bubonic plague struck Castile, killing perhaps half a million people. The expulsion of some 275,000 Moriscos (Christianized Muslims) followed, from 1609 to 1614. Another disaster struck in 1630–32 when famine and plague hit Castile. This high mortality fanned inflation as laborers received higher wages. Grain prices more than doubled in Andalusia and Castile. Since remissions of American silver were in decline, the government responded by minting large amounts of copper coinage (*vellón*), which also increased inflation. The cost of intermittent warfare in Europe and revolts in Catalonia and Portugal beginning in 1640 further aggravated Castile’s fiscal problems. A plague in 1647–52 was yet another blow.

After the final bubonic plague of the century, between 1676 and 1685, Castile at last began to revive and the population grew. A 75 percent devaluation of currency in 1680 brought inflation under control. The WAR OF THE SPANISH SUCCESSION confirmed a change of dynasty from HABSBURG to BOURBON despite PHILIP V’s loss of Madrid on two occasions. The war also enabled Philip to eliminate the Kingdom of Aragon’s special privileges (*FUEROS*) and to impose Castilian administrative institutions.

Castile benefited in the 18th century from rising American remittances of silver. Madrid, capital of the monarchy since early in the reign of Philip II, grew in size and continued to be the Iberian Peninsula’s single largest consumer of foodstuffs, WINE, and luxury goods. Legal colonial TRADE increased throughout the 18th century, particularly after the introduction of *COMERCIO LIBRE*. By the end of the century, the Crown had increased its share of American returns from 2 percent to 40 percent.

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**cathedral chapter** When the papacy created a diocese, it provided not only for a bishop, but also for the establishment of a cathedral chapter (*cabildo eclesiástico*) to support the bishop and to serve the parishioners. If all the

positions were filled, the cathedral chapter consisted of four ranks of members (collectively known as prebendaries) with specific rights and responsibilities. The ranks were dignitaries (dean, archdeacon, precentor, schoolmaster, and treasurer); canons; *racioneros*; and *medio racioneros*. Ordained priests were required in the first two ranks and normally filled the other ranks as well. Seniority within each rank determined where one stood or sat during public events. As part of the *PATRONATO REAL* and *padroado real*, the Spanish and Portuguese monarchs named the men who filled all positions in a cathedral chapter.

Among a cathedral chapter's responsibilities were administering the sacraments, participating as a body in ceremonies each day, and collecting the tithe, a 10 percent tax on some agricultural products. If a bishop or archbishop was absent or the see was vacant, the chapter governed the diocese. Individual members had particular responsibilities: For example, the schoolmaster oversaw educational programs, and the precentor was in charge of the MUSIC used in ecclesiastical services.

In BRAZIL, the comparatively few archbishops and bishops were *REINÓIS*, but the cathedral chapters were normally comprised of *brasileiros*. In the Spanish colonies, a majority of bishops and archbishops were PENINSULARS, but the cathedral chapters over time included numerous CREOLES, including native sons or appointees born in the diocese of service, and peninsulars whose prior ordination or formal residency in the colonies resulted in a

distinct category known as *domiciliarios*. In the cathedral chapter of the archdiocese of Mexico in the 16th century, appointments were secured by 32 peninsulars, 29 creoles, and 20 *domiciliarios*. Creoles typically entered the chapter at the lowest rung, but many advanced up the ladder, and some ended their career as bishops. Between 1700 and 1799, about 85 percent of members in the cathedral chapter of LIMA and about 70 percent of those in the cathedral chapter of Mexico were creoles.

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**Catholic Church** An important justification Spaniards gave for conquest and settlement was the conversion of indigenous peoples, a responsibility inherent in the papal donation of 1493. Consequently, clerics normally accompanied expeditions from the time of Christopher Columbus onward. Spaniards themselves in the Americas, of course, also wanted clerics available to minister sacraments to them. Though the year



The cathedral in Bogotá, New Granada (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

is unknown, clerics reached BRAZIL before the arrival of MANOEL DA NÓBREGA and five other JESUITS in 1549. Although diocesan, or secular, clergy became numerous over time, the Jesuits led the way in converting the NATIVE AMERICANS. By 1822, Brazil had six bishoprics.

Both the Spanish and Portuguese Crowns had received a series of papal bulls granting extensive rights of patronage (*PATRONATO REAL* and *padroado real*) over the church in the overseas territories. The Spanish Crown took an active role in promoting the christianization of indigenous peoples. It also encouraged the creation of schools and hospitals. Its rights enabled the Crown to select clerics who would serve in the Indies and also control the tithe, a tax, usually of 10 percent, on specified agricultural products and the increase in certain domesticated animals. Despite the royal patronage, as a quintessential corporate body the church preserved significant rights (*FUEROS*) that, for example, allowed clerics to be tried in ecclesiastical courts for most offenses.

By 1560, the church in both Spanish and Portuguese America was assuming the institutional form it would preserve for the remainder of the colonial eras. Bishoprics had been established in a number of cities in Spanish America, and in 1551, the bishopric of Bahia was erected in Salvador da Bahia; it became an archbishopric in 1676.

By 1560, the church was represented in almost every locale where Spaniards had settled, as well as in many Indian villages. While it is common to refer to the church as though it were a monolithic body, in fact, it had numerous divisions and at times violent competition between and within these. The church in Brazil was set up later than in the Spanish colonies but exerted a presence throughout the settlements of the colony.

Structurally, the church was divided into diocesan, or secular, clergy and regular clergy. Seculars included parish clergy, members of cathedral chapters, bishops and archbishops. Regulars were those clerics who belonged to religious orders. The most prominent religious orders were the Jesuits, FRANCISCANS, DOMINICANS, AUGUSTINIANS, and MERCEDARIANS.

The Franciscans eagerly pursued the conversion of Amerindians. By 1600, there may have been more than 1,000 Franciscans in NEW SPAIN alone; Franciscans were also in PERU, NEW GRANADA, QUITO, PARAGUAY, and SANTIAGO DE CHILE. Initially, for this order, the second coming of Christ seemed at hand. Jesuits were the leading missionaries in Brazil.

Place of birth created another important division in the clergy. Contemporaries knew whether a cleric was born in Spain or the colonies, and with many CREOLES eager for a clerical vocation and many positions to be filled, the American-born Spaniards were particularly interested in clerical vocations. While PENINSULARS were clearly favored for the most prestigious posts—they were named to 132 of 173 appointments as bishop or archbishop in colonial New Spain—by the end of the 16th century, creoles held a majority of the positions on cathe-

dral chapters and as parish priests throughout the empire. American dominance continued in the parishes throughout the remainder of the colonial era. For example, more than 95 percent of the parish priests in GUATEMALA from the early 17th century were natives of the diocese.

Place of birth was also important in the religious orders. For example, in LIMA, a majority of Franciscans were creoles in 1593 when the first creole provincial, or head of the convent, was elected. In CUZCO, nine of 10 provincials were peninsulars from 1607 to 1650, but seven of the next eight were creoles. In response to creole majorities within the orders, peninsulars sought a formal rotation in the highest offices of the orders to ensure their continued leadership at least half of the time. Franciscans in Mexico obtained this *alternativa* in the early 17th century, Dominicans in QUITO in 1625, and Augustinians in Lima in 1629. By the end of the 17th century, only the Jesuits in Spanish America were not using the *alternativa*; rather than being elected, their provincials came from Europe. In Brazil, the Franciscans adopted the *alternativa*.

A fundamental weakness in the colonial church was discrimination against nonwhites. Although indigenous people and *CASTAS* were explicitly allowed admission to minor orders in New Spain in 1539, the First Mexican Provincial Council of 1555 reversed this and specified that Indians, mestizos, and mulattoes were to be excluded from the minor orders (see *MESTIZAJE/MESTIZO*; *MULATO*). PHILIP II in the 1570s decreed that mestizos could not be ordained for lack of “suitability.” The Third Mexican Provincial Council that met in 1585 intended to continue the exclusion approved in 1555, but language ultimately approved in 1591 allowed indigenous people to be ordained and gave “qualified approval” of ordination of mestizos and mulattoes.

Much discrimination was indirect. Obstacles to prevent nonwhites from obtaining higher EDUCATION effectively eliminated most of them from clerical vocations, especially in the early decades after conquest. While mestizos were reluctantly allowed ordination, few Indians became priests. In native villages, however, Indians normally held the positions that provided support to the priests and the religious services.

The first nunneries were founded in New Spain and Peru in the mid-16th century and in outlying cities in the first half of the 17th century. They offered women a religious vocation, while providing a comfortable retreat from the world for “noble but poor” women who lacked good marital prospects. Sisters also were able to obtain some education. The size of convents varied, but some were very large. La Concepción in Lima had 247 nuns and 794 other inhabitants, many servants and slaves, in 1700. Numerous nunneries went into decline in the late 18th century.

The first nunnery in Brazil was established in Salvador da Bahia in 1677. Prior to the creation of the Convent of Santa Clara de Nossa Senhora do Desterro, well-to-do residents anywhere in Brazil had to send their daughters to Portugal for seclusion.

Franciscans led the advance of the church in Spanish America. Relatively few in number, they saw enormous opportunity among indigenous populations that numbered in the millions in New Spain and PERU. As more Spaniards immigrated and Spanish settlements increased, the missionaries pushed into the fringes of colonization and beyond. The arrival of the Jesuits intensified the mission effort in Spanish America and initiated it in Brazil. Given their small number, Franciscan friars and Jesuit priests were particularly interested in concentrating Amerindians in villages known as *congregaciones* in New Spain, *reducciones* in Peru, and *aldeias* in Brazil (see *CONGREGACIÓN*; *REDUCCIÓN*). This enabled them to minister more efficiently and provided the opportunity to establish Iberian-style towns, with the church located on a central plaza. The most celebrated reductions were the 30 GUARANÍ missions of the Jesuits in the Alto Paraná basin of PARAGUAY.

As outlined in the Ordenanza de Patronazgo of 1574, the Spanish Crown wanted to limit regular clergy in parishes and to put secular clergy in their place. The effort was long unsuccessful, but starting in 1749, a serious and successful program of secularization got under way. In Brazil, the Portuguese Crown prohibited the religious orders from entering the MINING district of MINAS GERAIS; only secular clergy were allowed.

Throughout most of the colonial period, the church served the Spanish Crown in many ways as an arm of the government. As part of its royal patronage, the Crown paid for the TRANSPORTATION of clerics going to the Americas, typically also providing a servant for every four religious. Between 1493 and 1819, the Crown sent 15,447 missionaries to the Indies, about a quarter of them to New Spain. The number increased until about 1600, then declined sharply into the 1640s before following a moderate and varied trajectory for the remaining years. Once at the destination selected by the order's provincial, friars were to remain there unless licensed by the government to move.

With some exceptions, during the centuries of colonial rule, the church's initial focus on the christianization of Indians gave way to more mundane matters. Through bequests, tithes, and fees, it became a property owner and holder of mortgages. Nunneries were most likely to buy urban property that could be rented. The Jesuits invested in rural estates and sometimes *OBRAJES* as sources of income. Other religious bodies lent money with property as collateral and used income pledged by owners against their property as a source to pay for chantries and chaplaincies. Only the Franciscans remained faithful to the ideal of poverty.

In the second half of the 18th century, the Iberian monarchs emphasized REGALISM, an expansion of royal authority vis-à-vis the church. This took the form of reducing the application of the church's judicial privileges, or *fueros*. The most draconian and dramatic examples of regalism came when the Portuguese Crown

expelled the Jesuits in 1759–60 and the Spanish Crown did likewise in 1767.

A second striking example occurred in Spanish America in 1804 when CHARLES IV extended the *CONSOLIDACIÓN DE VALES REALES* (consolidation of royal bills) to the colonies in an effort to transfer liquid assets from the Catholic Church to the Crown. Implemented in some but not all of the colonies, this action affected New Spain most adversely. There, the church collected the principal on mortgages and turned over between 8.5 and 13 million pesos to the Crown. The consolidation program angered mortgagees, in particular, and made clear to interested observers that the Crown was prepared to ruin the colonies for the sake of its policies in Europe.

During the wars of independence in Spanish America, some clerics, including those of highest rank, supported the royalist cause; other clerics supported the rebels and later patriots. Fathers MIGUEL HIDALGO Y COSTILLA and JOSÉ MARÍA MORELOS Y PAVÓN were the most noted clerics to lead insurgents in Mexico.

See also CATHOLIC CHURCH (Vols. I, III, IV); CLERGY, SECULAR (Vol. I); RELIGIOUS ORDERS (Vol. I).

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**cattle** Christopher Columbus brought the first cattle to HISPANIOLA in 1495, and soon Spaniards introduced them to JAMAICA, CUBA, and other islands of the CARIBBEAN. The first cattle on the American mainlands were introduced into NEW SPAIN in 1520 or 1521, Central America in the late 1520s, BRAZIL in the early 1530s, LIMA by 1539, VENEZUELA by 1548, and what is now northern Argentina in the 1550s.

Spaniards wanted cattle for three main reasons: food, leather, and tallow. In Mexico, the number of cattle exploded in the central plateau starting in the late 1530s and became inexpensive by the early 1540s. Beef was so cheap that in the 1580s, soldiers' rations in Mexico included two pounds a day; even with prices doubling by 1600, one could buy 16 pounds for one real. Ensuring the steady provision of beef to city dwellers was a common preoccupation of MUNICIPAL COUNCILS, although mutton was more popular among Spaniards (see SHEEP). The solution was to auction the right to provide a city with a specified amount of beef at a set price for a given period of time. The successful bidder typically obtained

a monopoly on slaughtering beef for the city and on the sale of tallow candles.

Tanned leather and hides were valuable exports if sold in large enough quantities and also central items in the domestic ECONOMY. In 1587, the fleet carried almost 100,000 hides to SEVILLE, nearly 75,000 of them from New Spain; 150,000 hides went with the fleet in 1598 (see FLEETS/FLEET SYSTEM). From the era of conquest, colonists used hides and leather in many ways, including rope; clothing; shoes; furniture; buckets, trunks, and other containers; and hammocks. Tanners and manufacturers of leather items were numerous. MEXICO CITY in 1788 had 167 men in the tanners' guild, 237 shoemakers, and 120 saddle makers.

Tallow was used to make candles that not only brightened dark rooms but served as the source of light in mines. *Mitayos* laboring in the mines at POTOSÍ had to provide their own candles, a significant expense (see MITA). Mexico City in 1788 had 187 candle makers.

MINING regions bought large quantities of beef, leather, and tallow. Already in 1586, cattle ranches serving ZACATECAS were enormous. One west of the mining region reported branding 33,000 young steers, while another to its north branded 42,000 cattle in the same year. The cattle were small; the average gross weight of steers butchered in Mexico City in 1575 was 340 pounds.

Cattle became extremely important in the region that would become the VICEROYALTY OF RÍO DE LA PLATA. When Juan de Garay led colonists from ASUNCIÓN to refound BUENOS AIRES in 1580, he traveled with about 500 cattle; some escaped, and by the early 17th century large herds existed on the pampas. In the Corrientes region of the Río de la Plata, large herds of wild cattle attracted cattle hunters known as *vaqueros*. By the mid-17th century and until about 1750, royal officials issued licenses to slaughter a specified number of cattle within a designated area of the region. The cowboys ate the tongue and ribs; hides were exported. With demand for hides increasing in the early 18th century, wild cattle in Corrientes were exterminated and replaced with domesticated cattle on lands held by an emerging elite. *COMERCIO LIBRE* brought an expansion of exports from Corrientes, which sent nearly 440,000 legal hides to Buenos Aires between 1780 and 1797. Another 149,000 cattle from Corrientes were herded to PARAGUAY during the same period.

From 1800 onward, U.S. newspapers carried ads for hides from Buenos Aires. A ship that arrived in New York on February 16, 1806, carried jerked beef, hides, and tallow loaded at MONTEVIDEO. On October 25, 1806, an ad read "good ox hides from 14 to 15 reals per 40 lbs.," "jerked beef 2 dolls. per quintal," and "tallow per 100 lbs. 7 dolls." A Philadelphia paper on August 22, 1807, reported that the "price of an ox is a dollar." In the 1810s, Buenos Aires exported 574,400 hides, 1,420 tons of tallow, and 1,082 tons of salted meat annually.

Cowboys were important in the wars of independence. In Venezuela, the *LLANEROS* were central to the

defeat of the Second Republic and then critical in SIMÓN BOLÍVAR's success in bringing definitive independence to NEW GRANADA and Venezuela. GAUCHOS played a role in the wars in the BANDA ORIENTAL and Río de la Plata as well.

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**Central America** See BELIZE; COSTA RICA; EL SALVADOR; GUATEMALA; HONDURAS; NICARAGUA; PANAMA.

**Cevallos, Pedro de** (b. 1715–d. 1778) *Spanish general and first viceroy of Río de la Plata* Born in CÁDIZ, Spain, Pedro de Cevallos was a career officer and colonel in the Infantry Regiment of Aragon when named a knight of Santiago in 1742 and a lieutenant general when appointed governor of BUENOS AIRES and dispatched there with 1,000 men in 1756. He drove the Portuguese from COLÔNIA DO SACRAMENTO, the northern BANDA ORIENTAL, and southern Río Grande, only to see his gains undermined by the TREATY OF PARIS of 1763, which was negotiated without knowledge of his victories. Recalled to Spain in 1767, Cevallos was appointed to the Council of War in 1773 and then governor and commandant general of Madrid in 1775.

In 1776, Cevallos was named to lead a major expeditionary force to the Plata region and secretly appointed its first VICEROY. He sailed from Cádiz in mid-November 1776 with the largest force Spain had sent to the territories; it included nearly 10,000 troops, 8,500 sailors, and other personnel. His attack on Colônia was successful, and on June 4, 1777, the Portuguese surrendered, enabling the Spanish to destroy the settlement and its fortress. The Treaty of San Ildefonso, signed on October 1, 1777, prevented Cevallos, to his annoyance, from attacking the Brazilian province of Río Grande.

Cevallos's service for the newly found VICEROYALTY OF RÍO DE LA PLATA was brief. He proclaimed the new entity upon returning to Buenos Aires after his success at Colônia. The viceroyalty included the governorships of Buenos Aires, PARAGUAY, Tucumán, the *corregimiento* of Cuyo, and CHARCAS. Under the new structure, POTOSÍ's minted SILVER was to be sent to Buenos Aires rather than LIMA. MERCURY from ALMADÉN destined for the mines of Charcas was also to be transported through Buenos Aires.

In addition to the 1778 declaration of *COMERCIO LIBRE*, the new structure provided a solid base for the viceroyalty's success. JUAN JOSÉ DE VÉRTIZ succeeded Cevallos in office in 1778.

A lifelong bachelor, Cevallos died in Madrid before his son by mistress María Luisa Pintos Ortega was born in Buenos Aires.

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**Chacabuco, Battle of** (February 12, 1817) The Battle of Chacabuco successfully culminated the first phase of JOSÉ DE SAN MARTÍN's campaign in CHILE. With an army of about 4,000 men assembled and trained at Mendoza, on the eastern side of the Andes, San Martín and his leading officers, including BERNARDO O'HIGGINS, initiated their advance across the Andes on January 18, 1817. A force of 800 men under Colonel Juan Gregorio de Las Heras crossed at the Uspallata Pass, while the rest of the army crossed at Los Patos. The men under O'Higgins caught the first royalist soldiers by surprise before being joined by Las Heras's troops. The reunited army made camp and prepared for battle with royalist forces.

With about 2,400 troops, the royalists decided to fight at Chacabuco, a defensible ridge located about 35 miles (56 km) or a day's march north of SANTIAGO DE CHILE. The division under O'Higgins led the attack, with O'Higgins commanding one column and Colonel Ambrosio Cramer the other. Joined toward the end of the battle, on February 12, 1817, by the division led by the Argentine general Miguel Estanislao de Soler, the Army of the Andes was victorious, and O'Higgins emerged as the hero. Some 600 royalists were killed in the fighting, and another 550 were imprisoned; the royalists also lost their artillery.

While the war was not over, the Army of the Andes had won the Battle of Chacabuco and quickly moved into Santiago on February 13, 1817. With the blessing of San Martín, on February 16, O'Higgins was named head of state by an assembly of eminent citizens. The independence movement would not be stopped.

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**Charcas (Los Charcas, Alto Perú, Upper Peru)** The *AUDIENCIA* district of Charcas, or what was known in the

18th century as Alto Perú (Upper Peru), representing a good part of what is today Bolivia, was home to Cerro Rico, the most famous SILVER MINING complex of the colonial era, and the legendary city of Potosí. Unlike present-day Bolivia, Charcas extended westward to the Pacific coast and the port of Arica, some 300 miles (483 km) by air from Potosí, and also into present-day PARAGUAY, Argentina, and CHILE.

Spanish interest in Charcas rested initially on the silver ore deposits at Porco, a preconquest site exploited by the Pizarros from the late 1530s, and especially at Potosí after 1545 when Spaniards became aware of the extraordinary deposits at Cerro Rico. The mining districts' need for labor, TRANSPORTATION, foodstuffs, building materials, clothing, and other material goods led to the foundation of Spanish towns within the *audiencia*. La Paz was founded in 1548; Santa Cruz in 1560, although it was subsequently moved to its present location; Oropesa (soon known as Cochabamba) in 1571; Tarija in 1574; and Oruro in 1606. These towns, as the earlier ones of LA PLATA, Porco, and Potosí, went through a formal process of foundation; upon its creation, a town council took responsibility for laying out streets and assigning lots and for policing and the provision of services.

Clerics arrived soon after the miners. In 1552, the diocese of La Plata was erected with the town of that name (also known as Chuquisaca and, after 1839, as Sucre) as its see. Dioceses of La Paz and Santa Cruz de la Sierra were erected in 1605 and that of La Plata was elevated to archiepiscopal status in 1609. FRANCISCANS were present in La Plata in 1540, Potosí in 1547, and La Paz in 1548. AUGUSTINIANS were in Charcas in the 1550s, and JESUITS arrived in the 1570s. A university was founded in La Plata in 1623.

The rich silver ore deposits also ensured that the Castilian monarchs would establish royal institutions to secure benefits for the treasury. Accordingly, in 1559, CHARLES I created within the VICEROYALTY OF PERU an *audiencia* to reside in La Plata. Its jurisdiction encompassed the lands from CUZCO to BUENOS AIRES and from the Brazilian frontier to the Pacific. Given this expanse, the Crown divided the region into provinces: La Paz, Potosí, Charcas, and Santa Cruz de la Sierra. It also created treasury offices (*cajas reales*); ultimately, nine were located in Potosí, La Plata, Oruro, La Paz, Cochabamba, Santa Cruz de la Sierra, Arica, Carangas, and Chuchuito. A royal mint (*casa de moneda*) established at Potosí in 1574 remained until 1825 (see MINTS).

In the early 1570s, FRANCISCO DE TOLEDO, fifth VICEROY of Peru, took steps that set the course for Charcas in general and Potosí in particular. His key actions were creating a forced labor draft (*MITA*); encouraging MERCURY production at HUANCAMELICA and its use at Potosí; relocating indigenous people to new settlements called *reducciones* and assessing TRIBUTE in cash rather than produce; and stimulating the foundation of the city of Cochabamba (see *REDUCCIÓN*). The results were dramatic.



With access to labor and improved technology, silver production at Potosí soared until 1592, and registered production from 1591 to 1600 reached an all-time high of 85.1 million pesos. Despite Potosí's diminishing output in the 17th century, new strikes elsewhere in Upper Peru, notably at Oruro, helped to cushion the decline in overall registered silver production. Nonetheless, registered production slipped to 30.6 million pesos for the decade 1691–1700 and may not have hit bottom until the 1720s. By that time, annual registered production was only 1.1 million pesos, scarcely over a quarter of the low point of 4.2 million pesos a year for the years 1580–1650.

The great mining boom in the late 16th and early 17th centuries brought tens of thousands of entrepreneurs, mine workers, artisans, families, servants, muleteers, and others to Potosí. Estimates of the city's population at its peak range from 100,000 to 160,000. For a time, Potosí was the largest city in the Americas with a population that exceeded Madrid's for many years. Its rapid growth provided a powerful demand for labor, transportation, foodstuffs, clothing, and an extensive variety of material goods imported from Europe and East Asia, as well as goods produced in the Americas.

The implementation of Viceroy Toledo's *mita* for Potosí called for the annual movement of 14,000 or more *mitayos*, men between the ages of 18 and 50 from 16 provinces between Cuzco and Potosí, to work in the mines for one year of every seven. Often accompanied by their families and llamas loaded with provisions, they traveled up to 60 days to reach the mines.

The influx of miners, other workers, and their families at Potosí created the largest market in the Americas in the late 16th and early 17th centuries and stimulated the production and transportation of goods not only from nearby regions, notably Cochabamba and also Tucumán and AREQUIPA, but also those as far away as QUITO, at almost 1,600 miles (2,575 km) as the crow flies.

Transportation was critical for producers, merchants, and consumers alike. Before the conquest, llamas had been the beast of burden in the Andes, and their use continued. For example, 1,749 *mitayos* went to Potosí from Chucuito in 1600 with an average of five llamas, each bearing food; added to those brought by the *mitayos'* leaders, at least 11,703 llamas accompanied the migration. MULES, capable of carrying heavier loads for longer distances than llamas, became a second source of transportation. The region around Córdoba in the province of Tucumán in present-day Argentina specialized in raising mules for the mining districts of Charcas. Subsequently driven to Salta, the mules were pastured from June until February or March, when 60,000 or so were sold in the annual fair and then taken farther north to provide transport to and from the mining districts of Charcas and even LIMA.

The creation of the VICEROYALTY OF RÍO DE LA PLATA in 1776 detached Charcas from the VICEROYALTY OF PERU. Until forcibly rejoined to Peru as a consequence

of a movement for autonomy in La Paz in 1809, Upper Peru's silver flowed legally to Buenos Aires. The region became independent in 1825.

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**Charles I (Charles V)** (b. 1500–d. 1558) *king of Castile and Aragon and Holy Roman emperor* Born in Ghent, Charles was the son and sole heir of Philip the Handsome, or the Fair, of Habsburg and Juana the Mad. He was grandson of Holy Roman Emperor Maximilian and the already-deceased Mary of Burgundy on his father's side and Ferdinand of Aragon and Isabella of Castile on his mother's side. The death of his father in 1506, the retirement of his severely depressed and perhaps schizophrenic mother in 1506, and the deaths of his grandfathers Ferdinand in 1516 and Maximilian in January 1519 brought him an inheritance that included the Burgundian lands, Spain with its Italian possessions and claims to the INDIES, and Habsburg dominions in central Europe and Italy (see HABSBURGS). In 1516, he became King Charles I of Spain. His election in 1519 to succeed his grandfather, Maximilian, as Holy Roman Emperor Charles V rounded out his regal responsibilities.

Charles's reign was marked by the emergence of Protestantism in a variety of forms as both a religious and political threat; war with Protestant states, France, the Ottomans, and the pope; ongoing fiscal problems; and the conquest and initial Spanish settlement of NEW SPAIN, PERU, and other parts of the Americas. By 1550, Charles was exhausted. He abdicated from all his titles in 1556.

A peripatetic ruler, Charles had traveled extensively and repeatedly throughout much of Europe and was absent from Spain more than he was present. He had directed Castilian resources toward a European, Catholic agenda, an approach that cost Castile dearly in terms of financial support and manpower drained into European conflicts and dynastic considerations. At the time of his abdications, his longtime rival Francis I of France had died (1547); the Netherlands had separated from the Holy Roman Empire (1548); the Peace of Augsburg (1555) had already established the principle that a ruler's choice of Catholicism or Lutheranism determined the religion in his lands; the Council of Trent, which focused on revitalizing Catholicism, was between its second and third meetings; and Philip, Charles's heir, had married Mary Tudor.

While Charles faced endless problems in Europe on the eve of his abdication, the news from the American

colonies, aside from a dramatic decline in the indigenous population, was generally good. New Spain was ending the successful introduction of viceregal rule by Antonio de Mendoza. Peru had emerged from its civil wars and, while its administration lacked the solidity of that in Mexico, order had trumped rebellion. The missionary effort in New Spain had produced some remarkable successes, more so than in Peru, where the quality and enthusiasm of the friars were less. While negative colonial reaction had forced modification of the New Laws of 1542, the star of the *encomenderos* in the centers of empire was waning; there would be no full-fledged nobility in the colonies (see *ENCOMIENDA*). The Crown had approved universities for MEXICO CITY and LIMA, and the one in New Spain had opened in 1553. Finally, the discovery of silver at ZACATECAS and POTOSÍ in the mid-1540s and the introduction of the amalgamation process in New Spain in 1555 heralded the regular arrival in Spain of significant remissions of American treasure. Moreover, an effective convoy system for delivering the silver to Spain was in use (see *FLEETS/FLEET SYSTEM*).

The epitaph on Charles's reign was that among his early acts as monarch, PHILIP II declared Castile unable to meet its fiscal obligations. Bankruptcy was the handmaiden of imperial glory.

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**Charles II** (b. 1661–d. 1700) *monarch of Spain* The last Habsburg monarch of Spain, Charles II was but four years old when he ascended the throne (see *HABSBURGS*). The son of PHILIP IV and Queen Mariana of Austria, who became queen regent during Charles's minority, the king married twice but fathered no heir and was widely considered to be impotent.

Charles's reign, which lasted until his death in 1700, was notable in several regards. He was undoubtedly the weakest and least capable monarch of the Habsburg era, relying for advice on his mother, royal favorites of low stature, and his second wife. The high aristocracy turned this weakness to their advantage, gaining high offices and personal benefits. The decision in 1680 to devalue copper money (*vellón*) and to fix prices at a low level resulted in unprecedented deflation. Commodity prices dropped almost 50 percent in two years, but the new, reduced value of copper money held and, despite great hardship in the early 1680s, the foundation had been laid for monetary stability and fiscal improvement. By 1685, the long decades of depression begun in 1640 had finally ended.

During the reign of Charles II, registered SILVER production in NEW SPAIN permanently surpassed that of PERU. The amount of unregistered bullion will never be

determined, but it appears that the amount of silver and GOLD reaching Europe far exceeded that imported legally. Indeed, the amount of bullion reaching Europe from 1660 to 1699 may have been considerably larger than the amounts in the last years of PHILIP II's reign, a century earlier when Potosí's population hit its peak.

One illegal outlet for Peruvian silver was the RÍO DE LA PLATA. In 1680, the Portuguese erected a trading fortress at COLÔNIA DO SACRAMENTO that served as a base for illicit trade with the miners in CHARCAS. English traders were particularly attracted to Colônia.

When it became clear that Charles would leave no direct heir, Spain and its possessions in Europe and overseas became the object of intense international interest, which resulted in three partition treaties. Charles's decision to leave his realms to Philip of Anjou, who was crowned PHILIP V, resulted in the WAR OF THE SPANISH SUCCESSION.

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**Charles III** (b. 1716–d. 1788) *monarch of Spain* Born in Madrid, Charles III was the son of PHILIP V and his second wife, Isabel Farnese of Parma. When he ascended the throne of Spain in 1759, he brought with him extensive experience as king of Naples and Sicily, as well as Italian advisers. In Naples, he had engaged in reforms to strengthen the power of the crown and developed a hatred for Britain, born of humiliation resulting from a British naval threat to Naples in 1742. Charles took his responsibilities as monarch seriously and generally appointed talented ministers to whom he showed great loyalty.

Charles brought from Italy two important advisers: Leopoldo de Gregorio, marqués de Esquilache (Squillace), who served as minister of finance and, beginning in 1763, minister of war; and Pablo Jerónimo de Grimaldi, marqués de Grimaldi, who served as secretary of state. While the latter had served both Philip V and FERDINAND VI, Squillace had no previous ties to Spain and was disliked as a foreign adviser to the king. With grain prices rising and efforts to increase revenues to pay for the expenses of the most recent war, Squillace's order that banned wearing Madrid's traditional hat and cloak sparked a riot in the capital that may have been inspired by opponents of reform. The Motín de Esquilache, or Hat and Cloak Riot, forced Charles to flee the capital for Aranjuez and to dismiss Squillace. Although Grimaldi remained in office for another decade, no more foreigners became ministers. Meanwhile, the JESUITS were blamed for having fomented the riot and were expelled from Spain and the colonies.

With the exception of Pedro Pablo Abarca de Bolea, count of Aranda, an Aragonese grandee whom Charles named president of the Council of Castile, the leading Spanish officials of Charles's reign were men of less elevated birth but demonstrated ability. They included Murcian José Moñino y Redondo, count of Floridablanca; JOSÉ DE GÁLVEZ Y GALLARDO of the village of Macharaviaya, marqués de Sonora; Asturian Pedro Rodríguez de Campomanes, count of Campomanes; Manuel de Roda; and Pedro López de Lerena, count of Lerena. Except for Lerena, these men were lawyers, and none of them was associated with the six *colegios mayores* that had enjoyed favor in the bureaucracies of state, the CATHOLIC CHURCH, and the INQUISITION for generations (see *COLEGIO/COLEGIO MAYOR*). Given their backgrounds and the expulsion of the Jesuits, it is not surprising that the Crown reformed the *colegios mayores* and forever ended the favored status the *colegiales* had enjoyed in patronage.

Charles's rule in Spain, which ended with his death in 1788, was marked by alliance with France and war with Britain. The Third Family Compact, signed in August 1761, led directly to Britain's seizure of HAVANA in August 1762 and Manila in October 1762, although both were returned in the TREATY OF PARIS, signed on February 10, 1763. Spain lost Florida to Britain but received the French colony of Louisiana from its ally as compensation. Despite a disastrous expedition to Algiers in 1775 that resulted in 5,000 casualties, Spain succeeded in capturing the Portuguese contraband center of COLÔNIA DO SACRAMENTO in the new VICEROYALTY OF RÍO DE LA PLATA in 1777 and supported France and thus covertly the rebels in the Revolutionary War in the thirteen colonies. A successful expedition led by Bernardo de Gálvez took Pensacola on May 10, 1781, and enabled Spain to regain West Florida.

Building on earlier efforts to strengthen royal authority and finances in the overseas territories, Charles III and his ministers acted with a justifiable sense of urgency following the British capture of Havana. Most of the BOURBON REFORMS date from the fall of Havana to the end of Charles III's reign. The interrelated broad objectives were to strengthen colonial defenses, improve the quality of administration, expand tax revenues and increase remittances to Spain, and enlarge legal TRADE with the colonies supplying bullion and raw materials, with Spain providing more finished goods.

Despite the failure at Algiers and loss of East Florida, Charles's reign was generally successful. Legal and thus taxable trade with the colonies increased substantially; the INTENDANT system was introduced into most of the colonies, although it had not had a fair opportunity to prove its worth; the population was growing throughout both Spain and the colonies; the Crown's authority over the church had never been greater; and MINING production in NEW SPAIN was at an all-time high. Despite the successful war of independence in the British mainland

colonies, there had been no movements for independence in Spanish America, and order had been reestablished in the regions of revolt in the VICEROYALTY OF PERU and VICEROYALTY OF NEW GRANADA in the 1780s. The reign of Charles III's successor, CHARLES IV, would not be so fortunate.

#### Further reading:

John Lynch. *Bourbon Spain, 1700–1808* (Oxford: Basil Blackwell Publishers, 1989).

**Charles IV** (b. 1748–d. 1819) *monarch of Spain* Born in Portici, Naples, to the future CHARLES III of Spain and Maria Amalia of Saxony, Charles succeeded his father on the Spanish throne on December 14, 1788. In 1765, he married his cousin Maria Luisa of Parma, born December 9, 1751. The dominant spouse, Maria Luisa, due to her affection for MANUEL GODOY Y ÁLVAREZ DE FARIA, ultimately discredited the royal family, brought about the abdication of her husband in 1808, and drove some Spaniards to support the idea of constitutional monarchy.

Charles had the misfortune of being monarch in an era marked by the French Revolution, the execution of his cousin Louis XVI, years of warfare first against France and then against Britain, and progressively deteriorating royal finances. Although initially Charles retained the count of Floridablanca as first minister and continued the policies of his father, neither Floridablanca nor his rival and successor, the count of Aranda, was able to deal satisfactorily with revolutionary France. As a result, Charles named Godoy, a 25-year-old royal guardsman from Extremadura's lower nobility, as first minister on November 15, 1792. With the exception of a brief period in 1798–1800, the royal favorite, rumored to be the queen's lover, dominated a court that became a byword for scandal and corruption.

Following its execution of Louis XVI, the Convention in France declared war on Spain on March 7, 1793, a consequence of Charles's futile efforts to save his Bourbon cousin's life (see BOURBON DYNASTY). Early Spanish successes gave way to defeat as French troops entered northern Spain. The Treaty of Basel on July 22, 1795, ended the conflict and gave France the remaining Spanish portion of the island of HISPANIOLA; a grateful Charles bestowed the title Prince of the Peace on Godoy, already titled duke of the Alcudia.

While patriotic donations marked the first days of the war with France, the Crown quickly turned to issuing *vales reales*, large denomination bills that circulated as paper money. Issues of *vales* in 1794 and January 1795 almost doubled the nominal value previously in circulation. Depreciation reduced their value by more than 20 percent prior to the Treaty of Basel. Peace with France was followed by an offensive and defensive alliance against Great Britain, signed by Spain and the French Republic at San Ildefonso on August 18,



Portrait of Charles IV (1788–1808), king of Spain (Private collection)

1796. Less than two months later, on October 7, Spain declared war on Britain. Britain soon demonstrated its naval superiority, capturing merchant ships and defeating a Spanish fleet at Cape Saint Vincent in February 1797. On April 11, British commander Horatio Nelson established a blockade of CÁDIZ, an action that wreaked havoc on Spain's colonial TRADE. While 171 ships from the colonies reached Cádiz in 1796, only nine did so in 1797. In order to enable the colonies to trade perishable and other items except SILVER and GOLD, tax this trade, get funds back to Spain, and supply items not produced in the colonies—for example, paper for cigarettes and stamped paper for official transactions—on November 18, 1797, the Spanish Crown allowed neutral trade with the colonies. Not surprisingly, the prohibition against trading with specie was unenforceable. Although legal neutral trade was largely abolished by a decree of April 20, 1799, many colonial officials recognized its importance and allowed it to continue. In January 1801, the Crown changed its position and reauthorized neutral trade but with the new purpose of benefiting the trea-

sure and facilitating the transfer of funds across the Atlantic.

Meanwhile, the Crown continued to issue *vales reales*. In 1799, their value dropped to 43 percent below par and, between 1800 and 1802, to 75 percent below par; in some cases they could not be exchanged for specie at any price.

The Peace of Amiens between Spain, Britain, and France on March 27, 1802, resulted in Spain ceding Trinidad to Britain and gaining Olivenza, Portugal, a result of invading its neighbor in the War of the Oranges. The peace enabled the restoration of trade between Spain and the colonies for two years. As specified in the Treaty of San Ildefonso with France on October 1, 1800, Spain turned over the enormous area known as Louisiana to the French; the French quickly sold it to the United States on April 30, 1803. Renewed war between France and Britain began in May 1803, and Napoleon pressed Spain for support. A treaty of subsidies with France in October 1803 obligated Spain to pay its ally 6 million livres (1.2 million pesos) monthly, although it was never able to keep the obligation current, even after extending the *CONSOLIDACIÓN DE VALES REALES* to the colonies. Understandably, Britain considered paying the subsidies a hostile action, and its navy moved against Spanish convoys.

The British seizure of four Spanish ships carrying 4.7 million pesos in October 1804 prompted Spain to declare war on Britain on December 12 and, on January 4, 1805, to enter a naval agreement with France. This resulted in disaster. Spanish trade with the colonies promptly collapsed. Worse, on October 21, 1805, Admiral Nelson's forces devastated a large combined Spanish-French fleet off Cape Trafalgar and established unquestioned naval supremacy.

As if the financial disasters and other losses of war were not enough, Napoleon had other plans for Spain. Following the signing of the secret Treaty of Fontainebleau on October 27, 1807, in which Charles IV agreed to support France's invasion of Portugal via northern Spain in return for the division of the neighboring kingdom into three parts, one of which would go to Godoy, General Jean Andoche Junot led French forces into Spain. Following the escape of the Portuguese court to BRAZIL thanks to a British fleet, French troops continued to enter Spain and march south toward Madrid.

Meanwhile the court of Charles IV was imploding. Ferdinand, prince of Asturias, was arrested at El Escorial on October 29 for plotting to dethrone his father. The prince begged forgiveness and identified his coconspirators, who were arrested but then released when Napoleon indicated he wanted this "Affair of the Escorial" ended.

The end of Charles IV's reign came following riots against Godoy and himself at the court's residence at Aranjuez the following spring. Dismissing the royal favorite from office on March 18, 1808, after the initial riot, the king abdicated to Ferdinand the following day

after a second riot (see FERDINAND VII). Although he subsequently recanted under pressure from the French, Spaniards paid him no heed. After traveling to Bayonne, France, he abdicated again, this time to Napoleon on May 5, 1808. He spent the remainder of his life in exile and died in Rome.

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### Charles V See CHARLES I.

**Chichimecas** *Chichimecas* was a derogatory generic term that Spaniards originally applied to nomadic and seminomadic hunting and gathering tribes of northern NEW SPAIN. It was borrowed from the generic term applied by the Mexica (Aztecs) to northern indigenous groups.

Armed with bows and arrows, the unkempt, painted, and often unclad warriors exacted an expensive toll on their opponents through carefully planned ambushes in places of their choosing and a refusal to fight as a massed army. Their skill and accuracy with bow and arrow became legendary, as was their cruelty to captives, whom they often scalped before killing. By the end of the 16th century, the use of *Chichimecas* yielded to names for specific peoples, for example, the Tepehuanes, Huachichiles, and Tarahumaras.

Following the Mixtón War in 1541–42, the region roughly to the north of Querétaro, east of GUADALAJARA, south of Saltillo, and west of Pánuco was known as the Gran Chichimeca; ZACATECAS was just west of its center. With the discovery of SILVER at Zacatecas, in particular, miners, merchants, cattlemen, missionaries, and other Spaniards moved into the region. The conflict between Spaniards and indigenous people in the Gran Chichimeca lasted from 1550 to 1590, years in which the PRESIDIO, the mission, and the ranch for livestock became central institutions of the frontier.

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**Chile** The conquest of Chile originated in PERU, from which Pedro de Valdivia departed in 1540. Establishing the city of SANTIAGO DE CHILE in 1541 in a fertile

central valley, Valdivia divided the indigenous population into *ENCOMIENDAS* to provide TRIBUTE and labor to their *encomenderos*. Further settlements were founded in Concepción, Valdivia, Santiago del Estero (across the Andes), and other sites before the ARAUCANIANS (Mapuche) defeated and executed Valdivia in 1553. After this setback, the Spaniards quickly abandoned all of the southern settlements except Valdivia. It required the arrival of a governor and a MILITARY force from LIMA later in the decade to reestablish Concepción and create a handful of other Spanish towns, including, in 1561, Mendoza, which was located on the eastern slopes of the Andes.

Long and narrow, bounded by desert in the north and indigenous lands in the south, colonial Chile communicated with Peru by ships sailing north from Valparaíso or Concepción and with provinces to the east by land across the Andes. The length of Chile under Spanish rule was about 700 miles (1,127 km), less than a third of today's length.

Chile had some 600,000 NATIVE AMERICANS when the Spaniards arrived, more than half south of the Bío-Bío River. War, abuse, and disease reduced the indigenous population substantially, a smallpox epidemic in 1561–63 alone killing perhaps 25 percent (see EPIDEMICS). By the end of the century, the indigenous population in regions settled by the Spaniards had declined sufficiently that slaving expeditions became common and remained so well into the 17th century (see SLAVERY). A mestizo population started to appear soon after the Spaniards' arrival in Chile, and a few blacks, including free black Juan Valiente who received an *encomienda*, were present from the time of Valdivia (see MESTIZAJE/MESTIZO). The Spanish population was small; probably few more than 3,600 had arrived by 1598, nearly all of them sent as soldiers. In 1630, the bishopric of Santiago had about 700 Spanish males aged 14 or older. In 1700, it had 84,000 inhabitants, and in Concepción, there were some 11,000. These numbers increased substantially by 1810, when the bishopric of Santiago probably had 383,000 and Concepción about 200,000. The city of Santiago at that time had a population of more than 30,000.

For more than two centuries, *encomenderos* battled to retain their grants, and the government engaged in an expensive struggle with the Mapuche in the south. Raiding Indian territory in pursuit of slaves proved a valuable source of income into the mid-17th century. Military demands were such that starting in 1601, the VICEROY of Peru started sending a subsidy (*situado*) to support the cost of WAR. In 1641, a treaty established the Bío-Bío River as the boundary between the Mapuche and Spanish Chile and allowed missionaries to enter Mapuche lands. While the accompanying gifts also smoothed relations, warfare broke out intermittently over the next century and a half.

Chile's fertile central valley made it a region of AGRICULTURE where WHEAT, MAIZE, and barley were grown.

Grapes were also successful, and the resulting WINE was consumed locally and exported to Peru; more than 200,000 jugs of eight liters each were produced in 1614. Livestock were also important, and estate owners raised CATTLE, SHEEP, goats, horses, and MULES, with some mules sold for use in CHARCAS. High-quality tanned hides were exported to Peru. Slaves and YERBA MATÉ were imported from the provinces of the RÍO DE LA PLATA.

While Chile was subject to frequent and sometimes devastating EARTHQUAKES, it was the quake that struck LIMA, Peru, in 1687 that severely damaged the irrigation systems in valleys that supplied the capital with wheat. Followed by a wheat blight, production of the staple plummeted, and merchants in Lima began purchasing wheat from Chilean producers in the Santiago region. The TRADE exploded. In 1713, more than 140,000 *fanegas* of wheat were sent to Peru on 30 ships. Chile supplied Peru into the early 19th century, although the fact that shippers from Lima owned most of the vessels used in the trade became a major frustration for Chilean producers.

GOLD production, of some importance in southern Chile in the late 16th century but then declining to negligible quantities, got a new lease on life in the 18th century in the area known as the Norte Chico, consisting of part of Atacama Province, Coquimbo, and part of Aconcagua Province. By the 1750s, miners were producing 350,000 pesos worth of gold a year. With gold from the mines and SILVER received from the wheat trade, Chileans in the 18th century had cash with which to purchase imported merchandise. Imported goods were increasingly available as a result of the commercial use of the Cape Horn route around South America by merchants from France during the WAR OF THE SPANISH SUCCESSION. Register ships from Spain brought merchandise after 1740, and more ships arrived under the terms of *COMERCIO LIBRE*.

A governor and president, normally a military officer from the early 17th century onward, headed the royal administration in Chile. After a failed attempt to implant an *AUDIENCIA* in Concepción in 1563, the Crown tried again in 1606 at Santiago. The tribunal lasted into the 19th century. In 1630, the *audiencia* district had 13 *CORREGIDORES* named by the president of the *audiencia*, eight in the bishopric of Santiago and five in that of Concepción. Santiago, of course, had a MUNICIPAL COUNCIL. In 1630, the city's jurisdiction had 48 indigenous villages assigned to 30 *encomenderos*. A mint opened in Santiago in 1749, eliminating the need to send bullion to Lima, and in 1759, the TOBACCO monopoly was established (see MINTS). With the establishment of the VICEROYALTY OF RÍO DE LA PLATA in 1777, the province of Cuyo was removed from Chile's jurisdiction. In 1786–87, the Crown created the intendancies of Santiago, extending from La Serena to the Maule River, and Concepción, extending from the Maule to the frontier with the Mapuche. Subdelegates replaced the former *corregidores*, 22 in number, in the mid-1780s.

Chile received bishoprics in 1561 in Santiago and in 1556 in La Imperial; the latter was moved in 1567

to Concepción. The diocese of Santiago had 23 curacies in 1614, of these 21 were held by priests and two by friars. It also had at that time convents belonging to the DOMINICANS, FRANCISCANS, AUGUSTINIANS, MERCEDARIANS, and JESUITS, with 210 friars and priests and two nunneries with 120 nuns. In the 18th century, most of the bishops were PENINSULARS or Peruvian CREOLES, but some were Chileans.

EDUCATION was limited in colonial Chile, although tutors and grammar schools were available by the 1570s. Santiago in 1803 had nine lay schools attended by about 400 children, in addition to CATHOLIC CHURCH schools. Santiago had a Jesuit *COLEGIO*, which became the Convictory of San Carlos after the order's expulsion in 1767, and a seminary operated by the bishop. Until the University of San Felipe opened in 1758, however, Chileans seeking a university education went to Lima. Chile did not have a proper printing press until 1811.

Far from the monarch and enjoying relatively prosperous times as the colonial period drew to a close, Chilean creoles had more grievances against Peru than against Spain.

See also CHILE (Vols. I, III, IV).

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**Chilpancingo, Congress of (Congress of Anáhuac)** (1813–1815) In response to a decree issued by JOSÉ MARÍA MORELOS Y PAVÓN on June 28, 1813, a small insurgent congress assembled at Chilpancingo in NEW SPAIN on September 8 and was installed on September 14. The adoption and promulgation of the CONSTITUTION OF 1812 by the CORTES OF CÁDIZ had changed political expectations and partially met the desires of AUTONOMISTS in Mexico. Morelos thus needed to clarify the objectives of his insurrection and to outbid the constitution.

As a guide to action, the congress considered Morelos's *Sentimientos de la nación* (Sentiments of the nation) a document that called for an unambiguous declaration of independence; Catholicism as the only religion allowed in Mexico; sovereignty of the people; the separation of executive, legislative, and judicial branches of government; the abolition of SLAVERY; restriction of government offices to Americans; open trade with friendly nations; abolition of the TOBACCO and other monopolies, sales tax, and TRIBUTE; and recognition of September 16, 1810, the date of the GRITO DE DOLORES, as the founding date of the independence movement.

The congress approved an explicit declaration of independence and continued that anyone who opposed it was a traitor. In addition, it declared Roman Catholicism the country's only religion, abolished slavery, and approved the restoration of the JESUITS. Although the remainder of Morelos's proposals awaited later action, the unequivocal declaration of independence approved on November 6, 1813, clarified the primary aim of the insurgency (see MEXICO, INDEPENDENCE OF).

Morelos left Chilpancingo on November 7 and reached Valladolid in late December. There, he suffered a major defeat to royalist forces led by Agustín de Iturbide and began to retreat. The congress meanwhile left Chilpancingo and ultimately arrived at Apatzingán, where it promulgated a republican constitution with a three-person executive and a strong legislature on October 22, 1814. By this time, however, the cause of independence itself was in retreat and the congress dissolved the following year.

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**Chocó** The Chocó was a GOLD-MINING region located in the northwest corner of NEW GRANADA between the Andes and the Pacific Ocean; to its north was PANAMA. Marked by isolation, a tropical climate, and, at first, an uncooperative indigenous population, only gold mined by black slaves made the region bearable to a few hundred Spanish miners, merchants, clerics, and officials, almost all of whom resided in riverine mining camps and villages so small they had no town councils (see SLAVERY). African slaves, NATIVE AMERICANS, and free CASTAS were far more numerous; in 1782, they constituted 98 percent of the population of 17,898.

Black slaves born in Africa (*bozales*), most of them shipped directly to CARTAGENA DE INDIAS, were the predominant laborers in Chocó's placer mining. Large slave gangs were common; in 1759, fewer than 350 out of more than 3,900 slaves were not in gangs of 30 or more. After 1780, the number of slaves decreased, a belated response to declining gold production after 1750. The price of prime slaves had already begun to drop by the mid-1740s and in 1797–98 was only 300 pesos as compared to 500 or more in the first half of the 18th century. Overall, owners found slavery to be a profitable source of labor.

Spanish miners were present in the Chocó in the late 16th century, and serious gold mining was under way in the late 17th century. Records for gold on which the *QUINTO* was paid indicate that the apogee of production was the quarter century from 1726 to 1750. Total gold mined in the Chocó between 1680 and 1810 was

probably worth around 80 million pesos, of which about half left the region as contraband. On the eve of independence, the Chocó remained a mining frontier.

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**Chuquisaca** See LA PLATA.

**Cisneros, Baltasar Hidalgo de** (b. 1755–d. 1829) *Spanish naval officer and viceroy of Río de la Plata* Born in Cartagena de Levante, Spain, Baltasar Hidalgo de Cisneros followed his father in a career in the Spanish navy beginning in 1770. He served in the Pacific, Algeria, the war against the French (1793–95), and the disastrous Battle of Trafalgar in 1805, during which he distinguished himself. He entered the Order of Charles III in 1806.

On February 11, 1809, the JUNTA SUPREMA DE SEVILLA named Cisneros, then serving as captain general of Cartagena, VICEROY of RÍO DE LA PLATA to replace SANTIAGO LINIERS Y BREMOND. The new viceroy reached BUENOS AIRES in June 1809, entering the city only after receiving the approval of the militia leaders then in power.

Cisneros reestablished the PENINSULAR militia, while retaining the paid CREOLE units. To provide the necessary financial resources, he reluctantly allowed a taxed trade with Britain on a provisional basis. The arrival of news in MONTEVIDEO on May 13, 1810, that the JUNTA CENTRAL had resigned in favor of the COUNCIL OF REGENCY and that the resistance in Spain to the French was focused in CÁDIZ provoked the revolution of May 1810 in Buenos Aires.

Under pressure from the creole militia, Cisneros convoked a junta of notables that assembled on May 22 and, following hours of rhetoric and debate, voted to empower the MUNICIPAL COUNCIL of Buenos Aires to establish a junta to govern in the name of FERDINAND VII until his return (see JUNTAS). Initially, Cisneros was named president of the five-person junta, but organized pressure by the militia and the populace forced its members to resign, and on May 25, 1810, the city council appointed a new seven-member Junta Provisional Gubernativa with creole militia leader Cornelio de Saavedra as president. Cisneros, who had resigned as viceroy, was conspicuously absent from the new governing body. May 25 was celebrated as independence day in Buenos Aires, although the official break from Spain did not occur until July 9, 1816.

Defeated by the local politicians, Cisneros retired to the royalist bastion of Montevideo and then to Cádiz. He held a number of prominent positions in Spain and

died as captain general of the department of Cartagena de Levante.

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**cities** Iberians who migrated to the Americas considered urban living central to civilization, thereby creating a “border” between themselves (civilized and Christian) and non-Iberians (barbarians and pagans). Consequently, they quickly founded villages, towns, and cities in the colonies as material signs of their territory and way of life. By 1574, some 30 Spanish municipalities had been erected in NEW SPAIN. By 1580, the cities that would be the administrative centers of colonial Spanish America had been created; in BRAZIL, BAHIA, RIO DE JANEIRO, and SÃO PAULO had been founded. By 1650, the Portuguese colony would have six cities and 31 towns, most of them close to the coast.

The location of cities was related to available indigenous labor, mineral wealth, shipping, defense, and access to necessary foodstuffs. Founding a Spanish city on the site of a preconquest city was a political statement that emphasized the new rulers’ success and power. MEXICO CITY was intentionally built on the razed Tenochtitlán to emphasize that Spaniards ruled in place of the Aztecs; in Peru, the Spaniards refounded the Inca capital of CUZCO as a Spanish city to make the same point. The new capital of Peru, LIMA, in contrast, was located near the Pacific Ocean in order to have a closer link to Spain, although there was a modest preconquest town on the location. It was not unusual for a town to be moved and refounded if the original location proved unsuitable. The town of VERACRUZ, for example, was moved three times. The relocation of Santiago de Guatemala, capital of the Kingdom of GUATEMALA, after the earthquake of 1773, is perhaps the most famous transfer.

Spaniards typically built cities around a central core (*traza*) that had as its heart a rectangular plaza. On one side of the plaza was a church; on a second side was the MUNICIPAL COUNCIL building; the third side would often have the offices of the region’s ranking royal official, for example, a governor or captain general; the final side would have shops. Usually located within the plaza were a fountain that provided drinking water and a pillory (*picota*). A striking difference from medieval cities in Europe, aside from port cities, was the general absence of walls and fortifications. Cities in Brazil had large squares, but they were not centered like the PLAZA MAYOR of Spanish-American cities.

Spaniards and Portuguese found cities particularly attractive. Colonials with aristocratic pretensions knew that cities offered the best selection of potential spouses for themselves or their children. PENINSULARS in gov-



A walkway in Veracruz, the major port for trade with Spain under the Viceroyalty of New Spain (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

ernment service and commerce availed themselves of marital opportunities as well. Whites might constitute only a minority of the population. Excluding officers and soldiers, Lima in 1790, for example, had a population of 52,627 of which only 36 percent were Spaniards; 19 percent were blacks, and 8 percent were Amerindians. The remaining 37 percent were persons of mixed ancestry (see *CASTAS*). Oaxaca, Mexico, had about 39 percent whites and 28 percent Amerindians. PUEBLA, a new Spanish city created away from Tlaxcala to safeguard the indigenous population, was to exclude *encomenderos* but never fulfilled its founders’ intention.

Most cities were administrative and ecclesiastical centers, sites of substantial retail and at times wholesale TRADE, and locales for a broad range of specialized artisans. In some places, *OBRAJES* were also present. The most attractive government positions were located in the leading cities of the colonies, especially Lima, Mexico City, SALVADOR DA BAHIA, and Rio de Janeiro. Wealth gravitated to cities as well, and successful *hacendados* often had an urban residence (see *HACIENDA*). However, PLANTATION owners in Brazil, even in Bahia, were more likely to be at their rural property than were their counterparts in Spanish America. Although successful landowners might reside in cities, towns often had a closer relationship to surrounding pastoral and agricultural enterprises.





Cities were also home to EDUCATION, in some places extending to the university level. Cathedral schools opened soon after dioceses were created. Religious orders provided secondary education (see *COLEGIO/COLEGIO MAYOR*). Universities were authorized for Mexico City and Lima in 1551, and in 1563, a university was established in BOGOTÁ. Later universities were founded in QUITO and LA PLATA in the 1620s and in SANTIAGO DE CHILE in the 1750s. Colonial Brazil never had a university.

Cities offered a range and quality of entertainment unavailable in towns or rural areas. This included lengthy receptions in Mexico City and Lima for new viceroys and frequent religious celebrations for particular saints. Gambling was a common form of entertainment, and in some cases, high-ranking officials and their spouses ran regular games of chance.

Town founders quickly established local government and a variety of municipal offices. Over time, the municipal councils became preserves for local families who purchased posts of alderman (*regidor*), which passed to their heirs. A municipal judge dealt with malefactors, and other local officials inspected the marketplace to ensure that vendors sold products at specified weights and prices. Cities faced the problems of providing potable water and of dealing with trash and sewage.

When Spain's constitutional crisis occurred in 1808, initial movements for greater autonomy were based in cities, often the capitals of their regions. Thus, JUNTAS were established in BUENOS AIRES, Santiago de Chile, CARACAS, and Bogotá, among other places.

In the 1820s, the only cities to exceed 100,000 inhabitants were Mexico City, Rio de Janeiro, and Bahia. With populations in excess of 60,000, HAVANA, Lima, and Buenos Aires were the next largest cities.

See also CITIES (Vol. I).

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**Ciudad de los Reyes** See LIMA.

**Clavijero, Francisco Javier (Francisco Javier Clavijero)** (b. 1731–d. 1787) *creole Jesuit author* Born in VERACRUZ, NEW SPAIN, to a CREOLE mother and a PENINSULAR father, Clavijero studied in various JESUIT *COLEGIOS*, entered the Society of Jesus in 1750, and was ordained a priest in 1754. For his remaining years in Mexico, he was

assigned both teaching and nonteaching responsibilities. While at the Colegio of San Gregorio in MEXICO CITY, he learned Nahuatl and began to write and publish. Assigned to teach in Valladolid (modern Morelia), he quickly made known to his students in a philosophy course that he was going to teach Greek rather than Aristotelian philosophy and then published a text on the subject that set forth ideas from Francis Bacon, René Descartes, and later writers, as well as Greek ideas. Moved to the Jesuit Colegio de San Tomás in GUADALAJARA in 1766, he remained there until the Society of Jesus was expelled from Spain and the colonies the following year.

While Clavijero's teaching in Mexico furthered the introduction of modern philosophy, he is best known for his writings while in exile in Italy. There, he joined numerous other Jesuits and remained after the pope suppressed the society in 1773. Nostalgic for their homelands, irritated by Europeans' often insulting notions of Americans' intellectual ability, and angry at the widely spread idea that man and beast deteriorated in the New World, a number of Jesuits, including Clavijero, took pen in hand to write defenses of the Americas against the errors of European writers such as Count Buffon, Corneille de Pauw, William Robertson, and Abbé Raynal.

Clavijero's most significant publication was *Storia antica*, a four-volume work originally published in Italian in 1780–81. The first three volumes focused on the ancient history of Mexico from the Toltecs' emergence in 544 until the Spanish conquest in 1521. The fourth volume consisted of chapters on nine topics related to the content of the other volumes. The work reached Mexican readers in late 1784, several years before Clavijero's death in Italy. A Spanish edition was published first in London in 1826.

Clavijero was one of what historian D. A. Brading referred to as "Jesuit patriots." The exile gave pre-conquest Mexico an important, even glorious history and valued its indigenous codices and other sources. He made no link between earlier uncivilized Native Americans and the Toltecs and their successors; rather, the ancestors of the Toltecs had carried civilization with them from biblical Babel across Asia to Mexico. Unfortunately, the Spanish conquerors had not married the daughters of "the American houses" and thereby created a single nation.

While not among the Jesuits who called for independence from Spain, Clavijero's pride in being a Mexican and his defense of Mexico against the philosophes place him among the late 18th-century writers who helped to create an intellectual environment in which the swirl of varied political ideas that followed the abdications of CHARLES IV and FERDINAND VII could take root (see ENLIGHTENMENT).

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**coca** Grown in tropical climates, the coca plant is a low bush, the leaves of which were chewed by Andeans as a stimulant to reduce hunger while working or traveling and to counteract the ill effects of high altitude. Coca was also employed in some indigenous religious rituals.

The use of coca by Andeans predates the establishment of Spanish colonies. Usage increased, however, following the development of the city and mines of Potosí, Porco, and other highland markets. The demand for coca quickly turned it into a commodity bartered, bought, and sold in the marketplace. In 1549, a basket of coca leaves cost as much as 18 pesos; by the 1560s and 1570s, the price had dropped to between four and five pesos a basket.

Coca production was extensive in the hot and humid *yungas* (low-altitude, tropical lands) of the province of Paucartambo in the bishopric of Cuzco and in the *yungas* on the eastern side of the Andes adjacent to La Paz. Coca was raised on PLANTATIONS under harsh, indeed, deadly,

conditions. Because of the high mortality of Andean workers in the coca fields, Viceroy FRANCISCO DE TOLEDO ordered them not to be kept there for more than 24 days, a vain hope rather than an effective limitation.

Clerics in the First Provincial Council meeting in LIMA in 1552 railed against coca consumption as a support for paganism, but Spanish *encomenderos* able to access the Potosí market required their Andeans to plant and harvest it (see ENCOMIENDA). Without coca, Andeans would not work in the mines, and SILVER would not be produced and taxed (see MINING). Some indigenous laborers believed that if they were not chewing coca, the quality of the ore they were mining would decline.

The volume and potential profits of coca were substantial. Antonio López de Quiroga, the fabulously wealthy silver miner and entrepreneur at Potosí, purchased in 1678 approximately 300,000 pounds of coca leaves valued at 72,000 pesos. Retail purchasers found the leaves available in numerous shops and stalls, typically run by women. The ubiquitousness of coca in 16th-century Potosí was such that it was often used in barter. Then and later, users purchased it on credit from female indigenous vendors who themselves had obtained the leaves on credit.

See also COCA (Vols. I, III).



A Peruvian coca plantation. An addictive stimulant, coca was widely used by miners. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

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**cochineal** A dye made from red insects, cochineal was cultivated in Central America and especially Mexico long before and after the Spanish conquest. The cochineal insect was raised on the nopal cactus, then removed from the cactus and dried. About 70,000 dried insects were required to make a single pound of dye. Cochineal was produced in Oaxaca and the region around PUEBLA and delivered to the Aztecs as TRIBUTE.

Cochineal produced a fast, brilliant scarlet color and was capable of dyeing 10 to 12 times as much cloth as dyes used in Europe. It first reached Spain in 1526 and was employed primarily by textile producers there for several decades. After the FLEETS provided regular TRANSPORTATION from NEW SPAIN to Spain starting in the mid-1560s, imports rose and increasingly were transshipped to dyers elsewhere in western Europe. By 1600, some 250,000 to 300,000 pounds (113,636–136,364 kg) of cochineal were being exported legally from VERACRUZ annually. The growth in Mexican exports stimulated production in Central America, but hopes were short lived, perhaps because of locust invasions in 1616 and 1618.

English weavers were particularly interested in the dye because their native dyestuffs were of inferior quality. Merchants from France and the Low Countries were also active in securing cochineal from at least the mid-16th century. Corsairs happily took cochineal as booty, and smugglers sold it to Spain's northern European competitors.

New Spain remained the most important producer of cochineal in the Americas, with the Oaxaca region the primary source. Indeed, cochineal was frequently second only to SILVER as the most valuable export of New Spain. Between 1758 and 1787, cochineal registered in the city of Oaxaca was always greater than 450,000 pounds (204,545 kg) and exceeded 1 million pounds (454,545 kg) in 10 of these years; the height of production was 1.558 million pounds (708,182 kg) in 1774. In the subsequent years to 1821, however, production fell substantially, exceeding 500,000 pounds (227,273 kg) only five times and dropping under 200,000 pounds (90,909 kg) in three years.

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**Cochrane, Thomas, Lord** (b. 1775–d. 1860) *British naval commander and mercenary* A Scot employed in the Royal Navy from 1793, Thomas, Lord Cochrane arrived at Valparaíso, CHILE, on November 28, 1818, to serve as a commander in the fledgling Chilean navy. He had a chequered career before reaching Chile, having demonstrated great ability during the Napoleonic Wars but then being cashiered for political reasons and alleged involvement in financial irregularities. He arrived in Chile with substantial knowledge of warfare at sea, an ability to organize and discipline men under his command, and a reputation for ingenuity and daring exploits. Given the rank of vice admiral, he was quickly named commander-in-chief of the new republic's navy.

When Cochrane arrived, Chile had been independent for only a few months, the BATTLE OF MAIPÓ being won by JOSÉ DE SAN MARTÍN's Army of the Andes on April 5, 1818. The Argentine general, however, perceived the independence in Chile as a preliminary step to the expulsion of the Spaniards from PERU. The failure of earlier campaigns to liberate CHARCAS had shown that a different approach was needed; the 600 miles (966 km) of the Atacama Desert between Chile and Peru dictated that San Martín's forces travel to Peru by sea.

Cochrane assumed command of a fleet of seven warships with 220 cannons. From the beginning, he unrelentingly sought supplies, equipment, and payment for the crews, which included experienced British and American seamen as well as Chileans. His charge was to blockade LIMA's port of CALLAO and to destroy the Spanish squadron based there.

The admiral set sail on January 16, 1819, with four ships commanded by foreigners; the remaining three later sailed under orders from Chilean admiral and second-in-command Manuel Blanco Encalada, although two of these three were also commanded by foreigners. Dealing harshly but effectively with discipline problems, including a mutiny, Cochrane literally whipped the crews into shape. In late February, after taking one gunboat near Callao, he declared the entire coast between GUAYAQUIL and Atacama to be under blockade. Blanco's ships arrived on April 1, and Cochrane began seizing prizes. A shortage of supplies, however, forced Blanco to lift the blockade, and on June 16, Cochrane was back at Valparaíso. Overcoming the threatened departure of the foreign sailors under his command by pressuring the government to pay them, Cochrane again sailed north and reestablished the blockade on September 27. Returning to Chilean waters in February 1820, Cochrane led an unexpected and successful attack against Valdivia and thus removed a threat in southern Chile. Back in Valparaíso on March 6, he found that BERNARDO O'HIGGINS's government had rejected his offer to lead a force of 2,000 men to Peru in favor of San Martín's plan to lead a larger army. Conflict between Cochrane and San Martín henceforth often bedeviled the expedition. Fortunately for the patriots, the two

leaders jointly promised both back pay and a substantial bonus following the army's entry into Lima.

The expedition counted 624 foreigners among 1,600 seamen; all of the captains were foreigners. Sailing north on August 20, 1820, the ships with San Martín's army reached Pisco on September 7. Immediately, San Martín and Cochrane disagreed over strategy. The admiral wanted to sail into Callao and to attack the viceregal forces without delay. San Martín wanted to encourage the Peruvians to rise up against viceregal rule. For 50 days, the army of less than 5,000 men remained in Pisco, and the squadron did little.

On the night of November 4–5, Cochrane led an expedition to Callao and managed to take the Spanish warship *Esmeralda*, the best ship in Spain's Pacific fleet, to the astonishment and chagrin of the royalists. Still, however, San Martín would not lead his army toward Lima, entering it only after the royalist forces had withdrawn into the Andes. The independence of Peru was declared on July 28, 1821, although Callao remained in royalist hands, and Cochrane's men demanded their back pay and bonuses. Their demands went unanswered.

On September 14, Cochrane seized at Ancón the royalist treasure that had been sent there from Lima and paid his crews. His break with San Martín was now irreparable. Returning to Valparaíso on June 13, 1822, Cochrane's Chilean fleet was in miserable condition, and his men clamored for the additional pay due them. On November 30, 1822, Cochrane resigned his Chilean commission, and on January 12, 1823, he left Valparaíso for BRAZIL.

Arriving in the Bay of Guanabara on March 13, 1823, Cochrane, after negotiating a satisfactory salary and the newly created rank of first admiral, took command of the small Brazilian fleet. Overcoming the presence of a Portuguese crew who were sabotaging his efforts, an overall shortage of adequate sailors, and ships in poor condition, he blockaded SALVADOR DA BAHIA starting in May and had the pleasure of seeing Portugal's convoy leave Salvador on July 2, 1823. Bahia was under Brazilian authority, and Cochrane was able to pick off stragglers from the Portuguese convoy as it sailed northward. By the end of July, he had secured the adherence of MARANHÃO to the Brazilian Empire through an ingenious ruse that implied the pending arrival of a large fleet and army.

Cochrane, always interested in personal financial gain, remained in Brazil's employ until 1825, at which time his services in Latin America ended. His reputation in Britain was subsequently cleared, and he was restored to the Royal Navy as a rear admiral. His contributions to independence in Latin America remain his greatest legacy. He died in London.

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**cofradía** *Cofradías* were lay ecclesiastical organizations that venerated a specific religious image. Typically, they consisted of a homogeneous ethnic or occupational group in a restricted area, frequently a village. With income derived from dues or other sources, a *cofradía* provided burial services for members and sometimes support for widows. In addition, each *cofradía* held festivals for its patron saint. Thus, it was a source of group solidarity and support.

*Cofradías* were numerous in Spain, probably more numerous than elsewhere in Europe. In the mid-16th century, Zamora had 153 for a population of 8,000; Toledo had 143 for a population of 60,000. In the province of Cuenca, there was a *cofradía* for every 48 households.

*Cofradías* in NATIVE AMERICAN villages were usually founded well after the military conquest. In Chiapa, mendicant priests founded them in the 1560s. In Central Mexico and Oaxaca, they appeared in the 17th century; in Oaxaca, they were founded into the 18th century. They offered religious offices and, at least in Central Mexico and Jalisco, provided financial support for the local cult and sometimes hospitals, frequently from earnings on communal property, including land and animals. In Yucatán, *cofradías* often operated their own estates, raising CATTLE as a way to earn resources. In Oaxaca, *cofradías* had fewer resources and less ambitious duties and expenditures. In general, the resources of *cofradías* began to decline in the 1770s.

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**colegio/colegio mayor** EDUCATION in 16th-century Spain extended from teachers and tutors of first letters to UNIVERSITIES, including the celebrated University of Salamanca. The former instructed young boys in reading, writing, arithmetic, and simple prayers and sections of the catechism. Universities offered baccalaureate and, in some cases, higher degrees. Between the two and in some cases overlapping with universities were *colegios* (primary and secondary schools), seminaries, and *colegios mayores* (residential facilities for a small number of post-baccalaureate students preparing for advanced degrees).

Spanish colonists wanted their sons to enjoy the benefits of formal education, notably employment opportunities with the church or state, and sought and encouraged the creation of schools, seminaries, and universities. Their interest coincided with the mandate of the Council of Trent that all bishops and archbishops should establish schools to educate young men for the clergy, as well as the desire of religious orders and the Society of Jesus to provide Christian education. The result was the creation of about 40 *colegios* and seminaries in New Spain, including the JESUIT Colegio Máximo of San Pedro and San Pablo in MEXICO CITY. A number were established elsewhere as well; among them was the particularly important Jesuit Colegio of San Pablo in LIMA, Peru.

Lima's Colegio of San Pablo opened in 1568 as a secondary school to teach humanities and, aside from a brief closure ordered by Viceroy FRANCISCO DE TOLEDO Y FIGUEROA in 1578, educated young Peruvian males until the JESUITS were expelled in 1767. Reopened in 1580, San Pablo gained the right to teach humanities and native and European languages but could not confer degrees, a privilege restricted in Lima to the Royal and Pontifical UNIVERSITY OF SAN MARCOS. The centrality of San Pablo was confirmed by a royal decision in 1621 that required students to receive its certification of successful completion of the humanities curriculum in order to matriculate at San Marcos. Starting with 40 students, San Pablo had expanded to about 500 in 1568 and had 1,000 or more from the 1660s to the 1760s. Admission was restricted to boys. Girls received limited education in some convents or, if from elite families, they might be privately tutored.

Until their reform in the 1770s, six *colegios mayores* in Spain (four at the University of Salamanca, one at the University of Valladolid, and one at the University of Alcalá de Henares) were the major source of new appointees to high-ranking positions in the church and state in Spain and the preferred source of appointees to similar posts in the Spanish colonies. Although the *colegios* of San Felipe in Lima and San Ildefonso and Todos los Santos in Mexico City were labeled *colegios mayores*, as a group their graduates never enjoyed the professional success of their peninsular counterparts.

The Jesuits operated a number of *colegios* in BRAZIL and every important coastal town had one. Usually, the Crown provided support for this activity by granting land in the vicinity of the town to the society.

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**Colônia do Sacramento** In 1680, the Portuguese established a fortified trading post opposite BUENOS AIRES on the northern coast of the estuary of the RÍO DE LA PLATA. Although the action supported Portugal's claim to the BANDA ORIENTAL, Spanish troops drove out the intruders on August 7, 1680, only to have Colônia returned to Portugal by treaty in 1681. Again in 1705, the Spaniards took Colônia, but in 1716, it was once more returned to Portugal. Long-term Portuguese interest in Colônia, however, was less than in the Rio Grande littoral, which they had invaded in 1737. In the TREATY OF MADRID in 1750, Portugal agreed to give Spain Colônia and claims to the Banda Oriental in return for the territory of the seven JESUIT MISSIONS in western Rio Grande.

Lack of support in Spain and Portugal for the Treaty of Madrid led to its abrogation in 1761. A successful Spanish military campaign again captured Colônia, but the gain was lost in the TREATY OF PARIS in 1763. Spain then blockaded Colônia in the hope that Portugal would ultimately give up the base. On April 1, 1776, a Portuguese victory forced the Spaniards to leave Rio Grande, where they had remained after the 1762–63 campaign.

Later in 1776, CHARLES III sent PEDRO DE CEVALLOS, leader of the earlier campaign, to the Río de la Plata with an expedition of almost 10,000 men, the largest military force Spain had sent to the colonies. After capturing Santa Catarina, Cevallos landed 6,000 to 7,000 troops near Colônia. On June 4, 1777, the Portuguese surrendered, and Cevallos's forces then demolished Colônia and sunk ships to block the harbor. The Treaty of San Ildefonso, signed on October 1, 1777, left Colônia's remains under Spanish control along with the north shore of the Plata.

Colônia was important both as a marker of Portuguese territorial ambitions and as an entrepôt for contraband TRADE to the SILVER MINING districts of CHARCAS. The latter reason more profoundly influenced its settlement, although the benefits were modest until after the WAR OF THE SPANISH SUCCESSION.

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**Columbian Exchange** Historian Alfred W. Crosby Jr. coined the term *Columbian Exchange* to describe the reciprocal flow of animals, plants, and diseases between the Old World and the New that began with Christopher Columbus's first voyages in 1492 and 1493. The decision to establish colonies rather than merely fortified trading posts in the CARIBBEAN stimulated the conscious exportation from Spain of numerous species of plants and animals and the accidental transmission of infectious diseases. A partial list of items introduced from the Old World includes SHEEP, goats, CATTLE, horses, hogs, donkeys, dogs,

**Colombia** See NEW GRANADA, VICEROYALTY OF.

cats, chickens, pigeons and doves, ducks, WHEAT, barley, rice, chickpeas, bananas, oranges, European broadbeans, mango, breadfruit, melons, onions, grape vines, sugarcane, radishes, cauliflower, and saffron. Diseases included smallpox, measles, and typhus. A partial list of items carried east from the New World includes MAIZE, potatoes and sweet potatoes, tomatoes, TOBACCO, peanuts, agave or century plant, manioc, quinine, CACAO, guinea pigs, and turkeys. Syphilis was also taken to Europe by Spaniards and perhaps by Native Americans.

The arrival of European animals, plants, and diseases had a profound effect on the Americas. Except for the llamas, alpacas, and vicuñas of the Andes, the New World lacked large domesticated animals. Horses, donkeys, and MULES transformed TRANSPORTATION and facilitated the movement of goods and precious metals. They also provided new occupations and sources of income, in the form of animal breeding and mule driving, for example.

The introduction of European cattle, sheep, goats, and chickens significantly expanded the sources of dietary protein available in the New World. Cattle hides provided leather, a versatile material that could be employed in many ways. Sheep provided wool that was quickly turned into cloth and clothing. Chickens were a source of eggs as well as meat and additionally did not destroy agricultural land. Sheep were very destructive; the rapid increase in their numbers could quickly turn rich farmland into desert through overgrazing.

The Mediterranean triumvirate of wheat, olive trees, and vines enabled Spaniards to eat and drink much as they did in Europe. Between the foods they introduced and encountered in the Americas, they enjoyed a diet far superior to that eaten by most Europeans.

The unintentional introduction of European diseases had an immediate and devastating toll on indigenous populations, who had no immunity to them. Smallpox killed thousands of NATIVE AMERICANS in Central Mexico at the time of the Spanish conquest and disfigured many more. Later EPIDEMICS of smallpox, chicken pox, measles, influenza, and other diseases repeated the devastation both there and elsewhere in the New World to the point that many demographers believe the indigenous population declined by more than 90 percent after 1492.

While the consequences of the Columbian Exchange for the New World were more dramatic, Europeans ultimately incorporated American foodstuffs into their diet to such an extent that the failure of the potato harvest in mid-19th-century Ireland provoked unprecedented outmigration. As a whole, the Columbian Exchange transformed many aspects of life in both the New and the Old World.

See also COLUMBIAN EXCHANGE (Vol. I).

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***comercio libre*** Between 1765 and 1789, the Spanish Crown sought to expand legal TRADE between Spain and the colonies by implementing *comercio libre*, or free trade, within the empire. Its goals were several: to provide protected and enlarged markets for Spanish products, agricultural and otherwise; to increase the volume and value of trade; and to increase royal revenues through taxes on trade (see TAXATION). Ships were allowed to sail directly from a number of Iberian ports to all American ports; this ended a monopolistic trading system that with few exceptions rested on sailings from the southern port of CÁDIZ to a small number of American ports, the most important being VERACRUZ in NEW SPAIN, CALLAO in PERU, and CARTAGENA DE INDIAS in NEW GRANADA.

In 1765, the Crown began the process by authorizing nine Iberian ports to trade directly with Spanish islands in the CARIBBEAN. It expanded the favored regions to include Louisiana in 1768 and Yucatán in 1770. In 1774, it allowed trade among American ports, with some restrictions. In early 1778, it added Peru, CHILE, and the RÍO DE LA PLATA to the regions that came under the new policy. The Reglamento para el comercio libre issued on October 12, 1778, consolidated the earlier legislation. By this time 13 Iberian ports (Alicante, Alfoque de Tortosa, Almería, Barcelona, Cádiz, Cartagena, Gijón, La Coruña, Málaga, Palma, Santa Cruz de Tenerife, Santander, and SEVILLE) and all colonial ports other than those in New Spain and VENEZUELA operated under the new system. Venezuela remained until the mid-1780s under the monopolistic control of the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS, and New Spain, the wealthiest mainland colony, was not included until 1789.

Despite the reference to “free trade,” the new system was free only in the sense that Spanish merchants could legally sail directly from multiple Iberian and American ports. Merchants from Britain, France, and other foreign countries remained legally excluded.

Although *comercio libre* allowed sailings from numerous Spanish ports, Cádiz was the major beneficiary. Barcelona became the second most important Spanish port for the INDIES trade with twice the imports of Málaga, the next greatest beneficiary. A detailed examination of *comercio libre* from 1778 to 1796 demonstrates that Cádiz accounted for 76.4 percent of Spanish exports, while Barcelona had 9.6 percent and Málaga 4.8 percent. The remaining Spanish ports accounted for only 9 percent of exports. Importantly, Spanish goods accounted for 57 percent of the total amount of goods shipped. Using 1778 as the base, legal trade quadrupled in the years to 1796; using 1783 as the base, the level of exports to 1796 more than doubled.

Veracruz was the largest colonial exporter to Spain and also received the largest percentage of goods from Cádiz, more than 35 percent in the years 1785–96. SILVER and GOLD were the most important colonial exports, accounting for more than 56 percent of the imports into Cádiz and Barcelona. TOBACCO (13.6 percent), CACAO (7.8 percent), SUGAR (5.5 percent), INDIGO (5.2 percent), and COCHINEAL (4.2 percent) were also important exports.

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**Companhia Geral do Comércio do Grão-Pará e Maranhão** As part of his effort to increase Portuguese control over TRADE with BRAZIL, in June 1755, the MARQUÊS DE POMBAL established the Companhia Geral do Comércio do Grão-Pará e Maranhão (General Commercial Company of Grão-Pará and Maranhão) as a privileged trading company with exclusive control over trade and navigation for Grão Pará and MARANHÃO for a charter period of 20 years. At the same time, Pombal expelled the itinerant traders known as *comissários volantes*, a vital link between Brazilian producers and foreign merchants in Portugal, and declared the Amerindians free from the tutelage of the religious orders, placing them under state-appointed officials. The company was to favor large-scale Portuguese merchants and Portuguese exports, provide transport to Portugal of the region's exports using armed convoys, reduce contraband, ensure a supply of African slaves to replace labor lost from the indigenous population, and stimulate exports from the northern captaincies (see SLAVERY).

The company proved an effective way to increase exports from Grão Pará and Maranhão. Between 1758 and 1777, it accounted for 75 percent of the exports shipped from São Luís and Belém. CACAO proved the most important export, providing 61 percent of the value of total exports. Cloves and coffee remained minor exports, showing no expansion during the company's existence. Hides were also exported, but the company encouraged the production of particularly cotton and rice, and both continued to expand after the company's demise. Cotton production from the captaincy of Maranhão more than sextupled between 1760 and 1777 to 40,553 arrobas; between 1800 and 1807, it exceeded 200,000 arrobas five times. Rice exports to Portugal expanded as well. Pará's production increased substantially after the early 1770s, although there was notable year-to-year fluctuation. Maranhão's exports of rice were negligible in 1767, but far exceeded 300,000 arrobas in both 1806 and 1807.

Although the company was successful and even provided a model for the Companhia Geral do Comércio do Pernambuco e Paraíba in 1759, both were terminated

in 1777 as part of a reaction to the fall of their creator Pombal.

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**Comunero Rebellion of New Granada** (March 16–June 7, 1781) A rebellion initiated on March 16, 1781, in the town of Socorro, province of Tunja, in the VICEROYALTY OF NEW GRANADA, quickly spread. The immediate cause was the announcement on March 15 of a decree by Juan Francisco Gutiérrez de Piñeres, regent of the Audiencia of Bogotá and visitor general, raising the sales tax (see TAXATION). Added to other fiscal and political measures that the visitor general had taken to raise revenues since his arrival in the viceroyalty in 1778, the tax increase pushed affected residents to violence.

A Spaniard with prior experience on the Chancellory of Valladolid, Gutiérrez de Piñeres was determined to demonstrate his diligence in royal service by increasing royal income to help pay for Spain's involvement in war against the British. He disregarded the local political culture, which expected consultation and compromise, and imposed from on high reorganization of the royal TOBACCO and AGUARDIENTE DE CAÑA monopolies (in the case of tobacco, restricting production to specified areas) and an increase in prices consumers paid for items controlled by other ROYAL MONOPOLIES: salt, playing cards, gunpowder, and stamped paper. Gutiérrez de Piñeres also resurrected a long-forgotten tax to support a naval squadron in the CARIBBEAN and added it to the sales tax. Additionally, he sought to replace tax farmers with royal officials who would collect taxes directly and introduced a cumbersome system to ensure that merchants did actually pay the sales tax. The use of PENINSULAR officials to implement the changes further angered New Granadans. Finally, the visitor general reaped the antagonism of indigenous people who had been resettled and lost lands in the 1770s.

The new fiscal policies directly affected the Socorro region. Adding cotton to the list of items to be taxed afflicted particularly the poor. The restriction on tobacco production deprived small producers of their source of income. Members of the local landed elite chafed at the visitor general's methods of imposing the fiscal changes.

When the rebellion began on March 16, it assumed the traditional form of declaring allegiance to the monarch but death to his agents. The rebellion spread quickly and within a month more than 4,000 insurgents had assembled in Socorro. While mestizos had initiated the rebellion and swelled its ranks, they elected to lead



the *común*—hence, the name *comuneros*—four CREOLES, one of whom, Juan Francisco Berbeo, soon emerged as commander (see *MESTIZAJE/MESTIZO*). Advancing toward BOGOTÁ, the *comunero* army of no more than 500 men defeated at Puente Real, a small military force sent by the government on May 8. The rebel victory brought Berbeo new recruits and prompted the government to negotiate in the hope of preventing an invasion of Bogotá. The flight of Gutiérrez de Piñeres from Bogotá to CARTAGENA DE INDIAS on May 13 symbolized the defeat of the fiscal changes he had imposed.

In the name of the emergency governing junta (Junta General de Tribunales) in Bogotá, Archbishop Antonio Caballero y Góngora negotiated with the rebels. At first rejecting their list of 35 demands, the junta changed its mind and on June 7, 1781, accepted a modestly revised list when informed that the Comuneros were prepared to enter the capital. With this, the rebels disbanded, and the junta secretly voided the agreement as being signed under duress. Subsequent efforts to rekindle the rebellion failed.

Although efforts at MILITARY reform in the previous decade had not been as extensive as some officials had wanted, rebellion had not taken root in provinces with a strong military presence. One reason was that men who might have been leaders of rebellion were in the militia and thus under military discipline. Caballero y Góngora, named VICEROY soon after the rebellion ended, strongly supported military reform.

Caballero also sought to expand government revenues through a renewed enforcement of the royal monopolies. Thus the Comunero Rebellion won the battle but lost the war. Viceroy-Archbishop Caballero supported strengthening the military in New Granada's interior, perceiving it as a necessary resource in the preservation of order. It would be nearly 30 years before widespread rebellion again rocked the Viceroyalty of New Granada.

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#### Comunero Revolt of Paraguay (1721–1735)

Established in 1537 by remnants of an unsuccessful attempt to create a colony at BUENOS AIRES, the town of ASUNCIÓN became capital of the province of PARAGUAY. Its location on the Paraguay River gave entrepreneurs easy access to riverine transport, but hopes that precious metals would be found in the region proved futile. Labor for AGRICULTURE and construction came from the GUARANÍ. With the compliant Guaraní also providing women as

wives and concubines for the Spaniards, the number of mestizos grew quickly (see *MESTIZAJE/MESTIZO*). By 1575, the several thousands of mestizos were considerably more numerous than Spaniards, and Guaraní was the language commonly spoken. The successful creation of the towns of Santa Fe on the west bank of the Paraná in 1573 and Buenos Aires in 1580 provided modest markets for Paraguayan products, of which WINE, SUGAR, and TOBACCO were the most important in the late 16th century. YERBA MATÉ, a type of tea, however, emerged as the province's most valuable export, as it became a beverage of choice in southern South America and even at the MINING center of POTOSÍ. Cultivated in yerba forests (*yerbales*) east of the Upper Paraná River, yerba production attracted merchants from outside Paraguay.

The Comunero Revolt in Paraguay, originating in 1721 and lasting until 1735, was a protracted dispute between the colonial elite in Asunción and the Society of Jesus and its supporters in the royal administration. The issues were both economic and political. The economic issue focused on access to Guaraní labor and the terms of its use, especially as these related to the production of yerba. Thus, there was competition between the *ENCOMIENDA* system through which mostly mestizo descendants of early Spanish colonists obtained labor and the essentially autonomous mission system put in place by the JESUITS in lands that included the best yerba stands in the region. In short, the Paraguayans sought the resources and profits enjoyed by the Jesuits. The political issue centered on favoritism by government officials toward the Jesuits and a history that exempted Jesuits from sales taxes and customs duties (see *TAXATION*).

Diego de los Reyes y Balmaseda, a successful PENINSULAR who married into a pro-Jesuit family and purchased an appointment as governor of Paraguay, ordered in 1717 a successful attack on Payaguá Indians and sent 70 captives to the Jesuits. His action angered Paraguayans, who saw their rivals benefiting while they would bear the principal risk of reprisals and an expensive and long war with the Payaguás. Subsequent actions by the governor led opponents to seek Reyes's ouster; the Audiencia of Charcas obliged and then sent a replacement, José de Antequera y Castro, to Paraguay as governor. The youthful and charismatic Antequera championed the anti-Jesuit position as he sought to exert authority over the society and its 30 missions and blocked viceregal and Jesuit efforts to get Reyes restored to office. It was the latter, supported by an army of 2,000 Guaranís from the Jesuit missions, that produced rebellion. On July 24, 1724, more than 100 leading citizens of Asunción met in an open meeting (*CABILDO ABIERTO*). They declared they would fight rather than accept Reyes or another surrogate for the Jesuits as governor and asked Antequera and the city council to organize an armed force to oppose the Jesuit-backed Guaraní army.

After throwing out the Jesuits in Asunción, a Paraguayan force of nearly 3,000 led by Antequera

defeated the Guaraní forces on August 24, 1724. The Paraguayans' victory provoked the new VICEROY of PERU, José de Armendáriz, marqués de Castelfuerte, to warn the Audiencia of Charcas to stay out of the affairs in Paraguay and order Bruno Mauricio de Zavala, the governor of the province of Buenos Aires, to lead an expedition to remove Antequera from office and reestablish control over Paraguay. By early 1725, most Paraguayans were willing to submit to Zavala, and Antequera decided to leave Asunción a month before Zavala reached it with his forces. Several years of peace followed and in 1728, after continued pressure from Viceroy Castelfuerte, the Paraguayans allowed the Jesuits to return to Asunción. Their opposition to the society, however, continued.

During the next several years, politics in Asunción grew even more complicated as some of the notables supported a new city council and others, the so-called Comuneros, supported a governing junta, which some observers considered a preface to breaking ties with Spain.

Although Antequera made his way to the Audiencia of Charcas in LA PLATA, the ministers no longer supported him; instead, they had him arrested and sent to LIMA. There, the judicial process lasted more than five years, but when a supposed link between Antequera and the Comuneros in Paraguay was discovered, on July 5, 1731, he and one of his close friends were executed. When word of his execution reached Asunción, the Comuneros broke ranks. The Jesuits were again expelled, but there was no fighting between their Guaraní forces and the Comunero army.

The arrival of a new governor, Manuel Agustín de Ruiloba, with a military force of 350 soldiers in late July 1733 pushed the revolt to its next stage. Ruiloba quickly outlawed the governing junta, was recognized by the city council as the legitimate governor, and reorganized the militia. In September, an armed rebellion began that took his life. In the countryside, rebels organized a general junta while its opponents supported the bishop of Asunción, Juan de Arregui. Meanwhile Governor Zavala of Buenos Aires had arrived in Corrientes with an army. The expectation that he would invade Paraguay brought him supporters from both notables in Asunción and rebels who could see their cause dwindling. In March 1735, the rebellion was virtually over and in April 18 accused rebels were found guilty. The Jesuits returned to Asunción in October 1735.

The Comunero Revolt of Paraguay looked backward to a time of substantial de facto autonomy resulting from its relatively isolated location. The Paraguayans' opposition to the Jesuits persisted, however, until the society's expulsion in 1767. Soon afterward, the charges against Antequera were revisited in Madrid, and ultimately he was declared a loyal royal servant. As part of his rehabilitation, his nephew Juan de Dios Calvo Antequera was named an *OIDOR* of the Audiencia of Charcas.

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**Condorcanqui, José Gabriel** See TÚPAC AMARU II.

**congregación** Efforts to force NATIVE AMERICANS to move from hamlets into new Spanish-style villages began in NEW SPAIN in the mid-1550s and expanded significantly in the years 1590 to 1605. The principal stimuli for this relocation were the friars' belief that more populous concentrations of indigenous people would facilitate conversion and promote virtues such as orderly living and sobriety; government officials' conviction that the villages would make administration of the Amerindians and TRIBUTE collection more efficient and facilitate protection of the Amerindians under the law; and the less frequently enunciated interest on the part of the colonists in securing vacated lands.

The resettlements followed an official review of existing communities and determination of which ones would be moved and whether the move necessitated the assignment of new agricultural lands because the old ones were too distant. The transplanted indigenous people received house lots and lands for growing MAIZE.

Opposition to resettlement came, not surprisingly, primarily from affected indigenous communities. They argued, for example, that their old lands were more fertile or better protected against CATTLE. They also protested being combined with indigenous peoples from different communities. Rarely were they successful. Moreover, following resettlement, Spanish officials took steps to prevent the indigenous from returning to their homes, even destroying houses that were still occupied.

The number of *congregaciones* created in the Valley of Mexico is unknown, although at least 30 were planned. The results were not as the Spaniards had intended. The resettlements did, however, concentrate the smaller population remaining after decades of EPIDEMICS and thus facilitate its control.

In Oaxaca, the resettlement program from 1595 to 1605 resulted in a small number of *congregaciones*, but most did not last out the 17th century. Spanish desire for access to indigenous labor had some influence on where the new settlements were located.

In Yucatán, as elsewhere in New Spain, the new villages were laid out in the grid pattern that characterized Spanish settlement. Both a church and a town hall were located in a central square. The program began in the 1550s under the direction of FRANCISCANS and with the

support of a royal visitor. In the newly created towns, from two to eight former villages were brought together. Typically outlying hamlets, villages, and subordinate towns were brought together under the prequest local centers.

Analogous to the *REDUCCIÓN* in PERU and the *ALDEIA* in BRAZIL, the *congregación* in New Spain served to simplify indigenous society from the bottom up, creating larger units that facilitated Spanish rule.

See also *CONGREGACIÓN* (Vol. I).

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**consolidación de vales reales** Spain's involvement in WARS with France and then Britain in the 1790s forced a government dependent on largely inflexible tax revenues to resort again to the sale of *vales reales*—large-denomination, interest-bearing, paper bills that circulated as money. The continued value of these treasury bills was directly related to the perceived ability of the government to redeem them and to pay the interest.

Increasingly desperate, in decrees of September 19, 1798, CHARLES IV ordered the sale of real property in Spain belonging to a variety of religious bodies, with the proceeds to be deposited in the Royal Amortization Fund at an annual interest of 3 percent. Owners of the treasury bills could use them to purchase the properties, and the Crown could then retire the bills from circulation. Since reform-minded government officials considered lands held by ecclesiastical organizations to be inefficiently utilized, they believed that this consolidation or amortization scheme would result in land transfer to more productive owners. As a scheme to retire the treasury bills and redistribute land away from the CATHOLIC CHURCH, it could have worked; the flaw in the plan was that the Crown did not retire the treasury bills.

On December 26, 1804, the Crown extended the consolidation of treasury bills to the empire. Since most ecclesiastical investment in the colonies was in loans and perpetual impositions on property rather than land, however, the land reform envisioned for Spain could not occur in the colonies.

In the colonies, between 8.5 and 13 million pesos were collected from New Spain alone. The consolidation of treasury bills upset CREOLES and PENINSULARS alike and caused considerable antipathy toward the Crown. While PERU provided only about 1.5 million pesos, its collection brought loud protests from the city council of LIMA. The implementation underscored that New Spain, as other colonies, held second-class status in the empire

and would be sacrificed for the interests of Spain. Thus, it strengthened the case of those who wanted greater autonomy within the empire.

A royal order of April 25, 1808, suspended the sale of property for the consolidation of treasury bills in Spain. Soon afterward, the highly unpopular consolidation was ended in the colonies as well.

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**Constitution of 1812** The CORTES OF CÁDIZ opened on the Isle of León adjacent to CÁDIZ, Spain, on September 24, 1810, a time when the French were laying siege to the great port city. Before the day ended the deputies, 30 of whom were representing the overseas population, declared that the General and Extraordinary Cortes legitimately represented the "Spanish nation" and embodied national sovereignty.

With this declaration, the deputies asserted the right to write a constitution that would serve as the foundation of government for the *Spanish Nation*, a term that encompassed the peoples of Spain and its overseas (*ultramar*) dominions, or *colonies*, a term carefully avoided. After declaring FERDINAND VII's abdication null and void, the deputies decreed a separation of powers in which the Cortes retained legislative authority, granted the COUNCIL OF REGENCY executive authority until the Cortes determined another type of executive, and confirmed the nation's judicial bodies (courts). When the Council of Regency refused to recognize the Cortes as the repository of national sovereignty and resigned, on October 28, 1810, the Cortes appointed a new Council of Regency.

In early March 1811, the Cortes established a commission to review relevant materials dating back to the days of the JUNTA CENTRAL and to draft a constitution for Spain and the empire. After extensive drafting and debate, on March 18, 1812, the Cortes approved for the "Spanish Nation" a constitution that was the most liberal in Europe at the time. Its opponents then and subsequently have maintained that the Cortes did not represent the Spanish nation, and thus, the constitution lacked legitimacy.

Underpinning the entire constitutional system were elections and the definition of eligible voters. The latter left the population overseas permanently underrepresented, because to be eligible a person had to have originated in Spanish lands or obtained a letter of citizenship

from the Cortes. This provision meant that Spaniards, Amerindians, and persons with ancestors from these two groups alone (mestizos) were eligible voters while other *CASTAS*, including mulattoes, and black slaves were not because of their African origins (see *MESTIZAJE/MESTIZO; MULATO*). As a result, the number of deputies from Spain would exceed those from overseas. Nonetheless, the introduction of elections, although indirect and complex, for deputies of the Cortes as well as for seven members of each *PROVINCIAL DEPUTATION* and for members of the *MUNICIPAL COUNCILS* meant that the idea of representative government emanating from Spain quickly took root.

The constitution defined the “Spanish Nation” as all Spaniards in both hemispheres. This free and independent nation was not the patrimony of any monarch or royal family. Sovereignty resided in the nation, which thus had the sole right to establish its fundamental laws or constitution. Unlike overlapping authority that characterized royal government before 1808, authority would be divided among the Cortes (legislature), the monarch, and the courts. Catholicism would be the nation’s only religion.

The constitution maintained a hereditary, constitutional monarchy vested in Ferdinand VII of the *BOURBON DYNASTY*, provided he swore allegiance to the constitution. His powers included serving as commander in chief, declaring war and peace, sanctioning and promulgating laws as well as issuing decrees for their implementation; the right to name and dismiss ministers and to name civil, ecclesiastical, and *MILITARY* officials; and a veto that required multiple legislative sessions for the Cortes to override. While these were substantial powers, the king was subject to a number of restrictions. These included allowing the Cortes to meet as provided by the constitution; prohibitions on leaving Spain without permission of the Cortes, alienating prerogatives, authority, or Spanish territory; imposing taxes; making offensive alliances or commercial treaties without the consent of the Cortes; depriving citizens of their individual liberty; marrying without permission of the Cortes; and dependence on the Cortes for financial support. The constitution clearly and intentionally limited the powers of the monarch as it sought to prevent the rise of a royal favorite, such as *MANUEL GODOY Y ÁLVAREZ DE FARIA*, or further abdications such as those of Ferdinand VII and *CHARLES IV* to Napoleon.

As the Spanish nation’s legislative body, the Cortes would meet annually for at least three months and administer a number of specific responsibilities: receive the monarch’s oath of allegiance to the constitution; resolve questions of succession to the throne; create or terminate public offices; determine public expenses; establish taxes annually; protect freedom of the press; and ensure that officials performed their duties.

The constitution also changed the pre-1808 system of councils, such as the Council of Castile and the *COUNCIL OF THE INDIES*. In place of them, it established

a 40-member Council of State that would include “at least” 12 councilors who had been born in the *provincias de ultramar* (colonies).

The constitution significantly reduced regional executives’ responsibilities. Rather than *VICEROYS* and captains general, it created the position of *jefe superior* (political executive) for each province. The *jefe superior*, the district’s *INTENDANT*, and seven elected members made up a provincial deputation; 19 deputations were created for the overseas territories. The deputation had responsibility for tax collection, implementation of legislation by the Cortes, and a variety of administrative responsibilities, including the creation of elected *MUNICIPAL COUNCILS* (*AYUNTAMIENTOS*) in towns with a population of more than 1,000 persons.

Creation of the new municipal councils was a profound change in two ways. First, the citizens (*ciudadanos*) of the towns elected the mayor and aldermen; this ended the hereditary position of alderman (*REGIDOR*). Second, the number of municipal councils mushroomed; in New Spain, by 1814, there were 896 where fewer than 20 had previously existed.

As a document written by *PENINSULARS* and *CREOLES*, the Constitution of 1812 offered many provisions acceptable to *AUTONOMISTS* and persons in the overseas territories who wanted total independence. The *PLAN OF IGUALA* specifically referred to the document as in effect concerning treatment of crimes until a new, Mexican constitution replaced it. The constitution was an important source of postindependence ideas throughout Spanish America.

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**consulado** Modeled after wholesale merchant guilds in Burgos and SEVILLE, the corporate bodies known as *consulados* were authorized for MEXICO CITY in 1592 and LIMA in 1593 and came into existence in 1594 and 1613, respectively. Aside from a comparatively ephemeral *consulado* in Santa Fe de BOGOTÁ from 1694 to 1712, no more were created in the Americas until the 1790s, when the Crown authorized *consulados* for BUENOS AIRES, CARACAS, GUATEMALA, HAVANA, VERACRUZ, SANTIAGO DE CHILE, GUADALAJARA, and CARTAGENA DE INDIAS. The new tribunals, of course, reduced the scope, power, and influence of those in Mexico City and Lima.

*Consulados* had jurisdiction over legal cases involving their member wholesale merchants and commerce. In addition to this role as a judicial tribunal, and in many ways more important, *consulados* represented the interests of the wealthiest and most powerful of their members, the guilds of wholesale merchants and shippers. The

Ordinances of the Consulado of Mexico made membership mandatory for all residents who made their living through TRADE and the sale of merchandise.

Because of the resources they could muster, the Consulados of Mexico and Lima engaged in tax farming. The guild in Mexico farmed the sales tax (*ALCABALA*) for more than a century, being replaced only in 1753. The Crown also utilized the *consulados* when seeking loans or donations.

Although merchants born in either Spain or the colonies belonged to the *consulados* of Mexico City and Lima, the PENINSULARS were dominant. In Mexico City, from 1742 onward, the top positions in the *consulado* rotated between parties from Santander and the Basque Provinces (see *BASQUES*). Merchants from other parts of Spain or the colonies had to join one of the two groups or abstain in elections.

As the leading voices for monopolistic trade, the Consulados of Mexico City and Lima were the most powerful lobbies in the empire. Both *COMERCIO LIBRE* and the creation of other *consulados* reduced their reach, although the new bodies had only a limited time to demonstrate their utility.

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**converso** In Spain, Jews or, less commonly, others who converted to Christianity were known as *conversos*. These new Christians became important in Spain following anti-Jewish riots in a number of urban locations in 1391. Faced with death if they did not convert, thousands of Jews abjured their faith and accepted Christianity. Not surprisingly, Old Christians, that is, persons without Jewish or Muslim ancestry, doubted the sincerity of these forced conversions and later the Christian beliefs of the *conversos'* descendants.

Unlike the Jews from whom they descended, *conversos* were originally eligible for royal and ecclesiastical offices. Starting in the mid-15th century, however, various municipal, educational, and religious bodies refused to allow *conversos* to enter their ranks as virulent opposition to them assumed the characteristics of earlier anti-Semitism. Encouraged by popular anti-*converso* sentiment that was fueled by perceived *converso* wealth and a general view that the New Christians threatened the well-being of a Christian state, Ferdinand and Isabella established the Tribunal of the INQUISITION in Spain primarily to investigate the sincerity of the Christianity of

the estimated 80,000–100,000 *conversos*. When in 1492 the monarchs expelled the Jews who would not convert, perhaps 50,000 to 150,000 Jews left permanently; like their ancestors, a significant minority of *conversos* was active in TRADE. Enough Jews went to Portugal, where most converted in 1497 rather than moving again, that Portuguese merchants were soon considered New Christians and, thus, Jews. Portugal established the Inquisition in 1547.

Castilian monarchs forbade the entry of *conversos* into the colonies of the New World, but the restrictive legislation was never totally effective. In any case, by the time of the conquests of NEW SPAIN and PERU, many Jewish *conversos* from Spain were resident in Portugal.

PHILIP II added Portugal and its colonies to his realms in 1580, a development that made it easier for Portuguese *conversos* to enter Spain. Reinvigorated prosecution by the Portuguese Inquisition also stimulated some Portuguese *conversos* to return to Spain. Particularly between 1580 and 1640, others entered the Spanish Empire, including via BRAZIL, probably in unprecedented numbers. Since many of them were involved in commerce and finance, LIMA was particularly attractive as the entrepôt of Spanish South America and funnel for both trade and SILVER from POTOSÍ. Successful *converso* merchants in the City of Kings became very prominent.

Within 17th-century PERU, the litany against New Christians included charges that they held heretical views and were secret Judaizers; engaged in unfair trading practices because of international connections, especially with the Dutch; were disloyal to Spain; and conspired with subversive slaves and indigenous people. It was the presence of prominent and wealthy Portuguese New Christians in Lima that contributed to the Great Jewish Conspiracy from 1635 to 1639, when the Inquisition arrested nearly 100 suspected New Christians. The result was an *AUTO DE FE* in 1639 at which 11 were burned at the stake as secret Judaizers and 52 others were punished with exile, whipping, and public shaming.

In NEW SPAIN, most heresy cases occurred in the late 16th century and the decade of the 1640s. Between 1571 and 1700, the total was only 525 cases of heresy, and some of these involved Protestant foreign seamen. After the mid-1660s, cases involving *conversos* were minimal.

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**corregidor/corregimiento** The abuses associated with the *ENCOMIENDA* system spurred the Spanish Crown to replace *encomenderos* with district officials usually known as *alcaldes mayores* in NEW SPAIN and *corregidores de indios* in PERU (see *ALCALDE MAYOR*). In some cases, the term *governor* was also used.

In Peru, the office of *corregidor* was first established for Spanish municipalities and their lands, territorial units known as *corregimientos*. *Corregidores* had direct authority over the Spanish population but worked through *KURAKAS* to govern the indigenous people within the jurisdiction. The original office was restricted to the Spanish population (*corregidores de españoles*). Normally, men in Spain were granted five-year terms at the time of appointment, while those already in the colonies received three-year terms.

The creation of *corregidores de indios* in Peru dates to 1548, but early attempts foundered under pressure from *encomenderos*. Another attempt began under President Lope García del Castro in 1565, but it required VICEROY FRANCISCO DE TOLEDO (1569–81) to effect implementation throughout the viceroyalty. By about 1630, there were 78 *corregidores de indios* in the *AUDIENCIA* districts of LIMA and CHARCAS combined.

A *corregidor*'s responsibilities included internal security, collecting *TRIBUTE*, assigning *MITAS*, adjudicating local disputes, and carrying out directives from an *audiencia* or its chief executive. There was no promotion system to reward meritorious *corregidores*, and, at least partly in consequence, many, if not most, were more interested in personal gain than upholding legislation that would reduce it. The victims were the indigenous people, who were forced to provide personal service, *TRANSPORTATION*, cloth, and other goods in return for below-market or even no payment. Well before the middle of the 17th century, *corregidores* introduced the *REPARTO*, the forced distribution of animals and merchandise, in their districts. They worked with *kurakas* and sometimes parish priests (*curas doctrineros*) to effect both the distribution of goods and the subsequent collection of payment among the indigenous population.

In the 16th and much of the 17th centuries, viceroys appointed most of the *corregidores* within their jurisdictions. Thus, the position was an important source of patronage that enabled viceroys to reward retainers brought from Spain as well as men already in the colonies. In 1678, however, the Spanish Crown began to sell appointments, restricting the viceroys to naming only a dozen *corregidores* each aside from interim appointments.

Added to the costs of travel, purchasing an appointment meant that the *alcalde mayor* almost always arrived at his post in debt. Anxious to pay off the obligation as well as make a profit, *corregidores* resorted to a variety of illegal means to extort either cash or goods from the indigenous within their district. The position of *corregidor* was replaced by that of *SUBDELEGADO* when the *INTENDANT* system was instituted in the 1780s.

See also *CORREGIDOR/CORREGIMIENTO* (Vol. I).

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**Cortes of Cádiz (Cortes Generales y Extraordinarias de España)** The constitutional crisis provoked by the abdications of FERDINAND VII and CHARLES IV in May 1808 led to successive governments of resistance—regional *JUNTAS*, the *JUNTA CENTRAL*, and the *COUNCIL OF REGENCY*. With the *Junta Central*'s appointment of the *Council of Regency* to replace it, the legitimacy of the government became increasingly questionable. Both to address the issue of legitimacy and to ensure there could be no repetition of rule by a royal favorite such as MANUEL GODOY Y ÁLVAREZ DE FARIA, calls for the convocation of the *Cortes* to write a constitution soon started to appear. Among its last acts, the *Junta Central* decreed that the *Cortes* would meet and issued instructions on the selection of deputies for Spain. On February 14, 1810, the *Regency* issued instructions for the multistep selection of deputies from the colonies.

Elections for proprietary overseas deputies took place in late 1810 and early 1811. The procedure allowed the city council of each provincial capital to select a deputy by drawing the name of a man born in the province from a pool of three candidates. After protests by *PENINSULARS*, however, resident Europeans were allowed to be candidates by decree of August 20, 1810. With the exceptions of CHILE and parts of the *VICEROYALTY OF RÍO DE LA PLATA*, *VENEZUELA*, and *NEW GRANADA*, elections were held, thus providing for a second time both an electoral experience and the opportunity for *MUNICIPAL COUNCILS* to send instructions or lists of grievances to Spain with the representatives. The process thus ensured growing politicization where elections were held.

The French occupation of most of Spain and the time it took to communicate with the colonies and organize indirect elections meant that many duly elected or proprietary deputies to the *Cortes* would not arrive at the Isle of León when the *Cortes* was to open. Anticipating this, the *Regency* devised a system in August 1810 for selecting substitute deputies, or *suplentes*, from the men of an electoral district who were already in CÁDIZ or Isle of León. This approach was extremely important for the colonies, since only one proprietary representative was present at the inaugural meeting of the *Cortes*.

The General and Extraordinary *Cortes* opened on September 24, 1810, in Villa de la Real Isla de León, usually shortened to Isle of León and renamed San Fernando by the *Cortes* on November 27, 1813. At the opening session were 104 deputies; of this number 47 were *suplentes* and 29 were from the colonies; over the next nearly three years, a total of approximately 300 men would serve in the *Cortes*, 63 of them Americans. The

American deputies included at least 39 who had studied civil or canon law and 11 who had obtained a doctorate in theology. In terms of professions, 25 were clerics, 22 were government officials, 14 followed military careers, and two were wholesale merchants. Although the representation shifted in the course of the Cortes's existence, approximately one-third of the deputies were clerics; one-sixth, nobles; and the balance, mainly professionals drawn from the rest of the population.

The Cortes of Cádiz was remarkable for the influence of men of liberal persuasion. The unicameral organization ignored the historic estates of the nobility and the clergy. The need to rely on *suplentes* meant that both the men elected and those who elected them tended to be young, very patriotic, and anxious to prevent a repetition of a powerful favorite gaining power as well as a monarch's abdication to a foreigner. Such men considered a written constitution to be the solution to three centuries of misrule.

In regard to the Americas, the Cortes failed to develop a coherent policy to pacify insurgency. Equally important, it did not implement the promised equality embodied in decrees by the Junta Central, Regency, and the Cortes itself.

As the number of American deputies indicates, the colonies were in a distinct minority throughout the life of the Cortes of Cádiz. The extent of their participation, in fact, had been important to Americans from the time that the Junta Central had sought colonial representatives. The opening of the Cortes again brought this issue to the surface. On its second day, José Mexía Lequerica, a *suplente* from QUITO, presented on behalf of the other American deputies a proposal to elect additional New World representatives at the rate of one for every 50,000 inhabitants, the same basis employed in Spain. Iberian deputies, of course, opposed this idea for it would have given the colonies a substantial majority of deputies. American representatives did not give up, but a division among them allowed for a compromise.

On October 15, 1810, the Cortes issued a decree specifying equal rights for persons derived from Spain and its overseas dominions. This wording meant that Spaniards, Amerindians, and mestizos would be counted in determining representation but eliminated Africans and persons descended from them, that is, *MULATOS* and other *CASTAS* (see *MESTIZAJE/MESTIZO*). The compromise confirmed that a majority of deputies would be from the Iberian Peninsula; it did not end debate on the issue. At the head of 11 propositions submitted by the American deputies as a group on December 16, 1810, was another call for equal representation. The final resolution as embodied in the CONSTITUTION OF 1812, however, continued the compromise while declaring that in both hemispheres there would be one deputy for every 70,000 inhabitants, thus providing a veneer of equality over a reality that excluded *castas* from the count used to apportion deputies.

On September 20, 1813, the Cortes adjourned, and the regular Cortes opened in Cádiz five days later.

The Cortes of Cádiz's most significant accomplishment was to serve as a government of resistance even after JOSEPH I abandoned Madrid and it was clear that the French were retreating from the peninsula. The Constitution of 1812 written by deputies from Spain and overseas was a remarkable document, indeed the most liberal constitution of its time. The return of Ferdinand VII to Spain and his nullification of the constitution along with all other legislative changes since he had left Spain in 1808, however, relegated much of the Cortes's work to a repository of ideas.

For the provinces overseas, the Cortes provided a new opportunity for securing greater autonomy with an all-encompassing "Spanish Nation." While it raised expectations for change, the Cortes's failure to address and follow through satisfactorily on the issue of equality, in particular, meant that it missed an opportunity to pacify the colonies and instead increased colonial politicization and frustration.

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**Costa Rica** After earlier efforts that included the creation of the city of Cartago in 1563, Spaniards established control of the highland region of present-day Costa Rica in the 1570s. A lesser area of Spanish settlement was on the Pacific coast. As had begun earlier in other parts of present-day Central America, some GOLD panning took place, but its modest results were an inadequate basis for an ECONOMY. Epidemic disease in the latter 1570s killed much of the indigenous population and left highland Costa Rica with a shortage of labor. In the early 1680s, the population of the colonial capital of Cartago included only 475 Spanish property holders (*VECINOS*).

Located between NICARAGUA to the northwest and PANAMA to the southeast, Costa Rica was part of the Audiencia of Guatemala, and its economic role centered on AGRICULTURE, pastoral activities, and the provision of foodstuffs (see *AUDIENCIA*). It sent pigs, hens, flour, and MAIZE from its modest CARIBBEAN ports to PORTOBELLO and CARTAGENA DE INDIAS and, with the addition of CATTLE products including hides and tallow, from the Pacific port of La Caldera to Panama. In addition, Costa Rica raised and provided pasturage for enough MULES to become a major supplier of them to Panama. The town of Cartago was an important way station on the route to Panama from the major breeding center of La Choluteca near the boundary between Nicaragua and GUATEMALA. By the 1640s, however, it had lost its Pacific market to producers from PERU and the Audiencia of Quito. Only CACAO

smuggling at the end of the 17th century restored a precarious prosperity to a small part of the population.

By the 1660s, entrepreneurs on the Caribbean side of Costa Rica perceived cacao production as their potential economic salvation. The Matina Valley was the focal point for extensive planting, with labor provided for more than two decades by Amerindians of the Talamanca area forcibly pressed into service. When the Crown prohibited this labor, the supply of workers dwindled; TAXATION further afflicted the producers. Attacks by BUCCANEERS and, by the end of the century, the multiethnic Mosquito ZAMBOS were additional burdens. The result was modest income for nearly all planters; the most successful, Antonio de Acosta Arévalo, was almost certainly involved in SMUGGLING. Overall, by the end of the 17th century, Costa Rica was a poor region whose lack of SILVER coin forced reliance on cacao beans as a medium of exchange, a condition that continued into the mid-19th century. Persistent and systematic contraband by the early 18th century offered a partial solution, but Costa Rica suffered economic woes throughout much of the colonial era.

With the creation of the TOBACCO monopoly in the *audiencia* district of Guatemala in 1765, limited areas of Costa Rica, along with HONDURAS and Guatemala, were approved regions of production. While the monopoly boosted royal revenue, tobacco production was an inadequate stimulant of economic growth. That required the large-scale exportation of coffee, which began in the 1840s.

In 1821, municipal representatives in Costa Rica agreed on independence from Spain. After a brief association with independent Mexico, in 1824 the region joined the Federal Republic of Central America.

See also COSTA RICA (Vols. I, III, IV); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**Council of Regency (El Supremo Consejo de Regencia de España e Indias)** In late January 1810, the JUNTA CENTRAL fled SEVILLE ahead of the French army and took refuge on the Isle of León, a short distance from CÁDIZ. Recognizing its inability to govern, the Junta Central appointed a five-member Council of

Regency on January 29 to serve as a transitional government until the CORTES OF CÁDIZ met. The members of the Regency starting February 5, 1810, were Pedro de Quevedo y Quintana, bishop of Orense; Francisco de Saavedra, councilor of state and secretary of state; Francisco Javier Castaños, captain general of the Royal Armies; Antonio de Escaño, councilor of state and secretary of the navy; and Miguel de Lardizábal y Uribe from Mexico, selected to represent the Americas. On February 9, 1810, the French began to bombard Cádiz in a siege that continued until August 25, 1812.

The primary responsibilities of the Council of Regency were to continue the WAR against JOSEPH I and the French armies of occupation, to maintain the alliance with England, to retain the colonies, and to oversee the opening of the Cortes convoked by the Junta Central shortly before its demise. Some of its members opposed the Cortes meeting as a unicameral body, a revolutionary change from its historic origins as representing three estates and from its most recent meeting in Madrid in 1789, when representatives of 37 CITIES were present. Nonetheless, on February 14, 1810, the Regency ordered the chief executives in the colonies to conduct indirect elections for deputies to the Cortes. The need to finance the war was such that the Regency turned to the Junta of Cádiz for funds and thus gave the merchants of Cádiz significant influence. Although divided internally, the Regency managed to keep the resistance alive despite the French occupying most of Spain.

The Council of Regency barely outlasted the start of the General and Extraordinary Cortes of Cádiz on September 24, 1810. On that date, the Cortes decreed that the five regents must swear to recognize that the Cortes embodied national sovereignty and that the Regency was now only the executive branch of government. The bishop of Orense resigned rather than comply, and soon, the remainder of the Regency did the same. On October 28, the Cortes appointed a new Council of Regency composed of Lieutenant General Joaquín Blake, general in chief of the Army of the Center; Pedro Agar, director general of the Naval Academies and rear admiral (*jefe de escuadra*); and Gabriel Ciscar, governor of the Plaza of Cartagena de Levante and designee as minister of the navy.

The new Regency understood its role in relationship to the Cortes but was itself replaced on January 22, 1812, by a Regency composed of the duque de Infantado, lieutenant general of the Royal Armies; Joaquín Mosquera y Figueroa, a councilor of the Indies who had been born in Popayán; Juan María Villavicencio, lieutenant general of the Royal Navy; Ignacio Rodríguez de Rivas, “of the King’s Council”; and the count of La Bisbal, lieutenant general of the Royal Armies. Juan Pérez de Villamil then replaced La Bisbal.

On March 8, 1813, the Cortes of Cádiz named the three senior councilors of state to form a provisional Regency: Pedro Agar, Gabriel Ciscar, and Luis de



Borbón, cardinal archbishop of Toledo. On March 22, provisional status ended. This Regency went to Madrid in January 1814.

On the night of May 10–11, 1814, Agar and Ciscar were arrested on orders from FERDINAND VII and subsequently sentenced. The former regent Blake was spared, for he had been imprisoned by the French since surrendering his army on January 10, 1812, and was not released until after the Treaty of Valençay between Ferdinand VII and Napoleon had been signed. In 1815, Ferdinand named Blake to chair the Junta Militar de Indias. Following the RIEGO REVOLT on March 18, 1820, the ex-regent was named president of the Council of State.

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**Council of the Indies** Originally a subcommittee of the Council of Castile, in 1524 the Council of the Indies became a formal institution with responsibilities for legislation, administration, finance, commerce, military matters, justice, and royal patronage in the overseas territories. As a “royal and supreme council,” it was independent of other councils.

Although the size and composition of the Council of the Indies varied over time, it normally included a president or governor; councilors, originally *ministros togados*, or men trained in law (*LETRADOS*); one or two Crown attorneys (*FISCALES*); other high-ranking officials; and staff. From 1626 onward, it also had *ministros de capa y espada*, or non-*letrados*.

With royal approval, the Council of the Indies issued legislation dealing with a plethora of colonial matters. Of particular concern was the treatment of the Amerindians. It was also the final court of appeals for some civil cases originating in the colonies. The council appointed visitors to investigate both general conditions and the actions of specific officials. The judicial reviews (*RESIDENCIAS*) held at the end of many officials’ tenure in office went to the council for final judgment.

A special section of the Council of the Indies known as the Cámara was created in 1600, eliminated in 1609, restored in 1644, and in existence save for a brief spell in the early 18th century until the crisis of 1808 brought an end to its existence. After its founding, the Cámara was responsible for recommending candidates to the king for appointment to *AUDIENCIAS*, high-ranking ecclesiastical positions, and some other posts just like the Cámara of Castile was for Spain.

During the 17th century, the powers of the Council of the Indies were reduced as kings and their favorites established special committees or *JUNTAS* to deal

with many issues previously considered by councils. In September 1717, PHILIP V clarified that his ministers (*via reservada*) were responsible for matters concerning war, finance, and commerce. The council’s portfolio henceforth included only judicial cases, municipal matters, and patronage over judicial and ecclesiastical positions. The definitive creation of the Ministry of the Navy and the Indies in 1721 confirmed this division of responsibilities.

For most of its history, the Council of the Indies was considered second to the Council of Castile. As a result, senior *ministros togados* were regularly advanced to the Council of Castile, a promotion system that reduced the Council of the Indies’s expertise in American affairs. Under the HABSBURGS, monarchs named 217 *letrados* to the Council of the Indies; about one-third of them advanced to the Council of Castile. While this practice unnecessarily reduced the expertise gained by serving on the Council of the Indies, the Crown also appointed few men with personal experience in the colonies. During Habsburg rule from 1516 to 1700, only eight men went directly from an American *audiencia* to the Council of the Indies. Another six men moved directly from American service to the council between 1701 and 1750, and six more with experience in the colonies were named before a policy change in 1773. In that year, the Council of the Indies was declared equal to the Council of Castile and the terminus of a promotion ladder. Within several years, new *ministros togados* and Crown attorneys were almost invariably men with prior service in the colonies. The consequence was to turn the Council of the Indies into an unparalleled store of information about colonial affairs.

During Spain’s war of independence against the French, the Councils of Castile and the Indies were briefly merged, separated, and then eliminated. FERDINAND VII’s return to authoritarian rule in 1814, however, restored the Council and the Cámara of the Indies to their 1808 configurations. They disappeared again in 1820–23 but were reconstituted once more after the liberals fell from power. Finally, in 1834, the Council of the Indies was definitively abolished.

See also COUNCIL OF THE INDIES (Vol. I).

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**credit** Credit was the indispensable lubricant of commercial life in the colonies. This resulted from a shortage of circulating coinage, the lengthy time that plagued transactions conducted over long distances, and inadequate capital. Probably everyone involved in buying and selling almost anything both owed and was owed money.

The failure of a major merchant banker affected an entire network.

In the absence of banks in the colonies, wholesale merchants, merchant creditors for miners (*aviadores*), the royal treasury, the CATHOLIC CHURCH, and the Tribunal of the INQUISITION were important creditors. Wholesale merchants (and other private creditors) borrowed and lent money for riskier ventures and short terms at rates higher than the 5 percent usually considered acceptable according to canon law's restrictions on usury. A 1639 example documents landowners owing "live and deceased" merchants significant sums at about 10 percent interest.

The importance of merchant and miner lenders in NEW SPAIN expanded in the 18th century. They provided cash and textiles and received produce in return. The recipients of the loans then traded cloth for labor or produce. The effective rate of interest might have been as high as 24 percent. Merchants also provided the performance bonds (*fianzas*) required of new government officials of many types and financed *alcaldes mayores* and *corregidores* and the goods they distributed through *REPARTOS* (see *ALCALDE MAYOR*; *CORREGIDOR/CORREGIMIENTO*).

Commercial interest rates obtained by long-distance merchants in QUITO from 1590 to 1610 ranged from 10 percent when the destination was GUAYAQUIL, 25 percent for trips to LIMA, and 30 percent to POTOSÍ, to 40 percent to MEXICO CITY and 100 percent for trips to SEVILLE. It is noteworthy that the rates varied by destination rather than the merchandise transported, the biggest risk being TRANSPORTATION.

All wholesale merchants in 17th-century Mexico dealt in SILVER. Merchants played a critical role in silver MINING for they extended large-scale, short-term credit for merchandise, animals, illegal MERCURY, and other items they provided to mine owners through networks that included *alcaldes mayores*, retailers, assayers, priests, and muleteers. In the early 1650s, for example, mineowners in Pachuca required more than 100,000 pesos of credit annually. At the same time Mexico City merchant bankers were important in financing mining in ZACATECAS. Often, the loans of 2,000 to 10,000 pesos went to local agents who lived in mining towns and promised to repay the amounts plus interest in four to 12 months. Traveling merchants were also sent from Mexico City to mining towns both to sell merchandise and to collect current or accumulated debts that in some cases exceeded 10,000 pesos. Until the latter part of the 18th century, merchants normally became mine owners only if they had foreclosed on the property.

At the top of the credit hierarchy were silver merchants who supplied silver bar to the MINTS. Paid in silver bar for credit they had extended to miners or other merchants, they profited from the extent to which they discounted the value of the bar as well as illegally through arrangements with corrupt mint officials. Indeed, mint officials in New Spain, at least, were often silver merchants earlier in their careers.

The royal treasury was also a major creditor, for it made advances of necessary components of the process for refining silver. In New Spain, miners purchased the essential mercury and salt from the royal monopoly on credit. In 1638, debtors in the district of Zacatecas owed almost 700,000 pesos for these two items. After the expulsion of the JESUITS in 1767, the Crown sold the society's properties on credit at 3 percent for terms between three and 50 years.

The Catholic Church, often considered the major banking institution in the colonies, lent limited amounts of cash. Within the church, religious orders, especially female orders, made low-risk loans usually but not always with landed property as collateral. The objective was to earn usually 5 percent interest annually; with the yield fixed, there was no advantage to arranging for repayment of principal, so most loans remained outstanding as long as the borrower paid the interest as required. In 1714, for example, the Convent of Santa Clara de Jesús loaned an *OBRAJE* owner 2,500 pesos at 5 percent with the *obraje* and the owner's slaves as collateral. *COFRADÍAS* also made loans.

At the most basic level of daily transactions for food and drink, credit was also indispensable. No owner of a grocery store (*PULPERÍA*) could stay in business without extending it; equally, no owner could stay in business without receiving goods on credit from wholesalers.

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**creole** The terms *criollo* (in Spanish) and *crioulo* (in Portugal) were originally used for Africans born in the Americas but were subsequently applied to Europeans born in the New World. By extension, *creole* came to be applied to strains of animals bred in the Americas (for example, *creole horse* in Chile), American dialects of European and African languages, premium CACAO native to the circum-Caribbean, and other cases.

*Criollo*, in reference to the children of Spaniards born in the Americas, perhaps first appeared in print in *Historia natural y moral de las Indias* (1590) by Father JOSÉ DE ACOSTA. In 1609, El Inca GARCILASO DE LA VEGA stated that blacks from Guinea first used the word to differentiate and denigrate blacks born in the Americas. Thus, early usages of *criollo* signified place of birth in the Americas for both Spaniards and blacks.

Historians of Latin America generally employ the word *creole* as shorthand for a Spaniard born in the colonies and thus distinct from a PENINSULAR, or Spaniard born in Spain. In documents of the late colonial era, however, bureaucrats commonly used the terms  *europeo* (European) and *español americano* (American Spaniard).

The importance of differentiating Spaniards on the basis of peninsular or colonial birth derived from perception as well as legislative restrictions and electoral guidelines in religious orders. Peninsulars considered themselves superior to creoles both by reason of claimed blood purity (*LIMPIEZA DE SANGRE*) and birth in Europe. Able to document their ancestry through generations of “pure”

Castilians, BASQUES, or other peninsular “race,” peninsulars suspected, with good reason, that Spaniards born in the colonies had an admixture of indigenous or African ancestry; they considered such ancestry as prima facie evidence of inferiority. Additionally, prominent European intellectuals in the 18th century, notably George-Louis Leclerc, Count Buffon, and Cornelius de Pauw, maintained that the descendants of Europeans degenerated physically and intellectually in the environment of the Americas. Thus, from the European perspective, creoles were inferior.

Legislation restricting prominent government officials’ personal and financial ties in the district of service discriminated against creoles who wanted to serve at home. Although the *Recopilación de leyes de los reinos de las Indias* (1680) contained no specific law precluding creoles from such service, the Crown routinely charged creoles for the privilege. In the 17th century, religious orders obtained the *alternativa*, a formal system of rotating creoles and peninsulars in provincial offices.

Spaniards at the pinnacle of society in each Spanish colony included the most successful peninsulars as well as their creole wives and prominent and wealthy creoles who could often claim descent from one or more conquistadores or early settlers. All creoles, of course, had lineage that included a peninsular, and inheritance law ensured that the creole children of the peninsular would receive at least a portion of any wealth. This meant that over time creoles became the most prominent landowners, often inherited salable and renounceable offices (for example, the post of alderman), and frequently became prominent clerics and government officials.

While a few fortunate creoles and peninsulars formed the highest tier in each colonial society, creoles could be found at every level. Poor creoles considered themselves better than *CASTAS*, Amerindians, and blacks, even though their number included persons who were homeless and unemployed, as well as practitioners of the entire range of occupations. In the city of Oaxaca in 1792, the largest number of male creoles was employed as low-status artisans (for example, shoemakers and weavers), and a small number were servants or peons. Creoles accounted for about half of the male population of Querétaro in 1791 and about half of the artisan and laboring population, with occupations that ran the full gamut, from silver-smiths to mule drivers and tanners.

Although creole males in the city of Oaxaca from 1793 to 1797 married creole women in a majority of cases, almost one-third married nonwhites, mostly *castizas* and *mestizas*; 38 percent of creole women married nonwhite males. Among 297 married Spanish clothing and textile workers in Querétaro in 1791, 82 (28 percent) wed nonwhites.

Although many historians have emphasized that creoles were virtually excluded from high office, a close examination of the men named reveals that this is true only for a small number of the highest executive positions. The clearest example is that only four creoles were



A well-to-do Chilean woman attended by her indigenous or mestizo servant (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

named VICEROY, three in NEW SPAIN and one in the RÍO DE LA PLATA. In contrast, a substantial creole presence was evident from the 17th century in AUDIENCIA and treasury positions, as well as in cathedral chapters and bishoprics. Some of these creoles obtained appointment to their region of birth.

In the *audiencias*, arguably the most important royal institution in the colonies, creoles accounted for more than half of the new ministers named from 1687 to 1712 and for 37 percent of all appointees from 1687 to 1821. While they were not evenly divided over time or by court, these appointments demonstrate significant access by creoles to high office. Although only a fraction of the creoles named, native sons were well represented in some courts for a substantial amount of time.

Mexicans accounted for 18 percent of the archbishops and bishops of New Spain, and all creoles totaled 24 percent. In Spanish South America, creoles accounted for at least 28 percent of the bishops. Creoles accounted for some 80 to 90 percent of the members of the CATHEDRAL CHAPTER OF LIMA from 1730 to 1799. At a lower level, in GUATEMALA from the early 17th century onward, more than 95 percent of the parish priests were natives of the diocese.

While a few thousand peninsulars outnumbered creoles in the early 16th century, by the early 19th century, creoles accounted for well over 95 percent of the Spanish population. An enumeration of peninsular males in MEXICO CITY in 1689 revealed only 1,082, of whom 69 were in the bureaucracy and 48 in the army and navy; well over half of the total were engaged in wholesale or retail commerce. New Spain had about 15,000 peninsulars out of a Spanish population of 1 million or slightly more in 1810.

Rebel leaders after 1808 often deliberately stoked antagonism between creoles and peninsulars. Nowhere was this more true than in VENEZUELA, where in 1813 SIMÓN BOLÍVAR proclaimed “war to the death” against all peninsulars who did not actively support independence.

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**crime and punishment** Crime and violence accompanied the Spanish conquest and persisted throughout the entirety of Spanish rule. Urban officials paid considerable attention to a variety of crimes, while royal bureaucrats, aside from cases of homicide, sedition, and aggravated assault, often knew nothing about crimes committed and criminals punished in rural areas. Sheriffs and constables arrested criminals; a well-defined court system meted out punishment to the guilty. The INQUISITION prosecuted certain types of crimes, notably those against morality.

Although persons of every background might succumb to passion, hunger, or simply opportunity and commit crime, by the middle of the 16th century, royal legislation had identified blacks, mestizos, and mulattoes as particularly troublesome, vice ridden, and prone to crime (see *MESTIZAJE/MESTIZO*; *MULATO*). Already in 1535, the Crown had forbidden blacks to carry arms because of the “many” crimes they committed. A 1553 law referred to orphaned mestizos as “badly inclined by their nature as well as by a lack of Christian education and employment.” A law in the following year referred to the orphaned children of Spaniards and mestizos committing a variety of crimes and sins that included illicit sex, robbery, and murder. Other laws noted that blacks in LIMA were robbing Indians and that mulattoes were “badly inclined.”

While *encomenderos* and other Spaniards abused the indigenous and *CASTAS* with, at times, callous impunity, colonial officials were less concerned with crimes by whites than those by other lawbreakers (see *ENCOMIENDA*). The 17th-century diarists of Lima, Josephe and Francisco Mugaburu, recorded a variety of prohibitions and crimes as well as the penalties incurred. In 1649, a black man killed with a machete a black woman, an Indian man and woman, and a mestizo blacksmith, in addition to wounding seriously a number of other people. Although the murderer died in jail the same day, the judge ordered him hanged, dragged through “the usual streets,” hanged again, and quartered. His head and hands were placed where he committed the original crime. In 1662, a Spaniard killed his wife “without any cause” and was condemned to be hanged and then cast at sea in a barrel. Proving he was a noble (*hidalgo*), he was beheaded rather than hanged, but still cast at sea. In 1674, a prohibition was proclaimed against blacks, mulattoes, mestizos, and quadroons carrying a sword or dagger unless they were militia officers on duty; the penalty was a fine and 100 lashes for the first offense, 200 lashes and four years in the galleys for a second offense.

An examination of nearly 500 cases handled by the criminal chamber of the Audiencia of Mexico from 1800 to 1807 reveals that 70 percent involved “low-status artisans” such as bakers, carpenters, and shoemakers (see *AUDIENCIA*). Spaniards were underrepresented in criminal investigations but still accounted for more than 37 percent; indigenous people were overrepresented, accounting for just under 44 percent.

Judicial punishment was most commonly a fine, but other punishments included whipping, forced labor in royal service such as in PRESIDIOS or construction projects, labor in privately operated textile mills (*OBRAJES*), and death. The last sentence was for sodomy, high treason, rape and murder, and robbery and murder. Prisons were used for detaining rather than punishing criminals.

Women were served particularly poorly by the legal system. Subject most commonly to physical abuse, beating, rape, and kidnapping, women usually knew the perpetrator but often refused to file charges for fear of

even worse physical abuse. Accused husbands typically countercharged that their wives had engaged in sexual misconduct. Usually it required rape of a married woman for a colonial judge to act; such action was not out of sympathy for the victim, but because of damage to the reputation or honor of her husband.

The wars of independence included an increase in crime, particularly in rural districts and along the few highways, as bands of assailants and insurgents were often indistinguishable.

See also CRIME AND PUNISHMENT (Vols. I, III, IV).

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**Cruz, Juana Inés de la (Juana Inés de Asbaje y Ramírez de Santilla; Sor Juana; the “Phoenix of America”; the “Tenth Muse”)** (b. ca. 1648–d. 1695) *creole poet in New Spain* Juana Inés was the illegitimate daughter of a CREOLE woman and a PENINSULAR. Born in San Miguel Nepantla, not far from the Popocatepetl volcano, she learned to read at the age of three. As a young girl, Juana moved to MEXICO CITY, where she resided with relatives, read, and studied. Precocious and attractive, Juana became a maid-in-waiting to the wife of the new VICEROY, marqués de Mancera, soon after mid-October 1664. At the viceregal court, she quickly gained a reputation for both her intellectual brilliance and her beauty.

At a time when respectable young women had only the options of marriage or life in a religious convent, Juana, who later expressed a “total disinclination to marriage,” chose the religious life as offering the opportunity to pursue her intellectual and musical interests. Briefly in the Convent of the Discalced Carmelites of St. Joseph in Mexico City, in 1668 or 1669, she entered the Convent of the Order of St. Jerome, where she remained until her death.

Sor Juana’s many writings include plays, poetry in numerous forms, prose, and *villancicos*, the last a kind of poetic carol or folksong sung during matins of religious feasts such as Corpus Christi and Immaculate Conception. No later than 1676, publishers began making Sor Juana’s writings available in print. In that year, a Mexico City press issued *Villancicos, que se cantaron en la*



New Spain’s most illustrious poet, Sor Juana Inés de la Cruz (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

*Santa Iglesia Metropolitana de Mexico.* Another set of *villancicos* sung in Mexico City appeared the following year, and in 1680 a set used in Puebla was published there. In 1680 as well, a Mexico City publisher printed *Neptuno alegórico*, Juana’s contribution to the formal reception of incoming viceroy the marqués de la Laguna. Two years later, a Zaragoza printer published *Poemas de la única poetisa americana, musa décima, sor Juana Inés de la Cruz*, the title underscoring both Juana’s American birth and residence and the popular evaluation of her as the “tenth muse.” Other publications followed. In 1692, a printer in SEVILLE released *Amor es más laberinto*, described as “a famous comedy by the Phoenix of New Spain” and *Segundo volumen de las obras de sor Juana Inés de la Cruz*, a collection also published the following year in Barcelona. Following Juana’s death, printers in Barcelona and Lisbon published *Fama, y obras posthymas, tomo tercero, del fénix de México, y décima musa, poetisa de la América*. A printer in Valencia in 1709 republished *Poemas de la única poetisa americana*. Reprints of other works were published for years.

In spite of, or perhaps because of, the enthusiastic reception that Sor Juana’s works received in both Mexico and Spain, prelates in Mexico and her own JESUIT con-

fessor viewed her writing with concern and disapproval. After she attacked a sermon by the famous Portuguese Jesuit Antônio Viera in 1690, the bishop of PUEBLA pointedly and publicly directed her to turn more attention to religious writings, and her confessor abandoned her. Her health deteriorating, she finally yielded and started selling her library of 4,000 volumes, her musical instruments, and her other worldly goods. Devoting her remaining years to helping those afflicted by an epidemic in 1691 and engaging in self-flagellation and other acts of penance, she died in 1695. Her friend, the university professor CARLOS DE SIGÜENZA Y GÓNGORA, delivered the funeral oration of the most remarkable woman in colonial Latin America, a woman some scholars consider the colonial world's first feminist.

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**Cuba** The largest and westernmost island in the Greater Antilles, by 1560, Cuba was a sorry leftover from the early decades of the 16th century when it was a supply base and source of conquistadores and settlers of the American mainlands. Conquest, disease, and abusive labor demands had reduced the indigenous population from perhaps 112,000 to 7,000 by 1531 and to fewer than 3,000 some 25 years later. The white population had largely left for greater opportunities elsewhere, and the brief GOLD boom was a distant memory; in 1570, only several hundred Spanish males resided in Cuba.

Cuba and especially HAVANA, however, would enter a new phase as a vital, strategic base as an outpost of the empire's mainland cores. Its location at the gate to the Gulf of Mexico and the CARIBBEAN placed it at the nexus of the return route of the FLEETS serving Spanish South America and NEW SPAIN. In addition, its location oversaw the maritime "bottlenecks of empire"—the Florida Straits, the Windward Passage, and the Yucatán Channel. The French devastated Havana in 1555 and attacked Santiago de Cuba in 1558 in sequels to earlier attacks on the island dating from 1537. English sea dogs were not far behind, and the Dutch entered the field as well in the late 16th century. The lesson learned by the Spanish was that Cuba had to be defended effectively for the empire to survive.

The French capture of Havana in 1555 stirred the Spaniards to establish MILITARY garrisons there and construct several major fortresses. The docking of the

Atlantic fleets stimulated the local ECONOMY and provided the basis for a growing population that outstripped that of the remainder of the island. CATTLE thrived on the island and the sale of beef, hides, and byproducts benefited ranchers. Havana also became the site of ship repairs and, benefiting from extensive nearby forests, SHIPBUILDING.

By the early 17th century, Havana was home to more than 10,000 of the island's 20,000 inhabitants and the official port for Atlantic TRADE. In short, western Cuba, with Havana formally declared the island's capital and residence of the governor and captain general in 1607, enjoyed some benefits of empire. Eastern Cuba, left largely to its own devices, became a center for contraband, trading hides, TOBACCO, salt beef, textiles, WINE, and wood for manufactures brought by merchants from Spain's European competitors. With foreign settlement of islands in the Caribbean in the 17th century, illegal trade increased.

Although commercial tobacco cultivation in Cuba followed on the heels of conquest and expanded as a result of the fleet traffic, inhaling snuff and smoking tobacco gained a substantial European market starting only in the late 16th century. Always on the lookout for new sources of income, the Spanish Crown began to regulate tobacco production and sale. Increased demand, however, stimulated greater production and contraband as growers sought to benefit regardless of royal dictates. By the early 17th century, owners shifted the use of land near Havana from pasturing cattle to producing tobacco and SUGAR.

With improved economic opportunities, the English capture of JAMAICA in 1655, and the resulting migration of the lost island's Spanish inhabitants, Cuba's population reached some 30,000 inhabitants in 1662. By this date, the African slave population was around 5,000; the Amerindian population was probably less than 2,000 (see SLAVERY). With relatively few white women entering the colony, racial mixing between women of color and Spanish males was commonplace, and the number of free persons of color increased.

Tobacco by the early 18th century was Cuba's most valuable export, its trade expanding with access to the French market. In response, the Spanish Crown in 1717 established a monopolistic company, the Factoría de Tabacos, with its main office in Havana and branches elsewhere, to purchase at fixed prices various grades of tobacco and to sell it abroad, primarily in Spain. The arrangement was designed to benefit the buyers in Cuba and the sellers in Spain. Since the Factoría determined the amount it would buy, producers were the losers. Rebellions by small tobacco farmers were violently extinguished.

The creation in 1740 of the Havana Company, a monopolistic trading company, and accompanying efforts to reduce contraband served royal interests by increasing the collection of revenue. Royal gain, however, meant

local pain and underscored Cuba's second-class status. The Cuban response was continued SMUGGLING. A majority of tobacco, perhaps only modestly reduced from the 75 percent of the 1720s and 1730s, was sold illegally, and a third of the hides exported went to British traders. Horses and MULES raised near Puerto Príncipe and Bayamo went in large number to Jamaica.

While it sought to limit tobacco production, the Crown also encouraged sugar production in the first half of the 18th century by taxing foreign sugar imported by Spain (see TAXATION). Particularly after the conclusion of the WAR OF JENKINS' EAR in 1748, Cuban sugar production increased substantially. In 1755, production for the whole of Cuba reached some 7,000 tons, about half of which was sent to Spain. Labor came from African slaves, of which 8,000–11,000 were imported between 1740 and 1760. The total for 1713–60 was probably 15,000–18,000 based on official figures, but the actual totals were certainly much greater, perhaps triple the official numbers, as a result of contraband trade, particularly with Jamaica.

In addition to sugar and tobacco production, Cuba continued to build and repair ships. Between 1723 and 1762, the shipyard built 32 ships, thus accounting for nearly 40 percent of Spanish naval construction. Cuban ships were better constructed, lasted longer, and were less expensive than those built in Spain as a result of cheap labor and ample, inexpensive lumber.

Toward the end of the Seven Years' War, the British occupied Havana on August 12, 1762, remaining until July 6, 1763. During this brief occupation, the British slave trade was legalized and perhaps more than 4,000 slaves were imported. The British also turned Havana into a free port and overall legal trade increased.

The loss of Havana shocked the Spanish government. It responded after the island's return following the TREATY OF PARIS in 1763 with military reform, administrative innovation, and commercial changes. In implementing these changes, the Crown worked closely with the Cuban elite, establishing a favored relationship absent in subsequent efforts at reform in the mainlands and giving Americans, notably the elite of Havana, an important role in the reorganized "disciplined militia." In 1765, Cuba gained the right to trade with eight Spanish ports in addition to CÁDIZ and with SANTO DOMINGO, PUERTO RICO, Trinidad, and Margarita in the Caribbean; this initial use of COMERCIO LIBRE would be expanded to the mainland over the next quarter century. An accompanying tax package promised additional benefits to Cubans as well as the Crown with increased Cuban exports.

With easier access to slaves and freer trade, Cuban sugar producers responded enthusiastically. The acreage devoted to sugar increased from 10,000 acres prior to the British invasion to 160,000 acres in 1792. Sugar production expanded from some 10,000 tons in the 1770s to 16,000 tons by the early 1790s. Royal income rose from 163,000 pesos in 1760 to 1.2 million pesos in 1782. The

number of slaves imported averaged about 2,000 annually from 1764 to 1790. The island's population grew from 171,620 in the census of 1774 to 272,300 in 1791 to nearly half a million by 1815 and 704,487 in 1827. By 1827, increased slave imports had raised the slave population to 41 percent of the total; whites accounted for 44 percent, and free colored, for 15 percent. Although the absolute numbers of each of the three groups had increased notably since 1774, the slave population alone had expanded as a percentage of the whole.

A rebellion of largely slaves in Saint Domingue in August 1791 quickly eliminated the French colony as the Caribbean's dominant sugar producer, tripled sugar prices by 1795, and stimulated emigration of perhaps 30,000 of the island's planters and slaves to Cuba (see HISPANIOLA). This new experience and capital stimulated increased sugar production and the development of coffee as another important export. Benefiting from the introduction of neutral trade during Spain's almost continuous involvement in European wars from 1793 to 1814, Cuba's trade continued to grow.

Cuba was the largest Spanish colony to remain loyal during the wars of independence in the early 19th century. Undoubtedly, the slave rebellion that transformed Saint Domingue into Haiti was a frightful example to Cuba's sugar planters, despite their control by 1815 of the island's regular army units and disciplined militia. The Spanish government's reforms and careful cooptation of the Havana elite after 1763 paid continued dividends as the exportation of sugar and coffee provided prosperity to the planters and merchants. Independence would not become an issue until later in the 19th century.

See also CUBA (Vols. I, III, IV).

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**curandera/curandero** The practice of medicine in the colonies, as in Europe at the time, was often ineffective. Its formal practitioners—university-trained and licensed physicians—were neither prestigious nor numerous; between 1607 and 1738, the UNIVERSITY OF MEXICO annually conferred on average fewer than four bachelors' degrees in medicine. Spaniards demanded "Latin doctors" who practiced medicine based on the Hippocratic approach of the four "humors"—blood, phlegm, black bile, and yellow bile—and their "complexion"—hot and

wet (blood), cold and wet (phlegm), cold and dry (black bile), and hot and dry (yellow bile).

Yet, the majority of the population in the Americas that sought medical care turned to *curanderas* and *curanderos*, or folk healers. In indigenous villages, the Crown recognized that these healers provided whatever treatment the residents would receive. Elsewhere, the willingness to countenance either *curanderas/os* or quacks who claimed to have lost their diplomas and licenses varied with the availability of university-trained and licensed doctors.

In the popular mind, illness arose from either natural or supernatural causes. Natural sickness came from God and could be a punishment for individual sin or an entire community's sinful behavior. Miraculous cures were seen as divine intervention and were often secured through healing shrines. Supernatural causes of illness could include personal enemies, sorcerers, and witches, usually female, working with supernatural beings and casting spells and curses. These "women who live evil lives" were almost invariably of African, Amerindian, or CASTA origins.

In colonial GUATEMALA, female curers (*curanderas*) and the much less common male curers (*curanderos*) used folk knowledge of natural ingredients such as herbs and other plants as well as a mixture of supernatural and religious ideas with male and female clients from all social groups. Successful curers could earn a living with their skills, although they were usually at risk for denunciation and prosecution by the INQUISITION.

See also MEDICINE (Vols. I, III).

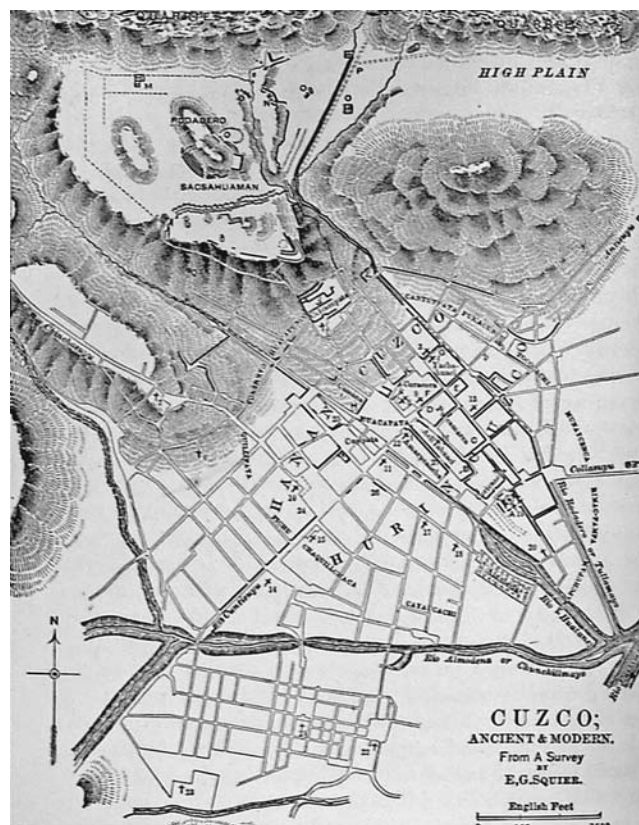
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**Cuzco** Located about 11,500 feet (35,052 m) above sea level, this political and religious capital of the Inca Empire was formally converted into a Spanish city in an act of foundation in 1534. The new MUNICIPAL COUNCIL soon apportioned plots with 200 feet of frontage to the 88 conquistadores who elected to become citizens (*VECINOS*). Despite its new colonial status, the city remained the heart of indigenous Peru throughout the colonial era and beyond. Its location and symbolism made it the only real challenge to LIMA's favored position in the colony.

The center of a dense indigenous population and hub of the road system of the Incas, colonial Cuzco had PERU's best access to Indian labor and TRIBUTE, was near rich agricultural lands, and benefited from its position on a major route that connected it to LA PLATA and POTOSÍ



A map of Cuzco, Peru, revealing the irregular layout of the former Inca capital (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

to the southeast and the mercury mines of HUANCAVELICA and the city of Lima to the northwest. Fray Antonio Vázquez de Espinosa reported that in the early 17th century it took three weeks for the mail to travel from Lima to Cuzco and just over five weeks from Cuzco to Potosí. The city of Cuzco was home to the largest number of *encomenderos* in Peru, and they received more tribute than anywhere else in the colony (see *ENCOMIENDA*). Vázquez de Espinosa reported that Cuzco had more than 3,000 resident peninsulares and creoles, an indigenous population that exceeded 14,000, and black slaves and *MULATOS*.

Within the bishopric of Cuzco were numerous *OBRAJES* that produced textiles, as well as estates that produced SUGAR and COCA. Both residents in the city of Cuzco and mine workers in CHARCAS consumed these products. Cuzco textiles were particularly important in the MINING areas in the 18th century as QUITO faded as a principal source. In the late 17th century, there were just over 700 HACIENDAS in the region; the number had declined to about 650 a century later.

A major earthquake in 1650 caused considerable damage to property in Cuzco, including public and religious buildings and homes of the elite. Indigenous residents were affected as well, and many left the city and bishopric in its aftermath. Meanwhile, other indigenous people migrated into the city for its economic opportunities, also



thereby escaping tribute and labor demands in the rural countryside. The city had a population of about 11,000 at the end of the 17th century; nearly half of the Amerindians there in 1690 had been born elsewhere. In the larger region of Cuzco, the nonindigenous population of about 6 percent in 1689 increased to 17.4 percent in 1786.

The revolt led by TÚPAC AMARU II threatened Cuzco, but the royalists prevailed and the rebel leader was executed in the city's central plaza. Cuzco became the headquarters for the royalist army that Viceroy JOSÉ DE LA SERNA had evacuated from Lima in 1821.

As the postindependence period commenced, the city of Cuzco had a population of about 40,000, of whom 47 percent were classified as Indians.

See also Cuzco (Vol. I).

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# D

**debt peonage** Debt peonage exists when a worker owes money to an employer that he or she cannot pay and the employer has access to juridical or more forceful means of preventing him or her from leaving the site of employment or securing a return if he or she has left.

Debt peonage arose primarily on HACIENDAS or in textile manufactories (*OBRAJES*) in Spanish America, although it could be found in MINING as well. It was typically the result of an owner seeking to secure a stable resident workforce by advancing wages or paying TRIBUTE to attract resident workers and then, through further advances, making it nearly impossible for them to pay their debts. In other cases, workers could be in debt because they had to pay for the tools with which they labored.

The existence of debt peonage in the colonial era is undeniable, but its extent and effectiveness varied considerably, depending on such things as the number of laborers available in a given location and the needs of the employers, needs that were related to the availability of land, water, and other resources. In colonial QUITO, Jesuit overseers of the Society of Jesus's properties routinely provided indigenous workers advances but considered them a cost of doing business and did not expect repayment. In the Valley of Mexico in the late 18th century, a majority of hacienda workers were not in debt; of those who were, most owed amounts no greater than wages for three weeks of labor. The number of workers who owed debts carried over from one year to the next, moreover, was much lower than those who received advances on labor alone. In any case, workers in Central Mexico often left their employer without paying their debts. The image of debt peonage in Mexico is based largely on its use in the decades before the Mexican Revolution of

1910, when *hacendados* forced workers to buy goods from the company store and hired special agents to track down and bring back debtors.

Rather than focusing on the negative implications of debt peonage, some scholars view advanced wages as CREDIT and an indication of workers' bargaining power. Without providing advances, *hacendados* had difficulty in securing workers. The more skilled the worker, the greater the sum that might be advanced. Where surplus labor was available, it was in the interest of the worker to be in debt as a means of ensuring continued employment. Sometimes, however, employers owed workers more than the reverse. In any case, the alternatives for unskilled or modestly skilled laborers were frequently less attractive than living and working on a hacienda.

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**diamonds** The recognition in the mid- to late 1720s that "some little white stones" were diamonds initiated a MINING rush at Serro do Frio, in MINAS GERAIS, BRAZIL, that complemented the GOLD mining that had been under way for some 30 years. Prepared to go to extremes where diamonds were concerned, the Portuguese Crown created

an isolated “Diamond District” in 1734 in an attempt to tax production and eliminate contraband TRADE in the jewel. Faced with a plunging price for diamonds as the quantity increased, soon afterward, the Crown tried to ban diamond mining until demand rose again. As prices went up, the Crown decided to allow supervised, limited mining. In 1740, it created a royal monopoly for diamonds; initially farmed out to contractors, the Crown took over its administration in 1771 (see MONOPOLIES, ROYAL). Efforts to prevent SMUGGLING, however, were only partially effective.

Brazilian diamonds were mined in such quantity that at one point the international market price fell by 75 percent. In addition to the Diamond District, diamonds were mined in BAHIA, MATO GROSSO, and Goiás. Some 8,000–9,000 African slaves were among the laborers in the mid-1730s, although they were widely believed to be a major source of illicit diamonds.

Diamond production peaked about 1770. With royal control, production declined irregularly, reaching a figure in 1827 well under 10 percent of the 1770 amount. Combined with gold production, diamonds helped Portugal to enjoy a favorable balance of payments in the first half of the 18th century.

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**diezmo** (*dizimo*) Levied to support the diocesan branch of the CATHOLIC CHURCH, the tithe (*diezmo*, in Spanish; *dizimo*, in Portuguese) was a tax of 10 percent imposed on the harvest of crops, for example, grain, rice, SUGAR, CACAO; most fruits; silk; dairy products; and most domesticated animals, for example, CATTLE, SHEEP, goats, pigs, and chickens. The Spanish Crown assigned oversight and collection of tithes to the bishops and CATHEDRAL CHAPTERS but retained one-ninth, a sum often applied to construction of churches, support of hospitals, or other charitable institutions. Clerics (*jueces hacedores*) oversaw the collection and disbursal of tithes, although they frequently employed tax farmers to do the actual collection. In practice, the tithe was often commuted into a set amount rather than 10 percent of the actual increase in a product.

No uniform policy directed the payment of the *diezmo* by indigenous people. In 1533, the Spanish Crown ruled that NATIVE AMERICANS were exempt, a position taken to emphasize that the teachings of the church were not compromised by material gain. Since the bishops and secular hierarchy benefited from the *diezmo*, they opposed this position. In practice, the outcome varied. Ultimately, the indigenous people in the Archbishopric

of Mexico paid the tithe; some indigenous in PERU paid, but others were exempt. In GUATEMALA, the indigenous never paid the tithe. Where the native population did not pay the tithe, TRIBUTE was increased by an amount applied to subsidizing the secular clergy. Even when they paid the tithe, indigenous people in Spanish America were exempt from paying the imposition on MAIZE, beans, and other New World products or on products grown on village land for their own consumption.

While the religious orders supported Indians’ paying the *diezmo*, the JESUITS, DOMINICANS, AUGUSTINIANS, and MERCEDARIANS claimed exemption by virtue of their clerical status and refused to pay it. Bishops refused to accept this argument, but the issue only became important in the 17th century when Jesuit properties in particular had become numerous, productive, and valuable. The conflict led to the removal of Bishop JUAN DE PALAFOX Y MENDOZA, but in 1655, the COUNCIL OF THE INDIES ordered all religious orders to pay tithes to the appropriate cathedral chapter; the Jesuits, however, appealed. In the 1750 resolution, the Society of Jesus recognized the Crown’s authority over the *diezmo* but was ordered to pay one-thirtieth of the amount of produce its hacienda managers declared.

Rising agricultural production made the *diezmo* in Spanish America an enviable source of revenue in the 18th century. This contributed to the regalist view that the church was too wealthy and led, in part, to the *CON-SOLIDACIÓN DE VALES REALES*.

In BRAZIL, the Portuguese Crown collected the *dizimo* by virtue of a papal bull of 1551 in return for its support of the colonial church. Since sugar was the engine of the economy, the *dizimo* was the Crown’s most important source of income until the discovery of GOLD in MINAS GERAIS in the 1690s. As was the case frequently in Spanish America, the actual collection of the tithes was farmed.

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**doctrinas de indios** Rural indigenous parishes, or *doctrinas de indios*, in Spanish America were established to serve recently converted NATIVE AMERICANS; priests known as *curas doctrineros* or simply *curas* served them. Rural parishes often included several villages, in one of which resided a priest who rode circuit among them to provide religious services. Often, the priest spoke

the local language, for example, Quechua or Nahuatl. Frequently, he was the most regular and visible symbol of Spanish authority. Financial support came from a designated portion (royal synod) of indigenous TRIBUTE; fees charged for specific services, notably births, marriages, and funerals; and charges associated with the CATHOLIC CHURCH's many feast days.

The “fiesta-cargo” system consisted of a number of sacred offices of increasing responsibility that men served over the course of years. Each office required time and labor, money, and sometimes other items such as food. There were mandatory payments as well as expected gifts or alms for the priest and for the church. Together, these contributions were a major burden on parishioners; efforts by the state to regularize and limit them invariably produced conflict between the *cura* and the parish.

A *CORREGIDOR*, governor, or *ALCALDE MAYOR* was the administrative and judicial official at the head of a group of *doctrinas* joined together as a district or province. This official frequently conspired with the *cura* and local *CACIQUE* or *KURAKA* in imposing the forced sale of goods (*REPARTO*), arranging for *MITA* labor (in Peru), and collecting tribute.

*COFRADÍAS* (lay religious brotherhoods) dedicated to specific saints were organized in many *doctrinas*. Besides supporting their saint through annual fiestas that brought the community together, the *cofradías* provided services to members and their families, for example, burial and perhaps limited sustenance to the surviving family members.

In 1749, the Spanish Crown initiated a serious program of converting *doctrinas* still administered by religious orders to parishes administered by secular clergy. Unlike an earlier effort begun in the 1570s, this new program was carried out with few exceptions.

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## Dominican Republic See HISPANIOLA.

**Dominicans** A major mendicant order, the Dominicans, or Order of Preaching Friars, was active in the christianization of the indigenous population in Spanish America but was not present in BRAZIL. Dominicans emerged in the early 16th century as “defenders and protectors of the Indians,” counting among

their number Antonio de Montesinos and Bartolomé de Las Casas, the latter the most famous enemy of forced conversion and Spanish exploitation. In 1526, 12 Dominicans reached NEW SPAIN, shortly after the first FRANCISCANS (1523) but before the AUGUSTINIANS (1533). The Dominicans became active in the region of PUEBLA, the Valley of Mexico, Valladolid (present Morelia), and the region surrounding the city of Oaxaca known as La Mixteca and La Zapoteca. Early friars encouraged the use of native languages and also produced very popular catechisms by 1565, including *Doctrina christiana breve* by Friar Domingo de la Anunciación.

Consecrated as archbishop of Mexico in 1553, Dominican friar Alonso de Montúfar upheld his order's reputation as defenders of orthodoxy and the most conservative of the mendicant orders in New Spain. As archbishop, he convoked the First and Second Mexican Provincial Councils in 1555 and 1565 to determine how to apply the rulings of the Council of Trent in the colonial environment of New Spain. His struggles with the secular clergy influenced PHILIP II to expand the authority of the secular bishops and, in 1569, to establish a freestanding Tribunal of the Inquisition, bringing an end to friar inquisitors.

By the early 17th century, the Dominicans had 69 monasteries and religious houses in Mexico, compared to 90 for the Augustinians and 172 for the Franciscans. The Convent of the Dominicans in Mexico City was among the wealthiest in the Spanish colonies.

Dominicans had 47 indigenous towns in highland GUATEMALA under their jurisdiction by about 1555, although the number of friars was smaller. The order began to discriminate against CREOLES after mid-century, determining by 1570 that “none of the so-called creoles shall receive the habit,” ostensibly because of low morals. A shortage of European friars, however, forced the order to bow to reality, and by the early 17th century, it was again admitting the American-born Spaniards. As with the Franciscans, the Dominicans introduced the mandatory rotation (*alternativa*) of important provincial offices between creoles and PENINSULARS. This stimulated continued immigration of peninsular friars, but in 1800, about 60 percent of the Dominicans in Guatemala were creoles.

Dominicans were the first order present in Peru, with Fray Vicente de Valverde and several other friars accompanying Francisco Pizarro. By 1550, the Dominicans had established some 60 schools of basic instruction for indigenous people and a *COLEGIO* in their convent in LIMA, where the linguist Fray Domingo de Santo Tomás was teaching theology. In the same year, the MUNICIPAL COUNCIL in Lima petitioned CHARLES I to convert the *colegio* into a full university modeled on Salamanca; indeed, from this *colegio* came the UNIVERSITY OF SAN MARCOS. A decade later, Santo Tomás published in Valladolid, Spain, the first Quechua grammar and dictionary. The first archbishop of Lima, Dominican friar Jerónimo

de Loayza, established the Hospital of Santa Ana for Andeans and blacks.

The early importance of Dominicans is evident in the appointment of 52 friars among the 159 bishops named to the INDIES between 1504 and 1620. In the 17th century, the Dominicans established UNIVERSITIES in SANTIAGO DE CHILE, QUITO, and Guatemala.

See also LAS CASES, BARTOLOMÉ DE (Vol. I); MONTESINOS, ANTONIO (Vol. I).

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**dowry** Dowries were the legal conveyance of property, cash, jewelry, clothing, and other items to a bride as support in her married life. The term was also used for the sum that convents often required for the admission of a nun. Not surprisingly, marriages involving NATIVE AMERICANS and *CASTAS* almost never included a dowry.

Parents able to provide a dowry did so to ease the married life of their daughter. In colonial Spanish America, the property a woman received as a dowry remained legally hers, and the terms of its receipt placed legal responsibilities on her husband. Should she be widowed, a generous dowry provided resources for sustenance. Although the husband administered the resources, he could not sell or otherwise alienate them without her permission. Moreover, he had to return the value of the dowry should the marriage be dissolved or provide for its return in his will. While many, perhaps most, husbands were dutiful administrators of their wives' dowries, there were cases of men who spent them or invested them badly.

An examination of dowries in GUADALAJARA and PUEBLA, NEW SPAIN, shows that cash and personal items most frequently appeared in dowries. Dowries of well-to-do brides typically included cash, real estate, slaves, and goods such as clothing, jewelry, and furniture. Strictly practical items, for example, pots and pans, were not usually included. Slaves were sometimes included, and real estate was relatively infrequent, probably because of its illiquidity. Aside from personal and household items, the contents of dowries could vary by region. Cattlemen in the BUENOS AIRES region in the late 18th century dowered daughters with CATTLE, calves, and sometimes SHEEP.

While well-to-do Spanish families regularly used dowries at least in part as a status symbol, documenting their place in local society, the average value of dowries in Guadalajara, Puebla, and Monterrey from 1640 to 1790 varied substantially. Only 14 percent exceeded 5,000 pesos, while 41 percent were less than 1,000 pesos.

WOMEN with only a small dowry were sometimes able to contract favorable marriages with men of the

same racial background and equal or better financial standing. An aristocratic FAMILY name and lineage, as well as good social connections, could make up for a less substantial dowry. Many a successful PENINSULAR merchant married a much younger CREOLE woman of better social standing, with ancestors dating back to the conquest or early settlers. In such cases, the *arras*, a gift the groom provided to the bride, could be substantial.

Marriage also provided an opportunity for families to consolidate and improve their fortunes. High-ranking Crown officials, for example, peninsular AUDIENCIA ministers, also contracted favorable marriages with wealthy creole heiresses. In such cases, the bride would bring a substantial dowry, and the groom had significant documented assets and provided appropriate *arras*. Family patriarchs could also select a bright, ambitious, and hard-working man, typically born in Spain, as a promising match for a well-dowered young creole. The marriage between JUAN FERMÍN DE AYCINENA Y DE YRIGROYEN and Ana María Carrillo y Gálvez in GUATEMALA in 1755 exemplifies this. Carrillo brought an enormous dowry of 178,000 pesos, as well as excellent family connections. Aycinena lived up to his potential; he was the only titled noble in Guatemala at the time of his death.

In BRAZIL, the legal context for the dowry was different than in Spanish America. Total community property was the rule; all property, including the dowry, brought to a marriage by either spouse became jointly owned. The size and importance of the dowry, at least in SÃO PAULO, changed over time. In the 17th century, the region's patriarchs gave daughters more wealth than sons. Through large dowries, they could largely determine a daughter's husband and where the couple would live. Indeed, families favored daughters at the expense of sons; although as long as the pattern persisted throughout society, sons made up for the discrepancy through their own marriages. The discovery of GOLD in MINAS GERAIS in the 1690s, closer Crown scrutiny, a decline of AGRICULTURE, and, in 1758, the end of disguised indigenous SLAVERY reduced the ascendance of great families. By the mid-18th century, large-scale immigrant Portuguese merchants enriched by trade with the mines had emerged as the wealthiest men in the region. This resulted in grooms bringing more tangible resources to a marriage than their wives brought as dowries. In consequence, daughters more commonly rose economically through marriage, while sons in an age of smaller dowries declined.

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**drugs** The disastrous spread of previously unknown epidemic diseases resulted from a lack of immunity on the part of the indigenous population and no effective treatments. The limited introduction of a vaccine for smallpox in the late 18th century came centuries after the disease had wrought its worst damage. Aside from EPIDEMICS, however, the population suffered from a variety of afflictions and resorted to physicians, surgeons, folk healers (*curanderas*), and self-help manuals for relief (see *CURANDERA/CURANDERO*). In an age in which ailments in Europe were diagnosed in terms of the four humors—blood, phlegm, yellow bile, and black bile—the cure could be as bad, if not worse, than the disease.

A glimpse into the pharmacist's inventory reveals some colonial cures. For kidney stones and hemorrhoids, powdered "crawfish eyes" were prescribed. Dried frog intestines were said to dissolve kidney stones. Pulverized swallow wings mixed with blood, salt, and "powders" "excited the urine" and were thus good for bladder infections. A treatment for epilepsy, paralysis, apoplexy, and head ailments consisted of a powder made from the ground cranium of a person who recently suffered a violent death. Pearls, coral, seashells, garnets, amber, emeralds, and topaz were used to treat hemorrhages and gonorrhea. Powdered bezoar stone taken from the stomach of ruminant animals of the Andes was mixed with water and prescribed for syphilis. MERCURY was, for a time, also considered a cure for syphilis.

The extraordinary variety of plants in the Americas provided hope for discovering new and more effective cures. As part of the ENLIGHTENMENT's interest in useful knowledge, in 1777 the Spanish Crown sent to PERU two young naturalists to find and classify previously unknown plants that might have medicinal and corresponding commercial value.

See also DRUGS (Vols. III, IV); MEDICINE (Vols. I, III).

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**Dutch West India Company (WIC)** Modeled on the earlier Dutch East India Company created in 1602, the Dutch West India Company (WIC) was chartered by the States-General (Netherlands's parliament) in 1621. Its charter gave it a monopoly over commerce to the Americas and West Africa, the right to its own MILITARY and naval force, and authority in administrative and judicial matters. A joint stock company that served as a military arm of the States-General in the regions authorized, the WIC regarded Spain as its natural enemy; when the Twelve-Year Truce ended in 1621, there were no diplomatic niceties restraining its actions.

The WIC viewed American SILVER from PERU and NEW SPAIN as fair game; it also sought SUGAR from BRAZIL and slaves, GOLD, and ivory from Portugal's trading posts in West Africa (see SLAVERY). The WIC's most famous success occurred in 1628. Returning to the West Indies from a brief, unsuccessful expedition to Brazil, Captain Piet Heyn and his fleet of 32 ships, armed with 700 cannon and with approximately 3,500 men, on September 8 captured the Mexican treasure fleet of 15 ships off HAVANA (see FLEETS/FLEET SYSTEM). The yield was impressive, totaling some 4.8 million pesos, most of it in silver and gold. The Dutch who held stock in the WIC enjoyed a dividend of more than 75 percent, the highest the company ever paid. The hapless Spanish commander, Juan de Benavides, was executed in SEVILLE in 1634. No subsequent WIC expedition repeated Heyn's success. In 1634, the Dutch placed a permanent settlement on the island of Curaçao; they also established bases for TRADE and salt MINING in the Lesser Antilles.

Brazil was a bigger prize. The WIC seized Recife in northern Brazil in 1630 and then expanded its control in PERNAMBUCO in the hope that the sugar-producing region would provide a sound financial basis for its other operations. Opposition from the settlers already there, however, finally forced the WIC to abandon the enterprise in 1654.

The WIC, despite the windfall of 1628, was never a consistently profitable company. After the failure in Brazil, the combination of military expenses and commercial losses resulted in its bankruptcy in 1674.

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# E

**earthquakes** Earthquakes have been and continue to be a scourge in Latin America. The famous 18th-century travelers JORGE JUAN and ANTONIO DE ULLOA listed 14 quakes that struck PERU between 1582 and 1746. Those of 1687 and 1746 were particularly damaging to LIMA and its environs. The former damaged irrigation systems near Lima and opened the way for Chilean WHEAT to dominate the Lima market into the 19th century. The latter destroyed Lima's port of CALLAO and seriously damaged the capital itself. In AREQUIPA, an earthquake and volcanic eruption on February 18, 1600, reduced the WINE yield in 1601 to 5 percent of its previous annual level. Subsequent quakes in 1604 further damaged the wine industry.

CHILE suffered 15 major earthquakes between 1570 and 1819. SANTIAGO DE CHILE was struck in 1575, 1647, and 1687. Concepción was destroyed in 1570 and again by a quake and tsunami in 1657; another serious quake and tsunami damaged most of the city in 1730, and a quake in 1751 once more wreaked havoc. The town was refounded in a new location in 1764. Valdivia, Osorno, and several other southern towns were destroyed in the 1575 quake that also damaged Santiago and Valparaiso. A quake in 1737 ravaged Valdivia once again.

Colonial GUATEMALA suffered even more frequently than Lima and Chile, with just over 100 quakes and volcanic eruptions reported from 1526 to 1821. A quake in 1565 severely damaged Santiago de Guatemala, which had already been moved from its original site in 1543. Serious earthquakes struck repeatedly in the mid-1570s, and in 1581 Pacaya Volcano erupted with such force and density that the ashes hid the Sun. The capital was severely damaged in 1689 and then again by three catastrophic quakes in 1717, 1751, and 1773. The last one, on July 29, caused

such extensive damage to homes and public buildings that the city was relocated again, although some inhabitants stubbornly refused to move to Nueva Guatemala.

Earthquakes in QUITO in 1645 killed more than 2,000 people; the measles and diphtheria EPIDEMICS that followed killed 12,000 more. Clerics fueled the widespread belief that this was God's anger vented on the populace for its sins. The eruption of the volcano Pichincha increased the agony of the people.

Colonials throughout the Americas considered earthquakes to be acts of God, and clerics routinely responded with services to give praise for a city's survival and then exhortations to the populace to stop its wicked ways and beg forgiveness. The relief in Lima after the damage caused in 1630 was memorialized in dedicating the anniversary of the event, November 17, to Our Lady of the Miracle. Residents of Salta similarly dedicated September 13 to Our Lady of the Miracle after surviving an earthquake that began on that day in 1692.

The earthquake that struck CARACAS on Maundy Thursday, March 26, 1812, was endowed with the most political meaning. The city was capital of the First Republic of VENEZUELA when the earth first trembled. The exact number of dead is unknown, but one estimate suggests as many as 10,000. Regardless of the number, many inhabitants interpreted the deaths and physical devastation as divine vengeance for abandoning the cause of FERDINAND VII and supporting independence.

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**economy** Terrain, climate, altitude, and the availability of land, labor, capital, entrepreneurs, water, and TRANSPORTATION profoundly affected the evolution of colonial Latin America. The extent of these conditions varied widely throughout the colonies and resulted in numerous local and regional economies.

Mountains dominate the landscape of major portions of Latin America. The Andes are the longest and highest of the mountain chains. Extending nearly 4,500 miles (7,242 km) from VENEZUELA to CHILE, they include peaks that average about 13,000 feet (3,962 m) in height and include Mount Aconcagua near the border of Argentina and Chile, at nearly 23,000 feet (7,010 m). Temperatures vary substantially, a reflection of both altitude and latitude. In Central America, the dominant mountains run east and west. Tajumulco, the highest peak at just under 14,000 feet (4,267 m), is in GUATEMALA. In Mexico, the Sierra Madre Oriental and Sierra Madre Occidental ranges run roughly north and south.

Land transportation in the colonial era was difficult and expensive, with the Andes in particular posing enormous problems. Provisioning Potosí required an immense number of MULES and llamas. By 1620, it was established practice to buy mules in Córdoba for the trip to Potosí. Between 1630 and 1650, an average of 12,000 mules a year were sold; for the remainder of the century, the number surpassed 20,000 a year. An observer in the 1770s noted that some 60,000 mules were sold annually at the fair in Salta for transport and distribution in PERU and CHARCAS through the *reparto de mercancías* (see *REPARTO*). The cost of transport across the Isthmus of PANAMA was nearly 14 times as expensive per 100 pounds (45 kg) as from the MERCURY mines of HUANCAVELICA to Potosí and more than 40 times as expensive as from ACAPULCO to VERACRUZ.

Spaniards sought regions that gave them access to indigenous labor, precious metals, or both. Through TRIBUTE, Spaniards could skim off foodstuffs and other products for personal use or sale. By the 1560s, colonists had established themselves from NEW SPAIN to Chile and founded most of the cities that would be prominent in the colonial era. The most important later addition, in 1580, was BUENOS AIRES. By that time, PERNAMBUCO and BAHIA's planters and ports were becoming important exporters of Brazilian SUGAR to Lisbon.

The vast majority of the population in colonial Latin America engaged in agricultural and pastoral labor. The challenge was to produce enough food for subsistence

plus a surplus that could be traded or sold for other goods. By the mid-16th century, the introduction of European plants and animals had created new expectations, such as the production of WHEAT for Spaniards, and new opportunities, for example, a variety of occupations associated with raising, processing, and selling domestic animals. Land grants for both AGRICULTURE and RANCHING enabled Spaniards by the late 16th century if not before to provide basic products such as mutton, beef, and leather to miners, rural workers, and urban markets.

By the 1560s, the initial stage of plunder had ended, and the *ENCOMIENDA* system that had provided labor and tribute for Spanish conquistadores and early settlers was in decline in New Spain and Peru, a consequence of the reduction in indigenous populations. Population decline prompted changes in the institutions used to harness labor and reductions in the amount of tribute extracted from the Amerindians. Originally provided in items for consumption such as chickens and firewood, the assessed amounts were changed to cash, an alteration that drove tributaries into economic activities such as labor on HACIENDAS that would earn them cash. Government intervention subsidized some labor costs through forced drafts and, at the municipal level, set prices of basic commodities. Potosí became a magnet for settlement because of its SILVER and VICEROY FRANCISCO DE TOLEDO's actions to provide, through the infamous *MITA*, the labor he believed the mines needed.

Agriculture and pastoral enterprises devoted to supplying local markets usually required less capital investment than enterprises focused primarily on export markets, with the exception of hides. In addition to land and basic tools, sugar planters used an expensive resident labor force of black slaves after indigenous workers proved unsatisfactory and a processing plant (*ENGENHO*, *ingenio*, or *trapiche*) (see *SLAVERY*). BRAZIL was the major sugar producer in the Iberian kingdoms' American colonies. CACAO and TOBACCO producers also employed slaves.

GOLD MINING was capital intensive to the extent that miners used black slaves, as was done in MINAS GERAIS in Brazil and the Chocó in NEW GRANADA. On the other hand, silver mining, central to the economies of New Spain, Peru, and Charcas, required considerable capital for refineries to process ore, especially when the amalgamation method was employed.

The Spanish colonies' most valuable export was bullion. It provided the foundation of legal TRADE with Spain via the fleet system, in place by the mid-1560s, as well as the incentive for SMUGGLING (see *FLEETS/FLEET SYSTEM*). Although Spanish producers in different colonies exported hides, COCHINEAL, INDIGO, cacao, and other products, none of these was a serious competitor with bullion or rivaled the amount of sugar exported from Brazil. Restrictions on intercolonial trade, especially between Peru and New Spain, were designed to strengthen legal commerce and maximize the amount of bullion flowing



to Spain by eliminating Peruvians' purchase of East Asian silks and other goods shipped from Manila to Veracruz. The restrictions were never fully enforced.

Although the Spanish Crown wanted colonists to buy the manufactures as well as the agricultural products carried on the fleets, Castile lacked merchandise to sell, and by the 1620s, smuggled textiles and other goods were readily available in the Americas. Moreover, a full complement of artisans provided most goods and services wanted in municipalities and mining camps large enough to support them. While MEXICO CITY undoubtedly had the greatest number of artisans, LIMA in 1790 had more than 1,000 for a population of less than 60,000. As the *CASTA* population expanded, the market for inexpensive imported textiles grew, but domestic woolens, especially those produced in *OBRAJES*, clothed much of the colonial population into the 19th century.

The fleet system, which operated well only from the 1560s into the early 17th century, was designed to serve Spanish wholesale merchants who sold goods in CARTAGENA DE INDIAS, NOMBRE DE DIOS and PORTOBELLO, and Veracruz. The largest colonial merchants operated from bases in Mexico City and Lima and developed distribution systems that reached into every significant market in New Spain, Peru, Charcas, the *AUDIENCIA* district of QUITO, and Chile. The merchants' practice of sailing around Cape Horn developed in the early 18th century and was followed by the use of register ships.

*COMERCIO LIBRE*, which began in 1765, included every Spanish colony by 1789. Legal trade more than doubled between 1783 and 1796, when war in Europe began to disrupt it. European wars from 1796 to 1814 and the overlapping wars of independence took a heavy toll on the Spanish-American economies. Mining production plummeted in New Spain with the uprising of MIGUEL HIDALGO Y COSTILLA. Silver production in Potosí after 1810 was devastated, and that in Peru was in decline by 1800. For exporters of agricultural products, notably cacao and cochineal, this disruption prompted a search for trading outlets that involved contraband as well as neutral traders.

Mainland Spanish America emerged from the wars with its long-standing commercial ties with Spain sundered. British merchants in particular had arrived when access to Spanish markets had disappeared in 1808. Cheap manufactured goods were a wedge into the market; selling for cash or on short-term CREDIT at reduced prices attracted consumers and small businessmen alike. At the same time, such sales over the course of the wars drained Spanish America of accumulated liquid capital and largely precluded domestic investment following independence. Consequently, the liberalization of commerce was not accompanied by increased production. Agriculture and CATTLE raising in Venezuela and Argentine provinces required modest capital compared to mining and, once peace was restored, began to expand rapidly. Overall, however, the economies in 1825 were in trouble.

Mainland Spanish America thus finished the wars of independence with its regional economies severely scarred. Turning to British investors for loans, new country after new country quickly defaulted. Independence did not usher in economic prosperity for most Spanish Americans. Although Brazil avoided a war of independence, it also became beholden to the British.

See also ECONOMY (Vols. I, III, IV).

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**Ecuador** See QUITO.

**education** A Spanish male in the New World colonies in 1560 could secure a formal education from elementary schooling to university instruction. Friars offered basic instruction in their convents and in villages. The Spanish Crown encouraged educational institutions in the colonies in recognition that they were a central means of transmitting European, Christian culture; it also encouraged separate schools for sons of *CACIQUES* and *KURAKAS*.

Franciscan friars paid particular attention to instructing children, recognizing that they were more impressionable than adults and would help to Christianize future generations. Franciscan instruction took place daily after mass and focused on the catechism, which contained prayers and dogma all were to learn, for example, the sign of the cross, the Ten Commandments, the Seven Sacraments, and the Ave Maria. Memorization was initially in the native language.

In Peru, the trilingual catechism made available in the 1580s was critical in establishing a written version of Quechua, now known as standard colonial Quechua and also referred to as *lengua general*. Although the Crown wanted the indigenous to be taught Spanish, the clergy,

especially the friars, refused out of concern that it would render the native people more vulnerable to Spanish intrusion and would make the teachers themselves more dispensable. With the secularization of indigenous parishes in the mid-18th century, the Crown again encouraged instruction in Spanish. The indigenous people had little interest, however, and often claimed they could not afford a school and schoolmaster. By 1770, about 30 percent of the towns in the diocese of GUATEMALA had schools, all suffering from poor attendance and teaching the catechism as had been done in the 16th century. Indians in NEW SPAIN responded similarly.

Recognizing that employment opportunities in CHURCH and state required a formal education, Spanish settlers sought instruction for their sons from the time they were old enough to read and write. Initially, they paid tutors who taught specific skills, but primary schooling quickly became available in Spanish municipalities.

Typically, bishops and, especially, religious orders took the lead in providing education. A school for Spanish children in LIMA was opened by the city's first bishop. By 1564, several grammar schools were operating in Lima; by the early 17th century, the number had increased to a dozen, with more than 1,000 students.

Archbishop of Mexico Juan de Zumárraga established the Colegio of San Juan de Letrán (see *COLEGIO/COLEGIO MAYOR*). Originally established for “poor boys,” it first taught Indians, but later also mestizos and Spaniards (see *MESTIZAJE/MESTIZO*). In the mid-16th century, it was attached to the UNIVERSITY OF MEXICO, providing instruction in reading, writing, arithmetic, MUSIC, and an introduction to Latin grammar.

The most important secondary school in PERU was that of San Pablo, established by the JESUITS in 1568. There were 40 students that year, but the number had increased to 300 by 1578, to about 500 by the early 17th century, and to more than 1,000 from the 1660s to the 1760s. The Jesuits also founded an elementary school in Lima in 1666 to provide instruction in reading, writing, and arithmetic; it was enrolling about 500 boys by the end of the century.

In MEXICO CITY, the Jesuits established the Colegio Máximo of San Pedro and San Pablo using generous gifts made in the 1570s. Reportedly, 300 or more students drawn from throughout New Spain attended the inaugural year. Three residential facilities were made available in 1574–75; one of them, San Gregorio, subsequently became a school for indigenous boys. The Jesuits in New Spain also established *colegios* in locations that included



The interior courtyard of the University of Mexico, the first university on the American mainland (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

PUEBLA, GUADALAJARA, Parral, VERACRUZ, and San Luis de Potosí.

The Jesuits were the leading educators in Spanish America for nearly two centuries. The classical curriculum (*Ratio studiorum*) they adhered to was the same as that used at Jesuit *colegios* in Europe. Thus, students studied Cicero, Sallust, Caesar, Livy, Plato, and Plutarch and historians of antiquity. Instruction in Latin was required for subsequent university study.

In Lima, the Colegio Mayor of San Martín was established in 1582. Students could enter this residential school at age 12 and remain until 24. The Colegio Mayor of San Felipe, founded in 1592, served as a residential facility for 16 students in the arts, canon law, and theology. The Seminary of Santo Toribio, opened in 1590, offered instruction in theology and sacred scripture. A separate school for caciques opened in 1620–21; its objectives were to teach reading and writing and civic and Christian principles.

In 1592, PHILIP II implemented a decision of the Council of Trent calling for diocesan seminaries. This led to the establishment of numerous seminaries including the Royal and Pontifical Colegio Seminary in Mexico City and the Tridentine Seminary of San Pedro y San Pablo in Puebla, the latter established by Archbishop JUAN DE PALAFOX Y MENDOZA. The Tridentine Seminary of San José in Guadalajara, founded in 1699, enrolled at least 950 students from that date to 1800.

The University of Mexico opened in 1553, the first of more than two dozen UNIVERSITIES created before independence. The Portuguese refused to establish a university in Brazil, forcing Brazilian males who wanted a university education to travel to Portugal and study at the University of Coimbra.

See also EDUCATION (Vols. I, III, IV).

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**Elío, Francisco Javier** (b. 1767–d. 1822) *Spanish military officer and administrator* Francisco Javier Elío was born in Pamplona, Navarre, Spain, and followed a military career that included service in North Africa and against the French in the early 1790s. A colonel when sent to the BANDA ORIENTAL in 1805, he participated in combating the British invasions of 1806 and 1807, and SANTIAGO LINIERS Y BREMOND named him acting governor of the Banda Oriental in 1807. Subsequently, Elío charged Liniers with treason and convoked a *CABILDO ABIERTO* in MONTEVIDEO that created, on September 21, 1808, a junta to rule in the name of FERDINAND VII and in opposition to BUENOS AIRES.

The COUNCIL OF REGENCY named Elío VICEROY of RÍO DE LA PLATA to replace BALTASAR HIDALGO DE CISNEROS in 1810. Elío returned to Montevideo on January 12, 1811, but the junta in Buenos Aires refused to recognize him.

On February 13, 1811, Elío declared war on the junta in Buenos Aires. Ruling from Montevideo, he alienated landowners of the Banda Oriental by increasing taxes and forcing them to demonstrate legal ownership of land. He also sought Brazilian assistance against the government in Buenos Aires. Finally, he blockaded Buenos Aires until it agreed to an armistice on October 20, 1811, and withdrew from the Banda Oriental. On May 26, 1812, the Portuguese similarly signed an armistice.

In 1810, the Regency named Elío governor of CHILE. Word of the appointment distressed Chileans and contributed to their creation of an autonomous junta in SANTIAGO DE CHILE.

Elío never served in Chile, remaining in Spain to fight against the French. He was captain general of Valencia when FERDINAND VII returned from exile in France in spring 1814. His offer to lead his troops in abolishing the CORTES OF CÁDIZ helped Ferdinand decide to restore absolutism in Spain.

In 1819, Elío received the great cross of the Order of Charles III. At the time, he was lieutenant general in the army and captain general of the kingdoms of Valencia and Murcia. When the liberals reestablished constitutional government in Spain in 1820, Elío was removed from office. A staunch royalist and opponent of the liberals, he was executed in 1822.

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**El Salvador** Part of the Kingdom of GUATEMALA, colonial El Salvador was the *alcaldía mayor* of San Salvador with municipal districts of San Miguel de la Frontera, San Vicente, and Santa Ana (see *ALCALDE MAYOR*). In 1784, San Salvador became the first intendency of the Kingdom of Guatemala (see *INTENDANT*).

Izalcos in Sonsonate was a CACAO-growing region prior to the arrival of the Spaniards. By the 1540s and 1550s, it was considered the source of Guatemala's finest cacao and was controlled by a small number of wealthy *encomenderos* who had the labor needed for its production (see *ENCOMIENDA*). Cacao could be transported by mule to Santiago de Guatemala in two days. By 1550, it was being shipped through Acajutla, several leagues from Sonsonate, to Huatulco and then carried to MEXICO CITY and other densely populated indigenous centers in NEW SPAIN. In 1570, the town of Sonsonate had 400 *VECINOS*, many of them engaged in the cacao trade. Production peaked

in the 1570s, but indigenous depopulation resulted in a shortage of labor, and coupled with natural disasters, the boom quickly ended despite efforts to import Indians from the highlands. By the 17th century, the indigenous population of present El Salvador resided in the countryside, while Spanish-speaking non-Indians inhabited the former Amerindian villages.

In the 18th century, San Salvador became Guatemala's major producer of INDIGO. Its success provoked antagonism with Santiago de Guatemala, where the wholesale merchants who financed the indigo TRADE resided. This antagonism was exacerbated when a son of the powerful Aycinena FAMILY led troops into San Salvador in 1811 to put down an autonomist rebellion (see AYCINENA Y DE YRIGOYEN, JUAN FERMÍN DE).

San Salvador issued its declaration of independence from Spain on September 29, 1821, shortly after endorsing the PLAN OF IGUALA. The city's CREOLES led a fight against a combined Mexican-Guatemalan force trying to force them into Mexico's short-lived empire under Agustín de Iturbide. Although the Salvadorans were defeated, the Mexican empire collapsed, and San Salvador led a successful movement to make the former Kingdom of Guatemala independent of Mexico. El Salvador entered the United Provinces of Central America in 1823.

See also EL SALVADOR (Vols. I, III, IV); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**Emboabas, War of the** (1708–1709) Frontiersmen and Indian slavers from SÃO PAULO (*paulistas* or *bandeirantes*) discovered GOLD in what became the province of MINAS GERAIS in the 1690s (see BANDEIRAS). The subsequent gold rush brought men from other parts of BRAZIL as well as Portugal. When the governor of RIO DE JANEIRO awarded grants to outsiders and the newcomers began arriving from 1705, they quickly became a majority in the gold fields. The *paulistas* dubbed them "emboabas," a derogatory name of unknown origin.

Contraband as well as legal TRADE supplied the region with CATTLE, foodstuffs, and black slaves. As outsiders controlled contraband trade and armed convoys carrying goods between BAHIA and Minas increased, attacks on them from *paulistas* grew, as did protests from

both sides to local and regional authorities. When fighting between the *paulistas* and *emboabas* began in 1708, Governor Fernando Martins Mascarenhas de Lencastre was unable to bring about peace. Although the *emboabas* emerged victorious, their common bond disappeared quickly. The war underscored the lawlessness of the region, and King John V responded by sending a new governor, Antonio de Albuquerque.

A final but indecisive battle was fought in November 1709, and the *paulistas* withdrew, perhaps because of word that the governor had sent reinforcements. A general pardon he issued later in the month contributed to peace. Meanwhile, a representative of the *emboabas* had reached Portugal, and the king responded by creating a new administrative unit for São Paulo and the MINING district. Albuquerque was appointed the first governor general and captain of the captaincy entitled São Paulo e Minas de Ouro. He immediately traveled to the mining area, turned some of the mining camps into towns, and returned to *paulistas* some but not all of the property *emboabas* had seized. Although peace had been established, deep antagonism remained between the *paulistas* and the *emboabas*.

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**encomienda** The fundamental institution through which Spaniards initially exerted demands on Amerindians, the *encomienda* system was inaugurated on HISPANIOLA and carried to the American mainlands. It required indigenous people to provide labor and TRIBUTE to an *encomendero*. In return, the *encomendero* was to provide military service to the Crown and a cleric to indoctrinate the Indians in Christian beliefs. The abuses perpetrated against NATIVE AMERICANS in *encomienda* were legion and stimulated outrage by clerics as early as 1511, most notably by the Dominican Bartolomé de Las Casas.

*Encomiendas* were the primary reward to conquistadores who accompanied Hernando Cortés, but their importance was already waning in Central Mexico by the middle of the 16th century. The New Laws of 1542 prohibited the assignment of new *encomiendas* and the inheritance of existing ones. Already the death of *encomenderos* without heirs was resulting in their *encomiendas* being transferred to the Crown, which emerged as the largest *encomendero* and turned to *corregidores* and *alcaldes mayores* to oversee the collection of tribute (see ALCALDE MAYOR; CORREGIDOR/CORREGIMIENTO). Although the Crown backed down on inheritance and reassignment of *encomiendas*, population decline had already directly reduced the value of many *encomiendas*. The arrival of more Spanish immigrants placed pressure on officials to make labor available, and in 1549, the Crown separated uncompensated labor from tribute in NEW SPAIN. Paid labor drafts

(*REPARTIMIENTOS*) became an important source of workers into the 1620s and continued after that in the drainage project for Lake Texcoco and limited other activities.

In PERU, *encomiendas* (also known as *repartimientos* there, an administrative equivalent to *encomiendas*) granted by Francisco Pizarro and his successors were in decline by the 1560s, but large *encomiendas* in the highlands, in particular, remained valuable. Indeed, in 1555, Peruvian *encomenderos* offered to pay 7.6 million pesos to PHILIP II if he declared their *encomiendas* permanent, inheritable property. The *KURAKASS* countered with a similar offer in return for an end to *encomiendas* and the abuse and alienation of resources with which they were associated. Philip, however, determined to deal with the *encomenderos* individually, charged handsome sums for specific arrangements. Nonetheless, population decline coupled with the use of *corregidores* starting in the 1550s and especially in the 1570s, the creation of new indigenous villages (*reducciones*) and the introduction of the colonial *MITA* by Viceroy FRANCISCO DE TOLEDO displaced *encomiendas* from their central position in the economy, although a few grants persisted as sources of income but not labor until the close of the colonial era (see *REDUCCIÓN*).

*Encomenderos* were dominant in NEW GRANADA from the assignment of *encomiendas* by conquistador Gonzalo Jiménez de Quesada in 1539; they employed *encomienda* Indians for personal service into the 1600s. The Crown slowly established control, introducing rotational labor (*repartimiento*) in the 1590s and expanding it in the 17th century. Although population decline affected the size of *encomiendas*, the institution was important in New Granada for a longer period than in Peru or New Spain.

As the Crown separated labor from tribute, the reassignment of *encomiendas* turned them into a form of pension, at times for beneficiaries in Spain. Royal directives of 1596 and 1601 ordered that Native Americans pay tribute in cash or kind only. Although *encomienda* was giving way to other forms of labor in Mexico and Peru from the mid-16th century, it remained important in northern New Spain, Yucatán, CHILE, New Granada, VENEZUELA, and PARAGUAY.

*Encomienda* was the basis for wealth and status among conquistadores. Early settlers and the original members of MUNICIPAL COUNCILS were typically *encomenderos* required to reside in the municipality within whose jurisdiction their *encomiendas* fell. To obtain the labor and tribute of “their” Indians, *encomenderos* relied on their chieftain (*CACIQUE* or *kuraka*), who was able to command the required resources. The most successful *encomenderos* used their initial access to labor and tribute as the basis for diversifying their economic activities, a necessary step in making a successful transition to a post-*encomienda* economy.

While land grants were distinct from *encomiendas*, *encomenderos* routinely obtained land to be worked with *encomienda* labor. *Encomenderos* also used *encomienda* labor

for MINING, construction, TRANSPORTATION, and other forms of physical labor. In addition, they rented out *encomienda* labor to other employers. Tribute included everything from consumable foodstuffs to commodities. Some *encomenderos* in Peru, for example, collected WHEAT, cloth, llamas, and COCA to sell to merchants who then marketed it in mining camps, especially POTOSÍ starting in the mid-16th century.

See also *ENCOMIENDA* (Vol. I); *LAS CASAS*, BARTOLOMÉ DE (Vol. I); *NEW LAWS OF 1542* (Vol. I).

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***engenho (ingenio)*** The SUGAR mill and often the sugar PLANTATION in its entirety were known in BRAZIL as *engenho* and in Spanish America as *ingenio*. Techniques of sugar production employed on the Madeira and Canary Islands and especially on the island of São Tomé in the Gulf of Guinea were transferred to the New World. These included owners of European descent, substantial investment, a sugarcane press with two horizontal rollers operated by oxen, horses, or water power, the plantation, and slave labor that, in the case of São Tomé, meant African slaves (see *SLAVERY*). The plantation system crossed the Atlantic soon after Christopher Columbus introduced the first sugarcane into the CARIBBEAN in 1493.

By 1530, the island of HISPANIOLA had 34 sugar mills. Hernando Cortés quickly introduced sugarcane into his estates in Cuernavaca and southern VERACRUZ. An enterprising Spaniard had started growing sugarcane in Morelos by the 1530s for both the domestic market and exportation to Spain. Viceroy Antonio de Mendoza founded a large sugar plantation in Orizaba. By the mid-16th century, *ingenios* were present in several parts of NEW SPAIN, and in the early 17th century, Jalapa had Mexico’s biggest and most productive plantation.

Spaniards planted sugar wherever there was either sufficient domestic demand to ensure profitability or access to an overseas market. The result was the creation of sugar plantations in numerous locations in the colonies. JESUITS in Peru were active in sugar production in coastal valleys until their expulsion in 1767. By that time, the price of sugar in Lima was less than half of what it was in the 1670s, a clear indication of increased supply.

The great expansion of sugar plantations in the islands of the CARIBBEAN began in the 17th century, with English, French, and Dutch producers leading the way. CUBA became an important producer in the 18th century, especially after the Seven Years’ War and even more so after the revolution in Saint Domingue effectively eliminated sugar production there.

BRAZIL, rather than any location in Spanish America, emerged as the New World’s premier producer of sugar

by the end of the 16th century and remained important for the rest of the colonial era. In the 1530s and 1540s, sugarcane was planted on the Brazilian coast from PERNAMBUCO south to São Vicente. Pernambuco proved the most successful and, with 66 *engenhos*, led Brazilian sugar production by 1580; the captaincy of BAHIA was in second place with more than 40 mills in the Recôncavo, an area surrounding the Bay of All Saints. By that time, wealthy mill owners and planters were establishing the plantation society that characterized Brazil's sugar-producing regions into the 19th century. Although indigenous people initially provided labor, their high mortality and unsatisfactory level of productivity led planters by the 1570s to turn increasingly to imported African slaves. SLAVERY provided the unskilled as well as much skilled labor in the planting, harvesting, and processing of sugarcane into the 19th century.

The production of sugar required several steps. After preparing the fields and irrigation canals, workers planted, watered, weeded, and harvested the cane. The cut cane was carted to the mill, called an *engenho* or *ingenio* if water driven and a *trapiche* if animal-powered. There, it was crushed by rollers, and the resulting juice was poured into large cauldrons where it was boiled until it had the consistency of honey. The juice was clarified and filtered as it was poured from one container to another. After successive stirrings and cooling, the mass rested for two days before a four-day distillation process was undertaken to separate the molasses from the sugar. Following claying and drying in the sun, the sugar was poured into loaves and wrapped, ready for sale. Because of the capital required for a mill, small producers took their sugarcane to the mill of a nearby plantation owner, who processed it for a share of the sugar.

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**Enlightenment** The Enlightenment is the name for the intellectual climate of opinion derived from European intellectuals including René Descartes, John Locke, and Isaac Newton. Pierre Bayle popularized the ideas that became associated with the Enlightenment and favored by the philosophes in 18th-century Europe, for example Montesquieu, Voltaire, Denis Diderot, other French encyclopedists, and Adam Smith, who opposed Aristotelian thought and reverent appeal to authority. The Enlightenment emphasized experimentation, observation, methodical doubt, and the application of critical reason. Adherents in Latin America stressed the use of these approaches in the pursuit of

useful knowledge, that is, knowledge sought and propagated by naturalists and applied scientists who were, in some cases, supported by the Spanish Crown. Although most representatives of the Enlightenment opposed revealed religion, this was not the case in Spain, where the Crown promoted the acquisition and dissemination of useful knowledge.

The widely read volumes by the Benedictine friar BENITO JERÓNIMO DE FEIJÓO Y MONTENEGRO most prominently introduced the intellectual approaches of the Enlightenment to Spain and Spanish America. Feijóo published nine volumes entitled *Teatro crítico universal* (1726–39) and five volumes titled *Cartas eruditas* (1742–60). Roundly criticized by Aristotelians for years, Feijóo ultimately received official approval in the form of honors of the Council of Castile.

By the late 18th century, a limited number of Latin American professionals, government officials, scientists, clergy, and university faculty and students participated in the Enlightenment and even referred to themselves as “*lucers*,” or “enlightened ones.” Nonetheless, European philosophes simultaneously considered Latin America a “horrible example.” The Abbé Raynal’s best-selling *History of the Indies* (54 editions between 1770 and 1800) set the tone with a contemporary version of the 16th-century BLACK LEGEND, telling of Spain’s unique cruelty and obscurantism fed by Catholicism.

The spread of enlightened ideas accompanied the creation of economic societies, or SOCIETIES OF *AMIGOS DEL PAÍS*, as they were often known. Between 1770 and 1820, about 70 economic societies were established in Spain; between 1780 and 1822, no fewer than 14 were founded or suggested in the overseas territories. Some of the colonial societies published periodicals that promoted modern knowledge, scientific information, examination of the conditions of their own regions, and proposals to improve their economies (see ECONOMY). The *MERCURIO PERUANO*, published in LIMA, and the longer-lived *Gazeta de Guatemala*, published in Guatemala City, were among the best known.

The Spanish Crown put some aspects of enlightened thought into practice. The rationalization of administration, notably through the INTENDANT system; the systematic collection and analysis of data; and several scientific and technical missions marked the last decades of the 18th century.

An example of a royally sponsored botanical expedition was that of Spanish pharmacists Hipólito Ruiz and José Antonio Pavón to Peru in the years 1778–88. Accompanied by a French botanist and two illustrators, Ruiz and Pavón collected specimens and seeds of plants in deserts, mountains, and tropical forests. Along with illustrations and comment, the results were to provide a comprehensive catalog of Peruvian plant life identified according to the methodology of famed Swedish botanist Carl Linnaeus. Aside from adding to botanical knowledge and stocking the royal botanical garden and collection of



The College of Mines established in Mexico City in 1792 illustrated the Enlightenment's focus on useful knowledge. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

natural history, the expedition aimed to identify plants of potential economic value such as dyes and medicines.

The medical profession in Spanish America proved itself a major outpost of enlightened thought. Faculty that taught medicine at the University of Guatemala demonstrated themselves both familiar with contemporary European medical practices and capable of experimentation and even invention of improved medical techniques. Dr. José Felipe Flores combined scientific study with unbounded optimism in declaring meatballs made of newts a cure for cancer and, eventually, nearly every other affliction. His published tract (1781) was translated into French and Italian, and enthusiasts in Spain and France declared experiments using the cure successful. Flores also created a wax figure with removable parts to provide anatomical study for medical students. Experimental method was furthered with actual cadavers when available. Dr. Narciso Esparragosa y Gallardo, Dr. Flores's prize student, performed successful cataract removal starting in 1797. He also invented an elastic forceps for removing infants from the womb. Experimentation in academic medicine in Guatemala was firmly established.

In general, colonial UNIVERSITIES were bastions of ancient ideas and considerable rote learning. As guard-

ians of credentials necessary for employment in the professions and some offices of royal administration, university faculties' control of curricula and instructional techniques based on those of the University of Salamanca and sanctioned by royal approval gave them power to introduce or prevent the dissemination of new ideas in courses. Not surprisingly, the desire to reform curricula and even replace Latin with Castilian as the language of instruction divided the cloister (*claustro*), or governing body of a university. Reformers were more successful in universities located far from viceregal capitals, such as the University of Guatemala.

A Franciscan friar from COSTA RICA, José Antonio Goicoechea, introduced experimental physics in GUATEMALA, perhaps in 1769. Although he held the second chair of theology from 1780, with the approval of at least a significant portion of the cloister, he taught experimental physics at the University of Guatemala, a course justified by its very utility. Goicoechea's proposed plan of studies for the university included chairs of mathematics and related subjects, as well as experimental physics. The proposed texts of natural philosophy were read at universities across Europe. When Goicoechea returned from travel to Spain, he brought equipment for teaching

the modern sciences, including chemistry, experimental physics, astronomy, mathematics, and natural history; an “intellectual revolution” in EDUCATION at the University of Guatemala antedated similar changes at the universities in Mexico City and Lima.

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**epidemics** The most deadly part of the COLUMBIAN EXCHANGE was the inadvertent introduction of pathogens from Europe, notably smallpox, measles, and typhus, that by the middle of the 16th century had killed untold millions of indigenous people in the Americas. The catastrophically high mortality rate was primarily due to the Amerindians’ lack of previous exposure; unlike the Spaniards and Portuguese, the native population had no immunity to the diseases. Although the regions and timing of epidemics varied, population decline due to epidemic disease of varying intensity occurred throughout colonial rule. Highland regions usually suffered less than villages in lowland and coastal regions, but everywhere the consequences were significant.

After terrible epidemics in 1520–21 and 1545–48, the Valley of Mexico was struck at least 45 more times before 1810. Particularly devastating was the great *cocoliztli* of 1576–79, an indeterminate illness marked by nosebleed, high mortality among NATIVE AMERICANS, and the death of a small number of Spaniards. After nearly a dozen earlier epidemics, the native population of Central Mexico had dropped to the point that Spaniards actively invested in AGRICULTURE in order to ensure an adequate supply of particularly WHEAT. Flooding in MEXICO CITY, most notably in 1629, created conditions conducive to the spread of disease. Repeated droughts in the 1660s brought illness and death to indigenous people and Spaniards. An epidemic, perhaps typhus, in 1736–39 was particularly severe for Indians, with about 60,000 deaths in Mexico City and some 200,000 throughout NEW SPAIN.

Between 1761 and 1813, five significant epidemics struck Mexico City. In 1761–62, typhus and then smallpox ravaged the capital. About 7,000 patients treated at the Royal Indian Hospital perished. Overall, between 14,600 and 25,000 persons died. Smallpox appeared again in 1779–80, claiming between 9,000 and 22,000 victims. In 1784–87, pneumonia and other ailments afflicted a population that by 1785 was also suffering from famine. The combination led to some 300,000 deaths throughout Mexico, with the poor suffering most. In 1797 occurred the final outbreak of smallpox prior to the introduction of vaccination, probably claiming more

than 7,000 lives in the capital. An epidemic of pestilential fevers broke out in 1813 in Mexico City and elsewhere in New Spain. More than 20,000 died in the capital city from this imprecisely identified malady. At a minimum, 50,000 died in the capital from the five epidemics.

Central America often but not invariably shared the early 16th-century epidemics with Central Mexico. By 1577, five pandemics may have reduced the 1519 population by more than two-thirds. Drought and famine were often accompanied by epidemics, as was the case in 1563–65, 1570, 1585, and 1610 in specific regions of Central America.

In the Andes, an epidemic identified by some scholars as smallpox struck in the 1520s and was followed by measles in the early 1530s. Typhus and pulmonary plague arrived in 1546, a year after reaching Mesoamerica. It was followed in the years 1557–62 by measles, influenza, and smallpox. Between 1585 and 1591, typhus, smallpox, and measles claimed victims. Measles returned in 1597, and diphtheria arrived in 1606. As in Mesoamerica, the 1610s were marked by measles and typhus; diphtheria also returned. Typhus was back in the early 1630s and smallpox once more in 1651. Epidemics in the 1690s severely affected the Kingdom of QUITO.

The western part of the Pasto region of NEW GRANADA lost about two-thirds of its tributaries between 1558 and 1570, the largest part to epidemics including smallpox. Before 1600, the GUARANÍ in PARAGUAY experienced epidemic diseases that devastated the population. In CHILE, the number of “peaceful” Indians dropped by nearly 50 percent between 1570 and 1600 as a result of “disease and exploitation.”

While the toll from epidemics and other causes brought the native population of Central Mexico to its nadir about 1625, PERU suffered a devastating pandemic of smallpox and influenza in 1719–21. POTOSÍ, for example, lost 22,000 people; in its environs another 10,000 perished. Over half of the population of the bishopric of CUZCO died; Indians were hit hardest. Those who tried to flee from the diseases usually simply spread them to new sites.

The policy of congregating indigenous people in new villages facilitated the spread of epidemic disease wherever the approach was employed (see CONGREGACIÓN; REDUCCIÓN). The same occurred in the ALDEIAS established by the JESUITS in BRAZIL.

The consequences of epidemics were numerous. The earliest epidemics in New Spain quickly lessened the value of ENCOMIENDAS and stimulated the widespread use of REPARTIMIENTO, or forced labor drafts. Subsequent epidemics ended the reliability of *repartimiento* as a source of labor; *hacendados* responded by employing wage laborers and encouraged residence on their properties by enough workers to handle year-round tasks (see HACIENDA).

Native population loss resulting from epidemic disease reduced the amount of TRIBUTE paid. Since Spanish officials made new counts of tributaries in villages after



the drop in population, at times long afterward, the surviving indigenous were forced to increase what they paid in order to meet the village's quota. This, in turn, made flight increasingly attractive, and the number of *FORASTEROS*, or "outsiders," in villages increased along with the number of indigenous people taking up residence on Spanish estates. In the worst cases, an epidemic could wipe out an entire village. For example, a number of villages vanished after an epidemic in the Guatemalan highlands in 1650. Reasons other than epidemics, of course, led Amerindians to leave their villages, the *MITA*, or forced labor draft, for Potosí being the most notorious.

BRAZIL'S native population also suffered from epidemic disease, probably smallpox, from at least the late 1550s. By 1562, an estimated 30,000 indigenous people under Portuguese control had died. When measles struck the following year, another 30,000 might have died. In 1575, the governor brought some 1,200 defeated Indians to BAHIA; there, outbreaks of measles and smallpox killed most of them. The impact of diseases on the native population resulted in Portuguese seeking to enslave Indians from farther inland in Brazil but also weighing the alternative of imported African slaves (see *SLAVERY*). Large numbers of imported slaves date from the 1570s.

Unlike the early epidemics of the colonial era, which afflicted Amerindians almost exclusively, by the late 18th century, epidemics took a toll across colonial society, testimony to the immunities acquired over nearly three centuries by the native population. In 1821, an epidemic identified as cholera struck Lima, incapacitating at least half of the royalist army as well as many civilians. Some 1,500 royalist soldiers died, and rebel forces outside the city were also affected. In 1825, an epidemic of typhus complemented by scurvy broke out among royalists under siege in the fortress of CALLAO; at least 2,700 civilians and soldiers died of disease and starvation.

See also *DISEASE* (Vol. I); *MEDICINE* (Vol. I).

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***estancia (estância)*** Although *estancia* could refer to a farm or indigenous community under the rule of another community, more commonly it referred to a CATTLE ranch (*estancia de ganado mayor*) or SHEEP or goat ranch (*estancia de ganado menor*) (see *RANCHING*). In NEW SPAIN, Viceroy Antonio de Mendoza in 1536 established the sizes and terms for grants of *estancias*.

As outlined by Mendoza, a grant of land for a cattle ranch was equal to one square league, or 6.78 square miles (17.5 km<sup>2</sup>), or 4,338 acres (1,756 ha); a grant for raising sheep or goats was 3.01 square miles (7.8 km<sup>2</sup>), or 1,928 acres (780 ha). In contrast, a grant for AGRICULTURE (*caballería*) was a mere 105 acres (42.5 ha). In practice, grants were of irregular shape and approximations of the specified sizes. Grants of *estancias* often included a provision that the recipient must pasture a specified minimum number of animals by a certain date and a prohibition against selling the land for four years. In Central Mexico after the mid-16th century, the term *estancia* was also applied to agricultural holdings. *Estancia de labor* referred to plowland; *estancia de pan llevar*, to wheatland; and *estancia de labor y ganados*, to fields and livestock. *Estancias* were often but not invariably a part of the large landholdings that became generally known in New Spain as HACIENDAS.

*Estancia* and the related term *estanciero* for its owner are associated mainly with the lands of present-day Argentina, although the Portuguese used the word *estância* for ranches as well. In the Pampas, the term applied generically to large estates, in extreme cases of several hundred thousand acres or more. Owned ultimately by CREOLES, most of them residents of BUENOS AIRES or one of the few interior cities, these estates were used for raising cattle, horses, sheep, and crops. As the 18th century ended, some of the more enterprising *estancieros* had expanded into the salt beef business. With independence achieved, the coastal landowning, cattle raising, and beef salting *estancieros* emerged as the most important interest group in the UNITED PROVINCES OF THE RÍO DE LA PLATA. The success of Juan Manuel de Rosas in dominating the United Provinces for many years rested in large part on his support from the *estancieros*.

See also *ESTANCIA* (Vol. III).

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# F

**family** The primary social and economic unit in colonial Latin America was the family. Among notable families, marriage and kinship provided bonds that linked multiple generations with diverse economic activities, political power, and prestige initially through aggregation and then through maintenance for heirs. Among other free families, complementary economic activities combined to provide sustenance. Slave families found mutual support in their difficult existence (see *SLAVERY*).

Church and government authorities considered the ideal family as one with married parents and legitimate children, although both recognized that children born out of wedlock were numerous. Considering the sacrament of marriage as the foundation of family life, clerics strongly advocated it both for religious reasons and for the practical consideration that they derived fees from the ceremony, one reason why the poor often settled for cohabitation.

Elite families consisted of a married couple and their offspring, their unmarried kin, for example, clerics and nuns, and their relatives through birth and marriage. Retainers, servants, and slaves extended a family's influence into nonelite sectors of local society. Elite families were almost invariably rooted in a specific city, often an administrative and commercial center but at times a successful *MINING* center, for example, *POTOSÍ*, *ZACATECAS*, and *GUANAJUATO*. As the largest and richest administrative and commercial capitals, *MEXICO CITY* and *LIMA* were home to numerous elite families who remained so over multiple generations.

While the conquistadores and early settlers who received rich *ENCOMIENDAS* provided the foundation of the earliest prominent Spanish families, it required diversified investment of *encomienda* *TRIBUTE* and labor

to sustain economic success during a century or more of declining indigenous populations. By the mid-16th century, the winnowing process was well under way. Long-term perpetuation of elite status required continued economic success or access to new sources of income. Debt was a solution long hallowed by the practices of the upper nobility of Castile but obviously less satisfactory than solvency. Fortunately for many elite families, salvation often came in the form of a successful *PENINSULAR* merchant or bureaucrat willing if not anxious to marry a young *CREOLE* woman of "good" lineage who, in many cases, could trace her genealogy to a conqueror or early settler. This solution was mutually beneficial, as the new husband confirmed and expanded advantageous political and economic connections in local society and the bride's family often gained access to wealth associated with the groom's business activities or connections to prominent royal officials. In such marriages, the groom was often substantially older than the bride.

Family ties were common in the businesses of merchants. In 17th-century *NEW SPAIN*, a merchant father and several sons were frequently involved in *TRADE* together. *Peninsular* wholesale merchants also often began their careers as young nephews called from Spain by successful uncles engaged in commerce in the Americas. In both cases, wholesalers routinely deferred marriage until they had become reasonably successful, an objective that often meant they were in their late 30s when they married. Some wholesalers, not surprisingly, married daughters of other wholesalers; others married daughters of local aristocrats. With the difference between spouses often some 20 years, the chances were excellent that the wife would outlive her husband by many years, if she did not die during childbirth. Widows enjoyed more authority,

independence, and legal standing than married women with living husbands. While widows might turn to a brother or other relative for assistance, many oversaw the family's affairs alone.

Patriarchical structure was the norm in prosperous colonial families, although wives oversaw domestic matters in mansions, which were usually located near the center of the city. Among notable families, arranged marriages were the rule; the combination of *DOWRY* and a type of bride-price or gift known as the *arras* meant that a family's financial well-being was a key issue. While a husband might or might not involve his wife in discussions about matrimony for their children, a widow's responsibilities for minor children included arranging careers and perhaps marriages for the sons and marriages or residence in convents for the daughters. The ultimate goal was the perpetuation of the family's status; diverse investments, varied careers, and financially advantageous marriages contributed to this end.

The vast majority of colonial families, of course, lacked elite status. Whether of Spanish, Portuguese, Amerindian, or African descent or any combination of these, most families struggled in a precarious existence that could turn perilous with disease, drought, unseasonable cold, a plague of locusts, or another natural disaster. Many cohabiting units did not meet the CATHOLIC CHURCH's definition of a family, and probably most did not care. As was the case earlier, more *CASTAS* in late 17th-century Mexico City were of illegitimate than legitimate birth. Their more pressing concerns were getting food for the day and having a place to sleep other than the street. While the Spanish Crown had tried to segregate NATIVE AMERICANS in both urban and rural areas, these efforts failed. By the middle of the 17th century, probably more *castas* than Indians were laboring in Mexico City, and the city had been assigning lands in the Indian district to Spaniards for a century. The Crown lumped together idle poor Spaniards, blacks, mulattoes, and mestizos and ordered them to get employment, a mandate that is most notable for its compression of social distance in a city without adequate jobs (see *MESTIZAJE/MESTIZO; MULATO*).

Artisans, shopkeepers, petty merchants, and a few others owned homes, sometimes inherited, where their families resided. Normally one story high, many had been built by the owner. Some rooms might lack a roof. Most plebians, however, rented rather than owned property. In the center of Mexico City, religious orders owned most rental properties. The poorest renters, often including children with a single mother, lived four or five to a single room at street level and were forced to share cooking, washing, and sanitary spaces with scores of other renters; they looked out at raw sewage and garbage in the street or canal, while more affluent tenants lived on the higher floors. Children's labor—legal or otherwise—helped families to survive. Crime was common (see *CRIME AND PUNISHMENT*). At the bottom of society

in late 18th-century Mexico City, observers regularly noted a large, homeless, almost naked population living with disease, filth, and ongoing alcoholism. While Mexico City was unique in terms of size and wealth in the Spanish colonies, its mortality rate throughout the colonial era was sufficiently high that only by a constant influx of migration could it maintain a stable population. Those persons who moved to Mexico City anticipated improving their lives.

In indigenous villages, even when outsiders had intruded, marriage was the norm for adults, and the family was the usual form of social organization. Customs varied regarding marriage, but in some parts of Spain's empire, lineage was as important to Amerindians as *LIMPIEZA DE SANGRE*, or blood purity, was to the Spaniards who claimed it. Spanish clerics never approved of the practice in Andean PERU of trial marriage (*sirovinacy*), but the results were generally stable families. Nevertheless, violence was most apt to be within a family, as it was elsewhere.

In indigenous communities, gender complementarity was the rule as pre-Hispanic practices persisted in most daily activities and social organization. Without gender complementarity neither men nor women could fulfill their expected roles, be they preparing food, fields, textiles, or irrigation canals. While only men were liable for service in the hated *MITA* of Potosí, it was unthinkable that their wives would not accompany them. Marriage and family were central to life.

Among Indians, *castas*, and poor Spaniards who took up residence on *HACIENDAS*, it was common for more than one family member to be employed and the senior member to guarantee that advances on payment made to other family members would be repaid. The Hispanic living environment of the hacienda increased the use of marriage, baptism, confirmation, and burial ceremonies.

In both Spanish and Portuguese America, some slaves married and had families, often overcoming great difficulties associated with their legal status as well as arbitrary, exploitive, and capricious masters to do so. The Spanish Crown preferred that Africans marry other Africans rather than marry or have unions with indigenous people. If Christian, slaves could marry and were entitled to a married life without a master's consent provided there were no impediments such as an existing marriage, kinship, or spiritual kinship ties.

Families as the church defined them rested in the first instance on marriage. There were cases, however, in which the relationship between husband and wife became so miserable that permanent separation was the only appropriate solution. *Divorcio* in the colonial era referred to permanent separation, but with no right of remarriage while the other spouse lived. Informal and often permanent separation was not uncommon, however, especially when a man went to the Americas but left his wife in Spain. The Spanish Crown was always concerned about the adverse effect this had on family life, and repeated

legislation required the man in the New World either to send for his wife or to return to Spain. Not all complied, of course, and more than a few men and some women came before the INQUISITION for bigamy.

In the varied family environments of city, village, and hacienda, children grew up, absorbed some social skills, and learned how to deal with their immediate surroundings. Some children learned basic survival skills; others learned about farming, gardening, stock raising, driving MULES, or shopkeeping; others became apprentices to a father, uncle, or unrelated artisan. A few boys attended parish schools and learned reading, writing, arithmetic, and some church doctrine; a few girls learned reading, memorized a catechism, and received instruction in sewing, weaving, and embroidery; still fewer boys received formal EDUCATION through a COLEGIO and university. Pregnancy without marriage or the sacrament of marriage was the step that turned young men and women into adults and again brought family to the fore. For husbands, the marital state came with legal and customary privileges and responsibilities; for wives, marriage meant moving from the custody of her parents to that of her husband.

See also FAMILY (Vols. I, III, IV).

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**fazenda/fazendeiro** In colonial BRAZIL, moderate to large estates known as *fazendas* were the counterpart to HACIENDAS in Spanish America. A rural property, *fazenda* is sometimes translated as “farm,” as is the Portuguese word *sítio*. *Estância* (ESTANCLIA, in Spanish), the term also used in the Río de la Plata region for a large rural property, is translated as “ranch”; although legally about 27 square miles (70 km<sup>2</sup>), many *estâncias* were much larger, in some cases exceeding 200 square miles (518 km<sup>2</sup>).

The term *fazenda* generally denoted rural properties devoted principally to AGRICULTURE; some owners grew WHEAT, MAIZE, and other agricultural products including, on occasion, SUGAR. Livestock could also be raised on *fazendas*. In the early days of colonization, donataries and

their representatives made large grants of land known as *sesmarias*, usually one league square, about 17 square miles (43.5 km<sup>2</sup>). Grants to favored nobles and commoners often were double that amount or more. Only improved land, however, had demonstrable value; “unimproved wilderness” was listed to confirm ownership but went unvalued in early 17th-century property inventories in Santana de Parnaíba.

Colonial *fazendeiros* invested much less capital than was required in the sugar PLANTATIONS or ENGENHOS that produced sugar for export. Like *hacendados*, *fazendeiros* sought to monopolize a local market, be as self-sufficient as possible, and perhaps sell commodities for regional consumption, as did the *fazendeiros* in MINAS GERAIS.

Indigenous people initially provided labor on *fazendas*. For example, GUARANÍ resident in the Jesuit ALDEIA of Barueri not far from Santana de Parnaíba labored for landowners in the early 17th century. The need for labor on the *fazendas* of SÃO PAULO also stimulated BANDEIRAS, the often successful slaving expeditions into the interior of Brazil. Pushing southwest into Guairá, the present state of Paraná, the *bandeirantes* attacked Jesuit missions and enslaved the native population so successfully that by the 1630s, the 13 missions of the region were destroyed and the JESUITS moved their remaining neophytes down the Paraná River. An observer in 1636 reported some 40,000 indigenous slaves on *fazendas* in the temperate lands of São Paulo. As access to indigenous slaves declined, planters in the 18th century increasingly relied upon Africa for slaves.

See also FAZENDA/FAZENDEIRO (Vol. III).

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### Feijóo y Montenegro, Benito Jerónimo de

(b. 1676–d. 1764) Spanish Benedictine author Spain’s most important 18th-century publicist of modern approaches to scientific knowledge, Benito Jerónimo Feijóo y Montenegro was born in Casdemiro, Galicia, Spain. A Benedictine from the age of 14, he spent many years teaching theology at the University of Oviedo. At the age of 50, he began publishing the nine-volume *Teatro crítico universal o discursos varios en todo género de materias* (Universal critical theater, or varied discussions on all types of subjects; 1726–39); he subsequently authored the five-volume *Cartas eruditas y curiosas* (Erudite and curious letters; 1742–60).

Feijóo set out to combat superstition and reliance on authority and tradition, to popularize new approaches to science, and to address selected philosophical issues. Drawing upon the advances of 17th-century philosophy and science, he emphasized that observation, experimentation, and application of critical reason were more

important in scientific knowledge than appeals to authority; Aristotle's scientific ideas were clearly out of date. The Benedictine held Francis Bacon in particularly high regard and introduced the ideas of René Descartes and Isaac Newton to the reading public.

The reception to Feijóo's first volume in 1726 revealed that Spain had numerous opponents of modern approaches to knowledge. Although the Benedictine did not embrace the philosophical systems of Descartes and Pierre Gassendi, his support of a new approach to scientific knowledge nonetheless stimulated a torrent of criticism. By the end of 1730, dozens of authors had attacked his works. Yet, there were supporters as well, most notably Martín Martínez, an advocate of skeptical medicine, and Martín Sarmiento, who published a two-volume defense of Feijóo in 1732. Attacks had slowed to a trickle by the time FERDINAND VI prohibited them in 1750.

CREOLE intellectuals in the colonies were particularly enchanted with Feijoo, for in *Teatro crítico*, he condemned the widely held European view that creoles' intelligence developed quickly but, in contrast to that of Europeans, then deteriorated precipitously, leaving the American-born with premature senility. Feijóo noted that creoles were as intellectually capable as Europeans. If they turned to idleness, the cause lay not with their abilities but rather the discrimination that limited their opportunities to serve in church and state.

The sales of Feijóo's volumes reached nearly half a million during the course of the 18th century. Second only to Cervantes's *Don Quixote* in Spanish publishing history, sales confirm the enthusiasm that increasingly greeted Feijóo's books. Spain's father of the ENLIGHTENMENT died in Oviedo.

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**Ferdinand VI** (b. 1713–d. 1759) *monarch of Spain* Born in Madrid, Ferdinand was the son of PHILIP V and his first wife, Maria Louisa of Savoy. Well meaning but lazy, he suffered mental instability, leaned heavily on his wife Barbara of Braganza, whom he had married in 1729, and was less interested in matters of state than in diversions.

Ferdinand's reign, beginning in 1746 until his death, enjoyed a welcome respite from war following the Treaty of Aix-la-Chapelle in 1748 and the TREATY OF MADRID with Portugal in 1750, the latter affecting Jesuit missions and the borders between BRAZIL and the Río de la Plata region. The monarch's leading ministers were Zenón de Somodevilla, better known as the marqués de la Ensenada, a title he received in 1736, and José de Carvajal y Lancaster. In 1737, Ensenada became minister

of the navy and started rebuilding the Spanish fleet (see FLEETS/FLEET SYSTEM). In 1743, he became minister of finance, war, the navy, and the INDIES, and superintendent of revenues, portfolios that made him the most powerful official in Spain (see MINISTRY OF THE INDIES). He was joined in December 1746 by Carvajal y Lancaster who became secretary of state, governor of the COUNCIL OF THE INDIES, and president of the board (junta) of commerce. Although both supported peace and neutrality, Ensenada was pro-French, while Carvajal favored Britain. Both sought to build their political bases through securing posts for their clients.

Ensenada sought to build the navy and thereby expand Spain's influence in Europe. To do so required significant financial resources; he proposed to get them through a single tax, the *catastro*, which would tax income, including that of the wealthy, instead of relying on taxes on consumer goods, including basic foodstuffs. Ensenada did not succeed in establishing the new tax, although working through INTENDANTS placed throughout Spain in 1749, a remarkable amount of preparatory social and economic data was amassed. Nonetheless, naval construction increased. In 1753, a new agreement was reached with the papacy; this concordat provided both financial gains for the Crown and a further expansion of royal patronage over the CATHOLIC CHURCH (see PATRONATO REAL).

Ensenada supported the use of register ships for TRADE with the colonies. A 1749 decree ordered the secularization of parishes still under the control of mendicants. Ensenada also oversaw an end to the sale of appointments to judicial positions in 1750.

The death of Carvajal in April 1754 and the machinations of the British ambassador, Sir Benjamin Keene; the duke of Huéscar; and Ricardo Wall, the new secretary of state, brought about Ensenada's fall in July.

In August 1758, Queen Barbara died, and Ferdinand VI completely lost his sanity; he spent the next months wandering in the castle at Villaviciosa de Odón, unwashed, unshaven, unkempt, and unwilling or unable to sign official documents, the last bringing government to a halt. His death in 1759 without a direct heir left the throne to his half brother, eldest son of Philip V and his second wife, Elizabeth Farnese, who succeeded him as CHARLES III.

Ferdinand's reign has been aptly described as a "time of transition." Anticipating the regal policies of Charles III, encouraging greater colonial trade by ending the fleet system for South America, promoting a more active state through the expansion of the intendant system, and initiating a more active policy in favor of PENINSULAR officeseekers, the government sought to reduce CREOLE and, particularly native-son, strength in administration in the Indies.

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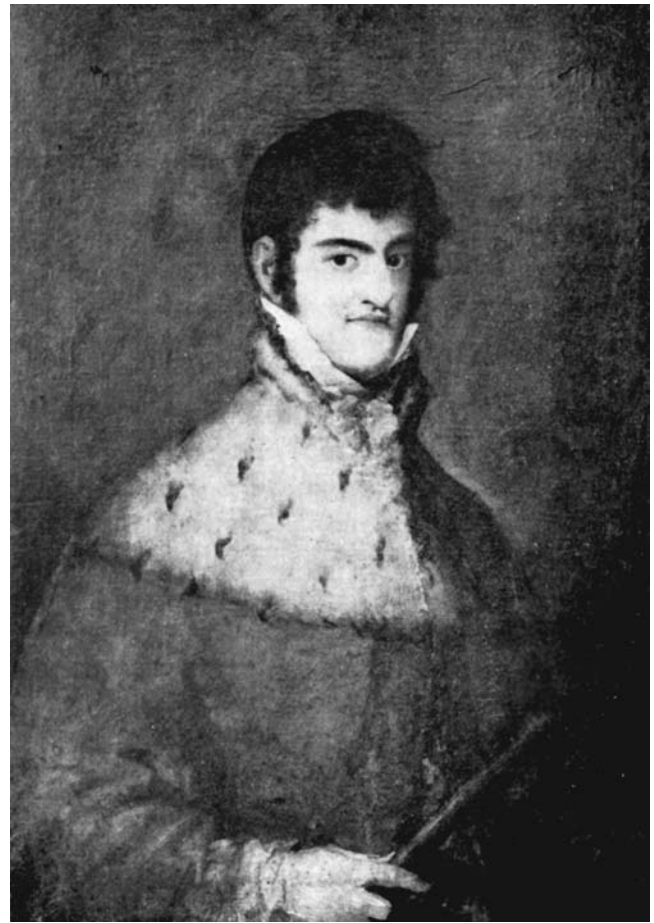
### **Ferdinand VII** (b. 1784–d. 1833) *monarch of Spain*

Born in the royal palace at San Lorenzo de Escorial, Spain, Ferdinand was the eldest surviving son of CHARLES IV and Maria Luisa of Parma. His first reign began as a result of Charles's abdication on March 19, 1808, the consequence of two riots at Aranjuez fueled by popular antipathy toward royal favorite MANUEL GODOY Y ÁLVAREZ DE FARIA, Prince of the Peace. The response in Spain and later the colonies to the deposition of Godoy and Charles, and the accession of Ferdinand, was jubilation. Although knowledge about Ferdinand was very limited, he had become a symbol of integrity and good government, his popularity increasing as opposition to Godoy had grown. The new monarch's first period of rule, however, lasted only a few weeks. With French troops posted from Madrid to the French border, Ferdinand traveled north starting on April 10 in the hope of obtaining Napoleon's recognition of his reign. He wound up abdicating to his father at Bayonne on May 6 before being sent to a French chateau, where he was detained for the duration of Spain's war of independence. During that time, he was known as "the Desired One," and governments of resistance in Spain invariably acted in his name.

The Treaty of Valençay, signed December 11, 1813, ended the war with the French and recognized Ferdinand as king of Spain. When the monarch returned to Spain in spring 1814, he was greeted by enthusiastic crowds. Assured of MILITARY support, on May 4, 1814, he declared all actions by the governments of resistance, including the CONSTITUTION OF 1812, null and void. Within a week liberal leaders were imprisoned. Soon, the INQUISITION was reestablished, a relatively free press abolished, the old councils reconstituted, the JESUITS restored, and other trappings of the old regime in place. There was no royal favorite like Godoy; rather, ministerial instability dominated, with ministers' service averaging six months. The treasury was a shambles; revenue in 1814 covered scarcely half of obligations, and all government and military employees were owed back pay.

It was one thing to restore old regime institutions and personnel in Spain, but a different matter in the Americas. There, the political spectrum in 1814 went from absolutists such as VICEROY JOSÉ FERNANDO DE ABASCAL Y SOUSA of PERU and VICEROY FÉLIX MARÍA CALLEJA DEL REY of NEW SPAIN, who were delighted with Ferdinand's actions, to adherents of complete independence from Spain such as were found in VENEZUELA, NEW GRANADA, and PARAGUAY. Royal treasuries in the colonies, as in Spain itself, however, were in parlous shape, and the Crown had significant unfunded debt.

Rather than seriously consider alternatives such as greater autonomy for the colonies, Ferdinand quickly determined to use military force to reestablish Spanish authority. In 1815, General PABLO MORILLO sailed for Venezuela with the largest military force ever sent to the colonies. Morillo reestablished Spanish control in



Portrait of Ferdinand VII, king of Spain (1808–1833) (*Private collection*)

Venezuela and New Granada but at the cost of alienating many families among the regions' elites. Although it appeared on the surface in 1816 that the royalists controlled the empire with the exception of parts of the VICEROYALTY OF RÍO DE LA PLATA, notably BUENOS AIRES and Paraguay, the reality soon proved different.

The RIEGO REVOLT, which began not far from CÁDIZ in January 1820, restored the liberals to power and forced Ferdinand VII to become a constitutional monarch with numerous restrictions on his authority. By the time French forces restored him to absolute power in 1823, the mainland empire in the Americas was on the verge of extinction. Royalist defeats in Peru, CHARCAS, and Chiloé, CHILE, ended the mainland empire.

During his final decade, a mostly peaceful time for Spain, Ferdinand's main concern was to leave a direct heir to the throne. In 1830, he published a pragmatic sanction approved by the Cortes of 1789 that allowed a female to inherit the throne. Although the publication preceded the birth of a daughter, Isabella, later in the year, it inflamed supporters of Ferdinand's brother Carlos, who had expected him to inherit the throne, and led to civil war soon after the monarch's death in 1833.

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**fiscal** The Spanish Crown's representative on every *AUDIENCIA*, chancery, and royal council was a *fiscal*. For much of their existence, the Audiencias of Mexico and Lima had two *fiscales*, one for civil cases and the other for criminal cases.

*Fiscales* held the most junior positions on the *audiencias* but were included in the *acuerdos* with the *oidores* (see *OIDOR*). They had a particular responsibility to look out for royal interests in cases involving the royal treasury (REAL HACIENDA). They also served as protectors of the Indians if the *audiencia* did not have a person named specifically for that purpose. When the position of *fiscal* was vacant, the junior *oidor* of the court assumed the duties of the post.

The position of *fiscal* for every *audiencia* other than in LIMA and MEXICO CITY was often a minister's first *audiencia* appointment. Between 1660 and independence, some 230 men were named *fiscal* as their first *audiencia* appointment; only 26 of them were named to Lima and Mexico City. Frequently, a *fiscal* was promoted to *oidor* of the same lesser *audiencia* or to *fiscal*, *ALCALDE DEL CRIMEN*, or *oidor* of the courts in Lima and Mexico City.

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**fleets/fleet system** To protect bullion, goods, and persons between Spain and the colonies, the Crown established, in October 1564, a fleet system under which one CONVOY sailed to VERACRUZ in NEW SPAIN and a second to TIERRA FIRME (CARTAGENA DE INDIAS and then PANAMA).

Two fleets sailed for the colonies annually from SEVILLE, CÁDIZ, or SANLÚCAR DE BARRAMEDA. Ideally, the *flota* left in May for Veracruz; the galleons left in August for Cartagena and then NOMBRE DE DIOS or, after 1597, PORTOBELLO. The fleets subsequently met at HAVANA and sailed through the Bahama channel, then northeast to catch the winds, east to the Azores, and back to Cádiz or Sanlúcar.

While the fleet system arose out of the need for protection, it was well suited for monopolistic trade. The Consulado of Seville (merchant guild) was dedicated to creating high-profit margins by sending a limited supply of goods to the three authorized ports (see *CONSULADO*).

The objective was to trade Spanish or reexported goods from elsewhere in Europe for all the SILVER and GOLD the merchants in America had brought to make purchases at the fairs.

Although most goods sent to the colonies in the early decades of the fleet system were taxed, the quantity of contraband goods increased as the cost of security mounted. Avoiding taxes enabled merchants either to make more profit when selling at a normal price or to sell goods more cheaply than their rivals while making a normal profit. In either case, chiseling spawned emulation, and contraband expanded, especially from about 1620 onward.

The total tonnage of a fleet was more important than the number of ships. Of the convoys sent to Tierra Firme between 1565 and 1730, the largest number of ships was 69 in 1589; their estimated capacity was 15,565 tons. The greatest amount of tonnage available was in 1587, when 64 ships had an estimated capacity of 19,957 tons. The variation in ships' capacities is demonstrated by the tonnage of 12,234 on 26 ships in 1603, compared to 12,867 tons on 49 ships in 1601.

The galleons sent to Cartagena and Panama at times came to collect gold and silver but did not transport numerous merchants and substantial merchandise to TRADE fairs. Between 1565 and 1600, 13 convoys of galleons went to Panama. Annual sailings arrived from 1601 to 1640, but thereafter the number dwindled; only 33 fleets arrived between 1641 and 1700. Between 1701 and 1730, there were four. A final fleet arrived in 1737. Henceforth, register ships carried legally traded goods between Spain and the South American colonies and Panama.

Fleets sailed to New Spain through most of the 18th century, but only eight sailed after 1730. The final fleet was sent from Cádiz in 1776. *COMERCIO LIBRE*, initiated in the Caribbean in 1765, replaced the fleet system for New Spain in 1789.

The primary purpose of the fleet system was to safely carry bullion from the colonies to Spain. Measured by this objective, the system worked remarkably well. Only twice did enemies of Spain manage to capture a treasure fleet. The most notable occasion was when a Dutch expedition led by Piet Heyn took the New Spain fleet off Matanzos, CUBA, in 1628. In 1656, English seamen under Admiral Robert Blake seized the galleons from Panama; the booty was some 2 million pesos. The following spring, Blake destroyed the New Spain fleet in the Canaries; its treasure and cargo were lost.

See also FLEETS/FLEET SYSTEM (Vol. I).

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**flota** See FLEETS/FLEET SYSTEM.

**forastero** *Forastero* generically means “outsider.” In colonial PERU, it came to mean a group of indigenous people and their descendants who had left their natal *ayllus* and been assimilated into other Indian communities.

When creating *reducciones* in Peru, VICEROY FRANCISCO DE TOLEDO divided the native population into two primary groups: tributaries and *yanaconas*, the latter attached to private citizens, usually Spaniards, through individual arrangements and exempt from *MITA* service (see *REDUCCIÓN*; *YANACONAJE*). These divisions placed *forasteros* in the *reducciones* they had left; by departing, however, they had given up their access to land through their kin group, along with the liability of labor imposed on the *reducciones*. Their ability to escape paying *TRIBUTE* to the community they left varied widely, with the distance they moved being particularly important. In the 1720s, *forasteros* became subject to tribute in the community in which they lived.

Despite the loss of access to their kin group’s land and labor assistance in agricultural production and other tasks, thousands of indigenous people migrated. Their reasons included a desire to escape the civil wars that marked early colonial Peru; fear of diseases such as measles, typhus, influenza, and smallpox, all of which struck 16th-century Peru; the damage wrought by natural disasters such as drought and EARTHQUAKES; and intolerance by Catholic clergy. Also important were the demands associated with SILVER production—MINING, *mita* labor, transporting goods, and providing agricultural products for those associated with mining. Finally, pressures on community resources, particularly the lands, and tribute demands spurred migration. The purchase of goods (*REPARTO*) imposed by *corregidores* provided yet another reason for migrating (see *CORREGIDOR/CORREGIMIENTO*).

The attribution of *forastero* was hereditary when descendants did not marry into their family’s original *ayllu*. These *forasteros* created ties in other communities where they could marry, have access to land, and own a home. Thus, they differed from the landless and transient. In the bishopric of CUZCO in 1690, *forasteros* lived in every province and two-thirds of the parishes; they accounted for between 6 and 100 percent of the population of these parishes and about 40 to 50 percent in the provinces. Thus, in some parishes, *forasteros* had completely replaced the original population of persons living in the *ayllu* of their birth.

After leaving their *ayllu*, *forasteros* had to seek income either through employment or access to land by rent, purchase, or marriage. Some joined other communities and participated in their production, while others became wage laborers. Thus, they represented an important shift in the organization of labor toward individualized, private labor contracts rather than the community obligations.

See also *AYLLU* (Vol. I); *FORASTERO* (Vol. I).

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**foreigners** Spanish monarchs sought to prohibit the unrestricted entry of foreigners into the empire. Under special circumstances of perceived utility to the Crown, however, they allowed foreigners not only to enter the empire but also to enjoy substantial rights, for example, in 1528 when CHARLES I authorized German bankers to undertake the conquest and settlement of VENEZUELA. Starting in the reign of PHILIP II, Irish soldiers entered Spanish employ, and in the second half of the 18th century, the Irish and their descendants included successful officers in the INDIES, for example, Alejandro O’Reilly, and administrators, including VICEROY Ambrosio O’Higgins.

Normally, the royal position was what Charles I stated in 1539 when he reiterated an earlier ban on entry into the empire of Jews, Moors, Jewish or Moorish *CONVERSOS*, and the second and third generations of persons judged guilty by the INQUISITION. The Inquisition was the institution directly responsible for investigating foreigners of questionable religious convictions.

The requirement that every passenger to the Indies be licensed facilitated enforcement of restrictions against foreigners, but violations of prohibitions were commonplace, as progressively more stringent punishments for them indicates. The ban was obviously unsuccessful, for in 1602, PHILIP III referred to the “growing inconveniences” of foreigners in the Indies. They threatened the integrity of Catholicism and were to be expelled as quickly as possible and sent away at their own expense. Foreign merchants resident in ports were particularly offensive; in contrast, those with useful skills such as tailors, potters, and masons were allowed to remain by PHILIP IV in 1621. In 1648, the viceroy of NEW SPAIN was ordered to send Judaizers condemned to exile to Spain. Orders issued as late as 1785 against smuggling passengers suggests the illicit entry of foreigners continued throughout the existence of the empire.

Foreign threats to Spain’s empire were present from the 16th to the 19th centuries. The exploits of JOHN HAWKINS and the capture and prosecution by the Inquisition of a number of his men were an early example. Francis Drake was even more notorious, striking on the Pacific coast as well as in the CARIBBEAN and PANAMA. In the 17th century, pirates based on Caribbean islands became the scourge of Spanish ports on nearby mainlands (see BUCCANEERS). The Dutch sought salt in the flats of Araya, near Cumaná in Venezuela, starting in the 1590s, engaged in contraband TRADE, and captured PERNAMBUCO, holding it from 1630 to 1654. The French



also established themselves in the Caribbean and used it as a base for illegal trade and, in Saint Domingue for profitable SUGAR production.

While goods transported by the fleets testified to foreigners participating in the Atlantic trade, these merchants typically worked through Spanish agents. The advantages of sending goods directly to the colonies and avoiding the delays and expense of shipping with the FLEETS, however, proved irresistible. The Dutch, English, and French established themselves on Caribbean islands in the 17th century, where they warehoused goods and then carried them directly to complicit colonial merchants. Between 1580 and 1640, when the same monarch held the crowns of Spain and Portugal, the presence of Portuguese *conversos* was particularly notable in LIMA.

The WAR OF THE SPANISH SUCCESSION benefited French merchants who shipped goods to the Pacific coast of South America in return for SILVER. A Treaty of Utrecht concluding the war authorized a British presence through the *ASIENTO* and its related warehouses for 30 years. Neutral trade in the closing years of the 18th and early 19th centuries benefited merchants from the United States, in particular. British merchants became especially important during the wars of independence, and colonies of British merchants remained after independence.

Under specified circumstances that emphasized their utility, long residence, marriage in the colonies, loyalty to the Crown of Castile, and the desire to remain under its rule and accept its rights and obligations, foreigners could obtain permission to remain through royal naturalization letters, at times for a price (*composición*).

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**Franciscans** The Franciscans were among the earliest religious orders in the Spanish colonies. After rapid expansion in NEW SPAIN from 1525–31, by the middle of the 16th century, Franciscan presence was well established. By 1570, the Franciscans acted from numerous locations in Central Mexico and were the preeminent order in western Mexico and northwest of ZACATECAS, with missions located at Sombrerete and Durango. The Franciscans required the indigenous to attend religious instruction and administered blows to latecomers. They used interpreters until they learned the local language and relied on various liturgical devices as well as MUSIC to convey Christian doctrine. Instruction was limited to the Lord's Prayer, Hail Mary, Salve Regina, the Creed, Ten Commandments, and seven capital sins.

Although the Ordenanza General del Patronazgo Real of 1574 threatened the religious orders, the Crown had no choice but to support the orders or give up the missionary activity that helped to legitimize Spain's presence in the New World. Unlike other orders in New Spain, the Franciscans followed a vow of strict poverty. They entered New Spain, moreover, with astonishing enthusiasm for the work of conversion. According to the exaggerated claim of Fray Toribio de Benavente (Motolinía), they had baptized 6 million indigenous people by 1540. Since the Franciscans viewed NATIVE AMERICANS as child-like innocents, however, some Franciscans believed they were not material for ordination—this despite the fact that the greatest experiment in Amerindian EDUCATION, the COLEGIO of Santa Cruz de Tlatelolco, was founded by Franciscans (see COLEGIO/COLEGIO MAYOR). There were friars who, like Fray Gerónimo de Mendieta, moreover, believed that the indigenous should be totally separated from the rest of the population. Yet, by rejecting hispanization of the native population, the Franciscans opposed royal policy, which equated it with Christianization.

The early Franciscans in New Spain adhered to what historian John Leddy Phelan has called “the mystical interpretation of the conquest.” For them, the existence of the New World presaged the apocalyptic end of the world. In this view, best expressed by the Franciscan missionary and historian Mendieta, conquistador Hernando Cortés was the “Moses of the New World,” chosen by God to prepare the way for the missionaries who would lead the Indians to the Promised Land. According to Mendieta, the period 1524–64 was the “Golden Age of the Indian Church.” Between the latter date and 1596 were years of trouble for the CATHOLIC CHURCH brought on by the COUNCIL OF THE INDIES' opposition to the Franciscan agenda; royal policy that emphasized hispanizing the indigenous population; epidemics that ravaged the native population; and Spaniards' exploitation of the Indians.

The Franciscans in New Spain included the linguist and ethnographer Bernardino de Sahagún, who spent from 1529 until his death in 1590 in New Spain, writing originally in Nahuatl, the monumental *Historia general de las cosas de Nueva España* (*General History of the Things of New Spain*). Motolinía also wrote on native life in *Historia de los indios de la Nueva España* (*History of the Indians of New Spain*). Neither of these works was published until the 20th century.

Franciscans arrived in PERU by 1532 and made their headquarters first in QUITO from 1537 until 1545, then in LIMA. There is no indication that they baptized large numbers of indigenous people with minimal instruction, as was done in New Spain. Nor is there evidence that the quality and enthusiasm of the Franciscans in Peru matched that in New Spain.

Franciscans served throughout the Spanish Empire and also in BRAZIL. By 1590, there were a reported 1,825 friars in 282 convents in Spanish Empire. By 1700, the



The Franciscans were zealous missionaries who oversaw the construction of numerous colonial churches. Here is pictured the Church of San Francisco in Lima, Peru. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

number of convents had more than doubled to 579, and the number of friars was just over 4,800. The secularization of the *DOCTRINAS DE INDIOS* that occurred between 1753 and 1769 overlapped with the exile of the JESUITS, which placed great pressure on the Franciscans and other orders to replace them in the frontier missions and also in the *colegios*. At the end of the 18th century, there were 5,000 Franciscans in Spanish America and the Philippines; 783 of this number were in frontier missions of New Spain, Peru, NEW GRANADA, and the RÍO DE LA PLATA.

The Franciscans were the first order to experience the antipathy between CREOLES and PENINSULARS. As creoles entered the order in growing numbers, peninsulars feared a complete loss of control and the diminishment of the order. The result was the rotation in office known as the *alternativa*.

See also BENAVENTE, TORIBIO DE (Vol. I); SAHAGÚN, BERNARDINO DE (Vol. I).

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**French Guiana** The southeastern portion of the region originally known to Spaniards as the Province of Guiana, French Guiana is located on the northeast coast of South America between the former Dutch Guiana, or SURINAME, and BRAZIL. Interested in a base for his country's merchants engaged in contraband trade in Spanish America and Brazil and the growing markets for SUGAR and TOBACCO, French monarch Henri IV facilitated an exploratory expedition to the region in 1604. Early efforts at settlement by entrepreneurs and French Catholic missionaries failed, however, and no Frenchmen remained by 1660. A permanent settlement was established at Cayenne, French Guiana's present capital, in 1664, but a shortage of labor left the struggling colony in a permanently precarious state. Eighty years later, there was a JESUIT mission on the Kourou River with about 600 Amerindians. In the mid-18th century, 500 Europeans and about 5,000 African slaves lived uncomfortably in the colony. In 1789, the colony had about 1,300 whites and 10,500 slaves, most of whom left their owners when the French Convention abolished SLAVERY in 1794; in 1803, slavery was reinstated. During its famed revolution, France inaugurated the use of French Guiana as a penal colony.

French Guiana grew some SUGAR, INDIGO, coffee, and CACAO but had modest trade and got most of its food from Suriname. French interest in the colony was minimal, save for some attention after losing Canada to Britain in the Seven Years' War.

See also FRENCH GUIANA (Vol. III).

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**fuero** Corporate bodies enjoyed legal rights and privileges known as *fueros*. Although the *Recopilación de leyes de los reynos de las Indias* (1681) refers only to the *fuero* of the INQUISITION, the Knights of the Order of San Juan, and the MILITARY, the compilation for Spain provides additional references to academic *fuero*, clerical *fuero*, naval *fuero*, *fuero* of the royal staff (*casa real*), treasury *fuero*, royal *fuero*, and provincial *fueros*. In fact, many other bodies enjoyed *fueros*, for example, the merchant guilds (*CONSULADOS*) of MEXICO CITY and LIMA. While some *fueros* provided tax exemptions, the most important privilege was the right to be tried in a court established by one's corporation. Thus, for example, clergy could be

tried in most cases in an ecclesiastical tribunal; similarly, agents (*familiars*) of the Inquisition claimed to fall under the tribunal's jurisdiction.

In Spain, the realms of the Crown of Aragon had separate *fueros* that each monarch had to swear to recognize if he wanted to receive financial support. The WAR OF THE SPANISH SUCCESSION in which the realms of Aragon supported the pretender Charles enabled PHILIP V to abolish their *fueros*.

Vizcaya and the other Basque provinces enjoyed the most distinctive *fueros* in Spain after the demise of those in Aragon. Considered "regional liberties," the *fueros* gave the BASQUES virtual autonomy. In Navarre, for example, native sons were entitled to all but a handful of positions in government and administration. Royal attempts to restrict the *fuero* invariably provoked heated response, and it required WAR in the early 19th century for the central government to triumph.

In the American colonies, the Spanish Crown undertook a campaign in the second half of the 18th

century to reduce the ecclesiastical *fuero*. At almost the same time, the Crown was increasing the number of men who fell under some form of the military *fuero* and thus, for many but not all offenses, were outside of direct royal jurisdiction. The extent to which the expansion of the military *fuero* undermined civil jurisdiction and thus contributed to the emergence of the military as an autonomous institution in the early 19th century has attracted the attention of numerous historians. Their varied conclusions underscore the differences among regions in the empire.

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# G

**galleons** See FLEETS/FLEET SYSTEM.

**Gálvez y Gallardo, José de** (b. 1720–d. 1787) *Spanish visitor general of New Spain and minister of the Indies* The second son of a modest family, José de Gálvez y Gallardo was born in the mountain village of Macharaviaya, Spain, became an attorney, and settled in Madrid. In 1764, he was named an *alcalde de casa y corte*, effectively the criminal chamber of the Council of Castile. The following year, he was appointed visitor general of NEW SPAIN, a prelude to reform that would increase revenue, the need for which was made apparent by the loss of HAVANA to the British in the Seven Years' War. For the remainder of his life, Gálvez was involved with the affairs of the New World.

Gálvez reached VERACRUZ on July 18, 1765. His instructions were to investigate the provision of justice and the treasury offices (REAL HACIENDA), to reform the administration of revenues to increase their yield, to report on the desirability of installing the INTENDANT system, and to make the TOBACCO monopoly an effective source of royal income.

As visitor general, Gálvez effectively created state-run tobacco factories that had more than 6,000 employees by 1771 and produced a profit of more than 5 million pesos in the five-year period 1771–75. He established direct administration of the customs duties at Veracruz, collecting the sales tax there. He also placed the monopolies of pulque, gunpowder, and playing cards directly under royal control. In 1767, he oversaw the expulsion of 562 JESUITS; when rioting followed in some areas, he punished the rioters with uncommon harshness. He also promoted expeditions to Lower California and Upper

California that led to permanent Spanish settlement in the latter.

While Gálvez made no fundamental reorganization of royal administration, he brought about an unprecedented



Portrait of José de Gálvez, visitor general of New Spain and minister of the Indies (*Private collection*)

level of enforcement of existing legislation. Royal revenues increased, and the size of the royal bureaucracy expanded significantly. From the Crown's perspective, the *VISITA* was a major success. In consequence, Gálvez's career prospered, most notably when he was named Minister of the Indies to succeed the deceased Julián de Arriaga in 1776 and also governor of the COUNCIL OF THE INDIES, a body on which he had served from 1772 (see MINISTRY OF THE INDIES).

Gálvez had left Spain in 1765 convinced that CREOLES had a firm hold on many royal institutions in the colonies, a situation that he believed must be reversed to obtain effective royal control. The composition of Mexico's *AUDIENCIA* in 1765 confirmed his belief, as eight creoles were present among its 14 ministers; two of the creoles were of Mexican birth and nine other ministers were *radicados*, or men tied to the district by length of service and local financial or family relationships. The number of creoles began to decline soon afterward, to three by 1775; never again would creoles be so numerous on the colonial tribunal. A pro-PENINSULAR appointment policy to the *audiencias* and other positions marked Gálvez's tenure as minister.

Gálvez's experience as visitor general convinced him to send visitor generals to the VICEROYALTY OF PERU and the VICEROYALTY OF NEW GRANADA soon after his elevation to minister of the Indies. The tenures of JOSÉ ANTONIO DE ARECHE Y SORNOZA in Peru and Juan Francisco Gutiérrez de Piñeres in New Granada ended with the TUPAC AMARU II revolt and the COMUNERO REBELLION OF NEW GRANADA.

During Gálvez's tenure as minister, several important policies were expanded or introduced. *COMERCIO LIBRE* was extended in 1778 to include all parts of the empire except New Spain and VENEZUELA. The intendant system was introduced in the VICEROYALTY OF RÍO DE LA PLATA, CHILE, Peru, and New Spain. By 1790, the remaining mainland colonies, except New Granada, received intendants as well. A third change was the reduction in the price of MERCURY used in processing SILVER ore; begun while Gálvez was visitor general in 1767 and completed in October 1776, the new price in the latter year was just half of the pre-1767 price. A fourth change was the expansion of royal bureaucracy, with peninsulars receiving the most desirable positions.

Gálvez's actions as visitor general and minister of the Indies brought significantly increased royal revenue and greater oversight of the colonies. The expansion of the royal government's role in directly administering taxes, increasing monopolies, and other efforts to improve administration—for example, enlarging *audiencias* and introducing intendants—resulted in substantial growth in the number of bureaucrats. In Chile, the overall growth of royal positions was almost threefold. In New Spain, the number of well-paid government positions quadrupled. In Río de la Plata, where a bureaucracy was created with the establishment of a

viceroyalty based in BUENOS AIRES, the number of posts grew tenfold.

Legal and hence taxable exports from Spain to the colonies grew with the expansion of *comercio libre*, although the extent of growth varies considerably, depending on the base year employed. Using 1778 as the base, legal TRADE quadrupled in the years to 1796; using 1783, as the base, the level of exports to 1796 more than doubled. Silver production expanded as well, increasing in New Spain in large part as a result of reduced mercury prices and substantial investment of capital. The amount registered rose from 132.7 million pesos in 1771–80 to 157.8 million in 1781–90 and 192.4 million in 1791–1800. Production also grew in Peru and CHARCAS.

Gálvez could view the results of his tenure with considerable pride. Colonists, however, viewed him with antipathy, considering that gains for the royal treasury and appointments to royal offices had come at their expense. In Spain as well, Gálvez provoked antipathy. After the minister's death, CHARLES III immediately divided his portfolio to end the centralization of authority over American affairs that Gálvez had exercised. Gálvez's services brought royal recognition in the form of a title of nobility, marqués de Sonora, a pensioned membership in the Order of Charles III, and an appointment to the Council of State.

Gálvez employed his relatives in important positions. During his tenure as minister of the Indies, he secured the appointments of his brother Matías and his nephew Bernardo as VICEROYS of New Spain. Another brother, Miguel, served on the Council of War and a third brother, Antonio, served as administrator of the port of CÁDIZ.

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**Garcilaso de la Vega (El Inca, Gómez Suárez de Figueroa)** (b. 1539–d. 1615/1616) *mestizo* author in Peru Born Gómez Suárez de Figueroa to the conquistador Sebastián Garcilaso de la Vega and the Inca princess Isabel Chimu Ocllo, the illegitimate mestizo child was reared in both his mother and his father's home in CUZCO, receiving some formal European EDUCATION as well as traditional teaching worthy of a noble Inca youth, including in Quechua (see *MESTIZAJE/MESTIZO*). In 1560, he went to Spain, where he changed his name to Garcilaso de la Vega. Unsuccessful in securing recognition and rejected by his father's family after his arrival, Garcilaso was ultimately taken in by an uncle and, in 1593, inherited his estate. By the time of his death, he was a recognized author.

"El Inca" Garcilaso's publications were *La traducción del indio de los tres diálogos de amor de León hebreo* (1589); *La*

*Florida del inca* (1605); *Comentarios reales de los incas* (1609); and *Historia general del Perú* (1616). In *La Florida*, Garcilaso recounted the story of Hernando de Soto's destructive and unprofitable expedition from present-day Florida to present-day Louisiana. He portrayed the native peoples favorably and without the vices repeatedly attributed to them by the Spaniards, however remarkable their exploits.

Historian D. A. Brading considers *Comentarios reales de los Incas* (*Royal Commentaries of the Incas*) one of two "prime texts of the patriotic tradition in Mexico and Peru" (the other is Juan de Torquemada's *Monarquía indiana*). When it appeared, the *Comentarios* was one of the few works published on the Incas. As described by Garcilaso, the Incas were similar to the Romans, although without writing. Their rule dated back more than 400 years and was marked by its adherence to natural law to such an extent that their behavior was often superior to that of Christians. The content provided a basis for later CREOLE pride in the preconquest culture of the Incas.

In *Historia general del Perú* (*General History of Peru*), Garcilaso focused on the Spanish conquest and subsequent civil wars, indicating that he was "proud to be the son of a conqueror." The central villain is VICEROY FRANCISCO DE TOLEDO, whose persecution of the Inca royal family, execution of TÚPAC AMARU I, and exile of mestizos raised El Inca's ire.

Garcilaso's work combined history and literary devices such as inventing letters. In the early 1720s, *La Florida* and *Comentarios* were republished in Madrid. Although the Spanish Crown ordered *Comentarios* banished from Peru and its reading prohibited after the TÚPAC AMARU II revolt, it was republished in Madrid in 1800–01, as was *La Florida* in 1803.

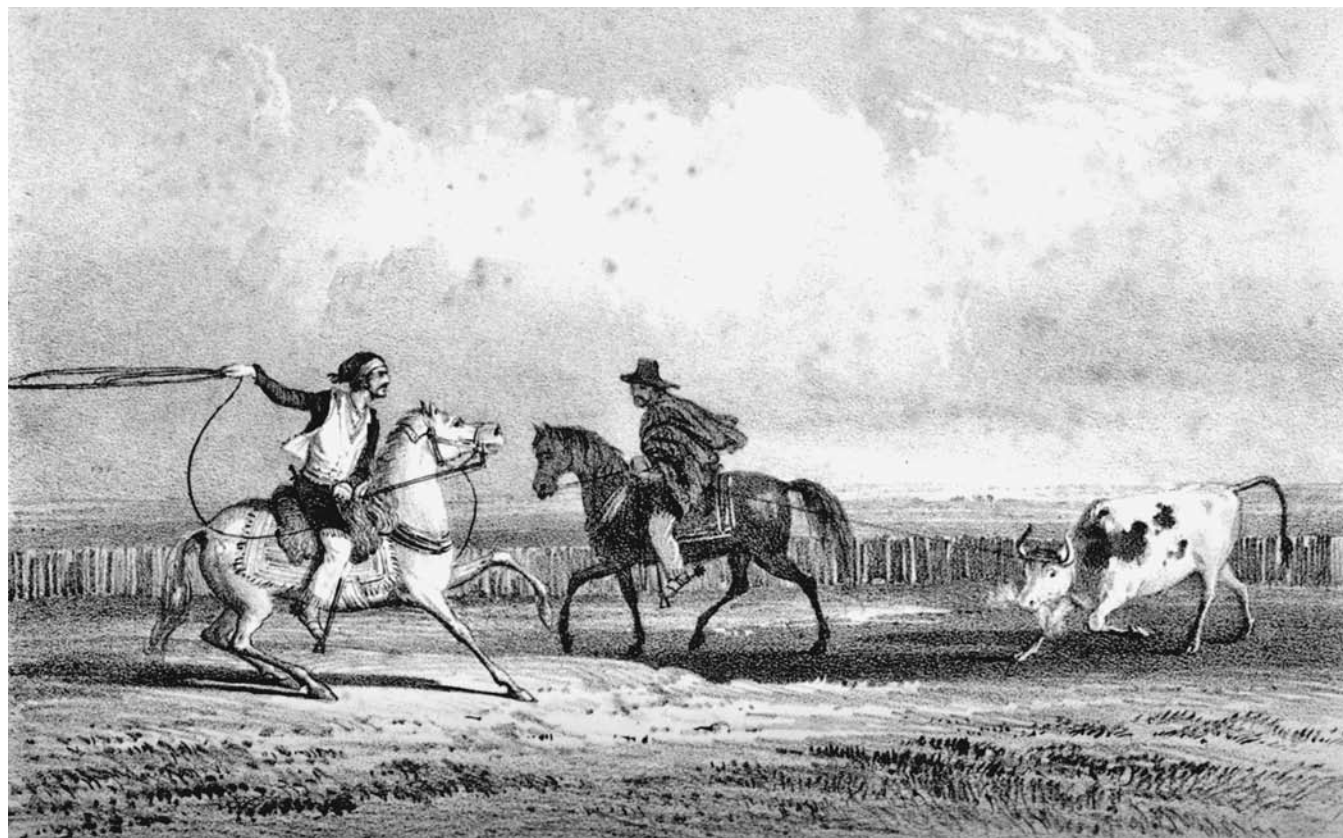
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**gaucho** (*gaúcho*) Cowboys of the plains of present-day Argentina, Uruguay, and BRAZIL's southern province of Rio Grande do Sul were known as gauchos (*gaúchos*,



Gauchos are the cowboys of the South American pampas. This rendering of gauchos using the lasso dates to 1838. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

in Portuguese), the regional counterpart to the *LLANEROS* of the interior plains of VENEZUELA, the *huasos* of central CHILE, and the *vaqueros* of northern NEW SPAIN. Following their introduction in the 16th century, CATTLE in the Pampas rapidly increased in number. The growing availability of feral cattle led to the emergence of gauchos, usually *CASTAS*, who killed them for their hides and for food in locations remote from central authority.

A gaucho needed only a few basic items: a stallion to ride; cattle to chase, eat, and skin for their hides; a long knife (*facón*) with which to kill and skin cattle, eat, and fight; a supply of TOBACCO; and some highly caffeinated tea known as YERBA MATÉ. Alcohol was prized and its heavy consumption routinely accompanied the annual rodeos, at which cattle were rounded up and the branded ones returned to their owners. Gauchos were willing to work for pay in the rodeos a few days each year in order to earn the cash needed to purchase tobacco, yerba maté, alcohol, and a poncho. Mostly, however, they remained beyond the “civilized” world of the colonies, prizing their independence of movement and control of their time and activities.

Among these unlettered men, status depended on bravery and skill in the activities of the frontier. Their bravery and horsemanship made them highly desirable recruits in the wars of independence in the VICEROYALTY OF RÍO DE LA PLATA; their prey simply changed from cattle to the men they considered despicable because they came from the city.

Success against the royalist forces helped to improve their image as valorous patriots rather than, to city folk, barbarians and outlaws. Juan Manuel de Rosas, the caudillo who ruled the province of BUENOS AIRES and through it the core of modern Argentina in the 1830s and 1840s, rose to power in part because of his demonstrated skill in activities valued by gauchos. In the early 20th century, the gauchos became the embodiment of Argentine virtue.

See also GAUCHO (Vol. III).

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**Gil de Taboada y Lemos, Francisco** (b. ca. 1736–d. 1809) *Spanish viceroy of Peru* Born in Santa María de Soto Longo, Galicia, Spain, Francisco Gil de Taboada y Lemos entered the navy as a cadet in CÁDIZ at the age of 16 and rose through the ranks. From 1774 to 1777, he was governor of the Malvinas Islands. Holding the rank of lieutenant general, on January 8, 1789, he replaced Antonio Caballero y Góngora as VICEROY of NEW GRANADA, a post he held until his successor arrived on July 31, 1789, and he could travel to PERU and assume the post of viceroy to replace Teodoro de Croix. He entered his new post on May 17, 1790, and served until June 7, 1796. He returned to Spain, was appointed to the Council of War, and after interim service, he was named

secretary of state for the navy. FERDINAND VII named Gil de Taboada to the Supreme Junta of Government he left to rule in his name when he departed Madrid in early 1808. Gil de Taboada resigned in May 1808 but on September 29, 1808, resumed his post as secretary of state for the navy under the JUNTA CENTRAL. Although his age precluded fleeing from the French, he refused to swear allegiance to JOSEPH I.

Committed to fostering colonial dependence on Spain, Gil de Taboada’s tenure as viceroy of Peru was successful. He oversaw a detailed census and supported the publication of several periodicals, including the *MERCURIO PERUANO* produced by LIMA’s Amantes de País, a variant of an economic society (see *AMIGOS DEL PAÍS*, SOCIETIES OF). Benefiting from rising production at Cerro de Pasco and Hualgayoc, in particular, registered SILVER production for the viceroyalty reached 3,479,212 pesos in 1790 and fell below that amount only once before 1812. The average for 1791 to 1796 was 507,146 marks or 4,310,741 pesos, more than double the average of 247,066 marks from 1771 to 1796. This increased production mirrored Gil de Taboada’s beliefs that MINING was the most important activity for Peru and exportation to Spain via TAXATION and commerce of as much bullion as possible was essential.

While Gil de Taboada was viceroy, a nautical school opened in CALLAO in 1794, and a chair of botany was created at the UNIVERSITY OF SAN MARCOS. The viceroy also oversaw an effort to pave the streets of Lima and to improve the collection and removal of garbage. Additionally, he divided the city into districts (*barrios*), an action designed to improve public safety. He also worked to restore the authority of his office, which had been reduced by the introduction of the INTENDANT system in the previous decade.

Gil de Taboada entered the Order of San Juan of Jerusalem in 1752 and subsequently received its great cross. He remained unmarried and died in Madrid.

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**Godoy y Álvarez de Faria, Manuel (Prince of the Peace)** (b. 1767–d. 1851) *Spanish royal favorite and minister* Born in Badajoz, Extremadura, Spain, Manuel Godoy y Álvarez de Faria received a good education and continued to study in Madrid after joining his brother Luis in the royal bodyguard in August 1784. In 1788, he met Charles, prince of Asturias, and his wife, María Luisa. Godoy’s rise thereafter was meteoric and widely suspected to be the result of amorous relations with the woman who would soon be queen. In May 1789, he held the rank of colonel in the cavalry; in 1791, he became a gentleman of the royal

bedchamber and a lieutenant general. The following year, on November 14, he replaced the count of Aranda as secretary of state, the count having been no more able than his long-serving predecessor the count of Floridablanca in dealing effectively with revolutionary France. Although briefly out of favor on one occasion, Godoy was the most important politician, in office or not, during the reign of CHARLES IV. His grateful royal patrons bestowed honors and wealth: knighthoods in the Orders of Santiago and Charles III; titles of duke of Alcudía in 1792 and Prince of the Peace in 1795, following a treaty with France that ended an unsuccessful war; and lands and incomes.

Although Godoy was intelligent and even taken with many ENLIGHTENMENT ideas, he lacked both experience in government and high birth. Unattached to either Floridablanca or Aranda, leaders of the two principal factions at Court, he was utterly beholden to Charles IV and the queen, and they, in turn, trusted him. War, however, dominated the years 1792 to 1808, and Godoy proved unable to attain victory or even neutrality. After initially losing a war to France (1793–95), in 1796, he agreed to the Treaty of San Ildefonso. This offensive and defensive alliance with France led to conflict with Britain, the most powerful naval power in Europe, and thus danger for the American colonies.

War began in October 1796. The following April, Great Britain initiated a blockade of CÁDIZ that lasted three years and forced Spain to allow neutral traders access to the colonies. The Peace of Amiens ended the war in 1802, but Spain agreed to a treaty of subsidies with France in 1803 that required it to pay nearly 3 million pounds a year. A renewal of war in 1804 between France and Britain found Spain an ally of France; the British navy destroyed the combined French and Spanish fleet at Trafalgar in 1805. Two years later, French troops started crossing Spain on route to Portugal in an effort to enforce the Continental System by which Napoleon sought to prevent English exports from entering the continent. Conflict with Britain ended only after Charles IV and FERDINAND VII abdicated to Napoleon in May 1808, when Great Britain agreed to support Portugal and the resistance movement in Spain against the French. By this time, many merchants in the colonies had established arrangements with neutral traders that would never be reversed.

The years of warfare proved the inadequacy of the fiscal structure of Old Regime Spain. As the government issued large denomination bills (*vales reales*) that served as paper money, its CREDIT declined. Efforts to establish an effective amortization system, however, failed; the extension of the *CONSOLIDACIÓN DE VALES REALES* to the American colonies, and NEW SPAIN in particular, made it clear that Spain was willing to destroy the colonies to save itself. Popular opinion in Spain fixed blame for these failures on Godoy; his ministerial despotism stimulated the CORTES OF CÁDIZ to adopt provisions in the CONSTITUTION OF



Portrait of Manuel Godoy, prince of the peace and royal favorite of Charles IV and his wife (Private collection)

1812 designed to prevent another royal favorite from gaining power.

After the failed coup attempt known as the Affair of the Escorial in 1807, a riot in Aranjuez provoked by supporters of Ferdinand, the prince of Asturias, forced Charles to remove Godoy from government in March 1808. The king abdicated to FERDINAND VII the following day, and Godoy was briefly imprisoned before being allowed to journey north to meet Charles and Louisa in Bayonne. Stripped of his honors and wealth by Ferdinand, Godoy spent the remainder of his life in exile and died in Paris.

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**godparentage** Spaniards and Portuguese brought the institution of godparentage (Spanish: *compadrazgo*; Portuguese: *compadrio*) to the Americas. A form of fictive



kinship, godparentage was associated with the baptism of a child, a defining event that made the child part of the spiritual community associated with the CATHOLIC CHURCH. Godparents sponsored the child's being baptized and by this act created a spiritual connection with both child and parents. By binding nonrelatives, the ritual kinship ties of godparentage were an important form of social connection in the colonies.

Elite Spanish families extended their influence through godparentage, a relationship that placed mutual obligations on all parties involved. Thus, the leading families of a locale typically used their children to create godparentage links to other leading families, a practice that could facilitate economic ties as well. In addition, members of elite families served as godparents for children born to their clients or laborers. Godparentage thus was a means by which elite families could obtain or increase the loyalty of laborers on their lands, while the laborers—whites, blacks, Indians, and *CASTAS*—gained some access to the political, economic, and social capital enjoyed by the godparents.

The use of godparentage was popular with NATIVE AMERICANS. In Cuernavaca, native nobles created kinship ties with other elite families, prominent Spaniards of the area, and commoners. The ties served more as a way to maintain local prestige than to advance in status.

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**gold** The lust for gold drove many young Spaniards to emigrate and led to the rapid exploration of the Americas and, by the mid-16th century, the discovery of the precious metal in many locations of Latin America. These included Antioquia and Popayán in NEW GRANADA, Carabaya in PERU, GUADALAJARA and Colima in NEW SPAIN, and Tegucigalpa in HONDURAS. By 1560, registered gold totaled 50,520,000 SILVER pesos (272 *maravedís*). After the decade 1531–40, however, the value of SILVER production exceeded that of gold in every decade to 1810. The largest gold deposits were discovered in MINAS GERAIS, BRAZIL, in the 1690s, ushering in a half-century of enormous production.

By 1560, New Granada had emerged as the most important region of production in Spanish America. Registered gold production from 1561 to 1810 exceeded that from any other region of the empire in every decade. From 1701 to 1810, however, BRAZIL's registered gold production exceeded that of New Granada and until 1791–1810 was greater than that from all of Spanish America combined. Registered figures, of course, do not include contraband gold, which might have doubled the registered amount. Since gold dust was more easily

smuggled than silver and its value per unit was much greater, SMUGGLING was undoubtedly considerable.

Processing gold was usually much simpler than processing silver. When the metal was found in sand or gravel, a pan or ground sluice could be used to separate the heavier metal from the material around it. When gold was found in veins, milling and sometimes the amalgamation process could be employed. Since some gold was often found in silver ores, the amalgamation process created an alloy; in this case, miners often separated the gold from the silver using nitric acid.

Antioquia was the most important MINING center in 16th-century New Granada. The Chocó became a major center of placer gold mining from 1680 to 1810. In the 1690s, gold production in CHILE started an ascent that continued throughout the 18th century. The north of New Spain also became a valuable source of gold, with mining at GUANAJUATO, Guadalajara, Zimapán, Durango, Rosario, and Chihuahua.

The discovery of gold in Minas Gerais about 200 miles (322 km) inland from RIO DE JANEIRO sparked a true gold rush and a resulting flood of the precious metal on the world market. The region's registered production was highest in the decade 1741–50, when it totaled 93,770,000 pesos. Although it dropped precipitously the following decade, to 72,010,000 pesos, and to only 25,470,000 pesos from 1800–1810, the latter amount still exceeded the registered gold during New Granada's highest decade of production. The discovery of gold and, in the late 1720s, DIAMONDS brought a substantial movement of free labor and slaves from Brazil's coastal regions of PERNAMBUCO, BAHIA, and Rio de Janeiro (see SLAVERY). The new wealth also increased Brazil's TRADE with Portugal and, between Portugal and Britain, a trade that resulted in the transfer of most Brazilian gold to England.

Both Spanish and Portuguese miners turned to nonwhites for labor in the gold fields. Although the composition of laborers varied by region, owners often favored black slaves over forced indigenous labor and, in any case, native depopulation was very high in low-lying areas. In the Chocó, black slaves mined more than 90 percent of the gold produced. From the mid-1730s to 1750, more than 90,000 slaves labored in Minas Gerais. Some mines employed paid labor, which included Indians, a few blacks, and mestizos and other *CASTAS* (see *mestizaje/mestizo*).

The Spanish Crown took 20 percent (*QUINTO*) of the gold produced for more than two centuries. It reduced the amount to one-tenth in New Spain in 1723 and to only 5 percent in GUATEMALA in 1758. In 1778, it reduced the tax throughout the empire, requiring 3 percent to be paid in the Americas and 2 percent when the gold reached Spain. From 1700, the Portuguese Crown similarly claimed 20 percent of the gold mined in return for authorization to exploit specified mineral lands; substantial evasion of this tax at foundry houses resulted in the Crown trying another approach to collect it. In 1735, it

initiated a head tax on slaves (*capitação*) but gave up on this as well in 1750. Long after gold mining's most productive years, in 1803, the Crown reduced the long-standing and frequently evaded 20 percent tax to 10 percent.

The wars of independence in Spanish America adversely affected gold production. Although gold still accounted for 90 percent of New Granada's exports, by 1808, the 3 percent tax on gold could no longer pay the cost of New Granada's administration. WAR brought a reduction in mining of perhaps 40 percent but a much greater reduction in mining revenues and an increase in gold smuggling. The nature of colonial placer gold mining and the low level of technology employed, however, meant that the infrastructure, such as it was, largely survived. The flight of slaves and the pressing of others into royalist road-building gangs were more important. Gold production in New Granada did not return to pre-independence levels until the mid-19th century. While Brazil had a relatively peaceful transition to independence, the heyday of gold mining was more than 60 years in the past, and the precious metal was by then only a minor contributor to the economy.

See also GOLD (Vols. I, III).

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**Goyenechey Barreda, José Manuel de** (b. 1776–d. 1846) *creole royalist military officer and politician* Born in AREQUIPA, PERU, Goyeneche was the son of the city's most successful entrepreneur, Juan Crisóstomo de Goyeneche y Aguerrevere, of Irurita, Navarre, and María Josefa Barreda y Benavides of Arequipa. He went to Spain in 1795 and in 1801 toured Europe studying MILITARY practices that could be applied in Peru. He entered the Order of Santiago in 1802 and held the rank of brigadier when commissioned in 1808 by Marshal Nicolas Soult to go to the colonies in America to solicit support for JOSEPH I. While in CÁDIZ, he informed the JUNTA SUPREMA DE SEVILLA of Soult's charge; the junta then commissioned him to secure colonial recognition for it as the legitimate government.

Goyeneche reached the city of LA PLATA in November 1808. In 1809, he was named president and captain gen-

eral of the Audiencia of Cuzco. On October 25, 1809, he defeated insurgents near La Paz. After the May 1810 revolution in BUENOS AIRES, he marched into the northern part of the province and defeated its supporters there. His victory over the Army of the North led by Juan José Castelli and Antonio González Balcarce at the Battle of Guaqui in CHARCAS on June 20, 1811, led to the demise of the governing junta in Buenos Aires and its replacement by the First Triumvirate.

By 1813, Goyeneche was frustrated by endless conflict and asked to go to Spain, where he fought against the French toward the end of the Spanish war of independence. A lieutenant general at the time, in 1817, he was granted the title count of Guaqui. In 1834, he received the great cross of the Order of Charles III. A royal appointee in Spain's legislature of 1834–35, he was subsequently a senator for the Canarias in the legislature of 1844–45 and senator for life in the legislature of 1845–46.

#### Further reading:

John Lynch. *The Spanish American Revolutions, 1808–1826*, 2d ed. (New York: W. W. Norton & Co., 1986).

**gracias al sacar, cédula de** A Spanish monarch enjoyed the unquestioned authority to change a person's status, for example, transform a commoner into a hidalgo, a hidalgo into a titled noble, or an underage boy into an adult able to hold office. As part of this authority, the monarch could issue a document, technically known as a *cédula de gracias al sacar*, that altered a petitioner's status to meet a legal requirement or to provide for an improved public condition.

Although the practice dated back centuries, on February 10, 1795, and, with higher prices on August 3, 1801, CHARLES IV issued a list of fees for 71 kinds of exemptions or approvals that fell under the heading of *gracias al sacar*; the equivalent of which would be a "concession of exemptions" in English. These ranged from lifting legal liabilities related to being too young to assume a specific responsibility or position, to founding an entail and obtaining a dispensation for illegitimate birth or a racial condition, for example, being a *PARDO*, which disqualified a petitioner from civil, ecclesiastical, or military positions and left him without honor. In the last case, the Crown was conferring *LIMPIEZA DE SANGRE*, or unblemished ancestry, as it had done on occasion since the Castilian obsession with descent from former Jews began in the mid-15th century.

A mere accusation of "unclean blood" could create a problem. A case involving Sebastián de Miranda, the father of the celebrated precursor of independence, FRANCISCO DE MIRANDA, demonstrates the impact of alleged lack of racial purity. In 1769, two CARACAS aristocrats charged that the older Miranda was, among other things, a *MULATO* who had falsified his lineage in order to serve as an honorary militia officer. Sebastián de Miranda

immediately resigned, obtaining an honorable discharge from the governor, and took steps to document his *limpieza de sangre*. In 1770, CHARLES III signed a decree not only confirming Miranda's *limpieza de sangre* but restoring him to his honorary position.

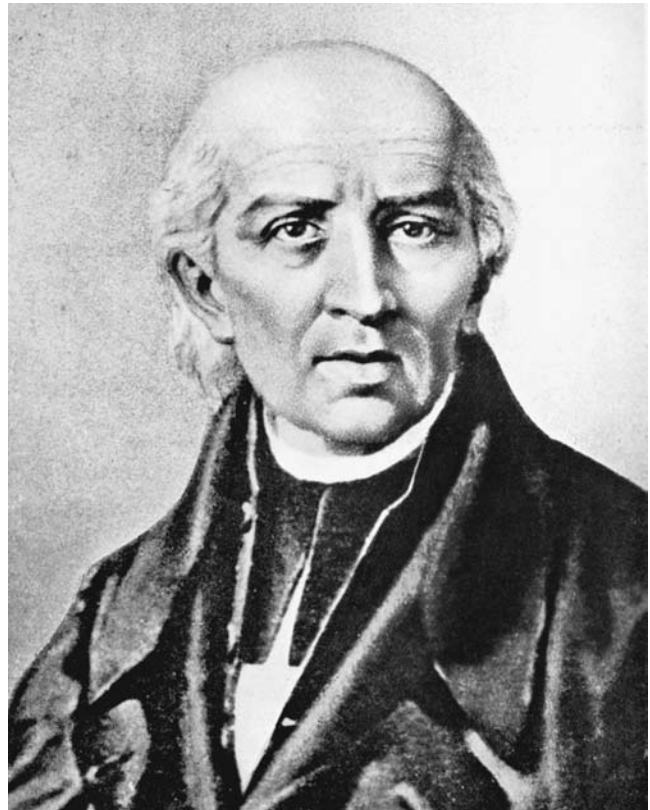
The appearance of the lists of fees for *gracias al sacar* in 1795 and 1801 provoked outrage where the local elites feared "whitening" threatened the social order. Elite Venezuelans, in particular, protested. In 1806, the COUNCIL OF THE INDIES summarized: "individuals of the vicious castes [continue] with notable inferiority and difference from legitimate whites and mestizos. . . . the dispensation of quality (*calidad*) that are considered to those [whitened] are rare." Although the *gracias al sacar* had the potential to inaugurate significant social change through its provisions for "whitening," there were only 13 cases of this happening. Legislation related to race ended with or, in some cases, significantly changed after independence in the early 19th century.

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Ann Twinam. *Public Lives, Private Secrets: Gender, Honor, Sexuality, and Illegitimacy in Colonial Spanish America* (Stanford, Calif.: Stanford University Press, 1999).

**Grito de Dolores** The Grito de Dolores marked Father MIGUEL HIDALGO Y COSTILLA's legendary initiation of the war of independence in NEW SPAIN. No reliable contemporary accounts exist of what Hidalgo said, but on Sunday morning, September 16, 1810, he addressed perhaps 600 or more parishioners of Dolores and urged them to support him in saving Mexico from persons that he claimed wanted to turn it over to the French. Moreover, he supposedly declared an end to TRIBUTE and offered to pay a peso daily to horsemen and four *reales* to those on foot who accompanied him. He might have concluded with "Long live Ferdinand VII! Long live America [or Mexico]! Long live religion! And, death to bad government!" the traditional cry condemning government officials but not the monarch.

What is clear is that Hidalgo initiated a rebellion that appealed to indigenous people and *CASTAS* and quickly raised the standard of OUR LADY OF GUADALUPE. When San Miguel (in the modern state of Guanajuato) fell to the rebels before dark on September 16, the anti-PENINSULAR character of the revolt became evident. On September 21, nearby Celaya fell to the rebels, and Hidalgo became "Captain-general of America." A week later, he led his undisciplined force of some 25,000 into the major MINING center of GUANAJUATO. The result was indiscriminate slaughter of whites, whether PENINSULAR or CREOLE, who had mistakenly taken refuge in the city's granary and the sack of the town for two days. Whatever the exact words Hidalgo used, the Grito de Dolores sparked an unprecedented rebellion that caused peninsulars and creoles to make common cause against his



Creole priest Miguel Hidalgo initiated New Spain's war of independence with the Grito de Dolores in 1810. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

undisciplined and violent followers (see MEXICO, INDEPENDENCE OF).

#### Further reading:

Hugh M. Hamill Jr. *The Hidalgo Revolt: Prelude to Mexican Independence* (Westport, Conn.: Greenwood Press, 1981).

**Guadalajara** Located in the modern Mexican state of Jalisco, about 280 miles (450 km) from MEXICO CITY, Guadalajara was the name of a colonial city founded on unoccupied land in the 1530s and, after the Mixtón War, relocated to its current site in the early 1540s. An *AUDIENCIA* district also known as Guadalajara or NEW GALICIA was created in 1548 and expanded north and west in 1572; the Intendancy of Guadalajara was established in 1786.

In 1546, Franciscan friars founded a village for some 500 indigenous people across the San Juan de Dios River from Guadalajara. The Diocese of Guadalajara was erected in 1548. Incursions by CHICHIMECAS in the region between Guadalajara and Mexico City provoked the construction of military forts (*PRESIDIOS*) in Celaya, Tazasalca in 1576, and Pénjamo at about the same time.

Surrounded by an agricultural region, Guadalajara was an administrative, ecclesiastical, and commercial

center that linked a substantial region in western New Spain. It served as the starting point for migrants heading west and north. In the early 17th century, commerce began to surpass administrative functions in importance, although some 250 resident Spaniards, about half of the total number, either held an administrative post or were dependents of an official. The richest residents were wholesale merchants who obtained merchandise through Mexico City. Wealthy wholesalers continued to be prominent for the remainder of the colonial period, joining together to form a merchant guild (*CONSULADO*) in 1795. The city also benefited from SILVER strikes within the *audiencia's* jurisdiction, for example, in El Rosario and Bolaños for several decades starting in 1746. In that year, Guadalajara had eight plazas, two hospitals, 14 churches and convents, and a variety of public buildings. The creation of the University of Guadalajara in 1791 added to the city's prominence. Nonetheless, by the end of the 18th century, Guadalajara's primary role was as a market for regional agricultural production (see AGRICULTURE).

The population of Guadalajara roughly doubled between 1600 and 1700 and then began to expand rapidly, despite a harvest failure in 1785 and a smallpox epidemic in 1779–80, reaching about 25,000–28,000 in 1793 and almost 40,000 by 1813, a size it also had in 1821. The expansion resulted primarily from migration of skilled and unskilled laborers from areas surrounding the city. By 1821, however, highly skilled artisans, for example, tailors and saddlemakers, were declining in number while



The city of Guadalajara in New Spain was an important administrative, religious, and commercial center. This photograph features the city's cathedral. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

less skilled trades, for example, weaving and bricklaying, were growing.

#### Further reading:

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Eric Van Young. *Hacienda and Market in Eighteenth-Century Mexico: The Rural Economy of the Guadalajara Region, 1675–1820* (Berkeley and Los Angeles: University of California Press, 1981).

**Guadalupe, Our Lady of** Contemporary Mexico's most potent national symbol, Our Lady of Guadalupe, originated in an alleged miraculous event in 1531. According to the story, at Tepeyac, not far from MEXICO CITY, the Virgin Mary appeared to Juan Diego, a Nahuatl Indian who had recently converted to Catholicism. A quarter of a century later, the location had a shrine with a painted image, and devotees claimed miracles. Archbishop Alonso de Montúfar favored the shrine and assigned a resident priest to it in 1555; the diocesan clergy supported it, while the FRANCISCANS opposed it. At that time, Our Lady of Guadalupe attracted more Spanish than indigenous devotees, probably because there was an established cult in Iberia.

A book written by the CREOLE priest Miguel Sánchez in 1648, *Imagen de la Virgen María, Madre de Dios de Guadalupe, Milagrosamente apreciada en la ciudad de México*, both made the 1531 apparitions known and fused them to creole identity. Mexico became the homeland of the Virgin Mary, as it was for the creoles and creole clergy who spread the story. A second account written in Nahuatl by Luis Laso de la Vega, vicar of the hermitage of Guadalupe, and published in 1649 recounted the apparitions and included an account of numerous miracles worked through the intercession of the Virgin of Guadalupe. Although NATIVE AMERICANS benefited from some of the miracles described, they did not embrace the virgin until the following century.

In the 18th century, Guadalupe devotion spread throughout NEW SPAIN as archbishops, parish clergy, and the JESUITS supported it, and creoles and indigenous people of Mexico celebrated the Virgin of Guadalupe on separate feast days. In 1736–37, an epidemic threatened to take perhaps 200,000 lives. Saints were employed in an effort to ward it off. After the Virgin of Loretto and the Virgin of Remedios proved ineffective, the CATHEDRAL CHAPTER in Mexico City and the archbishop sent celebrants and preachers to the shrine of Guadalupe; this and the invocation of numerous other saints failed as well. Desperate, the civil and ecclesiastical *cabildos* agreed to ceremonies making the Virgin of Guadalupe patroness of Mexico City, and the archbishop designated December 12 as a holy day of obligation for the

capital. The epidemic lessened and devotion to the virgin increased. In 1746, the archbishop proclaimed “the principal patronage of the Virgin of Guadalupe over the entire nation.” In 1754, the requisite ecclesiastical formalities confirming the *patronato* were secured from Pope Benedict XIV. In 1757, the proper feast and office were extended throughout Spain’s realms.

Even before the epidemic of the 1730s, numerous sermons on Guadalupe by 18th-century creole preachers helped to strengthen the devotion. Where earlier the virgin was invoked against flooding in the Valley of Mexico, in the second half of the century, farmers and ranchers turned to her to prevent or end drought. And, by the end of the 18th century, Guadalupe had become the most important Marian devotion in New Spain. Creoles in particular provided support. As the patroness of Mexico, her uniqueness confirmed the special favor God had bestowed on the colony. When Father MIGUEL HIDALGO Y COSTILLA started a revolt in 1810, he immediately proclaimed the Virgin of Guadalupe as the rebels’ saint.

#### **Further reading:**

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**Guadalupes, Society of** The most famous secret society in NEW SPAIN during the war of independence was the Society of Guadalupes (*los Guadalupes*), created soon after MIGUEL HIDALGO Y COSTILLA initiated a major revolt in 1810. A homegrown effort, the society emerged in MEXICO CITY and consisted of important supporters of greater political autonomy for New Spain. The AUTONOMISTS included lawyers, titled nobles, journalists, and even some government officials, as well as some wives of these supporters.

The Guadalupes provided important information to JOSÉ MARÍA MORELOS Y PAVÓN and his lieutenants. For example, they outlined troop movements and locations, supplied information about events in Spain, and supported the creation of a rebel press, delivering the necessary printing equipment to Ignacio Rayón in April 1812. They also engaged in smuggling arms and ammunition and actively promoted the election of supportive deputies to the CORTES OF CÁDIZ and sympathetic members of the PROVINCIAL DEPUTATION of Mexico. At one point, the Guadalupes tried to convince VICEROY FÉLIX MARÍA CALLEJA DEL REY to support their cause.

On February 24, 1814, royalists discovered the Guadalupes’ correspondence with Morelos. The authorities, however, were never able to identify the full roster of members.

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Jaime E. Rodríguez O. *The Independence of Spanish America* (New York: Cambridge University Press, 1998).

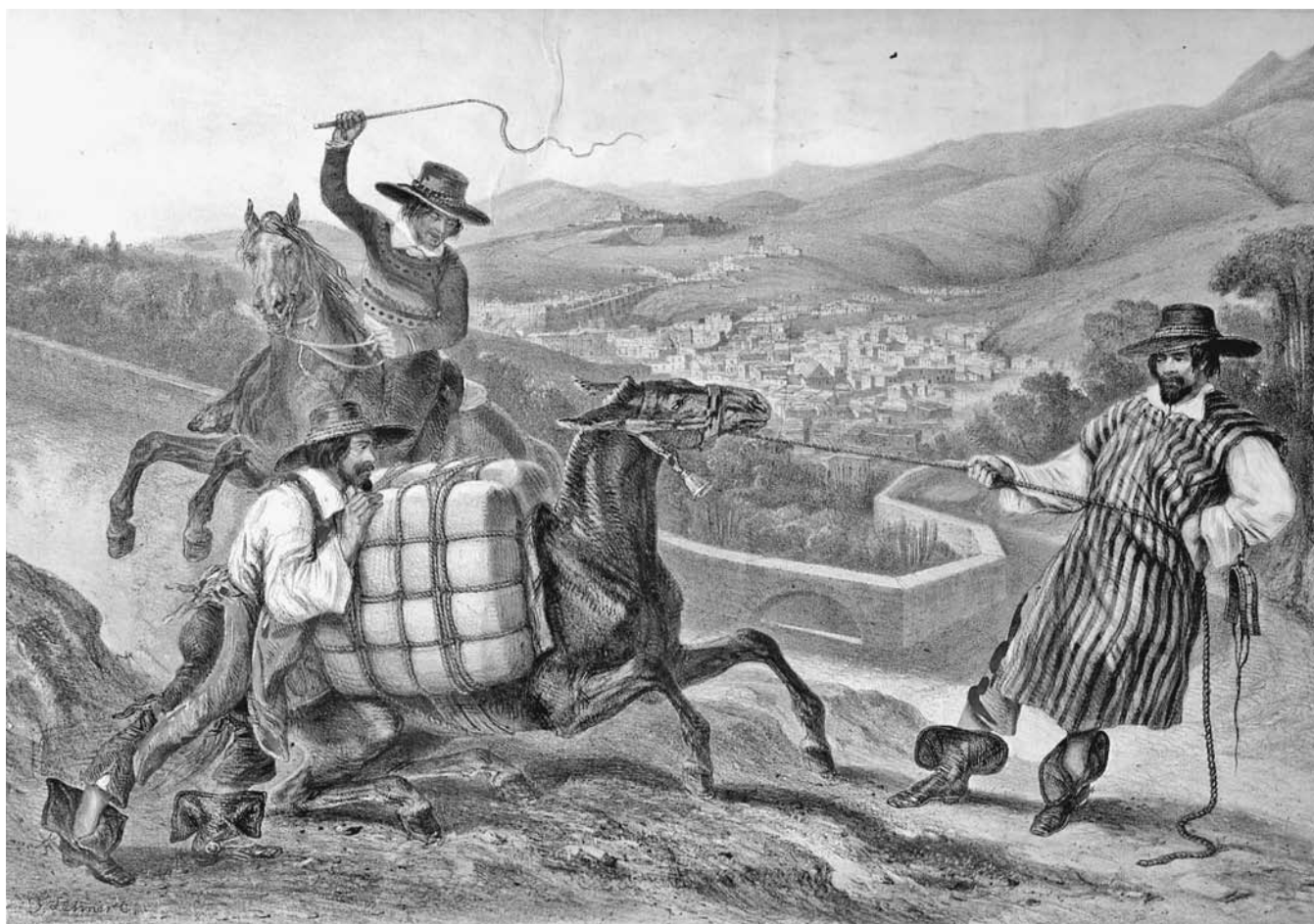
Wilbert H. Timmons. *Morelos: Priest Soldier Statesman of Mexico* (El Paso: Texas Western Press, 1963).

**Guanajuato** The discovery and production of SILVER at Guanajuato, NEW SPAIN, in the 1550s inaugurated what would become the foremost MINING region in the 18th-century viceroyalty. Located about 230 miles (370 km) northwest of MEXICO CITY in a canyon flanked by low mountains in the region known as the BAJÍO, Guanajuato became the capital of a district (*alcaldía mayor*) in 1559 and is the capital of the state of Guanajuato today. It was elevated from its original status as a mining camp and officially classified as a town in 1619 and as a city in 1741. In 1786, it became the capital of the new intendancy of Guanajuato (see INTENDANT).

Guanajuato grew slowly, and the mining district emerged as the leader in New Spain’s silver production only in the late 17th century. In 1700, the town’s population was about 16,000. The Bajío as a whole by that time had a strong agricultural base; in addition it manufactured woolen and cotton textiles and leather goods. Population growth in the region far surpassed that of Central and southern Mexico; the district of Guanajuato grew from 48,750 in 1742 to 114,344 in 1793. The city itself had about 32,000 inhabitants, and the adjacent mining and refining centers another 23,000. The intendancy of Guanajuato in 1793 consisted of nearly 400,000 persons. By that time, mestizos were a majority of the population (see MESTIZAJE/MESTIZO). Although the census credited Spaniards with 26 percent of the total, probably a majority of them had African or Indian as well as Spanish lineage.

Guanajuato was a major beneficiary of reforms made in the 1760s. The reduction in the price of MERCURY charged by the state monopoly made it profitable to refine poorer ore. Accordingly, the amount of ore processed by the amalgamation process increased, and silver production rose substantially. A large infusion of capital by merchant creditors (*aviadores*) who had withdrawn from TRADE with Spain after the introduction of COMERCIO LIBRE enabled major investments, notably in drainage projects that brought previously waterlogged mines back into production. As the 18th century ended, Guanajuato was producing one-sixth of the bullion in the Spanish colonies; neither the VICEROYALTY OF PERU nor the VICEROYALTY OF RÍO DE LA PLATA produced more. The engine of Guanajuato’s expanded production was a mine called La Valenciana, one of the most productive silver mines in New Spain.

Shortly after MIGUEL HIDALGO Y COSTILLA initiated a revolt in 1810, his forces sacked Guanajuato, brutally killing PENINSULARS and CREOLES who had taken refuge inside the city’s public granary. This action, more than



Mule drivers in the hills above the mining center of Guanajuato (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

any other, demonstrated the threat of social revolution and pushed creoles into common cause with peninsulars against the revolt. Following Mexican independence, Guanajuato became the capital of the state of the same name (see MEXICO, INDEPENDENCE OF).

#### Further reading:

D. A. Brading. *Miners and Merchants in Bourbon Mexico, 1763–1810* (New York: Cambridge University Press, 1971).

**Guaraní** The Guaraní were settled indigenous peoples in southern BRAZIL and adjacent Spanish America who spoke a dialect of the Tupí-Guaraní language. By 1556, some 20,000 Guaraní were distributed in *ENCOMIENDAS* held by 320 Spaniards in ASUNCIÓN, PARAGUAY, and lived primarily in nearby villages. Between 1580 and 1615, Franciscans created 13 *reducciones* populated by resettled Guaraní who were assigned to *encomiendas* and also subjected to rotational labor, or the *MITA* (see *REDUCCIÓN*).

The initial acute shortage of Spanish women in Asunción and the willingness of the Guaraní to pro-

vide wives and concubines to the Spaniards resulted in a mestizo population that contributed to the decline of native numbers (see *MESTIZAJE/MESTIZO*). Spanish abuse and slaving also contributed to the decline. Epidemic diseases, as elsewhere in the Indies, however, were mainly responsible for the indigenous population's dramatic drop by 1600.

Despite the conditions imposed by their Spanish (in fact, mostly mestizo) overlords, the Guaraní retained many of their cultural characteristics, some of which— notably their language—were adopted by the Spanish and maintained by the mestizo population. The mestizos from Asunción were important in founding towns in the Río de la Plata region, including Santa Cruz de la Sierra (1561), Santa Fe (1573), BUENOS AIRES for a second time (1580), and Corrientes (1588).

Between 1609 and 1707, JESUITS established 30 *reducciones*, or mission towns, in remote locations along the Paraná and Uruguay Rivers. Often established at the request of Guaraní, the missions affected the Amerindians' daily lives, economic activities, material culture, marriage, and religious activities but did not eliminate pre-Jesuit practices. While attracting *bandeirantes*, the mission

system also enabled the Jesuits to combat these slaving raids (*BANDEIRAS*) and to obtain exemption for their charges from providing labor and *TRIBUTE* to Spaniards.

The interaction between Guaraní, mestizos, and Spaniards resulted in a hybrid culture. Guaraní contributions included not only the widespread use of the Guaraní language but heavy reliance on female agricultural labor, the centrality of *MAIZE* and manioc in the diet, and sleeping in hammocks. Spanish contributions included iron tools and weapons, clothing made from both wool and cotton, uniform short hairstyles, monogamous marriage, a more elaborate social hierarchy, town living, literacy, and the creation of an armed militia. Guaraní, mestizos, and Spaniards together elevated drinking *YERBA MATÉ* to a daily occurrence.

Efforts to implement the 1750 *TREATY OF MADRID* provoked the Guaraní War (1753–56), in which most affected Guaraní chose to rebel rather than relocate west of the Uruguay River. Their defeat forced thousands to move, but a majority returned after Spain annulled the treaty in 1761. The expulsion of the Jesuits in 1767 led many Guaraní to desert the missions, but they subsequently reappeared as wage laborers in the countryside, towns, and city of Buenos Aires. Royal efforts to reorganize the *reducciones* did not stem the flow, and the wars of independence provided the final blow to the former missions. The continuing use of Guaraní as Paraguay's official language remains an ongoing testimonial to the persistence of the Guaraní culture.

See also *GUARANÍ* (Vol. I).

### Further reading:

Barbara Ganson. *The Guaraní under Spanish Rule in the Río de la Plata* (Stanford, Calif.: Stanford University Press, 2003).

**Guatemala** The colonial kingdom of Guatemala and the jurisdiction of the Audiencia of Guatemala were identical. They included the present countries of Guatemala, HONDURAS, NICARAGUA, EL SALVADOR, COSTA RICA, and BELIZE, as well as the region now in Mexico known as Chiapas. The capital of the kingdom was the municipality of Santiago de Guatemala, now known as Guatemala City.

Like the rest of Mesoamerica, Guatemala experienced devastating population decline among the Maya and other indigenous groups as a result of epidemic diseases unintentionally introduced by the Spaniards. The epidemics were worsened by the abuse of *NATIVE AMERICANS* by *encomenderos* and Spanish officials, which weakened indigenous resistance (see *ENCOMIENDA*). By 1570, the population of the Kingdom of Guatemala was estimated at 550,000 indigenous, 15,000 Spaniards, and 10,000 blacks and *MULATOS*. Santiago de Guatemala had about 500 *VECINOS*. The native population of the kingdom, expanding after about 1670, remained substantially larger than the non-native population of whites and *ladi-*

*nos* (*CASTAS*) throughout the colonial era; within colonial Guatemala per se, the native population in 1802, was just over 350,000, and the combined white and *ladino* population was 144,000. The total population in 1825, shortly after independence, was about 512,000.

For its first two centuries as a colony, Guatemala did not have a sustainable export. *CACAO* was an important export to Mexico for a time, but it was declining at its major production area of Soconusco by the end of the 16th century as a result of lower priced competition. Nonetheless, its high quality enabled cacao to remain a minor supplier through the 17th century. The blue dye, *INDIGO*, emerged as the principal export.

The fleet system, focused on retrieving American bullion, did not serve Guatemala well, especially from the 1630s (see *FLEETS/FLEET SYSTEM*). Prohibitions on intercolonial *TRADE*, for example, *WINE* from *PERU* from 1615 to 1685 and again from 1713 to 1774, stimulated the rise of *SMUGGLING*. Nonetheless, Guatemala experienced a serious depression from about 1640 to the 1660s. Trade in wine and oil with Peru increased slowly from the 1670s, the former often being imported as vinegar. A shortage of *SILVER* currency exacerbated Guatemala's woes, and Spaniards retreated to rural farms and "a rather squalid self-sufficiency," as historian Murdo J. MacLeod put it.

*CREOLES* anxious for a government position in these difficult times found that the office of *juez de repartimiento*, or the judge who distributed *REPARTIMIENTO* labor, was among the more remunerative. The use of the Guatemalan version of the *REPARTO*, known as *derrama*, and the distribution of unspun cotton and subsequent purchase of finished cloth at low prices on the part of *alcaldes mayores* were illicit sources of income for provincial officials (see *ALCALDE MAYOR*). In the 17th century, *DEBT PEONAGE*, sharecropping, and living and working on a *HACIENDA* were growing phenomena among the non-Spanish population.

By 1680, Guatemalan producers of indigo understood that if they were to be successful, they had to get their product to the European market. Since the fleet system was useless to them, they turned to contraband trade. British merchants operating from *JAMAICA* proved particularly useful in this regard, and by 1715, contraband had resurrected indigo, shipped through the Bay of Honduras, as Guatemala's most important export. Rising indigo sales at increasing prices were a result of demand from textile producers in Europe. The upward trend quickened after the mid-18th century, and *COMERCIO LIBRE* stimulated legal trade. The Aycinena family emerged as the dominant participant in marketing indigo and carried its power into independent Guatemala (see *AYCINENA Y DE YRIGROYEN, JUAN FERMÍN DE*).

Santiago de Guatemala was an established administrative center by 1570. In that year, the *AUDIENCIA*, after several moves since its founding in 1543, took up residence with a president as its executive and a jurisdiction that included Chiapas (Mexico) and extended to the

border with PANAMA. The president of the Audiencia of Guatemala was also governor and, systematically from 1609, captain general of the province of Guatemala.

The Kingdom of Guatemala had 22 *corregimientos*, four *alcaldías mayores*, and four *gobernaciones* in 1570 (see *CORREGIDOR/CORREGIMIENTO*). By 1785 these numbers were five *corregimientos*, 12 *alcaldías mayores*, and still four *gobernaciones*. The introduction of the INTENDANT system between 1785 and 1787 gave the kingdom four intendants for Honduras, El Salvador, Nicaragua, and Chiapas; remaining were the *gobernación* of Costa Rica, *corregimientos* of Quetzaltenango and Chiquimula, and *alcaldías mayores* of Totonicapá, Sololá, Sacatepéquez, Chimaltenango, Verapaz, Sonsonate, Escuintla, and Suchitepéquez. As elsewhere, intendants had subdelegates, who replaced the *corregidores* and *alcaldes mayores* (see *SUBDELEGADO*). The principal Spanish municipalities, of which there were five in the province of Guatemala, had MUNICIPAL COUNCILS. Similarly, substantial indigenous villages had town councils. A 1783 listing documented a total of 152 royal positions in the kingdom, including those at the treasury, the MINT, the TOBACCO office, and the office of sales tax (*ALCABALA*).

Clerics were present in Guatemala from at least the early 1520s, and the Bishopric of Guatemala was erected in 1534. Subsequent bishoprics were created for Chiapas, Honduras, Verapaz, and Nicaragua. In 1742, the bishopric for Guatemala was elevated to an archbishopric. Parish priests and their assistants overwhelmingly became men born in Guatemala; of 255 diocesan priests in the late 1760s, only four were born elsewhere.

By 1537, FRANCISCANS, DOMINICANS (including Father Bartolomé de Las Casas), and MERCEDARIANS had reached Guatemala. JESUITS arrived in 1582. By 1600, there were 22 Franciscan, 14 Dominican, and six Mercedarian convents within the province of Guatemala. AUGUSTINIANS arrived in 1610, and in 1668, the Bethlehemite order was founded to operate a hospital in the capital. By 1700, the Dominicans were the premier order in the colony. The Jesuits, all 20 of them in the province of Guatemala, were expelled in 1767.

In 1818, the bishopric of Guatemala had 131 parishes, 17 vicarages, 424 churches, and 1,720 *COFRADÍAS* serving 540,508 Christians. The capital had eight convents for men and five convents for women, as well as two schools for females.

By the 1570s, the Dominicans, Franciscans, and Mercedarians were teaching philosophy in their convents. In 1597, the bishop of Guatemala founded a seminary in the capital. The Jesuits opened the COLEGIO of San Lucas in 1641 (see *COLEGIO/COLEGIO MAYOR*). The first institution authorized to confer degrees was the Dominican Colegio of Santo Tomás, established in 1619 but closed by the late 1620s. The Jesuits secured permission to award degrees starting in 1622 but actually did so only from 1640. The Royal and Pontifical University of San Carlos opened in 1681 and before long was the only institution in Guatemala allowed to confer degrees (see UNIVERSITIES).

A press established by 1660 published a variety of religious pieces, university theses, and some items with a religious purpose in native languages. Some 408 items were published between 1660 to 1783; the pace then quickened, with 504 more appearing by 1799. The nature of the publications changed as well, especially after an economic society established in the capital in 1795 proved more active than most (see *AMIGOS DEL PAÍS, SOCIETIES OF*). When suspended in 1800, it had 149 members in Guatemala. The society was intimately related to the publication of the *Gazeta de Guatemala* that began in February 1797 and appeared until 1816. In 1810, the society was reestablished, but it was not doing much in 1815 and was effectively dead by 1818.

By 1800, the *audiencia* district of Guatemala had a population of approximately 1.2 million, about half of whom lived in the province of Guatemala; some 250,000 persons lived in San Salvador; 135,000 in Honduras; 100,000 in Chiapas; and 63,000 in Costa Rica. Santiago de Guatemala at that time had about 25,000 inhabitants; no other city in the *audiencia* district exceeded 12,000. About two-thirds of the *audiencia*'s population were Amerindians, located mainly in the highlands of Chiapas, Guatemala, and El Salvador. *Ladinos*, or hispanized Indians and *castas*, constituted just over 30 percent of the population and formed the majority in San Salvador, Honduras, Nicaragua, and Costa Rica.

The introduction of the intendant system increased the self-awareness of each region in the Kingdom of Guatemala but failed to produce economic progress (see *ECONOMY*). While creoles held some 700 of 740 positions in Guatemala, the best ones were rarely and sometimes never held by Guatemalans. Only five men born in Guatemala received any *audiencia* appointments between 1610 and 1808. Although Guatemala had led the world in indigo production from 1765 to 1795, competition, locust infestations, a decline in quality, and the consequence of the wars of the French Revolution on trade terminated the indigo boom. Depression and fiscal deficits replaced prosperity and colored the political environment the royal government faced after the abdications of CHARLES IV and FERDINAND VII in 1808. It required all of José de Bustamante's skill and effectiveness in working with the five interrelated families of Guatemala City's elite to keep the colony loyal during his tenure as captain general from 1811 to 1818.

The RIEGO REVOLT of January 1, 1820, in Spain forced a restoration of constitutional government and provoked Agustín de Iturbide and others to issue the PLAN OF IGUALA, which led to Mexican independence (see MEXICO, INDEPENDENCE IN). With its much larger neighbor independent, numerous municipalities in Guatemala declared their own independence, and on September 15, 1821, Captain General Gabino Gainza proclaimed the independence of the Kingdom of Guatemala. In less than four months, it was a part of the newly declared empire under Agustín I. In spring 1823, the former kingdom again declared its independence.



See also GUATEMALA (Vols. I, III, IV); ITURBIDE, AGUSTÍN DE (Vol. III); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**Guayaquil** The city of Guayaquil, founded about 1537, became the major port of the Kingdom of QUITO and an important SHIPBUILDING center. It became the capital of a *corregimiento* of the same name until 1763, when a governor assumed the responsibility of administering the province (see CORREGIDOR/CORREGIMIENTO). In 1803, it was transferred from the jurisdiction of the Audiencia of Quito to the Audiencia of Lima (see AUDIENCIA). With TRANSPORTATION via water to LIMA easier than land transportation to Quito, elite *guayaquileños* had close ties with the Peruvian capital.

A description of Guayaquil in 1604 enumerated 61 houses; 152 male householders, 73 of them married; 189 children; and 216 male and 117 female black and *MULATO* slaves (see SLAVERY). The householders were equipped with firearms, swords, and other weapons. Located near to Guayaquil were 10 indigenous villages.

In 1615, the Dutch admiral Joris van Speilbergen led a fleet of four warships and two smaller craft on behalf of the Dutch East India Company. While ostensibly sent to TRADE, the expedition was heavily armed in case the Spaniards did not trade willingly. Winning a decisive battle off Cañete against the royal South Sea Fleet (Armada del Mar del Sur), based in Lima, the Dutch encountered no further opposition, and Speilbergen's expedition moved northward, totally destroying Paita, but not invading Guayaquil (see FLEETS/FLEET SYSTEM). The experience, however, left the Spaniards shaken, and the new VICEROY, Príncipe de Esquilache, oversaw the construction in Guayaquil of a 44-gun galleon and a smaller ship with eight guns.

When the Dutch returned in 1624, Esquilache's replacement, the marqués de Guadalcazar, had only five

substantial ships available. Consequently, he turned to coastal defenses, and land battles were fought at CALLAO and Guayaquil. The attack on Guayaquil was costly for the Dutch. The defenders suffered fewer casualties, but the Protestants had extensively damaged the city. A second Dutch attack in late August was also unsuccessful. The two attacks, however, underscored both the vulnerability of Guayaquil and the unwillingness of the viceroy of PERU and president of the Audiencia of Quito to supply the resources needed to fortify it properly. Fortunately for Guayaquil, no further threat materialized until 1687, when pirates attacked the city on April 20, sacked it, abused the citizens, and fled with ransom money paid to free some of the captives they had taken (see BUCCANEERS). A further piratical raid led by Woodes Rogers in 1709 resulted in another sacking for the city, despite its having relocated to a more defensive site downstream.

The demand for ship construction and repair and the natural resources available nearby combined to make Guayaquil the most important shipyard on the Pacific coast; all it needed to import was iron for nails. The construction of ships for the South Sea Fleet was undertaken here, as was that for smaller merchant ships, mostly ordered by merchants in Lima. Nonetheless, viceregal orders dwindled in the 18th century. It took a significant expansion of exports to reinvigorate the shipyards, although in 1772, agricultural exports were already three to four times the size of shipbuilding (see AGRICULTURE). Expanding CACAO exports in the 1780s led Guayaquil's ECONOMY and created the demand that nearly doubled the annual revenue from shipbuilding between 1779 and 1788.

Guayaquil and its coastal region benefited from COMERCIO LIBRE, gaining the freedom to trade with Pacific colonies in 1774. Cacao had become an important export by the 1640s, but cacao growers in VENEZUELA secured a ban on unlimited exportation of cacao from Guayaquil to NEW SPAIN, the biggest colonial market. When the restriction was eliminated in 1789, Guayaquil's cacao production and exportation expanded rapidly, almost tripling between the 1780s and 1810.

The population of the city grew as well, increasing from some 6,000 in 1738 to almost 14,000 in 1804. Initially African slaves and then migration from the highlands of the Audiencia of Quito contributed to growth in the coastal region through the war of independence. Nonetheless, coastal merchants were often at the mercy of more highly capitalized merchant houses from outside the Guayaquil region. In addition, they had to deal with the high taxes and volatility of export prices on cacao, which accounted for 75 percent of Guayaquil's exports.

In 1809, Guayaquil requested support from Peru's viceroy JOSÉ FERNANDO DE ABASCAL Y SOUSA and remained royalist in opposing the Junta Superior in Quito. Between 1814 and 1820, however, FERDINAND VII's absolutism coupled with commercial woes resulting from minimal Spanish shipping led merchants and planters in Guayaquil to consider independence. Soon after

the RIEGO REVOLT and reestablishment of the Cortes in Spain, the province of Guayaquil declared independence on October 9, 1820, and convened a constituent congress to write a constitution for the new republic. Highland Quito, however, remained royalist. Over the next two years, JOSÉ DE SAN MARTÍN and SIMÓN BOLÍVAR tried to attract Guayaquil to their respective regimes. Bolívar was unwilling to allow the province to be independent. After Antonio José de Sucre defeated the royalist army at Pichincha and the city of Quito's agreement to join Colombia, Bolívar led an army into Guayaquil on July 11, 1822, and the city had no choice but to acquiesce to its inclusion in the new department of Quito.

See also GUAYAQUIL (Vol. III).

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**Guaycuruans** The Guaycuruans were a nomadic indigenous people of the Chaco, a vast region marked by the Andes on the west and the Paraná and Paraguay Rivers on the east and extending from Santa Fe in present Argentina to north of the boundary between PARAGUAY and Bolivia. Guaycuruans included Abipones, Mocobis, Mbayás, Payaguá, and the Toba. Language rather than political organization linked these major groups. Their total population was perhaps 250,000–500,000 prior to contact with the Spaniards. By the mid-1700s, it was 35,000–45,000.

Warring peoples, Guaycuruan groups fought among themselves, raided Jesuit missions as well as European villages, hunted CATTLE and horses, and traded with other indigenous and Spaniards. They rapidly adopted horses, which increased their mobility in raids. The Payaguá used WAR canoes against Spanish shipping on the Paraguay River. Throughout the 17th century, they preferred war and TRADE to life in missions. Horses, cattle, and improved weapons made with iron contributed to larger Guaycuruan bands and made their MILITARY presence more threatening.

A Spanish expedition with more than 1,300 soldiers left Tucumán in 1710 to bring an end to Guaycuruan depredations. Those who could not escape the invasion negotiated; others retreated northward, enabling Spanish landowners to expand their holdings and to create new HACIENDAS. Women and young male Guaycuruans captured by the Spaniards were forced to be servants, if not slaves. By the early 1730s, however, Guaycuruans were again threatening

Tucumán and other Spanish towns and almost ended traffic from Jujuy to POTOSÍ. A major Guaycuruan raid in late 1734 and early 1735 threatened Salta.

EPIDEMICS of smallpox and measles proved a more effective enemy than Spaniards, striking Guaycuruans in the mid-1730s. Prohibitions against trading with Spaniards, improved defenses, and colonists' northward movement in Paraguay, which reduced their hunting grounds, also adversely affected the Guaycuruans. Pushed toward Spanish lands by ecological changes and military threats, they felt their gods had lost to the Spaniards' deity and finally several thousand agreed to move to Jesuit missions as a way to survive. Even after the expulsion of the JESUITS in 1767, many of these Guaycuruans remained in the missions, perhaps increasing in number to 5,000 or 6,000.

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**Guyana** On the basis of "discovery" and "formal possession" in 1593, Spain claimed title over the "Province of Guiana," which extended on the northeastern coast of South America between the Amazon and Orinoco Rivers. As a region left unsettled by the Spanish but close to both the Caribbean and Brazil, this "Wild Coast," attracted the attention of other Europeans in the late 16th and early 17th centuries. In 1595, the English courtier Sir Walter Raleigh sailed to Guiana with an expedition that conducted a futile search for a legendary golden city of Manoa and an equally legendary Gilded Man (El Dorado). Upon his return to England, Raleigh published an exaggerated account of the exploration in *The Discovery of Guiana*. Added to envy of Philip II's empire and the expanding market for SUGAR grown in Brazil, then part of Philip's patrimony, this book increased the interest of the Dutch and French as well as the English in Guiana.

The Dutch established a settlement along the Essequibo River in 1616 and another on the Berbice River in the 1620s. PLANTATION cultivation of sugar, TOBACCO, and cotton was undertaken with the labor of African slaves. A large-scale slave rebellion in 1763 threatened continued Dutch rule. After late 18th-century transfers of the region involving the British and French, in 1803, the British gained sovereignty over the colony. Britain maintained the northwestern part of the original Province of Guiana as British Guiana, with Georgetown (Stabroek under the Dutch) as its capital, until Guyana gained its independence in 1966.

See also GUYANA (Vols. I, III, IV).

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# H

**Habsburgs (Hapsburgs)** The succession of CHARLES I of Castile and Aragon, also known as the Holy Roman Emperor Charles V, fastened the Habsburg dynasty and its possessions in the Netherlands on Spain for nearly two centuries. Charles was the grandson of Ferdinand of Aragon and Isabella of Castile and Emperor Maximilian I and Mary of Burgundy. He was son of the mentally deranged Juana la Loca and Philip the Handsome, who died prematurely in 1506. Arriving in Spain for the first time in 1517, Charles initially spoke no Castilian and allowed his Burgundian advisers and their minions to treat Spain and its American empire as spoils. The death of his grandfather Maximilian in 1519 gave Charles not only additional lands in central Europe but the opportunity to purchase election as Holy Roman Emperor Charles V. He spent the remainder of his rule engaged in a monumental struggle against various forms of Protestantism supported by local rulers.

During Charles's reign, Spaniards in the Americas established a mainland empire through exploration, conquest, and settlement. By the end of his rule, American bullion was arriving in sufficient quantity to be important but never enough to cover Charles's military expenditures. Worn out by endless campaigning and travel across Europe, Charles abdicated in 1556 to Philip, his son through his marriage to Isabel of Portugal.

PHILIP II, an industrious monarch who studiously read and annotated countless documents, ruled Spain from his father's abdication until his own death in 1598. He had visited England, where he married Mary Tudor, and the Netherlands while prince; as king, he remained in Spain throughout his long reign. War with Protestants was almost ongoing, but Spain also fought France and briefly Portugal after Philip claimed the latter's crown

in 1580, thus inaugurating 60 years of Spanish rule of its neighbor, as well as BRAZIL.

The unquenchable revolt of the Calvinist Netherlands dogged most of Philip's reign, although England's defeat of the Spanish Armada in 1588 remains even better known. An unprecedented flow of SILVER from POTOSÍ and NEW SPAIN helped fund nearly endless European conflict but was never enough; royal bankruptcy in 1557 inaugurated Philip's reign just as a third and final bankruptcy in 1596 marked its fiscal demise.

Elizabethan privateers, or sea dogs, notably JOHN HAWKINS and his ultimately more successful protégé Francis Drake, forced unprecedented expenditures for defense in the colonies. Fear of Protestants also led to the establishment of the Tribunal of the INQUISITION in both MEXICO CITY and LIMA. Misfortune bedeviled Philip's family life as well. He had four wives: Mary of Portugal, Mary of England, Isabel of France, and Anne of Austria. Following the 1568 death of his only son, Carlos, in 1570, Philip wed the daughter of his Habsburg cousin Anne. Of their five children, only one son reached adulthood, the future king PHILIP III.

Philip III reigned from 1598 until his premature death in 1621, years in which Spain initially remained mired in WAR with the United Provinces of Netherlands. A truce in 1609 provided a respite until 1621; it also offered the opportunity to expel the Moriscos from Spain, an action decided on the same day as the truce was signed. Although American silver continued to be mined at a high level, the amount reaching Spain decreased as SMUGGLING within the fleet system and contraband carried directly to the colonies by foreign merchants highlighted Spain's inability to provide what the increasingly self-sufficient colonies wanted to purchase (see FLEETS/

FLEET SYSTEM). With a monarch of renowned lassitude, rule by royal favorite triumphed. The primary figure for nearly all of Philip's reign was the duke of Lerma; his name became synonymous with corruption. Philip and his wife, Margaret of Austria, the sister of Austrian Habsburg monarch Ferdinand II, had several children of whom the eldest became PHILIP IV; daughter Anne married the French Bourbon Louis XIII.

Born in 1605, Philip IV assumed the throne in 1621 and promptly converted his mentor, Gaspar de Guzmán, known by his later titles as Count-Duke of Olivares, into the royal favorite, a status he held until 1643. Although Olivares vigorously pursued tax and other reforms as a means to restoring national greatness and contested the French and their renowned minister Cardinal de Richelieu, ultimately he failed in the face of the revolts of Catalonia and Portugal beginning in 1640 and military defeat by the French at Rocroi in 1643. In 1648, Philip recognized the independence of the United Provinces, ending 80 years dominated by conflict. Spain's fortunes continued to wane in the latter half of Philip's reign. Silver remittances from the Americas reached derisory levels as Potosí and PERU's registered silver production continued to decline. The indigenous population of New Spain, however, began to inch upward from its mid-century nadir. Overall, the American colonies' level of self-sufficiency continued to increase. Philip IV, in 1649, married his niece Mariana of Habsburg, daughter of his sister Mary and Ferdinand III of Habsburg. Their son Charles, born in 1661, inherited the Spanish throne.

Sickly and mentally deficient, CHARLES II was incapable of ruling, and his mother served as regent in his early years. Declared of age in 1675, Charles quickly found himself subjected to a military coup by his illegitimate half brother Don Juan of Austria, whose dominance lasted until his death in 1679. During Charles's reign, Spain reached its nadir. A measure to devalue the copper currency by 75 percent in 1680 was followed in 1686 by a lesser devaluation of silver; the consequence was the monetary stability necessary for the economy to pull out of depression. By 1680, New Spain's registered silver production exceeded that of Peru, but almost all taxes collected in the colonies remained there (see TAXATION). Although Charles II married twice, he proved unable to father an heir. The result was a series of partition treaties by other European powers that plotted the future of Spain and its empire following his death. When Charles died in 1700, however, he had clearly designated the Bourbon grandson of France's powerful Louis XIV as heir. The WAR OF THE SPANISH SUCCESSION was the result. Habsburg rule in Spain ended, and the BOURBON DYNASTY began.

See also HABSBURGS (Vol. I).

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**hacienda** Most simply defined as a type of large landed estate, or *latifundio*, and known as *FAZENDA* in BRAZIL, the hacienda emerged as an important form of land ownership and rural production in colonial Spanish America. Scholars have long debated its origins, characteristics, relationship to different forms of labor, regional variations, and differences from PLANTATIONS, another form of *latifundio*.

The hacienda appeared in NEW SPAIN during the latter half of the 16th century. It produced WHEAT and sometimes other grains and plants for human consumption or other use and animal fodder, and also raised livestock. It typically consisted of a residence for the owner or manager, the former also often having an urban home in the provincial or *AUDIENCIA* capital. It also had separate housing for resident workers and their supervisors, sheds, stables, and other out buildings, and in some cases a chapel. While the hacienda often produced much of what its residents needed for subsistence, the *hacendado* also sought to dominate the local market. The labor force was a combination of resident and seasonal workers.

As landed property, the hacienda could be used as collateral for loans and its income mortgaged to pay for chaplaincies established to benefit the souls of past or present owners or members of their families. One consequence of this was that some haciendas could be bought with a minimal down payment but substantial encumbrances on the property. In some regions, private ownership changed frequently, although the creation of *MAYORAZGOS* (entailed estates) could prevent this. Ownership by an ecclesiastical entity, the JESUITS being the best example, reduced potential instability. The capital required to operate an hacienda was normally much less than for plantations on which slave labor and equipment were employed (see SLAVERY). While haciendas might consist of a single piece of property, patchworks of not necessarily contiguous properties were also common.

Haciendas required land, labor, capital, and an entrepreneur (*hacendado*, or manager for a religious order). In New Spain, conquistador Hernando Cortés assigned and revoked land grants, as did the city council of MEXICO CITY and the Audiencia of Mexico. VICEROY Antonio de Mendoza (1535–50) centralized the process and made numerous land grants (*mercedes*) for agricultural and pastoral purposes. Using modern equivalents of measure, the smallest grants, 105 acres, were for AGRICULTURE. Grants for CATTLE (*estancias de ganado mayor*) were 6.78 square miles (17.5 km<sup>2</sup>); those for lesser livestock, such as SHEEP and goats (*estancias de ganado menor*), were 3.01 square miles (7.8 km<sup>2</sup>) (see *ESTANCLIA*). Typically, the grantee was given a specified time to put some or all of the land to

active use and was prohibited from selling it for four or more years. By 1620, Spaniards had received grants totaling about 250–300 square miles (647.5–777 km<sup>2</sup>) for agriculture and 700–750 square miles (1,813–1,942.5 km<sup>2</sup>) for grazing in the Valley of Mexico—about a third of its area. Despite legislation that prohibited grants to Spaniards of land occupied or used by indigenous people, viceroys awarded such lands, often unknowingly, and in other cases confirmed titles to properties purchased or usurped from Amerindians.

Spaniards received rural land grants wherever they settled, and geographical and climatic conditions made them valuable. The discovery of SILVER in sparsely settled lands northwest of Mexico City, ZACATECAS (1546) and GUANAJUATO (about 1554), for example, resulted in an immediate rush of workers to the promised riches, as well as the need to defend the road from Mexico City. Viceroy Luis de Velasco, in 1555, delegated to Angel de Villafañe the foundation of the town of San Miguel and the assignment of properties for farms and stock raising, houses, and orchards to the settlers. Thus, Spanish entrepreneurs quickly obtained on route to or near mines lands that could supply grain, beef, and other comestibles; tallow; leather; animals for TRANSPORTATION; and sometimes fuel. Some *hacendados* also owned mines and thus benefited from the vertical integration of their enterprises. They sought to increase their holdings, even if they were left idle, in order to drive rivals from the market or to force small producers off their lands and into the labor market, if not on to the *hacendado's* lands.

Colonial haciendas varied greatly in size and value, reflecting the quality of soil and extent of land; the availability and cost of labor; the cost of transportation to market; and the inventory of animals, buildings, seed, and other items. The term *hacienda* was applied in Oaxaca to estates under 5,000 acres (2,023 ha). Haciendas in the dry and sparsely populated north of New Spain, on the other hand, could be immense. The land held in the Marquisate of Aguayo totaled more than 14 million acres (5.6 million ha) in the 1760s. One estate near BOGOTÁ in NEW GRANADA consisted of more than 125 square miles (324 km<sup>2</sup>). A single owner in Bahia, Domingos Afonso Sertão, had numerous rural properties totaling more than 2.5 million acres (1 million ha).

Many *encomenderos* were early beneficiaries of land grants (see ENCOMIENDA). Unlike other settlers, they already had labor at their command and thus were well positioned to develop their properties. Of course, other Spaniards granted land also wanted access to cheap labor. The initial solution in New Spain came in 1549 when a rotational draft (REPARTIMIENTO) was created that provided labor for farmers and others until 1632, when its use was severely restricted. In PERU, a similar draft known as the MITA was implemented on the base of the new villages (*reducciones*) created by Viceroy FRANCISCO DE TOLEDO (see REDUCCIÓN). In New Spain, the successor to *repartimiento* was free wage labor. While this could

develop into DEBT PEONAGE, its overall significance in the colonial era was less than in the late 19th and early 20th centuries, at least in Mexico. In addition, there is evidence that advances in wages were the price that some workers demanded in return for their labor. There is also evidence that, at least in the Valley of Mexico, life on an hacienda was more advantageous than life as a tributary in an indigenous village, working in an *obraje*, or living on the streets of Mexico City.

High mortality usually due in large part to disease, particularly in low-lying coastal regions and in high-density locations, reduced the indigenous need for and use of land. The reorganization of Indian villages by Toledo in Peru and the similar process, known as CONGREGACIÓN in New Spain, made more, often high quality land available for grants to Spanish settlers. The decline in the native population also threatened the availability of the foodstuffs that Spaniards wanted, especially WHEAT and, according to some historians, led, at least in New Spain, to *hacendados* in the Valley of Mexico replacing indigenous producers as suppliers by the end of the 16th century. Stable or even falling food prices in 17th-century Mexico, however, resulted in haciendas producing at less than full capacity, and lower SILVER production in the middle decades of the 17th century led to many of the haciendas owned by miners changing hands.

In many parts of the colonies into the 18th century, land was less valuable than livestock, seed, or water for irrigation, although a rising population increased its value, especially in the absence of other profitable investment opportunities. Land ownership also could provide a base for local political power.

The CATHOLIC CHURCH and religious orders, notably the Society of Jesus, became major landholders in the Spanish and Portuguese colonies. The Jesuits in particular were very successful both at obtaining and expanding their estates and operating them at a profit. Their great advantage was continuity of ownership and the development of skilled administrators. While inheritance laws divided Spanish estates except in the relatively small number of cases in which *mayorazgo* was employed, the Jesuits retained properties received as gifts and bought and sold other properties. Thus, the size of their estates increased over time. The expulsion of the society put substantial property in the hands of both the Spanish and Portuguese Crowns and then on the market for private purchase.

See also HACIENDA (Vol. III).

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**Haiti** See HISPANIOLA.

**Havana (La Habana)** Founded in 1514, Havana was relocated to its present location on CUBA's north coast in 1519 in order to benefit from Spanish expansion to Yucatán and the land farther inland. Occupied by a French fleet in 1537, it was captured again and destroyed by the French in 1555. The French threat provoked an immediate response and sealed the importance of Havana as a MILITARY outpost vital for the Atlantic TRADE. The Crown created a resident military force that varied in size from about 400 to 1,000 men and began the construction of what became three fortresses: La Fuerza, El Morro, and La Punta. The fleet system established in the 1560s made Havana the port of embarkation for the returning combined fleets and the temporary residence of up to 5,000 hungry, thirsty seamen who sought entertainment as well as places to stay (see FLEETS/FLEET SYSTEM).

The predominance of Havana over the rest of Cuba was confirmed by administrative changes. In 1553, the island's governor was moved there from Santiago de Cuba, and in 1607, Havana was formally declared the island's capital. A beneficiary of financial subsidization from NEW SPAIN, it was also the only legal port of entry for goods entering Cuba and the port from which the island legally sent nearly 300,000 hides to Spain between 1570 and 1590. SHIPBUILDING and ship repair were other important economic activities.

Havana had only about 60 Spanish households in 1570, but the city and surrounding communities had more than 10,000 inhabitants in 1608, about 25,000 by 1700, and some 82,000 including military personnel in 1778. The population included Spaniards, blacks, a few Amerindians, and *pardos*. The perennial shortage of Spanish women in a society in which more than nine of 10 Spaniards were males in the 16th century and men still outnumbered women throughout the 17th and 18th centuries resulted in the growth of a substantial number of free persons of color. The city was home to the island's elite CREOLE families, nine of which held titles of nobility by 1770 as well as substantial lands increasingly devoted to producing SUGAR for the export market. As was typical in the empire, the creole elite incorporated successful PENINSULARS through marriage.

The defining event in 18th-century Havana was its capture by the British on August 13, 1762, after more than two months' resistance. For a few months, the port was opened to free trade. The number of ships arriving increased noticeably, and the number of slaves imported increased as well (see SLAVERY). Although the TREATY OF PARIS returned the capital to Spain in 1763, a shaken Spanish government hurriedly, and uniquely for the empire, worked with elite leaders in Havana to develop a program of military reform, fiscal change, more open trade, and greater access to slaves. The sugar industry was an immediate beneficiary, and by 1800, more than 200 sugar mills were operating in the vicinity of Havana.

As a result of Spain's involvement in European conflicts growing out of the French Revolution, beginning in 1793, Cuba gained access to neutral trade, most important with merchants from the United States, who provided flour and wood for both fuel and packing crates. The island's major port and its hinterland benefited at once.

As fitting of Cuba's most populous municipality and a vital military base, Havana's public ARCHITECTURE revealed symbols of power and culture. The residence of the governor and captain general, the customs house, 11 houses of religious orders, and from 1728 the University of Havana were unmistakable signs of the city's status. The fortresses first constructed in the 16th century remained visible reminders of the capital's ongoing military importance. Long subject to the bishop of Santiago de Cuba, in 1787, Havana's wealthiest parish was elevated to episcopal status with its bishop's jurisdiction encompassing four provinces in Cuba, as well as Florida and Louisiana.

The late 18th and early 19th centuries were a time of growing prosperity for Havana's creole elite. In 1791, 27 prominent landowners formed an economic society (see *AMIGOS DEL PAÍS*, SOCIETIES OF) that sought useful knowledge and supported the newspaper *Papel periódico de La Habana*, which first appeared in 1791; by 1795, the organization had 163 members, and from 1793, the newspaper appeared daily. In 1793, the Crown also approved a merchant guild (*CONSULADO*) made up mostly of planters and wholesale merchants.

By the late 18th society, Havana was one of the largest and most prosperous CITIES in the Spanish Empire. Its importance for Spain increased substantially in the early 19th century as Spain's mainland empire disintegrated.

See also HAVANA (Vols. III, IV).

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**Hawkins, John** (b. 1532–d. 1595) *English merchant, ship's captain, and corsair* Born in Plymouth, England, into a seafaring family, John Hawkins was the son of a successful shipowner who made voyages to America, probably starting in the late 1520s. By the time his father died in 1554, Hawkins was an established merchant with ties to counterparts, especially the Ponte family, in the Canary Islands. Following a stop in Sierra Leone to secure slaves, he led a small expedition to the Americas and landed at HISPANIOLA in 1563, where he sold some slaves and other merchandise without a license to do so (see SLAVERY). After being arrested by the Spanish, he paid a junior official for a license, not knowing it was

legally worthless, and returned to England with a profit. There, he immediately planned his next voyage.

Again after securing slaves in Africa, Hawkins sailed to the INDIES, arriving in spring 1565. At each stop, he sold slaves and other merchandise with the connivance of local officials, who sold him licenses. The result again was substantial profit for the English merchant. A third expedition left Plymouth in October 1567. Acquiring slaves by a variety of means, Hawkins and his fleet of 10 ships left the African coast in February 1568. Reaching the Indies, he stopped at seven ports, again routinely offering to purchase a license authorizing TRADE. At CARTAGENA DE INDIAS, however, the Spanish commander refused to negotiate, and Hawkins made no sales.

On the way to the Straits of Florida, Hawkins encountered a violent storm that ultimately led him to the island of San Juan de Ulúa and the harbor at VERACRUZ. There, the incoming VICEROY of NEW SPAIN, Martín Enríquez, caught the fleet. The Spaniards captured four ships and destroyed a fifth, but Hawkins and his cousin Francis Drake escaped and ultimately reached England. The more than 100 men captured found themselves, as Protestants, the target of the INQUISITION; two were garroted and burned at the stake. Unlike Hawkins's earlier voyages to the Indies, the third was a disaster in terms of both human lives and material loss. Hawkins's career as a slaver had ended. His voyages had demonstrated both that trade with the colonists could be a profitable enterprise and that the Spanish Crown was not going to authorize foreigners to engage in it.

Subsequently suspected of treason for his dealings with the Spanish, Hawkins did not lead another trading voyage to the Indies, although Drake organized several raiding expeditions that might have involved Hawkins from afar. Hawkins, in fact, was not allowed to command a ship for many years, although he became treasurer of the English navy in 1578. Finally, in 1586, he was given command of a fleet of 15 ships. After capturing a half dozen ships returning from BRAZIL, then under Spanish rule, Hawkins planned to sail for São Miguel in the Azores. A severe storm changed his mind, and his fleet struggled back to England; the expedition had been a financial failure and, to his enemies, additional proof of Hawkins's untrustworthiness.

Nonetheless, when the Spanish Armada threatened England in 1588, Hawkins was again sent to sea as a commander of 20 ships. His service at sea was creditable and earned him a knighthood, but his success as an official in forming the English navy into a formidable MILITARY force was even more important.

Hawkins's final voyage to the Indies occurred in 1595. Anchored off PUERTO RICO, he died on November 11.

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**Hidalgo y Costilla, Miguel** (b. 1753–d. 1811) *creole priest who initiated Mexico's war of independence* The son of Cristóbal Hidalgo and Ana María Gallega y Villaseñor, Hidalgo was born in the BAJÍO of NEW SPAIN on a HACIENDA where his father was overseer. Educated in Valladolid (present-day Morelia, Michoacán) mostly in the diocesan Colegio of San Nicolás Obispo, he received baccalaureate degrees in arts and theology at the UNIVERSITY OF MEXICO. He was ordained a priest in 1778 but began teaching at San Nicolás in 1776 and continued there as teacher and administrator until 1792. He was successively named curate of parishes in Colima, San Felipe Torresmochas, and, in 1803, Dolores, a well-paying and desirable appointment. As a parish priest, Hidalgo showed a taste for prohibited LITERATURE, pleasant conversation and entertainment, women, and economic enterprises, and had difficulty in financial affairs. Although denounced to the INQUISITION, he remained a popular priest in Dolores.

After the coup against Viceroy JOSÉ DE ITURRIGARAY Y ARÓSTEGUI in September 1808, Hidalgo joined a small group of CREOLE conspirators in Querétaro who despised PENINSULARS and claimed to want to keep New Spain free from French rule. Correctly fearing that many creoles in the militia would not join them in an armed uprising against the peninsulars, the conspirators agreed to arm indigenous people who would support them. When warned that word of the conspiracy had reached the new viceroy, FRANCISCO JAVIER DE VENEGAS, Hidalgo launched a rebellion in the name of FERDINAND VII on September 16, 1810, two months earlier than planned, with the GRITO DE DOLORES, an appeal to the NATIVE AMERICANS in his parish. On the same day, he made OUR LADY OF GUADALUPE the symbol of his rebellion.

Starting with a modest but quickly expanding number of supporters, Hidalgo took San Miguel, Celaya, and, on September 23, the rich mining town of GUANAJUATO. There, his followers sacked the town and killed the peninsulars and creoles of the local elite who had taken refuge in the town's granary. Although the size of Hidalgo's ill-disciplined force of mostly indigenous people and CASTAS reached 60,000 by the middle of October and subsequently about 80,000, the massacre at Guanajuato galvanized creoles and peninsulars into common opposition to the rebellion.

Hidalgo led his men to the heights above MEXICO CITY but recognized that entering the capital would result in his force's disbandment. After defeat at the Battle of Monte de las Cruces by the army led by FÉLIX DE CALLEJA DEL REY, many thousands of Hidalgo's supporters deserted. Retreat followed as Hidalgo and his major coconspirator, Ignacio de Allende, divided the remaining forces and headed west. In retreat, Hidalgo was brutally committed to "death to the *gachupines*," as the peninsulars were known, and many were slaughtered. By the time he reached GUADALAJARA on November 26, his force had about 7,000 men. Although he was able to

raise more men, on January 17, 1811, his forces were defeated decisively at the Bridge of Calderón, east of Guadalajara. Hidalgo fled as the leadership of the rebellion divided. Betrayed by a former supporter, Hidalgo was captured on March 21. After abjuring the rebellion he had initiated, he was defrocked and, on July 30, 1811, executed.

It would be another 10 years before Mexico gained political independence from Spain. Hidalgo's revolt, however, had caused serious economic damage to the important MINING region around Guanajuato and set loose persistent violence and disorder in the countryside. Its catastrophic conclusion served as an object lesson to JOSÉ MARÍA MORELOS Y PAVÓN, who kept the ideal of independence alive in southern Mexico through the use of trained and disciplined supporters (see MEXICO, INDEPENDENCE OF).

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**hidalguía** Noble status with its attendant rights and privileges was known as *hidalguía*. The legal privileges enjoyed by hidalgos, the lowest rank of the Castilian nobility, were set forth in a number of laws collectively known as the *fuero de hidalguía* (see *FUERO*).

The Castilian nobility began with the king and descended through the *grandees*, as the most exalted were known after CHARLES I's creation in 1520 of a hierarchy of nobles drawn from the senior families of Castile and Aragon, other titled nobles, the younger sons (*segundones*) of the *grandees* and titled nobles, and lower nobles called *caballeros* (horsemen, or knights) or *hidalgos* (literally, *hijos de algo*, "Sons of Somebody"). Nobles of any rank might claim the prefix *don* by the mid-16th century. The remainder of Castilian society included commoners (called *pecheros* because they were required to pay a head tax or TRIBUTE generically known as the *pecho*) and a small number of slaves (see SLAVERY).

Among the privileges of *hidalguía* were exemptions of one's house, horse, mules, and firearms from seizure in case of private debt and exemption from torture and also from imprisonment for debt if not resulting from criminal acts. Neither could nobles be lashed, sent to the galleys, or hanged. Those found guilty of a crime for which death was the punishment were decapitated.

Most nobles enjoyed their status by virtue of lineage; the children of nobles were noble. In addition, the king could issue patents of nobility, a poor second choice, but a reward for notable service by a commoner. The Basque provinces represented a special case. All persons whose ancestors were from the provinces of Vizcaya, Alava, and Guipúzcoa considered themselves nobles; many Navarrese benefited from collective nobility as well.

The concept of *hidalguía* accompanied the Spaniards to the Americas. Perhaps 10 percent of the conquistadores of Tenochtitlán and maybe a little more than 20 percent of the 168 men present at the capture of Atahualpa were *hidalgos*; none were from the titled nobility.

As in Castile, by the middle of the 16th century, colonial societies embodied a hierarchical structure, although titled nobles remained rare. In the colonial structure, Spaniards considered themselves above Amerindians and thus noble in comparison, although indigenous nobles benefited from exemption from TRIBUTE. Tributary status, indeed, was a definition of *Indian*, the equivalent of *pechero* in Castile.

Among Spaniards, whatever punctilious PENINSULARS might have thought of CREOLE's claims to nobility, the noble-commoner/tributary division took root and, with some modification arising from the emergence of *CASTAS*, remained until independence in the early 19th century and in some cases beyond. Although the military reconquest of Spain from the Moors (Reconquista) had fostered the development of the Spanish nobility, administrators in Madrid never fully appreciated colonial claims of nobility, claims that originally rested on the conquest in the Americas and early Spanish settlement more than lineage.

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**Hispaniola (La Española)** The island of Hispaniola was the site of SANTO DOMINGO, the first important city founded in the Americas by the Spanish. After formally ceding the eastern part of Hispaniola to the French in 1697, the Spaniards referred to their remaining territory also as Santo Domingo.

A beneficiary of royal patronage and an important base for expeditions of exploration, conquest, and settlement on the American mainlands in the early decades of the 16th century, Hispaniola's importance soon declined. It was largely bypassed by the middle of the century despite the continued existence of the first colonial *AUDIENCIA* in the capital city of Santo Domingo. CATTLE were abundant and European fruits, bananas from the Canary Islands, and native TOBACCO and cassava were cultivated. The most important plant was sugarcane, which was introduced by Christopher Columbus in 1493; the first SUGAR processing mill was operating by 1510. The need for labor was solved by forcing indigenous people to work and importing African slaves (see SLAVERY). By 1526, the island had 19 mills and was importing around 400 slaves annually.

Foreign raiders beginning with the French attacked the smaller ports of the island from the 1530s. In 1562, the Englishman JOHN HAWKINS sold some slaves on



Hispaniola. The Crown recognized the strategic value of the island and in 1584 created a financial subsidy program (*situado*) that sent funds from NEW SPAIN to Hispaniola via HAVANA. Francis Drake led a naval attack in 1585, seizing the fortified capital, removing its guns and munitions, and gutting its major buildings. Subsequent depredations by the Dutch led Spain to order settlers on the northwest coast of Hispaniola to move to the south coast, nearer to the city of Santo Domingo. Enforced by MILITARY ACTION, this decision led many settlers to flee the island. The cattle left behind went wild and later fed BUCCANEERS and the French who took advantage of the vacated lands. An English invasion made up of recruits from the Leeward Islands landed on Hispaniola in 1655 to attack Santo Domingo but failed dismally.

In 1697, the Spanish recognized French settlement in the western third of Hispaniola by the Treaty of Ryswyck. Saint Domingue, as the French termed their colony, became an extraordinarily prosperous PLANTATION SOCIETY based on sugar produced by slaves. The slave population increased from 206,000 in 1764 to 480,000 in 1791. By that date, Saint Domingue had displaced Barbados as the Caribbean's largest supplier of sugar, making available almost 80,000 tons annually.

At the outbreak of the French Revolution in 1789, the colony of Saint Domingue produced about a third of all French foreign TRADE and about two-thirds of its tropical produce. The white population numbered less than 25,000, about the same as the free persons of color, mainly of mixed racial heritage. The whites were divided between *grands blancs* (the upper class) and *petits blancs* (the poor and working class); free persons of color were either mulattoes or blacks; slaves were either locally born or imported (see MULATO). The great plantation owners whose lands were dominant in North Province, however, considered themselves the spokesmen of the colony whether they resided in France or the colony; the *petits blancs*, strong in the West Province, disagreed. The wealthy free colored population of South Province, whose lands produced coffee, INDIGO, and cotton, sought full citizenship. Issues of wealth and race intersected with "liberty, equality, and fraternity."

Although armed conflict began when *grands blancs* and *petits blancs* supplied their slaves with weapons, the French National Assembly's decision to enfranchise mulattoes with specified wealth turned the conflict into a race war. In August 1791, slaves in North Province initiated an unprecedented revolt for their own liberty, equality, and fraternity. In the scorched-earth fighting that followed, the ex-slaves, freed by a decree on February 5, 1794, were led by the former slave Toussaint Louverture. His success resulted in an incomplete victory by 1797, a constitution for the colony, and an attempt to restore production. Napoleon's response was to send more than 21,000 experienced troops, most of whom succumbed to yellow fever after arriving in 1802. By tricking Toussaint and then sending him to France where he soon died, the

French produced a backlash that resulted in wholesale destruction of property and, in 1804, the declaration of independence for the new country of Haiti by Toussaint's lieutenant Jean-Jacques Dessalines. Social revolution had triumphed; Saint Domingue no longer existed.

Since its separation from Saint Domingue in 1697, the remainder of Hispaniola had gone its own way and experienced neither intensive slavery nor an export trade dominated by sugar. Its primary trade was in cattle with Saint Domingue. With the "line of tolerance" separating the two parts of the island, regular troops and militia units were prominent in the Spanish portion of the island. Of a total population of 30,000 or fewer in the early 1720s, approximately 500 were professionals and another 3,300 were also considered soldiers. This gave Santo Domingo almost four times the number of troops per thousand persons as present in CUBA in 1800. Between the 1750s and the 1790s, the annual financial subsidy Santo Domingo received from New Spain via Havana roughly doubled, totaling nearly 350,000 pesos in the 1790s. The capital city of Santo Domingo benefited most from the subsidy as the majority of professional soldiers resided there. Part of an extensive kinship and patronage network, prominent landowners and cattlemen with military titles and troops under their command benefited from illegal trade with Saint Domingue and were often able to defy Santo Domingo's royal authorities. The extent to which military officers dominated political and economic life in Santo Domingo was unequalled on the mainland.

Under the Treaty of Basel, which ended the war between France and Spain in 1795, the latter abandoned its portion of the island to the French, moving the Audencia of Santo Domingo to Puerto Príncipe, Cuba.

See also DOMINICAN REPUBLIC (Vols. III, IV); HAITI (Vols. III, IV); HISPANIOLA (Vol. I); SANTO DOMINGO (Vols. III, IV).

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**Honduras** Located between GUATEMALA and NICARAGUA, Honduras experienced severe population decline in the early years of Spanish rule, a result of

slaving, abuse, and especially EPIDEMICS. Briefly home to an *AUDIENCIA*, in 1568, the tribunal was definitively transferred to Guatemala City (Antigua). GOLD and SILVER MINING provided some employment, but the region lacked the technology to deal effectively with exceptionally hard ore. In addition, it was short of labor and unable to obtain enough MERCURY to process effectively silver ore too poor for smelting. Thus 17th-century mining, focused around Tegucigalpa, did not provide a basis for real prosperity, although it did result in increased RANCHING in central and southern Honduras and greater agricultural production, as well as the triumph of fraud (see AGRICULTURE). The availability of salt on the Gulf of Fonseca was another modest source of income.

Included in the *audiencia* district of Guatemala, in 1630, the Bishopric of Honduras had five Spanish cities, including Comayagua, and three Spanish towns and mining camps, including Tegucigalpa, where an *ALCALDE MAYOR* resided. The king named a governor and captain general of Honduras, who resided in Comayagua.

Comayagua became the capital of an intendency of the same name in 1786 (see INTENDANT). The district of Comayagua grew from some 57,000 people to about 84,000 between 1778 and 1800. Tegucigalpa expanded from about 31,000 to 44,000 during the same years. In both districts, families of mixed ancestry outnumbered those classified as Spanish in about 1800. In 1825, the 57 towns and villages of Honduras had a population of approximately 200,000.

As required by the CONSTITUTION OF 1812, Comayagua formed a PROVINCIAL DEPUTATION, which governed from November 1820 to March 1821. A provincial junta held power from September 1–28, 1821, and then created the Junta de Gobierno Independiente on September 28 that cut the ties with Spain and indicated that it did not consider itself tied to Guatemala either. Nonetheless, it agreed to send representation to the March 1822 assembly that politicians in Guatemala City were organizing. Tegucigalpa's city council, however, agreed to stay united to Guatemala City and wanted no political tie to Comayagua. Nonetheless, in October 1823, Honduras was represented in the National Constituent Assembly meeting in Guatemala City that declared total independence and became part of the short-lived Central American federation.

See also HONDURAS (Vols. I, III, IV); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**House of Trade** See CASA DE CONTRATACIÓN.

**Huancavelica** The town of Huancavelica is located in the highlands of PERU about 275 miles (442.5 km) southeast of LIMA. MERCURY, discovered in 1563, became the reason for the town's creation in 1571 and the mainstay of the area's ECONOMY. The area provided the mercury that fueled the dramatic increase in SILVER production at the famed mines at POTOSÍ for the remainder of the century and, complemented by mercury from ALMADÉN, enabled the use of the amalgamation process in Peru for the rest of the colonial era.

VÍCEROY FRANCISCO DE TOLEDO (1569–81) bought out the Spanish discoverer, made the Santa Barbara mine a royal property leased to private entrepreneurs and mercury a royal monopoly, extended credit to the mine owners, and established a MITA to provide labor (see MONOPOLIES, ROYAL). In 1574, a shipment of more than 2,500 quintals was sent in 16,953 sheepskins to Potosí.

After 1645, the *mita* called for 620 *mitayos* (laborers), but the actual number differed. In the 1680s, it was 300–400, and in the early 1720s, 447. In a fashion analogous to that used in Potosí, mine operators received a cash payment in lieu of a worker; in 1685, it was suggested that only 11 percent of the authorized draft were serving. Moreover, some miners and viceregal favorites living in Lima enjoyed rights to *mita* labor that they rented to actual mine owners in Huancavelica. In 1684, this amounted to 291 *mitayos*, nearly half of the authorized total; in 1738, 380 *mitayos* were assigned to such absentee labor lords.

The worst feature of work at Huancavelica was the poisonous mercury dust, which brought slow death to countless *mitayos*. There were other hazards, however. Carbon monoxide apparently killed some workers; pneumonia was common; and cave-ins and other mining accidents took a toll. Recognition of the need for labor and the difficulty in procuring it, as well as a desire to lessen the burden on indigenous people, resulted in a 1631 mandate that “mulatto, negro, and mestizo delinquents” be sentenced to work there.

Registered mercury from Huancavelica between 1570 and 1700 totaled 678,469 quintals, an average of nearly 5,200 quintals annually. Calculated production between 1701 and 1760 was 243,747 quintals, just over 4,000 quintals annually. As earlier, the amounts produced varied by year. Production fell substantially, for example, from 1709 to 1713, amounting to only 1,838 quintals a year; registered silver production plummeted as a result. Between 1761 and 1800, Huancavelica registered 164,177 quintals, about 4,100 quintals annually. The amount of unregistered mercury is unknown but was undoubtedly substantial, especially when the Crown was unable to pay mining contractors promptly for their production.

Although most of Huancavelica's mercury went to silver miners in CHARCAS and Peru, in both the 17th and 18th centuries mercury was occasionally shipped to NEW SPAIN for use in mines at ZACATECAS and elsewhere. There were times, however, notably the first six decades of the

17th century and after Santa Barbara's collapse in 1786, when Peru received mercury from ALMADÉN because Huancavelica's production did not match demand. Mercury from Idrija, Slovenia, went to the colonies as well between 1620 and 1645 and again between 1786 and 1799.

Five years after its collapse, the once great mine of Santa Barbara was closed in 1791. Despite the presence of other deposits in the region and the discovery of the mine of Sillacasa in 1794, Peru was henceforth heavily dependent on imported mercury. In 1813, Huancavelica's mercury production effectively ceased, with only 188 quintals registered.

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**hurricanes** European awareness of hurricanes dates to Christopher Columbus, who personally experienced them in 1494, 1495, and 1502. In the last case, he famously warned Governor Nicolás de Ovando not to send his fleet back to Spain as planned; Ovando ignored the advice, and 20 ships were lost. A plague of the CARIBBEAN, some 400 identified hurricanes had struck the region by the mid-19th century.

Quickly appreciating that hurricanes generally struck between June and November, the combined fleet for NEW

SPAIN and galleons for PERU were to meet at HAVANA in March and sail together from there for Spain (see FLEETS/FLEET SYSTEM). This schedule did not always ensure they avoided dangerous weather conditions, however. In January 1605, seven galleons sailing from CARTAGENA DE INDIAS to Havana were struck by an unexpected storm. The four ships that went down may have been carrying as much as 8 million pesos worth of bullion and jewels; some 1,300 persons perished. The loss of the *Atocha* carrying registered bullion worth 1 million pesos and five other ships on September 5, 1622, off the Florida Keys was also due to a hurricane.

The consequences of sailing during hurricane season were demonstrated on July 31, 1715, when a hurricane struck a fleet en route to Spain under Captain General Juan Esteban de Ubilla. More than 1,000 of the approximately 2,500 persons on board were killed, including Ubilla. Salvage efforts recovered more than 5 million pesos of the 7 million registered, but word of the disaster attracted pirates, and in 1716, an English pirate attacked and looted the salvage camp established by the Spaniards, escaping with about 120,000 pesos.

In addition to causing the loss of ships and treasure, hurricanes affected property on land, forcing substantial public expenditures. In 1672, a hurricane struck HISPANIOLA, destroying the CACAO plants and ending the island's flirtation with exporting cacao. A hurricane that struck the Havana area in 1692 left only 13 SUGAR PLANTATIONS standing and reduced sugar production for many years. Havana was also severely damaged by a hurricane in 1768 and lost CATTLE in flooding caused by a hurricane in 1791. Two hurricanes struck JAMAICA and Barbados in 1781, destroying most of the latter's capital of Bridgetown and causing the death of some 3,000 persons.

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**Iguala, Plan of** (February 24, 1821) Issued on February 24, 1821, the Plan of Iguala encapsulated Agustín de Iturbide's and his associates' vision for an independent NEW SPAIN and served as a statement around which almost all politically active inhabitants of the viceroyalty could rally.

Among its 24 articles, the plan called for complete political independence for New Spain, Catholicism as the only religion, citizenship for all inhabitants without distinction based on place of birth or race, and a constitutional monarchy. FERDINAND VII was to be emperor, but should he decline to move to Mexico, the Constituent Cortes would offer the throne to another member of Spain's royal family. Until the Cortes met, a junta or regency would rule. The clergy would retain its privileges (*FUEROS*). AN ARMY OF THE THREE GUARANTEES led by Iturbide and formed by combining all forces, including those led by Vicente Guerrero, would support the Plan of Iguala. The new army would ensure that the provisions concerning independence, the CATHOLIC CHURCH, and the "intimate union of Americans and Europeans" were enforced.

The Plan of Iguala offered something to everyone. Old supporters of JOSÉ MARÍA MORELOS Y PAVÓN and others who wanted independence from Spain were gratified. Those who wanted constitutional government were assuaged. The plan reassured PENINSULARS that they would be protected. It also placated the Church, which was threatened by anticlerical sentiment in Spain's liberal Cortes.

When Lieutenant General Juan O'Donojú arrived from Spain to serve as Mexico's first political chief, he found that Mexico was independent and Spain retained VERACRUZ, ACAPULCO, and little else. On August 24,

1821, in the town of Córdoba, he agreed to a treaty that recognized Mexican independence and the plan of offering the imperial throne to Ferdinand VII (see MEXICO, INDEPENDENCE OF). Emissaries then were sent to Spain to invite Ferdinand to be emperor and to recognize the independence of Mexico.

The Cortes meeting in Madrid declared the Treaty of Córdoba "illegal, null, and void" on February 13, 1822. The action, however, had no impact on events in Mexico. Iturbide was soon made emperor, but on April 8, 1823, the Mexican Congress declared his coronation null and exiled him to Italy. On the same day, it nullified both the Plan of Iguala and the Treaty of Córdoba.

Short lived as it was, the Plan of Iguala brought about Mexican independence with minimal fighting. There were no battles comparable to Boyacá for Colombia, CARABOBO for VENEZUELA, or AYACUCHO for PERU.

See also ITURBIDE, AGUSTÍN DE (Vol. III).

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**immigration** Spaniards and Portuguese did not make the decision to immigrate to the colonies lightly. Travel involved expenses, risks at sea for weeks and often months, and arriving at an unknown location where at best the new immigrant had some relatives and countrymen (*paisanos*).

Opportunities in the colonies changed over time, and the persons attracted changed as well.

By the middle of the 16th century, Spanish immigration to the overseas territories was well established, and bureaucratic policies to oversee it were in place. Nearly 30,000 emigrants have been identified by 1560, more than a third of them from Andalusia. During the more than two and a half centuries before independence, many more immigrants continued to arrive in colonies from NEW SPAIN to RÍO DE LA PLATA.

Although persons traveling to the colonies were required to obtain licenses from the CASA DE LA CONTRATACIÓN and documentary evidence of thousands of licenses still exists, there is no doubt that the number of licensed travelers was much smaller than the actual number of persons who emigrated from Spain. In addition, slave traders transported African slaves to the colonies. Finally, there were some persons, for example, converted Jews or their descendants, who were legally prohibited from entering the colonies but did so anyway.

A detailed study of emigrants from Spain between 1560 and 1600 reveals that Andalusians continued to be the largest regional group, accounting for nearly 40 percent of the total of just more than 26,000 that have been identified. The province of SEVILLE was particularly important, providing more than twice as many emigrants than the second-ranked province of Badajoz. Unlike earlier trends, emigrants from New Castile were more numerous than those from Extremadura, although the latter region was well above the fourth-ranked region, Old Castile.

The nature of emigrants by 1560 had already changed. Young men anxious for adventure but lacking employment prospects were being replaced by more women and children, a majority from the province of Seville, which accounted for almost 30 percent of emigrants between 1560 and 1579. Government officials and high-ranking clerics were taking large retinues. By the last years of the 16th century, over half of male emigrants were servants, as were more than a sixth of female emigrants. Seville also accounted for a preponderance of merchants going to the colonies.

The destinations of identified emigrants changed over the course of the 16th century. In the years 1540–59, PERU and CHARCAS attracted more than 50 percent more emigrants than did New Spain, a reflection of the drawing power of the wealth taken from the Incas. Between 1560 and 1579, however, New Spain drew nearly twice as many immigrants as Peru and Charcas. With SILVER MINING at POTOSÍ shooting upward, Peru and Charcas again outdrew New Spain from 1580 to 1600. Immigration to peripheral regions was far smaller. Distant CHILE attracted only 831 and VENEZUELA only 234 licensed immigrants from Spain between 1560, and 1600.

Immigrants directly from Spain or from other colonies had created remarkably complete societies in some locales by 1560, and the total white population, made up

of PENINSULARS and their CREOLE descendants, by a conservative estimate, was nearly 120,000 by 1570.

While the extent of Spanish migration to the colonies is uncertain for the 16th century, it is even more so for the 17th century. An estimate based on ship capacity and an approximate number of sailors who remained in the colonies gives a total of about 240,000 emigrants. Almost half of this number went to the colonies between 1601 and 1625 at an annual rate of 4,452, the highest of any comparable period during Spanish rule. The pace of emigration slowed between 1626 and 1650 to about 3,340 per year and then fell to only 820 a year for the remainder of the century. The natural increase in the population perceived as white, however, put the total Spanish population in 1650 at an estimated 655,000.

The number of Spaniards immigrating to the overseas territories in the 18th century is unknown, but several figures suggest it was modest. In 1810, New Spain, the richest and most populous colony, had about 15,000 peninsulars. Approximately half of this number were men in the military and about 1,500 were in the clergy. MEXICO CITY had 2,185 men and 174 women from Europe in 1790. The mining town of GUANAJUATO in 1792 had but 314 residential peninsulars, almost half of them merchants and apprentices. BUENOS AIRES in 1810 had 2,167 peninsulars. In Oaxaca, Orizaba, and Jalapa, peninsular merchants and cashiers totaled 219 men, 60 percent of the cities' total number of peninsulars. There were probably fewer than 40,000 peninsulars in the colonies in 1810.

The wars of independence quickly reduced the number of civilian peninsulars. SIMÓN BOLÍVAR declared “war to the death” against peninsulars in 1813. “Any Spaniard who does not . . . work against tyranny in behalf of this just cause . . . will be shot by a firing squad.” This was the most extreme anti-peninsular proclamation, but throughout the Americas, peninsulars faced ill treatment either during the wars or shortly after independence was achieved. The descendants of Spanish immigrants had taken control.

Immigration to BRAZIL began in the early 16th century and by about 1570, there were probably between 17,000 and 22,000 Portuguese immigrants, most of them in the captaincies of Bahia and Pernambuco. It appears that fewer Portuguese women immigrated to Brazil than Spanish women did to the Spanish colonies. Young, unmarried men were the most common immigrants; their social status ranged from peasants and laborers to low-level gentry or *fidalgos*, although the Portuguese Crown made a point of shipping criminals (*degredados*) to Brazil. Jews and New Christians were also more numerous than in the Spanish colonies, for the INQUISITION in Brazil was weaker.

The gold rush to MINAS GERAIS in the first half of the 18th century attracted an enormous number of immigrants. Many came from the northern Portuguese province of Minho. Although the Portuguese Crown established a passport system in 1720, thousands ignored it.

The largest single immigration at one time occurred in 1808 when the Portuguese Court and some 10,000 followers arrived in Rio de Janeiro. About 4,000 returned to Portugal with JOHN VI in 1821.

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**independence** See BRAZIL, INDEPENDENCE OF; MEXICO, INDEPENDENCE OF; SPANISH SOUTH AMERICA, INDEPENDENCE OF.

**Index of Prohibited Books** The first Spanish *Index of Prohibited Books* was published in 1551 in an effort to identify and prevent the entry and circulation in Spain and its colonies of books that contained heretical or otherwise objectionable material. The initial *Index*, largely a reprint of one published by the University of Louvain in 1550, included all works by 16 authors, mostly Protestant leaders. A larger *Index* published in 1559 included about 700 books, almost two-thirds of them in Latin and published outside Spain.

The Tribunal of the INQUISITION assumed the responsibility of policing potentially dangerous works. In the 1559 *Index*, special attention was paid to Erasmus; literary works in Castilian, including *Lazarillo de Tormes*; and works of piety in Castilian, for example, Luis de Granada's *Book of Prayer* and Francisco Borja's *Works of a Christian*. Until the 18th century, no other Spanish *Index* added notable Castilian works of poetry and literature. In 1564, the Council of Trent issued an index that was considered authoritative by the authors of Spain's next *Index of Prohibited Books*. The 1571 Spanish *Index* began the practice of removing passages from otherwise unobjectionable books. In the early 1580s, a two-volume *Index* was published. One volume listed 2,315 prohibited books, of which 74 percent were in Latin and only 8.5 percent in Castilian; the second volume listed expurgated works. All works written by Peter Abelard and François Rabelais were banned, and particular books by Jean Bodin, Niccolò Machiavelli, and others were prohibited. Subsequent *Indexes* were issued in 1612, 1632, and 1640. Despite their repeated publication, the lists of banned and expurgated books actually affected few readers, and private libraries often included works in the *Index*.

In the 18th century, new editions of the *Index* appeared in 1707, 1747, and 1790. They continued

to ban all works by Martin Luther, John Calvin, and Erasmus, and particular works by Petrarch, Giovanni Boccaccio, Machiavelli, and other authors were prohibited or expurgated. Other books listed included Pierre Bayle's *Historical and Critical Dictionary*, Daniel Defoe's *Robinson Crusoe*, Montesquieu's *The Spirit of the Laws*, the French *Encyclopaedia*, Guillaume Raynal's *Philosophical and Political History of the Settlements and Trade of the Europeans in the East and West Indies*, William Robertson's *History of America*, and all works by Jean-Jacques Rousseau and the noted French philosopher Voltaire. Both the Inquisition and the Spanish government tried to keep out French works related to the French Revolution.

Additionally, the Crown prohibited the independent publication and distribution of works. Starting in 1527, it sought to prevent any foreigners from obtaining "any picture or description of the Indies" and banned conquistador Hernando Cortés's *Letters*. In 1556, PHILIP II required the COUNCIL OF THE INDIES to approve any book on an American topic. He banned works on indigenous cultures in 1577, including the ethnohistorical study of the Nahuas by Fray Bernardino de Sahagún known as the *Florentine Codex* (eventually published 1950–74). The botanical and zoological information collected by Doctor Francisco Hernández, the *protomédico* sent to the colonies, was similarly suppressed. In the second edition of Agustín de Zárate's *History of Peru*, published in 1577, three chapters on indigenous beliefs, legends, and religion were excised. During the TÚPAC AMARU II revolt, the Crown banned GARCILASO DE LA VEGA's *Royal Commentaries of the Incas*, originally published in the early 17th century.

Despite the *Index of Prohibited Books*, colonial intellectuals were usually able to obtain publications they wanted to read, in part because inefficiency and lack of adequate staff rendered the Inquisition incapable of keeping prohibited literature out of the colonies. As one frustrated inquisitor noted, prohibited books often entered the colonies with covers identifying perfectly acceptable works.

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Henry Kamen. *The Spanish Inquisition: A Historical Revision* (New Haven, Conn.: Yale University Press, 1997).

**Indies, the** Spaniards applied *the Indies* to all of their colonial possessions in the Americas or New World. The singular form, *India*, in the Middle Ages referred simply to lands to the east of the Muslim world. In its plural form with an article, as Christopher Columbus used

it, *the Indies* meant Asia. Rarely used earlier, the plural apparently is the consequence of dividing India into *India the Greater*, *India the Lesser*, and the *Indian Islands*. It thus could refer to all lands known as India, a term with little specificity at the time.

Having reached “the Indies,” Columbus logically referred to its inhabitants as “Indians” (*indios/indias*), ignoring native designations of individual indigenous groups.

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**indigo** A dyestuff processed from a number of indigoferous plants, indigo first complemented and then replaced woad as a blue dye in textiles. Indigo was initially exported from VERACRUZ, but by the early 1560s, Guatemalan production based on the *xiquilite* plant was under way. Several locations in the CARIBBEAN, including JAMAICA and Saint Domingue, became producers in the 17th century; Saint Domingue became the most important indigo producer in the Americas. South Carolina also produced indigo, and Venezuelan and Brazilian indigo entered the market in the 1770s. Substantial amounts of indigo exported to Spain and Portugal were normally then sent to other parts of Europe.

The hardy, perennial plant was most productive in its second and third years, after which it was removed and the land reseeded. Locusts, grasshoppers, and caterpillars could devastate a crop, but significant labor was needed for only a few weeks a year. Workers cut the plants above the soil and transported the stalk and leaves to the dye works (*obrajes de añil*), where they were put in large vats and covered with water to ferment for six to 20 hours. The next stage involved draining the indigo into a second vat, where it was vigorously beaten, either by hand or a wheel driven by horse or water. The third stage involved draining the water and shoveling the remaining indigo into boxes in which it dried, a process that might take up to 40 days. The mass was then cut into pieces that were wrapped in cloth, stored, and sold. Usually, there were three grades priced depending on quality.

Processing indigo was miserable work that attracted endless flies and thus ensured the transmission of infections. In GUATEMALA, the Crown prohibited indigenous labor starting in the mid-16th century but never secured compliance. Planters lacked access to enough black slaves to meet demand and claimed *CASTAS* were unreliable. A 1738 ruling permitted planters to hire Amerindians as free laborers. In 1784, the Crown allowed forced labor of *castas* and free blacks who neither owned nor leased land planted in specified crops; in addition, up to one-quarter of a village’s able-bodied indigenous males could be drafted. As in numerous other economic activities,

merchants supplied planters with CREDIT and profited handsomely.

The amount of indigo produced in colonial Guatemala, principally on the coastal plain of present EL SALVADOR, became significant in the latter decades of the 16th century and continued to be important. From 1606 to 1620, registered imports in SEVILLE averaged 240,000 pounds annually, but this may be less than half of total production. Guatemalan production after 1620 stagnated until the end of the century, when expansion began again. Between 1772 and 1802, registered exports ranged from a low of 363,000 pounds in 1774 to a peak of 1.344 million pounds in 1797; total production might have reached an average of a million pounds a year. Between 1801 and independence, however, production fell, dropping as low as 257,000 in 1813.

Venezuelan indigo production expanded in the late 18th century, averaging almost 740,000 pounds a year from 1793 to 1796. International competition from the East Indies also disrupted the European market for Guatemalan indigo. Despite tax exemptions starting in 1803, the indigo producers of Guatemala were in decline. Indigo production in India averaged 5 million pounds a year from 1805 to 1814, an amount greater than all American sources combined.

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Robert S. Smith. “Indigo Production and Trade in Colonial Guatemala.” *Hispanic American Historical Review* 39, no. 2 (May 1959): 181–211.

**industry** See MINING; OBRAJES; SHIPBUILDING; SUGAR; TOBACCO.

**Inquisition** The presence of Portuguese CONVERSOS and foreign Protestants in the Americas stirred PHILIP II to replace the episcopal inquisitions of the bishops with tribunals of the Inquisition in MEXICO CITY and LIMA modeled on the Tribunal of the Inquisition established in Castile in 1480. Philip III authorized a third tribunal in CARTAGENA DE INDIAS in 1610 to deal with foreign heretics in the CARIBBEAN.

The tribunals’ jurisdiction extended only to persons who had been baptized, and notably, Amerindians were normally exempt because they were considered permanent minors unable to make a rational decision of heresy. The inquisitorial procedure began with either self-denunciation or denunciation by an agent (*famil-*

Inquisition in Mexico: Classification of Cases, 1571–1700<sup>1</sup>

TYPE OF CASE	NUMBER OF CASES	PERCENTAGE OF CASES
Heresy*	525	27.5
Heterodoxical tendencies	11	0.6
Minor religious transgressions**	568	29.7
Solicitation in the confessional***	157	8.2
Sexual transgressions****	462	24.1
Witchcraft/magic	138	7.2
Civil crimes	52	2.7
Total	1,913	100

\* Majority were Judaizers; another group was foreign seamen

\*\* Includes blasphemy, “heretical propositions,” disrespect toward the Inquisition, irreverent statements or acts toward the sacraments, sacred objects or places, and disobedience to teachings of the Catholic Church

\*\*\* Much more common than in Spain (2.6% of cases)

\*\*\*\* Includes bigamy and polygamy

<sup>1</sup> There are several lists giving total number of cases between 1,456 and 1,933. The table above is drawn from *Archivo General de la Nación (México)*, Riva Palacio, vol. 49.

Source: Solange Alberro. *Inquisición y sociedad en México, 1571–1700* (México: Fondo de Cultura Económica, 1988), p. 207.

iar) of the tribunal or another person. If an inquisitor believed the charge had merit, an investigation followed. If it substantiated the charge, the suspect was arrested, and his or her goods were sequestered to pay the costs of imprisonment.

Secrecy separated the Inquisition from other judicial tribunals. The prisoner was not informed of the charges or who made them but repeatedly instructed to confess. The accused could plead extenuating circumstances, such as insanity or drunkenness. In fact, most persons arrested knew the reason why, for they were indeed guilty. Those who persisted in claiming innocence and supported it, for example, by formally naming their enemies, might secure release; others might be tortured by procedures imported from judicial practices in Europe. Prisoners pronounced guilty were subjected to either a private or a public *AUTO DE FE*. The former occurred in the Inquisition’s offices; the latter was an enormously popular event attended by thousands of onlookers, including royal officials and clerics. At the *auto de fe*, the Inquisition decreed penance or punishment enforced by the state. The ultimate penalty was death at the stake, a penalty given to no more than 100 nonrecanting heretics during the colonial era. Much more common were fines, flogging, gagging, confiscation of property, and exile. In all cases, the victim’s family was punished by a prohibition through the great-grandchildren of securing ecclesiastical or government offices. Since the three American tribunals together considered about 6,000 cases, many thousands of individuals were affected directly and adversely by its activities.

The tribunal in Lima began with the formal recognition of an inquisitor and staff on January 29, 1570. Between then and its abolition in 1820, it held about 40 *autos de fe*. It tried some 3,000 persons and con-

demned 48 to death at the stake. The most common infraction was bigamy, accounting for 20 percent of cases. Judaizers accounted for 17 percent; witchcraft, 12 percent; heresy, 10 percent; and solicitation by clergy, 7 percent. Between 1700 and 1820, bigamy and witchcraft cases accounted for nearly half of the cases tried, even though the Crown assigned jurisdiction for most bigamy cases to civil courts in 1754 and confirmed that decision in 1788.

The Peruvian Inquisition went beyond the *INDEX OF PROHIBITED BOOKS* and would suppress the circulation of other books it considered objectionable. It was possible for individuals to obtain licenses to read banned works, and at least 51 did so between 1738 and 1817, including the physician HIPÓLITO UNANUE and the *AUDIENCIA* minister José Baquíjano y Carrillo.

Some inquisitors found the temptations their offices provided irresistible. Inquisitor Pedro Ordóñez Flórez left his position in Lima in 1611 with an estate of 184,225 pesos.

Although Portugal established a tribunal of the Inquisition in 1547, it did not establish one in BRAZIL. On three occasions, it sent special agents to Brazil, but normally, bishops were responsible for inquisitorial activity. The local representatives typically levied the kind of charges against morality and blasphemy that filled the dockets in Spain and its colonies.

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**intendant** After earlier experimentation, in 1749, the Crown established the intendant system throughout Spain in order to provide more effective administration and to increase revenue. Following the restoration of CUBA to Spanish rule in 1763, an intendant was introduced there. An intendency was also established in VENEZUELA, in 1777. Between 1782 and 1787, the office was founded throughout the mainland colonies with the exception of NEW GRANADA. In final form, there were nearly 40 intendencies.

In almost every case, the intendants provided a level of provincial administration that had previously been absent as they represented clusters of earlier districts, notably *alcaldías mayores*, *corregimientos*, and governorships (see *ALCALDE MAYOR*; *CORREGIDOR/CORREGIMIENTO*). In New Spain, 149 *alcaldías mayores* were distributed among the 12 intendencies. In PERU, about 60 *corregimientos* fell within the jurisdiction of eight intendencies.

Powerful provincial officials, intendants were to oversee public administration; inspect their province annually; promote economic growth; map the province; and improve roads, bridges, municipal government, and sanitation. In addition, they were to handle judicial cases within the province with the assistance of an attorney known as a *teniente y asesor* (lieutenant and legal adviser); appeals went to the relevant *AUDIENCIA*. Within their jurisdictions, intendants also had responsibilities to pay MILITARY forces and to inspect supplies; serve as vice patron, a task that led to conflict with bishops; and, of primary importance, oversee the collection, disbursement, and transfer of treasury funds.

Because of the intendants' extensive responsibilities, the Crown paid them high salaries—often 6,000 pesos, a sum larger than *audiencia* ministers received—and selected appointees with considerable care. Officers with meritorious service in the army or navy were often appointed. With only rare exceptions, the men named were PENINSULARS; the level of discrimination against CREOLES and native sons was much greater than was the case in *audiencia* appointments made at the same time.

The principal defect in the intendant system was the inadequate pay given to the district officials known as *SUBDELEGADOS*, who served under the intendants. These men literally replaced the previous district officials—the *corregidores*, *alcaldes mayores*, and sometimes governors. Nominated by the intendant and appointed for a five-year term by a VICEROY, *subdelegados* included many creoles. Instead of a fixed amount, they received 3 percent of the TRIBUTE collected in their district (*subdelegación*) in payment for their services. As a result, many resurrected the abuses of their predecessors, including the *REPARTO* of merchandise that the Crown had sought to eliminate.

The results of the intendant system were mixed. In Peru, revenue rose initially but could not sustain the increase. In NEW SPAIN, previous measures taken during and after the inspection tour (*VISITA*) of JOSÉ DE GÁLVEZ Y GALLARDO had already increased revenue, and the inten-

dant system, as its critics had predicted, added costs but not benefits. Everywhere, however, the fact that creoles had been virtually excluded from the important, prestigious, and remunerative new position rankled and added to other grievances that would be voiced after 1808.

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**Iturrigaray y Aróstegui, José de** (b. 1742–d. 1815) *Spanish viceroy of New Spain* José de Iturrigaray y Aróstegui was born in CÁDIZ, Spain, and followed a MILITARY career. He fought in the Seven Years' War and was captain of the cavalry regiment of Alcántara when he entered the Order of Santiago in 1765. In 1786, he married the daughter of Agustín de Jáuregui, former VICEROY of PERU (1780–84). In 1793, Iturrigaray distinguished himself in the war with revolutionary France and, in 1801, led the army of Andalusia against Portugal, serving under royal favorite Generalissimo MANUEL GODOY Y ÁLVAREZ DE FARIA, Prince of the Peace. It was this service and Godoy's favor that brought Iturrigaray an appointment as Viceroy of NEW SPAIN.

Iturrigaray entered his new assignment on January 5, 1803, and quickly proved himself a genial personal-



Viceroy of New Spain José de Iturrigaray was overthrown in 1808 by a peninsular coup. (Private collection)

ity. Well disposed toward Americans, he was still serving when the riot at Aranjuez toppled Godoy and his master, CHARLES IV, and brought FERDINAND VII to the throne. Word of this unexampled event reached Mexico on June 18, 1808; five days later came news of riots in Madrid on May 2 and the royal family's departure for Bayonne. On July 14, Iturrigaray learned that Charles IV and Ferdinand VII had abdicated to Napoleon on May 5 and 6, 1808. The resulting constitutional crisis echoed in the colonies, and two things became clear in New Spain: The French were occupying Spain and multiple JUNTAS claimed to be the country's government of resistance.

On August 9, Iturrigaray made the popular move of suspending further collection of funds under the CONSOLIDACIÓN DE VALES REALES. Additionally, he listened to CREOLES who wanted a junta for New Spain until Ferdinand was freed but suggested the viceroy should remain in control of the government. This attention to

the AUTONOMISTS was too much for PENINSULAR merchants and officials. On the night of September 15–16, 1808, they staged a coup that quickly removed the viceroy from office; the Audiencia of Mexico recognized the action and appointed the aged officer Pedro de Garibay as his successor the following day. Iturrigaray and his family were quickly sent packing to VERACRUZ and from there to Spain, where he died.

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**Jamaica** An island of the Greater Antilles, Jamaica had an Arawak population of probably no more than 20,000 when Juan de Esquivel conquered it and began enslaving the native population in 1509. The few Spanish settlers introduced CATTLE that by the mid-17th century had formed large, feral herds. In 1655, the English captured the island as a token prize for the failed Western Design of Oliver Cromwell. This event initiated a transformation of the island. Small-scale farming and stock gave way to its use as a base by BUCCANEERS, especially at PORT ROYAL, located across the harbor from Kingston, for the remainder of the century. The island became a commercial entrepôt for illicit TRADE with the Spanish colonies and a site of SUGAR PLANTATIONS worked by imported African slaves (see SLAVERY).

Jamaica's English merchants in the late 17th and 18th centuries delighted in supplying the Spanish colonies with slaves and merchandise. They traded for GOLD through CARTAGENA DE INDIAS, hides from CUBA, CACAO and INDIGO from Central America, and other products. Throughout the 18th and well into the 19th century, Jamaica accounted for at least half of Cartagena's trade.

Exporting 6,300 tons of sugar in 1714, by the middle of the 18th century, Jamaica had surpassed Barbados and become Britain's premier sugar colony of the CARIBBEAN. In addition, there were cotton, INDIGO, ginger, and coffee plantations. An indication of the size of Jamaica's plantation economy is the number of slaves in 1787; of some 220,000 on the island, about 160,000 worked in the fields. In 1800, the slave population was some 300,000, the free colored population was about 35,000, and the white population was 15,000. As a result of the Haitian Revolution, Jamaica's share of the sugar market increased,

and by the early 19th century it was exporting more sugar than pre-revolutionary Saint Domingue.

See also JAMAICA (Vol. IV).

**Further reading:**

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Frank Moya Pons. *History of the Caribbean: Plantations, Trade, and War in the Atlantic World* (Princeton, N.J.: Markus Wiener Publishers, 2007).

**Jenkins' Ear, War of** (1739–1748) Merged with the War of Austrian Succession in Europe in 1742, the New World conflict between 1739 and 1748 was called the War of Jenkins' Ear. The war pitted Spain against Great Britain and in large part was the result of Spanish efforts, authorized by the Treaty of Seville in 1729, to impede British smugglers in the CARIBBEAN (see SMUGGLING). The unusual name of the war derives from the claim of Robert Jenkins, a British sea captain, that Spanish coast guards had severed his ear in 1731.

The war was important for Spain and the colonies in several ways. British admiral Edward Vernon's success against PORTOBELLO in late 1739 was the last blow to the fleet system to South America (see FLEETS/FLEET SYSTEM). Subsequently, single register ships handled TRADE from Spain to the South American colonies. The defeat of a British attack on CARTAGENA DE INDIAS in 1741 was an important triumph for the Spanish forces. The additional financial stress placed on Spain by this war led to the sale of numerous appointments to American AUDIENCIAS and, notably in LIMA and SANTIAGO DE CHILE, left native

sons and long-serving ministers present on the courts for decades, a circumstance that increased corruption and reduced the government's ability to secure efficient administration.

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**Jesuits** Founded in 1540, the Society of Jesus was a highly centralized religious order of the CATHOLIC CHURCH led initially by the BASQUE Ignatius Loyola. Its members took vows of poverty, chastity, obedience, and special obedience to the pope. The head of the society was the superior general, who resided in Rome. By the time of Loyola's death in 1556, the Society of Jesus totaled 936 members; this number expanded to 15,544 by 1626 and about 23,000 by 1759.

The first Jesuits sent to the Americas went to BRAZIL in 1549. Others reached Florida in the mid-1560s, PERU in 1568, NEW SPAIN in 1572, GUATEMALA in 1582, Tucumán in 1585, QUITO in 1586, and CHILE in 1593. As in Europe, EDUCATION was a major focus in the wake of Protestantism and the Council of Trent. Jesuits established schools (*COLEGIOS*) in numerous CITIES, for example, LIMA, MEXICO CITY, PUEBLA, GUADALAJARA, ZACATECAS, Chihuahua, and BAHIA; in New Spain, they created seven *colegios* by 1600 and had 26 *colegios* and six seminaries by 1767; in eight locations in Spanish America, such as Córdoba, they founded UNIVERSITIES. In Brazil, they established *colegios* in the 16th century at SALVADOR DA BAHIA, RIO DE JANEIRO, Olinda, SÃO PAULO, and Vitória and three more in the 18th century. In addition, they operated several seminaries.

The curriculum at Jesuit *colegios* everywhere followed a plan of studies (*Ratio studiorum*) promulgated in 1599 by Father General Claudio Aquaviva. Students who knew some Latin passed through an integrated sequence that included three courses in Latin grammar, one course in humanities, one in rhetoric, and three in philosophy.

To provide students with free education, the society secured charitable bequests, purchased urban and rural assets, and established funds supported by profitable agricultural and livestock ventures, SUGAR refineries, textile mills (*OBRAJES*), rental property, and other investments (see AGRICULTURE). Unhindered by Castilian inheritance laws or profligate heirs, benefiting from mortmain, and enjoying comparatively low overheads, the Society of Jesus amassed substantial landed estates that were managed by skilled overseers.

The Jesuits were also active missionaries on the frontiers of Spanish and Portuguese settlement. They

sought to christianize the indigenous population and to bring about their assimilation into colonial society (that is, Europeanization). In Brazil, they founded numerous *ALDEIAS*. In the western Amazon, they established some 60 missions, of which no more than 40 operated at any one time. Between 1682 and 1744, Jesuits in Lima and Santa Cruz de la Sierra founded 25 missions in Moxos in northeastern CHARCAS. In New Spain, they were particularly active in the northwest and Baja California. Their 30 missions with nearly 100,000 GUARANÍ in PARAGUAY led to accusations that they were establishing a separate domain.

Jesuits on the frontier sought to attract NATIVE AMERICANS into missions by offering food, tools, and other goods. Once successful, they sought to make the mission self-sufficient by persuading the indigenous people to grow crops that promoted a settled existence. These mission Indians became, in some regions, an important source of seasonal agricultural workers either hired by landowners as free wage laborers or distributed through labor drafts (*REPARTIMIENTO*). As the history of the Guevavi mission in southwestern Arizona illustrates, the Jesuits could fail in their efforts.

Because Jesuit interests involved control over the native population, they repeatedly came into conflict with those of military officials, frontiersmen, and other settlers. Envy of Jesuit success more than failure, however, accounts for the expulsion of the Jesuits from Portugal and Spain and their empires.

In Spain, alumni of the Jesuits' residential colleges at the Universities of Salamanca, Valladolid, and Alcalá de Henares had long enjoyed preferential treatment in patronage for appointments to chancelleries and councils, the INQUISITION, and high-ranking positions in the church. The Jesuit missions in Paraguay were the source of endless rumors of great wealth, abuse of Amerindians, and a Jesuit state. Exaggerated reports of Jesuit wealth used to support *colegios* and seminaries also aroused cupidity. In addition, Jesuits were suspected of provoking the "Hat and Cloak Riot," or Motín de Esquilache, in Madrid in 1766, which drove CHARLES III from the capital. To a regalist monarch, the Jesuits' primary loyalty to the pope rather than the Crown was unpalatable as well.

In 1755, the MARQUÊS DE POMBAL expelled the Jesuits from their missions; four years later he expelled them from the Portuguese Empire, an action affecting about 600 men. The French acted next, seizing Jesuit properties in 1762 and expelling them in 1764. The Spanish acted last.

The expulsion of 1767 affected about 3,000 Jesuits in Spain and more than 2,000 in the American colonies, including 239 foreigners and 590 lay brothers. Specifically, 562 were expelled from Mexico; 437 from Paraguay; 413 from Peru; 315 from Chile; 226 from the Kingdom of Quito; and 201 from NEW GRANADA. The papacy tacitly approved the expulsions when it suppressed the society worldwide in 1773. At the time of their expulsion from

Spanish America, the Jesuits ministered to more than 250,000 Amerindians in more than 200 missions.

Bishops were assigned the task of providing replacements for the Jesuits in their missions. In most cases, this resulted in missions being turned over to diocesan clergy or religious orders, notably the FRANCISCANS, or simply collapsing.

Both the Portuguese and Spanish monarchs assumed ownership of properties held by the expelled Jesuits. The Spanish Crown reassigned Jesuit *colegios* for public or church use and created administrative offices to oversee the sale of the revenue-producing properties, or *temporalidades*. The affected properties included some of the most valuable HACIENDAS in the colonies, for example, Santa Lucía in New Spain. The income realized was to pay for pensions to the Jesuits, religious obligations, administration of properties until sold, and other royal expenses in Spain. Although many Jesuit properties were sold, thus creating a vested interest against their return, others were still under royal control into the wars of independence.

The papacy restored the Society of Jesus in 1814, and Ferdinand VII authorized the Jesuits' return but did not return their properties. The liberals in Spain expelled the society again in 1820.

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**John VI** (b. 1767–d. 1826) *regent and monarch of Portugal* John VI was the second son of Pedro III and Maria. His future marriage was arranged by treaty in 1777 to Carlota Joaquina, daughter of CHARLES IV and Maria Luisa of Spain; the marriage took place in 1790 and was followed by a life of marital discord improved by separate residences. Following the deaths of his father in 1786 and older brother in 1788 and the descent of his mother into madness, in 1792, John (João in Portuguese) took over running the government for Portugal and its colonies. In 1799, he was formally vested as regent following recognition that his mother's insanity was permanent.

A hunter of game and fowl, John was an intelligent, pious, gluttonous, and poorly dressed regent who took his responsibilities seriously even if he preferred inaction. Napoleon, however, forced his hand in 1807 by sending an army across Spain to Lisbon. Having anticipated this possibility, John implemented a plan to escape with his court to BRAZIL under British naval protection. The royal family and some 10,000 Portuguese reached Brazil, and in March 1808, John reached RIO DE JANEIRO.

Having opened direct TRADE to Brazil with all countries with which Portugal enjoyed peace in 1808, two years later, John agreed to treaties with Britain that gave its powerful ally most-favored-nation trading status and a customs duty of 15 percent. In addition, he agreed to limitations on Portuguese involvement in the African slave trade and promised to support its eventual abolition (see SLAVERY). The regent sent forces to support the Spanish VICEROY in MONTEVIDEO against both the GAUCHO army of JOSÉ GERVASIO ARTIGAS and the forces of BUENOS AIRES, continuing a long history of Portuguese interest in the BANDA ORIENTAL.

On December 17, 1815, the Kingdom of Brazil was proclaimed in Rio, coequal with the Kingdom of Portugal. Following the death of his mother three days later, the regent was proclaimed King John VI. The following year, he sent Portuguese troops to the Banda Oriental, then a republic under Artigas, for what turned out to be a long involvement. In 1817, a revolt in PERNAMBUCO was quickly squelched.

The RIEGO REVOLT in Spain initiated on January 1, 1820, soon forced FERDINAND VII to become a constitutional monarch again. In Portugal, a successful liberal revolt broke out in August 1820; the victors quickly issued a call for elections to a constituent Cortes that would write a constitution. Invited to return to Portugal, John stalled. In early February, a rising in BAHIA supported the new government in Portugal. Amid the turmoil was serious consideration of sending Prince dom Pedro to Portugal to try to gain control of the revolution. In the end, however, a military revolt in Rio that supported the constitution, although quickly quelled by dom Pedro's presence, resulted in John, Carlota Joaquina, and son Miguel leaving for Portugal on April 26, 1821. They reached Lisbon in July.

The Portuguese Cortes quickly voted to remove cokingdom status for Brazil and to eliminate government agencies established there. Word of these actions stimulated an immediate response, which resulted in Brazil's declaration of independence. On November 15, 1825, John recognized Brazilian independence, retaining the title of king of Portugal and Brazil, but bestowing the title of emperor on his son Pedro. The Portuguese monarch died the following year.

See also PEDRO I (Vol. III).

#### Further reading:

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**Joseph I** (b. 1768–d. 1844) *monarch of Spain and the Indies* Previously king of Naples and Sicily (1806–08) as Guiseppe Napoleone I, Joseph I became king of Spain

and the INDIES by imposition of his younger brother and French emperor Napoleon Bonaparte, on June 6, 1808. His appointment was approved by an assembly at Bayonne composed primarily of French sympathizers (*afrancesados*); on July 7, 1808, the monarch swore his oath of office as prescribed in the Constitution of Bayonne. He sought for five years to rule a country that largely rejected him. The vast majority of Spaniards in Spain and an even larger majority in the colonies considered him the *rey intruso* and supported successive governments of resistance claiming to rule in the name of FERDINAND VII who, along with CHARLES IV, had abdicated the throne and was being held in France.

Joseph reached Madrid on July 20, 1808, and on July 25 was officially proclaimed king. French troops led by Joachim Murat, grand duke of Berg, had entered the capital on March 23 and put down a popular rising on May 2. By mid-July JUNTAS promising to rule until the return of Ferdinand existed throughout most of Spain and, following the lead of the town council of Móstoles, considered themselves at war with France. Britain, which in the previous year had escorted the Portuguese Court to BRAZIL, was already sending guns, ammunition, swords, and money to assist the Junta of Oviedo. The unexpected occurred on July 18, when Spanish forces won a great victory over the French at Bailén, 20 miles (32 km) north of Jaén. The news reached Madrid on July 28. On August 1, Joseph left the capital for northern Spain with an army of nearly 20,000 troops; he made Vitoria his temporary headquarters.

The Spanish victory at Bailén provoked Napoleon to lead more French troops into Spain. He arrived at Vitoria on November 5 and on December 4 entered Madrid. He remained in Spain for some six weeks but failed to win a decisive victory over the British, who disembarked at La Coruña in mid-January. Napoleon's successes, however, were enough to enable Joseph to reenter Madrid on January 22, 1809, and within weeks he established an *afrancesado* cabinet and tried to rule as a progressive monarch, abolishing the old councils, titles of nobility, and male religious orders. In addition, he ordered houses owned by opponents of the regime confiscated and sold.

Late in 1809, the French moved south. A decisive victory over some 52,000 Spanish forces at Ocaña on November 19 opened Andalusia. The JUNTA CENTRAL fled SEVILLE for the Isle of León on the night of January 23, and the French entered the city on February 1, 1810. In early February, some 20,000 French forces began a siege of CÁDIZ that continued until August 25, 1812.

Well before the French lifted the siege of Cádiz, it was apparent that they exercised effective authority only in occupied towns, as Spanish guerrillas were ubiquitous in the countryside. Moreover, while Joseph I was titular ruler of occupied Spain, in fact, the French marshals who commanded the armies that totaled more than 350,000 men by mid-1810 only took orders from Napoleon. The monarch also suffered the affliction of inadequate revenues to cover the cost of the armies, civilian employees,

the royal household, and other expenses. He wrote his brother from Madrid on Christmas Eve 1811 that he was "surrounded by the most horrible misery" and that his "presence here is no longer of any use." The year 1812 was even worse, and in 1813, his reign ended. The monarch left Madrid for the last time on March 17, 1813, traveling with an unwieldy baggage train and a large number of supporters. He entered France on June 28, 1813, king in name only. The Treaty of Valençay, signed in December 1813, brought peace between France and Spain. Ferdinand VII entered Spain on March 24, 1814. After spending some years in the United States, Joseph I ultimately died in Florence.

Supporters of Joseph I, the *afrancesados*, included a number of prominent figures who had begun their careers during the reigns of CHARLES III and Charles IV and held important posts related to the colonies. Among them were Miguel José de Azanza, former VICEROY of NEW SPAIN and 1st duke of Santa Fe by enactment of Joseph I; Miguel de la Grúa Talamanca y Branciforte, 1st marquis of Branciforte, former viceroy of New Spain; Antonio Porlier y Sopranis, 1st marquis of Bajamar, AUDIENCIA minister of CHARCAS and LIMA, councilor and governor of the COUNCIL OF THE INDIES, and secretary of state for Gracia y Justicia of the Indies; Benito María de la Mata Linares, former *audiencia* minister of SANTIAGO DE CHILE, Lima, and BUENOS AIRES, councilor of the Indies, and councilor of state under Joseph I; and Juan Manuel de Moscoso, born in AREQUIPA, bishop of CUZCO and bishop of Granada.

Joseph I initially sought support from Spain's colonies, and the Constitution of Bayonne, dated July 6, 1808, contained articles that provided for colonial representation. Reaction in the colonies to Napoleon's anointment of his brother as Joseph I is exemplified by the response in CARACAS: "... whereupon there were riots in streets and squares, execrations against the usurpers and repeated hurrahs in favour of the adored name of Ferdinand VII." The colonists never accepted Joseph I as their monarch, and his name became a symbol of the hated French who had invaded Spain.

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**Juana Inés de la Cruz** See CRUZ, JUANA INÉS DE LA.

**Juan y Santacilia, Jorge** (b. 1713–d. 1773) *Spanish naval officer, scientist, and author* Born in Novelda, Alicante,

Spain and orphaned at the age of three, Jorge Juan y Santacilia concluded his formal EDUCATION at the new naval academy in CÁDIZ. He served in Spain's Mediterranean fleet beginning in 1730 and then was named in 1734 to accompany compatriot ANTONIO DE ULLOA and French scientists Louis Godin and Charles-Marie de la Condamine on an expedition to the Kingdom of QUITO to measure the length of a degree at the equator.

In addition to their scientific work, Juan and Ulloa were secretly charged to observe conditions along their route. After spending considerable time in the AUDIENCIA districts of Quito and LIMA, they left for Spain in October 1744. Four years later, they published *Relación histórica del viaje a la América meridional*, a four-volume work based on their travels that was issued in French in 1752 and in English in 1758 under the title *A Voyage to South-America*. Later editions in Spanish, English, and other languages have also appeared.

Juan and Ulloa completed their confidential report in 1749. Known as *Noticias secretas de América* and full of scathing indictments of the treatment of Amerindians by Spanish officials and clerics, it remained unpublished until 1826, when it appeared in Spanish in London. Subsequently published in a variety of editions, its use for anti-Spanish propaganda is clear in an abridged English version published in Boston in 1878 under the title *Popery Judged by Its Fruits* (see BLACK LEGEND).

In addition to authoring other works, Juan became a rear admiral (*jefe de escuadra*) of the Royal Armada, director of the Royal Seminary of Nobles, a member of the Board of Commerce and Money, and ambassador to Morocco. Following his death, the *Gazeta de Madrid* eulogized that his scientific accomplishments had given him “a place and credit among the scholars (*sabios*) of Europe” confirmed by his membership in the Royal Academy of San Fernando in Madrid, the Academy of Science of Paris, the Royal Society of London, and the Academy of Berlin.

#### Further reading:

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**judiciary** See ALCALDE MAYOR; AUDIENCIA; CASA DE CONTRATACIÓN; CORREGIDOR/CORREGIMIENTO; COUNCIL OF THE INDIES; RELACÃO.

**Junín, Battle of** (August 6, 1824) After a difficult march from the coast into the Peruvian Andes, an army of liberation of nearly 9,000 prepared for battle with the royalists. The army included veterans of the most

important battles fought to date in the struggle for independence in South America—MAIPÓ in CHILE, Boyacá in NEW GRANADA, CARABOBO in VENEZUELA, and Pichincha in the AUDIENCIA district of QUITO (see SPANISH SOUTH AMERICA, INDEPENDENCE OF). The commanding generals were Antonio José de Sucre and SIMÓN BOLÍVAR. The latter addressed the army in review at Cerro de Pasco before battle: “Soldiers! You are going to free an entire world from slavery, the freedom of the New World is the hope of the universe, you are invincible.” On August 6, 1824, the army of liberation met the royalist army commanded by Field Marshal José de Canterac in the highland plains of Junín, northeast of the Jauja Valley in PERU. Both sides used only cavalry with lances and swords in a short battle of less than two hours. Reportedly, the royalists lost about 250 men and Bolívar's army about 150. Victory gave the liberators control of the valley of Jauja, although the royalists' army withdrew to CUZCO in good enough condition to fight another day. Nonetheless, the royalists' defeat led to another withdrawal from LIMA, which they had reoccupied in February; both results encouraged Bolívar's supporters.

The Battle of Junín was the penultimate battle of the war for independence in Peru. Both royalists and liberators recognized that the next battle would decide the colony's fate and, indeed, the fate of Spain's colonial empire. The BATTLE OF AYACUCHO marked the demise of colonial Spanish America.

#### Further reading:

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**Junta Central (Junta Suprema Central Gubernativa de España e Indias)** The French invasion of Spain, abdications of CHARLES IV and FERDINAND VII, and forced accession of the *rey intruso* JOSEPH I to the throne created a constitutional crisis in a context of widespread military failure. Responding that sovereignty returned to the people in the absence of the monarch, Spanish patriots in the late spring of 1808 created JUNTAS in numerous locations to organize defense against the French. Although jealous of their powers, by mid-summer most juntas recognized that a central government of resistance was essential to negotiate with foreign powers and to win the WAR. The resulting Junta Central first met in Aranjuez on September 25, 1808.

The Junta Central initially had 25 deputies representing 13 juntas: Aragon, Castile, Córdoba, Granada, Jaén, Mallorca, Murcia, SEVILLE, Valencia, Asturias, Catalonia, Extremadura, and Toledo. Representatives from Madrid, Navarra, and Galicia soon joined it. The arrival of Napoleon in Spain with an army from France on November 4, 1808, and his subsequent movement toward Madrid prompted the Junta Central to abandon Aranjuez on December 1, 1808. Napoleon reached Charmartin near Madrid the following day but did not pursue the

Junta Central as its members fled to SEVILLE, arriving on December 17, 1808. Although England had agreed to support the patriots on June 15, the flight and desperate need for funds to prosecute the war led the Junta on January 22, 1809, to instruct the nine viceroalties and CAPTAINCIES GENERAL of the empire, as “an essential and integral part of the Spanish Monarchy,” to hold indirect elections for 10 deputies to join it (see VICEROY/VICEROYALTY).

Aside from a disregarded invitation to the four viceroalties and GUATEMALA and CUBA from Joseph I in July 1808, the call for elections and deputies to be sent to Spain was unprecedented. As various municipalities had done historically for representatives and agents at court, they provided the deputies with instructions indicating policy changes they were to pursue. The inequality in the number of representatives from the American realms compared to those from Spanish provinces was apparent to all. Nonetheless, in most regions of the Spanish monarchy, elections took place.

The cumbersome electoral process and the short remaining life of the Junta Central precluded representatives sent from the Americas reaching the Junta before it expired. Just before its demise, on January 1, 1810, it ordered elections for a national Cortes to be convoked as a unicameral body. In Spain, each provincial junta and city that had been represented in the historic Cortes could provide a deputy; in addition, every 50,000 inhabitants could elect another deputy. In the Americas, each province could elect a deputy, but there was no provision for additional deputies based on population.

With Joseph I accompanying an army into Andalusia in late 1809, on January 24, 1810, the Junta Central abandoned Seville for the Isle of León, where CÁDIZ was located. Five days later, it appointed a five-member COUNCIL OF REGENCY and dissolved itself, leaving it to the Regency to set September 1810 for the opening of the CORTES OF CÁDIZ.

In its brief existence, the Junta Central failed in its principal mission of winning the war against the French. Indeed, the French had effectively driven it off the peninsula and destroyed its credibility. Certainly, the prospects of defeating the French looked bleak when the new Regency assumed its responsibilities on the Isle of León on February 1, 1810. As Americans interpreted conditions on receiving news of the change in government and extent of French occupation, only the most optimistic could believe that Spain would expel the armies of the greatest power in Europe.

The very existence of juntas and the Junta Central stimulated political discussion in the colonies about fundamental notions of sovereignty, elections, equality, and a Spanish nation rather than an empire with colonies. The desire for autonomy present in 1808 grew with the French occupation of Spain. No colonists supported Joseph I, and the idea of autonomy initially meant maintaining freedom from French rule (almost always in the name of Ferdinand VII). The intellectual step from free-

dom from French rule to freedom from any external rule, however, was small. A political revolution had begun.

### Further reading:

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**juntas** The creation of juntas, or ruling committees, in Spain quickly followed the abdications of FERDINAND VII and CHARLES IV and the presence of a French army. The examples stirred a desire to follow suit in a number of Spain’s American colonies.

On May 25, 1808, the Supreme Junta of Government of Oviedo was established; it was the first of many Spanish juntas created to resist the French government. Within days, other juntas existed in SEVILLE, Cartagena, Murcia, Valencia, Zaragoza, Santander, La Coruña, Jaén, Córdoba, Granada, Badajoz, Valladolid, and other locations. All claimed that sovereignty returned to the people in the absence of the monarch and that they represented the people. The JUNTA SUPREMA DE SEVILLA specified in its title Spain’s overseas dominions (the Indies) and immediately sent agents to the Americas to obtain recognition and American SILVER.

The juntas’ primary objectives were to fight against the French, to provide financial support and supplies to the MILITARY units raised, and to maintain patriotic and popular enthusiasm for the conflict. Although a number of juntas sent representatives to the JUNTA CENTRAL when it convened in August 1808, some were reluctant to give the more expansive body full authority over such things as recruiting soldiers, soliciting funds, and requisitioning arms and supplies.

After the first often confusing accounts of events in spring 1808 reached the Americas and it became clear that Spain had no single recognized government, CREOLES in the Americas who sought home rule, but rarely independence, began agitating for juntas or other bodies to rule in the name of Ferdinand VII until his return. In NEW SPAIN, VICEROY JOSÉ DE ITURRIGARAY Y ARÓSTEGUI called together an assembly of notables that met four times in August and September 1808; he was ousted by a PENINSULAR coup as a result. On August 10, 1809, a short-lived junta was created in QUITO with the marqués de Selva Alegre as president. On April 19, 1810, a junta was created in CARACAS and accompanied by the deposition of Captain General Vicente de Emparán y Orbe and the Audiencia of Caracas; they were exiled shortly afterward. A junta was created in CARTAGENA DE INDIAS on May 22, 1810. In BUENOS AIRES, a junta created on May 25, 1810, initiated home rule in the name of Ferdinand VII that continued until the UNITED



PROVINCES OF THE RÍO DE LA PLATA declared formal independence in 1816. Juntas were established in other regions as well, for example, in BOGOTÁ on July 20, 1810. On September 18, 1810, the Junta de Gobierno was created by a *CABILDO ABIERTO* in SANTIAGO DE CHILE. In ASUNCIÓN, PARAGUAY, a three-man junta was created on May 15, 1811, but by 1815, it had been transformed into the dictatorship of Dr. José Gaspar Rodríguez de Francia.

The juntas had relatively short lives. While some in Spain persisted until the return of Ferdinand in early 1814, juntas in the Americas were repressed everywhere but Buenos Aires and Asunción. The return of Ferdinand VII ended their claims to legitimacy. In some regions, however, explicit declarations of independence had already appeared by 1814.

#### Further reading:

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**Junta Suprema de Sevilla (Junta Suprema de España e Indias)** The abdications and detention of FERDINAND VII and CHARLES IV in France resulted in the formation of numerous JUNTAS in Spain claiming to rule in Ferdinand's name until his return. The most important was the Junta Suprema de Sevilla, also known as the Junta Suprema de España e Indias, created on May 27, 1808. Its president in the critical months before the JUNTA CENTRAL convened on September 25, 1808, was Francisco de Saavedra, a native of SEVILLE and a seasoned government official with experience in the Indies as well as Spain, where he was minister of the treasury (REAL HACIENDA) in 1797–98 and secretary of state for some months in 1798.

The Junta Suprema's major accomplishments were to declare WAR against France, secure assistance from Britain, create an army that defeated the French at Bailén on July 19, 1808, and obtain financial resources from the American colonies.

The Junta Suprema quickly sent representatives to the Indies to gain recognition of its claim to represent FERDINAND VII during his absence, as well as to secure financial support for the war of liberation against the French. The only other Spanish junta to send representatives to the Americas was the Junta of Oviedo, which sent them only to NEW SPAIN.

The representatives the Junta Suprema sent to the Americas were *capitán de fragata* Juan Jabat and *capitán de reales guardias españolas* Manuel Jáuregui, brother-in-law of VICEROY JOSÉ DE ITURRIGARAY Y ARÓSTEGUI, to New Spain; Brigadier JOSÉ MANUEL DE GOYENECHÉ Y BARREDA, a native of AREQUIPA, to RÍO DE LA PLATA and PERU; *capitán de fragata* Juan José Sanlloriente to NEW GRANADA; naval officer Antonio Vacaro to CARTAGENA DE INDIAS; *comandante del navío*, the marqués del Real Tesoro to PUERTO RICO and HAVANA; *captain de navío* José Meléndez Bruna to CARACAS; and *capitan de navío* Rafael

de Villavicencio, brother of Juan María de Villavicencio, *comandante general de marina de Cuba*, to Havana.

Along with the other juntas created in Spain after the abdications and even before JOSEPH I was named monarch, the Junta Suprema exemplified the position that sovereignty returned to the people in the absence of the monarch. Coupled with the knowledge that other juntas existed, AUTONOMISTS in the colonies argued that they, too, should be able to create juntas to rule in Ferdinand's name.

The arrival of the Junta Central in Seville on December 17, 1808, marked the displacement of the Junta Suprema de Sevilla from its previously central role in organizing resistance to the French.

#### Further reading:

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**Juzgado General de Indios** The Spanish Crown quickly decided that native laws and customs were to be respected as long as they did not conflict with Christianity and were not clearly unjust. Administrative decisions were to resolve cases of little import in order to prevent protracted litigation and limit costs.

After nearly 60 years of viceregal experience, jurisdictional issues, and excessive costs to NATIVE AMERICANS, the General Indian Court, or Juzgado General de Indios, of colonial Mexico was created to solve the problem of providing prompt and inexpensive justice. Ultimately regarding them as *miserables* under a judicial doctrine that gave minors, widows, and the poor special rights, the Crown authorized a separate tribunal in 1591 for civil cases involving indigenous people, and in 1592, the VICEROY determined that a dedicated tax of a half-real added to TRIBUTE would support it. The General Indian Court opened in 1592, and PHILIP III approved both the court and its funding in royal *cédulas* of 1605 and 1606. The court handled cases until its abolition in 1820.

The court had alternate first-instance jurisdiction over cases between Indians and when Spaniards brought charges against Indians, but theoretically not the reverse. The court also had alternate jurisdiction in criminal cases against Indians. In addition, indigenous people could take petitions to the viceroy for administrative resolution. In practice, the Indian court brought together viceregal jurisdiction in native matters with a resultant intertwining of judicial and administrative functions. Among other cases, the Indians used the court to deal with issues regarding land, complaints against local Spanish officials, and complaints against Spaniards concerning labor.

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# K

**Kino, Eusebio** (b. 1645–d. 1711) *Italian Jesuit missionary in New Spain* Born in the southern Tyrolean Alps in Segno, Italy, Eusebio Kino joined the Upper German Province of the Society of Jesus in 1665 and proved an impressive student of mathematics, astronomy, and cartography (see JESUITS). He taught mathematics and astronomy at Ingolstadt and subsequently mathematics at Jesuit *COLEGIOS* in SEVILLE and Puerto Santa María. Unsuccessful in his desire to serve in the Far East, the Jesuit was sent to the northwest of NEW SPAIN and instructed to establish a mission there. He left Spain in May 1681; upon his arrival in MEXICO CITY, he was named cosmographer of an unsuccessful expedition to Baja California led by Admiral Isidro de Atondo. Before leaving the capital, Kino published *Astronomical Exposition*, a work about the comet of 1680 considered a personal attack and consequently vigorously disputed by CARLOS DE SIGÜENZA Y GÓNGORA, a prominent CREOLE intellectual who had been ejected from the Society of Jesus.

In 1687, Kino journeyed to northern Sonora, known at the time as Pimería Alta, and established missions. On his many travels throughout northern and western New Spain, he mapped the region and discovered that California was a peninsula rather than an island.

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**kuraka (curaca)** A lord or chieftain, a *kuraka* was the leader and representative of an Andean kin group (*ayllu*) to which he was connected by kinship and reciprocal

loyalties and obligations. *Kurakas’* power and privileges varied, for they held authority at different levels. A *kuraka* represented an ethnicity as a whole; below him to the *ayllu* level were *kurakas* for each of the nested social groups that made up the ethnicity.

As a community’s leader, the *kuraka* was to adjudicate disputes, ensure fair access to resources, and arrange for the group to fulfill its obligations to the state. As compensation, he requested and typically received favored access to the community’s resources, including land, labor, and goods. Completing the cycle of reciprocity, the *kuraka* distributed wealth to his kin.

The Spaniards recognized *kurakas* as nobles and extended varying privileges to them, for example, exemption from sumptuary legislation and requirements for personal service. Unlike indigenous commoners, who had the legal status of minors, *kurakas* were recognized as full adult members of colonial society.

*Kurakas* were vital intermediaries between their peoples and Spanish *encomenderos* and officials (see *ENCOMIENDA*). Thus, they were responsible for the collection and delivery of TRIBUTE, construction of churches and payment of clerics, and provision of workers for labor drafts. They also arranged for labor provided to Spaniards in return for cash; indeed, other than through the application of force, Spaniards were unable to gain access to indigenous labor without a *kuraka’s* involvement. For example, a Spaniard would pay a *kuraka* for a certain amount of cloth that the *kuraka* would then obtain from his community by providing yarn, food, and drink, in addition to ongoing administrative services and support in times of need.

As cultural brokers, *kurakas* could use the Castilian language, sign legal documents, and arrange commercial transactions with Spaniards. They often adopted Spanish

customs and clothing and over time accumulated private property in the European manner.

A *kuraka*'s ability to marshal his community's labor rested on his kin continuing to accept his legitimacy as their leader. He was thus caught between Spanish demands for labor and goods on the one hand and his community's perception that what he was requiring exceeded what he was providing. Given that Spanish officials considered *kurakas* personally liable for tribute and labor, the benefits of *kuraka* status dwindled, especially as the native population declined.

While 16th-century *kurakas* sold their kin's labor, by the 18th century, *kurakas* were selling goods to their communities just as non-Indian merchants did. The bonds of reciprocity characteristic of Andean relation-

ships had loosened, although *kurakas* continued to consider themselves Andeans and were still recognized as leaders by their communities.

See also *AYLLU* (Vol. I); *KURAKA* (Vol. I).

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**labor** See DEBT PEONAGE; ENCOMIENDA; MITA; OBRAJE; REPARTIMIENTO; SLAVERY; YANACONAJE.

**La Plata (Chuquisaca, Charcas, Sucre)** Also known in the colonial period as Chuquisaca and Charcas and today as Sucre, La Plata was located near densely populated communities in a temperate highland valley of the Andes in the *AUDIENCIA* district of CHARCAS, at an altitude of 9,200 feet (2,804 m). The city was founded on an indigenous town in the late 1530s by Pedro de Anzúes, an associate of Francisco Pizarro, and became the home of numerous *encomenderos* (see ENCOMIENDA). Its future was secured when SILVER was discovered at POTOSÍ, located at an inhospitable although inhabitable altitude of more than 14,000 feet (4,267 m).

Laid out in the typical grid pattern, La Plata became the administrative center of the lands under the jurisdiction of the Audiencia of La Plata created in 1559 and installed in 1561. The jurisdiction included Charcas, known in the 18th century as Upper Peru, and briefly CUZCO, as well as the governorships of PARAGUAY, Tucumán, and BUENOS AIRES. La Plata was the see of the Bishopric of La Plata created in 1552 and was granted archiepiscopal status in 1609. In 1624, the Royal and Pontifical University of San Francisco Javier opened under the supervision of the JESUITS. It provided EDUCATION primarily to students from La Plata and other parts of the *audiencia's* district.

Erected in a central agricultural valley of Charcas, La Plata became an important supplier of foodstuffs and livestock to the relatively nearby MINING centers of Potosí and Porco (see AGRICULTURE). It later became a stop on the road from the city of Santa Cruz in the lowlands to

Potosí; the city benefited from tax on the tropical products being transported.

The creation of the VICEROYALTY OF RÍO DE LA PLATA brought the *audiencia* district of La Plata under its jurisdiction and thus gave the VICEROY in Buenos Aires legal access to the silver of Potosí and other mines of Charcas. The city of La Plata became the capital of the intendency of the same name in 1783 (see INTENDANT).

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**La Serna, José de** (b. 1770–d. 1832) *general and last viceroy of Peru* Born in Jerez de la Frontera, Cádiz, Spain, La Serna entered the artillery corps as a cadet at the age of 12. He participated in Spain's international wars in the late 18th and early 19th centuries, was captured by the French but escaped to rejoin the Spanish army, and attained the rank of brigadier at the end of Spain's successful war of independence against Napoleon's armies. Named commander of the Army of Upper Peru, he reached PERU in September 1816, claiming to be under the direct orders of the Spanish monarch and independent of the new viceroy, JOAQUÍN DE LA PEZUELA. Conflict between the absolutist Pezuela and the liberal La Serna and his allies ultimately resulted in a military coup in January 1821 that ousted the former and made La Serna his replacement. The liberal government that had taken control of Spain following the RIEGO REVOLT ultimately confirmed La Serna as viceroy. By this time, JOSÉ DE SAN

MARTÍN and his army of liberation had already landed south of LIMA. In July 1821, La Serna withdrew from the capital and took his forces to CUZCO, their base until the battles of JUNÍN and AYACUCHO in 1824 ended Spanish rule in Peru. Seriously wounded at the Battle of Ayacucho, in 1825, La Serna returned to Spain, where he was granted the title count of los Andes by the restored FERDINAND VII and died.

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**letrado** Men with one or more university degrees in civil law, canon law, or both, *letrados* staffed the high councils of Spain and the regional courts known as chancelleries and *AUDIENCIAS* and held many of the most prestigious positions in the CATHOLIC CHURCH and INQUISITION. Important as Crown officials by the end of the 14th century, their significance increased after Ferdinand and Isabella formally restricted a number of positions to them. Not only were the *letrados* formally educated, but their knowledge of Roman law brought additional value in expanding royal prerogatives against other jurisdictions.

With *letrados'* worth proven in Spain, successive monarchs named them to posts in the colonies. The creation of an *audiencia* in SANTO DOMINGO in 1511 testified to the Crown's intention that justice would accompany settlement and conquest and that *letrados* would be prominent in the new colonies. As more *audiencias* were created, more *letrados* were needed to staff them as judges, Crown attorneys, and, in some cases, president. In total, more than 1,400 *letrados* were named to the colonial *audiencias*.

The restriction of certain positions to *letrados* created a direct link between UNIVERSITIES and royal employment. While universities in Spain—Salamanca, Valladolid, Alcalá de Henares, SEVILLE, and Granada in particular—were important sources of *letrados*, colonists sought their own universities so that American-born youth could obtain the requisite EDUCATION for employment in the high offices of state and church. Recognizing the legitimacy of this request, the Crown authorized the creation of universities in the colonies, first in MEXICO CITY and LIMA in 1551; a pool of American-educated *letrados* was soon available.

Formal study of law at a university was required to become an attorney in Spain and its empire. Either subsequent training in the office of a practicing attorney or judge or completion of an advanced degree in civil or canon law at one of several universities in Spain was also necessary. With the prerequisites met, it was possible to

follow a career that culminated in a position on a high court or even council or a high post in the church or Inquisition. The most professional of all employees in state and church, *letrados* were the human core of the empire.

*Letrados* were living evidence of the importance of law and its formal study in Spain and the empire. Britain, in contrast, did not require university training for lawyers or judges.

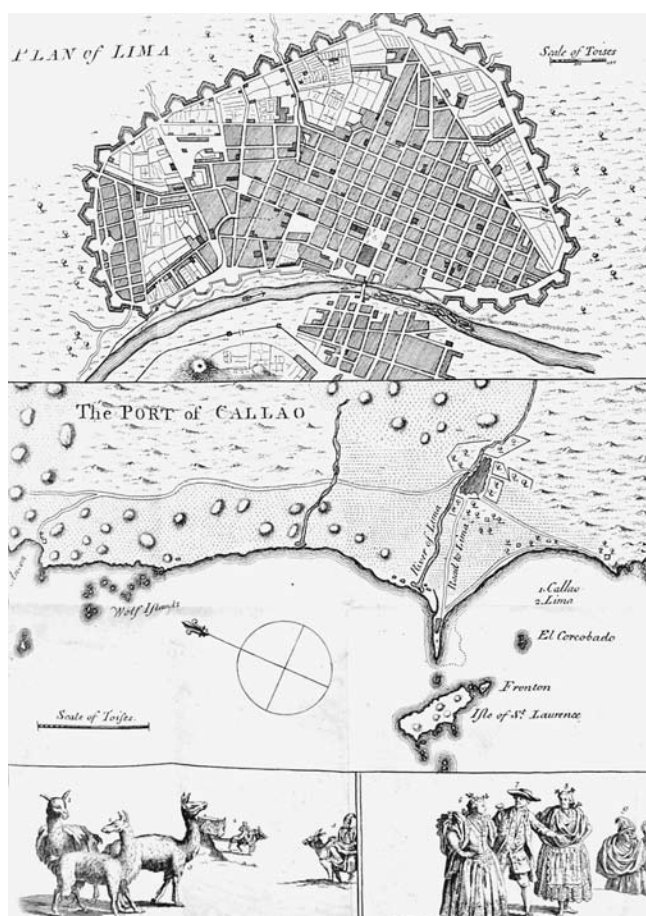
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**Lima** Founded by Francisco Pizarro on January 18, 1535, as the Ciudad de los Reyes (City of the Kings), Lima, with a name that was a corruption of Rimac, soon became the capital of the VICEROYALTY OF PERU, created in 1542. Its location near the Pacific coast gave it advantages in communication and as an entrepôt for TRADE not available in the former Inca capital of CUZCO. Building on an existing indigenous town, Pizarro's residence replaced that of the local chieftain, while the church that would later become a cathedral was constructed on the site of an indigenous temple. Both were located on the PLAZA MAYOR, as were the offices of the city council. On the fourth side were sites for retailers. Since the governor's residence backed against the River Rimac, the standard grid pattern of streets emanated in three directions rather than the customary four. The city's founders received house lots closest to the *plaza mayor*; the native population was located in an adjacent parish known as El Cercado.

Although rare and somewhat inexact, early population figures for Lima convey a sense of the city's diverse population. By the mid-1550s, the city had a slave population of at least 1,500 (see SLAVERY). A count in 1593 revealed a population of 12,790, of which 6,690 were blacks or mulattoes (see MULATO). A census in 1614 revealed substantial growth with 11,867 Spaniards, 10,386 blacks, 744 mulattoes, 1,978 Amerindians, and 192 mestizos, for a total of 25,167 (see MESTIZAJE/MESTIZO). A set of figures compiled in 1636 gave the following: blacks, 13,620; mulattoes, 861; Spaniards, 10,758; Indians, 1,426; mestizos, 377; and Chinese, 22. Despite the apparent precision of the counts, none can be considered accurate. What is striking, nonetheless, is that Spaniards born in Spain and in the colonies were a minority of the city's population from at least the late 16th century.

By 1560, Lima was already firmly established as the capital of the viceroyalty and the region under the jurisdiction of its *AUDIENCIA*. With a VICEROY, *audiencia*, treasury office, archbishop, long-distance wholesale merchants and retailers, a wide range of artisans, a city council, domestic servants, and slaves, Lima was fast approaching its mature configuration. Although the Crown authorized a university for Lima in 1551, it was



Backed against the Rimac River, Lima was capital of the Viceroyalty of Peru. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

not until the 1570s that a DOMINICAN school was turned into the UNIVERSITY OF SAN MARCOS (see UNIVERSITIES). The arrival of the Society of Jesus in 1568 was soon followed by the creation of the Colegio of San Pablo (see COLEGIO/COLEGIO MAYOR). The introduction of the Tribunal of the INQUISITION in 1570 opened an era of its own. By the end of VICEROY FRANCISCO DE TOLEDO's tenure in 1581, almost all of the institutions that would enable Lima to dominate the viceroyalty were in place.

The wealth of Lima's institutions was most visible in the public displays that accompanied the arrival of a new viceroy, the accession of a new monarch in Spain, and major religious occasions. A celebration by the city's artists on December 2, 1659, included floats with comic figures, eight costumed Incas, figures of all of Peru's viceroys, and others. In addition, the chronicler Mugaburu noted, "there were very brave bulls the rest of the afternoon."

When the celebrated travelers JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA visited Lima in the middle of the 18th century, they recorded that the city had 19 male convents and colleges (four Dominican, three FRANCISCAN, three AUGUSTINIAN, three MERCEDARIAN,

and six JESUIT), 14 nunneries, and 12 hospitals, most restricted to a single clientele, for example, poor clerics, mariners, WOMEN, NATIVE AMERICANS, and lepers.

Lima through its port of CALLAO served as the Pacific terminus and distribution center for Peruvian SILVER and imported merchandise for the duration of the fleet system (see FLEETS/FLEET SYSTEM). Lima secured its own merchant guild (CONSULADO) in 1613. Into the 19th century, Callao was South America's most important Pacific port.

Lima's location made it prone to EARTHQUAKES. It experienced a number of them in the colonial era, the most destructive occurring in 1687 and 1746. The earthquake of October 20, 1687, and its aftershocks damaged the city severely. Viceroy Melchor de Navarra y Rocafull, duque de la Palata, moved out of the viceregal palace and spent more than two months living in improvised housing in the *plaza mayor*. More important, the quake brought devastation to WHEAT fields near Lima by disrupting ancient irrigation systems. As a consequence, merchants in Lima began importing grain by ship from CHILE, a practice that continued into the 19th century. The earthquake and accompanying tsunami of 1746 demolished Lima's port of Callao and sank 19 ships in the harbor; approximately 95 percent of the port's population of some 4,000 were killed. Damage to the city itself was extensive, although it was spared the losses of Callao.

A census of Lima's population in 1790 as published by the *MERCURIO PERUANO* revealed a city of 52,627 excluding MILITARY personnel and 47,796 excluding clerics and others living in religious communities. Of the latter number, 17,215 were classified as Spaniards; 8,960 as blacks; and 3,912 as Indians. Some 17,709 persons were *CASTAS*, or of mixed ancestry, and 9,229 were slaves. In terms of occupation, there were more than 1,000 artisans, 474 white servants, 426 government employees, 393 merchants (*comerciantes*), 287 grocery store operators (*pulperos*), 91 lawyers, and 21 physicians. No fewer than 49 inhabitants boasted titles of nobility.

Although pessimists had feared doleful economic repercussions following the transfer of Upper Peru with its mines at POTOSÍ to the new VICEROYALTY OF RÍO DE LA PLATA in 1776, rising silver production in Lower Peru had eclipsed that of CHARCAS in the 1790s and helped to sustain the city's ECONOMY.

A bastion of royalist support because of historic commercial ties to Spain and resultant benefits, fear of racial war engendered by the TÚPAC AMARU II revolt, and the decisive actions of Viceroy JOSÉ FERNANDO DE ABASCAL Y SOUSA, Lima was the prize sought by the invading army led by JOSÉ DE SAN MARTÍN that landed in PISCO on September 8, 1820. The withdrawal of royalist forces from the city by generals José Canterac and JOSÉ DE LA SERNA in late June and early July 1821 resulted in San Martín's securing through coercion a declaration of independence for Peru dated July 28 and ultimately signed by 3,504 citizens. With undefeated royalist forces in the Andes, however,



This 1825 drawing features women of Lima wearing a distinctive shawl, which often covered one eye and earned them the nickname *tapadas* (covered women). (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

the declaration was a statement of the invaders' intention rather than a final victory. Royalists would occupy Lima from February until December 1824 before Peru, with the exception of the fortress at Callao, was independent.

See also LIMA (Vols. I, III, IV).

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***limpieza de sangre* (*limpeça de sangue*)** The concept of purity of blood or unsullied lineage arose out of anti-Semitism in late medieval Castile. Following a series of vicious anti-Jewish riots in 1391, large numbers of Jews converted to Christianity and became known

as *CONVERSOS* or New Christians. Subsequent riots in Toledo in 1449 produced the first statute of *limpieza de sangre*, when on June 5 the city excluded all persons with Jewish ancestry from holding municipal office. Ciudad Real followed suit in 1468. The introduction in 1480 of the Tribunal of the INQUISITION emphasized the division between Old Christians, without Jewish ancestors, and New Christians, the primary initial target of the Inquisition. As the Inquisition began functioning and anti-*converso* feeling reached fever pitch, about 1482 the Colegio Mayor of San Bartolomé at the University of Salamanca adopted a policy of excluding *conversos*. In 1483, the pope prohibited New Christians from being episcopal inquisitors, and the military orders of Alcántara and Calatrava began excluding descendants of Jews and Muslims (see ORDERS, MILITARY AND CIVIL). The requirement for purity of blood spread to other university colleges, CATHEDRAL CHAPTERS, UNIVERSITIES, and religious orders.

Aristocrats and royalty shared Jewish lineage to such an extent that it almost seemed as if descent from peasant stock alone would guarantee purity of blood. Throughout the remainder of the colonial era proof of *limpieza de sangre* was required for entry into a Spanish or Portuguese military order; indeed, one attraction of membership in a military order was that passing the rigorous examination of lineage served as a guarantee of blood purity. In the case of the Order of Santiago, this meant proving *limpieza de sangre* through the fourth generation.

The burden of proving one's blood purity rested on the individual who sought its confirmation. Part of demonstrating blood purity involved documenting legitimacy. This required producing notarized copies of parish records in which marriages were recorded. The proofs (*pruebas*) of blood purity for candidates for military orders in Spain routinely noted whether or not the candidate had resided in the INDIES.

While documented blood purity classified one as an Old Christian, it did not, of course, equate to nobility. In the absence of royal dispensation, however, documented noble status included *limpieza de sangre* as one condition. Thus, candidates for military orders needed to demonstrate both. In addition, the idea of blood purity was extended to include *limpieza de oficios*, or proof that ancestors had not engaged in certain types of dishonorable employment, for example, as artisans or petty retailers. Thus blood purity, legitimacy, type of employment, and honor divided Spanish society. The emphasis on purity of lineage continued well into the 19th century.

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**Liniers y Bremond, Santiago de** (b. 1753–d. 1810) *French hero in defeat of British invasion in 1806 and*

*viceroys of Río de la Plata* Born in Niort, France, Santiago de Liniers y Bremond followed his father in a naval career. Because the Second Family Compact between France and Spain in 1743 granted Frenchmen the same rights and responsibilities as Spaniards in the Spanish MILITARY, he went to CÁDIZ and joined the Spanish navy. In May 1775, he was sent to Cartagena de Levante, Spain, and the following year he joined the expedition led by PEDRO DE CEVALLOS to remove the Portuguese from COLÔNIA DO SACRAMENTO in the BANDA ORIENTAL. He participated in 1781 in the successful campaign to regain Menorca from the British and the following year in the failed effort to retake Gibraltar. He advanced to the rank of *capitán de fragata* in December 1782. With limited opportunities available during the subsequent interlude of peace, in 1788, he accepted a posting to MONTEVIDEO. VICEROY Joaquín del Pino named Liniers interim governor of the 30 former JESUIT missions in October 1802, but his service was brief. His wife died on the return trip, and he reached BUENOS AIRES in May 1805 with his eight children.

Following the British invasion under Colonel William Carr Beresford in 1806, Liniers organized a military force of about 1,300 men in Montevideo that engaged the British forces and forced their surrender on August 12. In recognition of the officer's valor, the city council and other citizens, in a *CABILDO ABIERTO*, petitioned Viceroy RAFAEL DE SOBREMONTTE, who had fled to Córdoba, to name Liniers military commander of the viceroyalty. The Crown recognized Liniers's accomplishment and promoted him to *brigadier de la armada*.

Correctly anticipating another invasion, Liniers took the lead in organizing an effective militia of some 8,000 men under his command. On October 15, 1806, the unit known as the Patricios was created with participation limited to men born in the intendency of Buenos Aires; choosing their commander by vote, they selected Cornelio de Saavedra (see INTENDANT). The creation of numerous regiments based on place of birth increased the status of CREOLES in the Buenos Aires elite because of their higher numbers in the militia.

In February 1807, several thousand British troops took Montevideo. Then, 8,000–9,000 troops for a second British invasion of Buenos Aires led by General John Whitelocke landed on June 28, 1807. Unsuccessful in dislodging the defenders and suffering heavy losses, Whitelocke surrendered on July 7, 1807, although MARTÍN DE ALZAGA rather than Liniers emerged the hero. The viceroy Marqués de Sobremonte, who had fled to the interior of the VICEROYALTY OF RÍO DE LA PLATA in 1806 and again in early 1807, was deposed by the Audiencia of Buenos Aires in February 1807 and replaced by Liniers, the war hero of 1806, an appointment confirmed by the Crown.

Liniers's tenure as viceroy was brief. When word of the abdications of CHARLES IV and FERDINAND VII and the French invasion of Spain reached Buenos Aires, the



viceroy was quickly charged by supporters of the city council with being pro-French, for using his office for personal financial gain, and for exhibiting questionable morals as a result of his relationship with La Perichona, his French lover.

The attempted coup of January 1, 1809, led by Alzaga and several PENINSULAR militia units failed only when the creole militia led by Saavedra occupied the central plaza in support of Liniers. Backed by the creole militia and plebeians in Buenos Aires, Liniers remained as viceroy until replaced later in the year by BALTASAR HIDALGO DE CISNEROS, a seasoned naval commander. Liniers's services, however, were recognized with a substantial pension, land, and the title count of Buenos Aires.

Viceroy Cisneros allowed Liniers to move to the interior town of Alta Gracia, where news of the May revolution of 1810 in Buenos Aires reached him. He helped organize resistance to Buenos Aires but failed to get reinforcements from either LIMA or Montevideo. On route to Lima, he was captured and executed for treason by a military force sent by the junta of Buenos Aires.

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**Lisbôa, Antônio Francisco** See ALEIJADINHO.

**literature** The Europeans' discovery, exploration, conquest, and settlement of the New World provided content for literary and historical works that began with Christopher Columbus's first letter, published in Rome in 1493. By 1560, various accounts of triumph and travail and about the Amerindians encountered were in print, despite an order of 1527 banning publication of works that could inform FOREIGNERS about the INDIES. In 1556, PHILIP II required the COUNCIL OF THE INDIES to approve any book on an American topic, and in 1577, he banned works on native cultures. Nonetheless, other books did appear, for example, *The Natural and Moral History of the Indies* (1590) by the Jesuit JOSÉ DE ACOSTA and El Inca GARCILASO DE LA VEGA's *La Florida del Inca* (1605), *Comentarios reales de los Incas* (1609), and *Historia general del Perú* (1616).

Excluding religious tracts that included sermons, funeral orations, and catechisms, history was the dominant theme of both prose and poetry from the 16th into the 18th centuries, with writers born in Spain accounting for much of the historical writing in the 16th century and part of the 17th century. PENINSULAR Alonso de Ercilla's *La Araucana*, published in three parts in 1569, 1578, and 1589, was a poetic narrative recounting the Spanish victory over the ARAUCANIANS, but portraying the Araucanians as the heroes. CREOLE Juan Flórez

de Ocariz published the first volume of *Genealogies of the New Kingdom of Granada* in Madrid in 1674. Using prominent families to organize his material, he tracked family ties often to the mists of time in Spain and provided information about the many persons included. While not traditional history, it documented the concern with lineage and family that characterized much of creole society. Another creole from BOGOTÁ, José Oviedo y Baños, authored *History of the Conquest and Settlement of Venezuela*, published in Madrid in 1723. It identified the heroes and villains of VENEZUELA's conquest and treated both Spaniards and NATIVE AMERICANS with respect.

Mexican dramatist Juan Ruiz de Alarcón was a lawyer and officeholder who spent much of his life in Spain. Burdened with a hunchback and bow legs that made him the butt of ridicule by jealous rivals, between 1617 and 1634, he wrote a number of humorous plays that enjoyed popular success in the Spanish theater and placed him among the finest dramatists of his age. Among his best plays were *La prueba de las promesas* (*The Proof of the Promises*), *Las paredes oyen* (*The Walls Have Ears*), and *La verdad sospechosa* (*The suspect truth*). Ruiz de Alarcón's work inspired other authors, for example, the celebrated 17th-century French playwright Molière.

Poetry was an important form of entertainment among the literate elites of colonial Spanish America, and frequent poetry contests in the 17th century brought forth numerous poor poems. There were some masters of the genre,



Born in New Spain, Juan Ruiz de Alarcón was one of the four most noted dramatists of Spain's Golden Age. (From the collections of the Mercantile Library at the University of Missouri–St. Louis).

however. Many contemporaries in NEW SPAIN (Mexico) and Spain, where a number of her writings were published, considered SOF JUAN INÉS DE LA CRUZ the best of America's poets. Her contemporary, CARLOS DE SIGÜENZA Y GÓNGORA, was also known for the quality of his poetry.

Travel literature appeared from time to time, but Spain's efforts to keep foreigners and especially non-Catholics out of the empire limited the potential practitioners of this genre. Timely publication, moreover, often foundered on the Spanish Crown's continued desire to restrict knowledge of the colonies. Thus, the extremely informative work by Antonio Vázquez de Espinosa, *Compendium and Description of the West Indies*, written in the early 17th century, went unpublished until the mid-20th century. An exceptional case indicating a new openness by the Spanish Crown was the relatively rapid publication of *A Voyage to South America* by JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA. It was an account of the scientific expedition the two young peninsulars had made with the French scientist Charles-Marie de la Condamine, who published his own account in Paris in 1745–46. The original edition of Juan and Ulloa's *Voyage* appeared in 1748 in Spanish; German, French, English, and Dutch editions followed. The multivolume publications of Alexander von Humboldt in the early 19th century are remarkably detailed. Italian Jesuit Giovanni Antonio Andreoni published in Lisbon in 1711 *Cultura e opulência do Brasil por suas drogas e minas*, an important work on BRAZIL's natural resources and ECONOMY.

In the 18th century, writers often turned to scientific topics and contributed, especially toward the end of the century, to periodicals that sought, among other things, to make their region known and to spread current knowledge to the literate populace. Thus, for example, contributors to the *MERCURIO PERUANO* in LIMA (1791–95) wrote articles about MINING, health, and chemistry.

Some of the most potent writing of the late 18th century came from exiled American JESUITS who yearned for and extolled their homelands against the belittling criticisms of European writers such as Corneille de Pauw, Georges-Louis Leclerc Buffon, Guillaume-Thomas Raynal, and William Robertson. Mexican FRANCISCO JAVIER CLAVIJERO took aim at the philosophes' claims in *Storia antica*, a four-volume work originally published in Italian in 1780–81. Ecuadorean Jesuit Juan de Velasco similarly attacked the “sect of anti-American philosophers” in *History of the Kingdom of Quito*, published in Spanish in 1789. In 1799, the year after his death, Peruvian Jesuit Juan Pablo Viscardo y Guzmán's *Letter to the Spanish Americans*, completed in 1791, was published in French; a first English edition appeared with the help of FRANCISCO DE MIRANDA in 1808, and it appeared in Spanish in 1810. A scant 23 pages in length, Guzmán's *Letter* characterized the centuries of Spanish rule as “ingratitude, injustice, slavery, and desolation” as it called for independence from Spain.

See also LITERATURE (Vols. I, III, IV).

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**llanero** *Llaneros* were the plainsmen or cowboys of VENEZUELA's tropical plains, the Llanos. Typically of mixed ancestry, *llaneros* were the equatorial variant of the GAUCHOS of the Río de la Plata region and the vaqueros of northern NEW SPAIN. Illiterate and uncouth, their manners were described by an early 19th-century Englishman as “the most unpolished and almost uncivil I ever met with.” The *llanero* rode clad in pants and with a handkerchief around his head; if the countryside allowed it, he was barefoot. In addition, he had a poor man's poncho, or *cobija*, which was six feet (1.8 m) square. It served as protection against rain and burning sun, as well as a ground cover at night. A horse to ride and a knife or machete for protection and mundane tasks were the indispensable companions of every *llanero*. Similarly, gambling was a passion, whether on a cockfight or a game of cards. As with gauchos, *llaneros'* interest was CATTLE rather than land. They believed in common grass and pasture.

*Llaneros* were tough, used to deprivation, and ready to kill man or beast, and their support became a key to success in the wars of independence in Venezuela and their extension into NEW GRANADA. The first leader of the *llaneros* to emerge in the wars was JOSÉ TOMÁS BOVES, an Asturian who was a cattle dealer in the town of Calabozo. Imprisoned in the town by the First Republic, he was freed by royalists in May 1812. Promising booty taken from the propertied whites who looked down on them, Boves attracted black and PARDO *llaneros* and some Canarians.

After a defeat by republican forces, Boves retreated and organized his followers as a cavalry with lances. His call for war to the death on whites issued at Guayabal on November 1, 1813, was directed to the *llaneros*, and they responded. In July 11, 1814, Boves and the *llaneros* took Valencia; on July 6, SIMÓN BOLÍVAR evacuated CARACAS, and the *llaneros* soon imposed unspeakable atrocities on those who had not fled. On December 5, 1814, Boves was killed in a battle at Urica that destroyed the republican forces. Bolívar had already escaped Venezuela on September 8. The Second Republic was over.

The *llaneros* entered the fray again in 1817, this time under the leadership of José Antonio Páez, son of a minor Spanish official and, since fleeing justice, a resident of the

Llanos who had mastered the requisite skills of arms and horsemanship to win the respect of his comrades. He led his private *llanero* army against the royalists, since after their return to power, they had the goods to plunder. He became republican commander-in-chief of the border region between Venezuela and New Granada and pursued guerrilla war. In January 1818, he came to terms with Bolívar, putting the *llanero* cavalry of some 4,000 men at his service.

Complemented by foreign legionnaires who joined Bolívar and Páez along the Orinoco River, the *llaneros* were central to Bolívar's ultimate success. A threat wherever they were posted, the *llaneros* joined in the Battle of CARABOBO and thus contributed to the liberation of Venezuela. With *llaneros* as the base of his support, Paéz emerged as Venezuela's hero, caudillo, and president.

See also PÁEZ, JOSÉ ANTONIO (Vol. III).

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**Logia Lautaro** FRANCISCO DE MIRANDA is credited with establishing in London in 1797 a secret organization along Masonic lines that promoted the idea of independence for Spanish America. Referred to as the Logia Lautaro (Lautaro Lodge), Gran Reunión Americana (Great American Assembly), and Sociedad de los Caballeros Racionales (Society of Rational Gentlemen), Miranda's lodge allegedly was used as a model for an affiliate created in CÁDIZ in 1811 and also given the name *Logia Lautaro*. The name *Lautaro* commemorates the celebrated ARAUCANIAN chieftain who defeated Pedro de Valdivia in 1553 and forced the evacuation of Concepción, CHILE, in 1554 and again in 1555. Because secrecy was imperative, little is known about any of the lodges.

JOSÉ DE SAN MARTÍN and Carlos Alvear allegedly belonged to a secret society in Cádiz, probably the Logia Lautaro, and used it as the model for the Logia Lautarina that they established in BUENOS AIRES in 1812 and for a Chilean version created in 1817 at the insistence of San Martín and with the support of BERNARDO O'HIGGINS, himself a member of Miranda's lodge. Historian Jay Kinsbruner avers that the Logia Lautarina in SANTIAGO DE CHILE "governed Chile" between February 1817 and August 1820, when San Martín's expedition left for Peru.

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**López de Gómara, Francisco** (b. 1511–d. before 1566) *Spanish biographer of conquistador Hernando Cortés* The first biographer of conquistador Hernando Cortés, Francisco López de Gómara was born in Old Castile, obtained a classical EDUCATION, and spent a decade in Italy, where he was a protégé of humanist Diego Hurtado de Mendoza. In 1541, he joined the embarrassingly unsuccessful expedition to Algiers; at that time, he met Cortés and subsequently served as his secretary and chaplain until the conquistador died in 1547. With the death of his employer, Gómara retired to Valladolid, where he devoted himself to writing, especially chronicles of the conquest.

In 1552, López de Gómara published *Historia general de las Indias* (General history of the Indies). Prince Philip, the future PHILIP II, promptly ordered the work suppressed, perhaps due to the influence of DOMINICAN friar Bartolomé de Las Casas, whose view of the conquest was markedly different from that of either Cortés or López de Gómara. Philip repeated the order in 1566 and in 1572 decreed the confiscation of López de Gómara's papers; these included a manuscript written in Latin of the *Life of Cortés*.

López de Gómara's *Historia general* focused on his former employer and undoubtedly drew heavily on conversations they had enjoyed. The credit he gave Cortés for the conquest of Mexico rankled the aging conquistador Bernal Díaz del Castillo and provoked him to complete his *True History of the Conquest of Mexico*, the title of which contrasted with the "lying histories," of which he considered López de Gómara's work a fine example. Certainly, the writing style of the two authors was very different. López de Gómara was a classical stylist, whereas Díaz del Castillo was an untutored writer who told a compelling story.

Not surprisingly, López de Gómara's *Historia general* contained descriptions of Spanish cruelty to the Amerindians that served as a source for contemporary writers who sought to blacken Spain's reputation, for example, the Dutch propagandist Philip Marnix of Sainte-Aldegonde (see BLACK LEGEND).

See also CHRONICLERS (Vol. I); CORTÉS, HERNANDO (Vol. I); DÍAZ DEL CASTILLO, BERNAL (Vol. I).

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# M

**Madrid, Treaty of (1670)** Under the Treaty of Madrid signed in 1670 by Spain and England, the Spanish recognized English possessions in the New World. These included the Atlantic colonies, as well as JAMAICA and other possessions in the West Indies. England agreed to recall its privateers to end hostilities against Spanish possessions in the Western Hemisphere and not to engage in illegal TRADE there.

While the treaty served as the foundation of foreign relations between Spain and England until the WAR OF THE SPANISH SUCCESSION, it allowed eight months after signature for its announcement in the Americas. Its signature, moreover, came after Governor Sir Thomas Modyford of Jamaica had in effect declared WAR on Spain in July 1670, following several Spanish attacks on ships and settlements on the island. The interval was important, for it allowed Modyford to commission HENRY MORGAN as a privateer and the latter to lead the largest buccaneer expedition ever against a Spanish possession, in this case PANAMA. In the aftermath of the BUCCANEERS' success, Spain decried what it considered deceptive behavior. The arrest of Modyford and his transport to London and brief imprisonment there accomplished little, especially when the English government knighted Morgan and sent him back to Jamaica as deputy governor.

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**Madrid, Treaty of (1750)** Signed by Spain and Portugal on January 13, 1750, the Treaty of Madrid provided Spain with the control it sought over the River

Plate and gave Portugal expansion of its base in Rio Grande, BRAZIL. Portugal was to receive the lands of seven of the 30 GUARANÍ missions and would give Spain the fortified entrepôt of COLÔNIA DO SACRAMENTO, while yielding claims to free navigation in the estuary of the RÍO DE LA PLATA. In addition, Spain would grant Portugal some territory in Amazonia in the north.

Added to the actual loss of land, the expulsion of the JESUITS and their 30,000 indigenous charges from the seven missions provoked outrage in Spain. Portuguese, in turn, objected to the loss of trade through Colônia. While the Jesuit general ordered compliance, the Black Robes in PARAGUAY were beside themselves with anger. Although their missives provided fodder for their enemies, the priests, nonetheless, acceded; the Amerindians who were ordered to move refused and initially defeated Spanish and Portuguese expeditions in 1754. The bloody defeat of the Indians in 1756 provided additional ammunition for the Jesuits' opponents but ultimately was for naught.

The abrogation of the treaty in 1761 gave the destroyed missions back to the Jesuits and Guaraní and specified a return to pretreaty status. Failure to agree on what that status was, however, brought war in 1762–63 and resulted in the Spanish seizing Colônia and expelling the Portuguese from most of Rio Grande.

The Treaty of Madrid brought to a close the provisions of the Treaty of Tordesillas of 1494, which had established the boundary between Spanish and Portuguese possessions. Despite several exceptions, it effectively recognized that each country would retain the land it occupied. Thus, Brazil expanded at the expense of the Spanish colonies and assumed approximately the shape it has today.

See also TORDESILLAS, TREATY OF (Vol. I).

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**Magellan, Strait of** Just over 330 nautical miles (611 km) long and 2.5 to 15 miles (4–24 km) wide, the Strait of Magellan separates mainland South America from Tierra del Fuego. It bears the name of Ferdinand Magellan, the Portuguese commander sailing for CHARLES I who encountered the strait and led his small expedition through it into the Pacific in 1520, during what became the first circumnavigation of the globe.

In 1577, Francis Drake entered the strait with three ships from the Atlantic side, but storms in the Pacific scattered them. Left with one ship renamed the *Golden Hind*, he sailed north along the coast, raiding Spanish towns along the route, before crossing the Pacific and ultimately returning to England. Thomas Cavendish in 1586 followed a similar route and also engaged in raids on Spanish towns, returning to England with the treasure from an intercepted MANILA GALLEON.

Storms, winds, and a difficult passage limited the use of the strait before the age of steam-powered ships.

See also MAGELLAN, FERDINAND (Vol. I).

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**Maipó, Battle of (Battle of Maipú)** (April 5, 1818) Fought on the plains near SANTIAGO DE CHILE on April 5, 1818, the Battle of Maipó pitted the Army of the Andes, led by General JOSÉ DE SAN MARTÍN, against royalist forces under General Mariano Osorio. The background to the battle included San Martín's army successfully crossing the great cordillera, defeating the royalist army under General Rafael Maroto at the BATTLE OF CHACABUCO on February 12, 1817, and entering Santiago. Subsequently, however, San Martín suffered a disastrous loss in the Battle of Cancha Rayada on March 19, 1818. Between the two battles, at Talca in early February 1818, BERNARDO O'HIGGINS signed a declaration of CHILE's independence from Spain.

The Battle of Maipó resulted in heavy losses for both royalists and the army under San Martín. Reportedly, of Osorio's 4,500 troops, at least 1,500 were killed and almost 2,300 were taken prisoner. Some 800 of San Martín's men were killed and 1,000

wounded. Although costly, the victory ensured Chilean independence.

The royalists' loss at Maipó had immediate repercussions in LIMA. General Osorio was the son-in-law of VICEROY JOAQUÍN DE LA PEZUELA, and his defeat tarnished the reputation of the already unpopular executive. The Chileans' victory also immediately cost the merchants of Lima nearly 1 million pesos, while simultaneously turning PERU's most important trading partner into a foreign state. Most important, as the inhabitants in Lima were fully aware, the defeat of the royalist army in Chile opened the way for San Martín, once he had adequate sea power, to move north to the Peruvian capital. As San Martín stated, Maipó "decided the fate of South America" (see SPANISH SOUTH AMERICA, INDEPENDENCE OF).

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**maize** NATIVE AMERICANS domesticated maize, or corn, of many varieties long before the Spanish conquest, and when Europeans reached the Americas, it was grown from southern Canada to southern CHILE. It remained the most important staple in the diet of many indigenous people. Although manioc, or cassava, was a staple in many lowland areas, for example, coastal BAHIA, maize was the favored food plant where it grew easily, especially in cool and relatively dry highlands. Its yield per unit of land was substantially higher than that of WHEAT, which Spaniards overwhelmingly preferred. In NEW SPAIN, the normal seed yield ratio of maize varied, with 1 to 100 or 1 to 200 considered normal to good. Europeans considered maize, as one 16th-century writer put it, "a more convenient food for swine than for men."

Amerindians of Central Mexico and the Maya in Yucatán ate maize on a daily basis; in PERU, Amerindians ate maize and also made it into the alcoholic beverage *chicha*. Because Native Americans had discovered a complex process known as nixtamalization, the protein value of maize was considerably enhanced, and its consumption, in combination with beans, formed the basis of a nutritious diet.

Native peoples in Mexico usually ate maize in the form of tortillas. WOMEN started the preparation in the evening, simmering the kernels in a solution of mineral lime that caused nixtamalization. Before sunlight the next day, they started grinding the corn into a dough (*masa*). Before each meal, they shaped the dough into round, flat



Indigenous women often spent five hours or more a day making *masa* and tortillas. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

tortillas and cooked them on a griddle. All *masa* had to be used on the day of its preparation or it started to ferment. Tortillas had to be eaten soon after preparation, as they became hard and inedible in just a few hours. Preparing tortillas for a large family occupied a woman for five or six hours each day.

The growth cycle of maize remained central to native life throughout the colonial era. Planted annually, maize required water and weeding; it took about six months to mature and could be stored. Hand planting using a digging stick (*coa*) resulted in higher yields than using draft animals and plows. Indigenous people planted several kernels of maize together in “hills” that were arranged in rows; an estimated 16,000 kernels were planted per acre. After a harvest, they stored the maize for the winter. Good harvests signified prosperity; poor yields meant hardship, if not starvation. The supply of maize was greatest after a harvest, but by late summer, fall, and early winter prices typically increased in response to shrinking supply. The distance from market also affected prices. A harsh frost on August 27–28, 1785, ruined the crop and resulted in the highest maize prices in the Valley of Mexico during the colonial era. Conditions were so bad that people starved to death, and the government suspended the collection of **TRIBUTE**. Then, following nearly three decades of rising prices for maize, drought in the summers brought successive harvest failures and famine. Suffering among the poor in the

Bajío reached the point where they responded eagerly to MIGUEL HIDALGO Y COSTILLA’S GRITO DE DOLORES in September 1810.

See also MAIZE (Vols. I, III).

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**mameluco** The offspring of white and indigenous parents in BRAZIL were known variously as *mamelucos*, *mestiços*, and *caboclos*. Part of the mixed-race population generically termed *pardos*, this latter, more inclusive group also took in *mulattoes* and *cabras*, or persons of undefined mixed racial background (see **MULATO**).

By the late 17th century, mixed-race inhabitants were a majority of Brazil’s population, although the extent of *mameluco* presence varied geographically. Second only to NATIVE AMERICANS in MARANHÃO-Pará, *mamelucos* were less numerous than Africans, mulattoes, and whites in the ports of Recife, SALVADOR DA BAHIA, and RIO DE JANEIRO

and the adjoining regions. In SÃO PAULO, however, *mamelucos* constituted a majority of the population.

*Mamelucos* descended from shipwrecked Portuguese and their indigenous wives; the daughters of native chieftains were among the first settlers of the town of São Paulo, founded by JESUITS in 1554. These *mamelucos* and their families were the foundation for the subsequent “great *paulista* families.” Starting in the late 16th century, they were leaders and major participants in the *BANDEIRAS* that sought Amerindians to enslave in the interior of Brazil. As would later be the case in nearby Santana de Parnaíba, most “whites” were *mamelucos* or their descendants who identified with Portuguese culture, although they typically spoke *lingua geral* and were knowledgeable in indigenous ways.

Restrictions on *mamelucos* were similar to those placed on mestizos in Spanish America (see *MESTIZAJE/MESTIZO*). For example, they were forbidden to own lethal weapons unless engaged in an expedition to find escaped slaves.

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**Manila galleons** Miguel López de Legazpi and the soldiers, sailors, and other Spaniards on the three ships that survived the voyage from ACAPULCO landed in the PHILIPPINE ISLANDS in January 1565. Legazpi claimed the land for PHILIP II, established a Spanish presence at Cebu, and in 1571 founded a Spanish city at Manila Bay. Andrés de Urdaneta led a successful return to Acapulco in 1565 and established a route using the westerlies in the northern Pacific. This route was employed, with a costly modification in the late 17th century, for the remainder of the colonial era. With Urdaneta came some cinnamon, the first product from the East to reach NEW SPAIN and but a taste of the exotic spices and other items from the Orient henceforth obtained from Chinese merchants in Manila. By 1576, TRADE with China via Manila was well established. It grew rapidly, bringing silks of varied weaves and colors, stockings, bedspreads, tablecloths, napkins, women’s combs by the thousands, fans, spices, and innumerable other objects. For the next 250 years, Manila’s primary role was to be the entrepôt through which flowed Chinese silks and other luxuries to the American colonies and SEVILLE in exchange for SILVER from New Spain and PERU.

From Acapulco, which replaced Huatulco as Mexico’s major Pacific port and became the only port in New Spain authorized for trade with the Philippines, licensed galleons sailed annually for Manila, a voyage that usually

took 75–85 days. The return voyage often took five or six months, although some ships made it in four months and others took eight or slightly longer. The longer the voyage, the greater the probability that crew and passengers would be afflicted by scurvy; in the worst cases, well over 100 persons might die during or shortly after the voyage. In the most extreme cases, everyone on board perished.

The 16th-century trade with Manila resulted in considerable reshipping of goods from New Spain to Peru, with its rising production of silver. In 1582, Philip II quickly ended attempts by merchants in LIMA to trade directly with the Philippines. He also prohibited Peru from importing or selling goods brought from the Philippines via New Spain, although he later relented, allowing some trans-shipment to the buoyant South American market. Underpinning demand was both the low price of East Asian textiles and consumer taste.

Under pressure from merchants in Seville and fearing a decline in taxes from the Atlantic trade, the Crown started to impose restrictions on trade between the Philippines and New Spain between 1587 and 1593 and also to limit trade in general between Peru and the northern viceroyalty. Until 1593, several ships sailed from Acapulco to Manila each year; subsequently, only two were permitted to sail. The sailings continued until 1815. All trade between New Spain and Peru, however, was definitively prohibited in 1631 and again in 1634; when it was reopened in 1774, the Crown limited it to American products. The prohibitions stimulated illicit trade, including trans-shipped items brought from Manila. In the 1740s, JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA reported the extensive availability of goods from the Orient on the Pacific coast of South America.

The galleons leaving New Spain carried missionaries, royal officials, provisions for the trip, and especially silver, as well as small quantities of COCHINEAL, olive oil, and Spanish WINE. In 1593, the Crown limited the export of silver to 500,000 pesos carried on two ships; this legal limit was not raised until 1702, when it increased to 600,000 pesos. In 1593, Philip II limited the trade to two galleons able to carry 200 tons each, when in 1589, there had been galleons that carried 700 tons each. In fact, the ships were frequently larger and more heavily laden than prescribed. By 1614, ships that carried 1,000 tons or more were employed in the trade, and in 1616, one fleet had an enormous ship, which could carry over 2,000 tons. Although the Crown raised the legal tonnage to 560 in 1720, the use of significantly larger ships was routine. One ship employed from 1746 to 1761 had a tonnage of 1,710.

The value of the Manila trade had challenged the Atlantic trade from VERACRUZ to Spain by 1600. Reportedly 12 million pesos had been smuggled out of Mexico for the Manila trade in 1597. An estimated 5 million pesos annually, much of it from Peru, were going to Manila in the early 17th century. Until 1620, it appears

the Manila trade continued to increase, with the profit margin on silk sufficiently high that merchants transhipped silk across Mexico to Veracruz for shipment to Spain.

The richness of the Manila trade attracted foreign interlopers anxious to seize a ship laden with silver or even silk. The English managed to take four galleons, one in 1587 and three in the 18th century. The Dutch, however, never took any. Thus, while more than 30 galleons were lost in the history of the Manila galleons, seizure by enemies was far less of a concern than shipwrecks resulting from storms and incompetence.

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**Mapuche** See ARAUCANIANS.

**Maranhão** Located east of the Amazon River, Maranhão was one of the original donatary provinces of BRAZIL but was not occupied by the Portuguese until the early 17th century. The French established a small presence in northern Maranhão in 1568, including a settlement on Maranhão Island in 1612; they remained until 1615, when the Portuguese drove them out and established the port town of São Luís do Maranhão. In 1616, Belém was founded at the mouth of the Amazon. In 1621, Maranhão was joined with the provinces of Ceará and Pará to form the Estado do Maranhão and administered as a unit apart from the Estado do Brazil, which constituted the remainder of the colony. Although reorganized in 1751 as the Estado do Grão Pará e Maranhão, with Belém as its capital, the division continued until 1772.

There was good reason for separating the far northwestern captaincies. It was both safer and faster to sail from Lisbon to the port of São Luís, a voyage of about five weeks, than it was to sail from São Luís to SALVADOR DA BAHIA. In contrast, it took 80 or 90 days to sail from Lisbon to RIO DE JANEIRO. The connection of Maranhão to Lisbon was so reasonable that the bishops of Belém and São Luís were subordinate to the archbishop of Lisbon rather than Salvador, and legal cases were appealed directly to Lisbon rather than to a colonial *RELAÇÃO*. The TREATY OF UTRECHT recognized Portuguese claims to

land extending to the present northwestern boundary of Brazil.

Despite a prohibition in 1570, enslaved Amerindians were taken on various pretexts to provide the labor for the small number of Portuguese in Maranhão. FRANCISCANS took the lead in missionizing the indigenous people, but JESUITS also become predominant after 1655. Under the direction of Antonio Vieira, they sought to congregate NATIVE AMERICANS in *ALDEIAS* and to limit colonists' access to them. The result was predictable. In 1661–62, the colonists expelled the Jesuits; they repeated the process in 1684, provoking a royal compromise in 1686, the *Regimen of Missions*. This authorized the settlement of Amerindians in *aldeias* but provided colonists' access to their labor under conditions similar to those found in *REPARTIMIENTO* and *MITA* in the Spanish colonies. With just some 800 Europeans in the whole of Maranhão, including Belém and São Luís, in 1672, the captaincies of Portuguese Amazonia were poor. Exchange was by barter, and cotton cloth was used to pay workers, all coerced to some degree. The number of natives in *aldeias* by the 1740s was about 50,000.

During the era of the MARQUÊS DE POMBAL, the relatively neglected northwestern region received attention as the powerful minister sought to convert the mission-dominated indigenous labor system into a commercial PLANTATION system in order to expand exports and revenues. He went as far as encouraging marriages between Portuguese and Amerindians and to make the Indians full royal subjects. In 1757, he ended the religious orders' control over the *aldeias*, replacing them with a lay Directorate of Indians. This lasted until 1799, by which time the increased contact with Portuguese had led to more EPIDEMICS and reduced the native population under Spanish control in the Amazon Basin to fewer than 20,000.

In Maranhão, the Pombaline approach resulted in expanded production of rice and cotton on plantations worked with African slave labor (see SLAVERY). Centered near Caxias, 184 miles (296 km) southeast of São Luís, commercial exports of cotton, a plant native to Brazil, began in 1760. By 1800, production had increased by 800 percent. Rice exports, negligible in 1767, exceeded 320,000 *arrobas* in 1807, becoming the second most important crop in the captaincy. Both cotton and rice were exported to Portugal via the port of São Luís do Maranhão. CATTLE ranches in the interior (*SERTÃO*) and Piauí helped to support the plantations. By 1800, the captaincy's population was nearly 80,000; 46 percent were slaves, and nearly two-thirds were black or mulatto (see *MULATO*).

Accustomed to considerable latitude in running its affairs and more attached to Lisbon than to Rio de Janeiro, Maranhão and the other three northern provinces supported the Cortes rather than the prince-regent Pedro in 1822. With the invaluable assistance of THOMAS, LORD COCHRANE and his audacious naval maneuvers,



Pedro won Maranhão the following year by force of arms.

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**Martín de Porres** (b. 1579–d. 1639) *mulatto Peruvian saint* Born in LIMA, PERU, to a Spanish father and a free black mother from PANAMA, Martín de Porres was an illegitimate son whose father long refused to recognize him. In his teens, he entered the Dominican convent in Lima as a servant (*donado*) (see DOMINICANS). He quickly demonstrated his concern for the sick and the poor, bringing them to the convent for rest and treatment. His piety and successful cures brought full admission to the Dominican order, despite his racial background. He was instrumental in the creation of a foundling hospital and an orphanage.

The belief that Fray Martín de Porres had performed many miracles led to an effort to secure his beatification. A chronicler in Lima noted that on November 23, 1686, the file was closed and escorted from the cathedral to the Dominican convent “accompanied by all the Dominican order, the chief constable of the city, and many illustrious persons. All the mulatto women came out with banners, dancing ahead in great joy.” Martín de Porres was beatified in 1837 and canonized in 1962, the first person of African and European descent to be so honored (see MULATO).

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**Mato Grosso** Located in central-west BRAZIL and adjacent to CHARCAS on the southwest, Mato Grosso was a sparsely populated frontier land. Part of it was placed under the JESUITS in 1607 and became the location of MISSIONS and, for several decades, raids for slaves by BANDEIRAS operating out of SÃO PAULO. CATTLE intended to help support the missions remained after the Jesuits and their charges had abandoned the region.

GOLD discovered on the Coxipó and Cuibá Rivers in 1718 or 1719 and on the Guaporé River farther north in about 1734 attracted miners anxious to make their fortunes. Fewer Portuguese immigrated to participate in the gold rush to Mato Grosso than had done so earlier to the MINING camps of MINAS GERAIS. More difficult travel, awareness that many men who had gone to Minas Gerais had failed to strike it rich, and the higher cost of slave labor and provisions all served to dissuade them (see SLAVERY).

From 1720, annual expeditions used rivers to transport food, equipment, slaves, and sometimes livestock from São Paulo to the mining camps of Mato Grosso, notably Cuiabá and Vila Bela. The voyage was treacherous, with numerous rapids and the threat of attack by the Payaguás and the GUAYCURUANS; between them, they may have killed as many as 4,000 travelers in the 18th century.

Four years after Goiás, in 1748, Mato Grosso was separated from the captaincy of São Paulo and made its own captaincy. The modest population of Mato Grosso, under 30,000 in 1800, however, precluded much of an administrative structure. The nearest *RELAÇÃO* was the one created for RIO DE JANEIRO in 1751.

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**mayorazgo** A *mayorazgo*, or entailed estate, in Spain and Spanish America passed undivided from one single heir to the next and thus preserved substantial financial resources within a FAMILY through successive generations. The term referred to the holder of the estate as well as to the property. The comparable institution in Portugal and BRAZIL was a *morgado*.

Formed initially by an assignment of property from the heritable estate as authorized by the Crown, a *mayorazgo* could be augmented in each generation by its holder adding up to one-third of the value of the heritable property after the widow's claims were paid. Thus, it was a means for circumventing Castilian inheritance laws, which required the full dispersal of an estate in each generation. It was also often used as collateral for loans, even though this was prohibited. Up to  $\frac{7}{15}$  of an estate could be consolidated in a *mayorazgo*, whose purpose, as JUAN FERMÍN DE AYCINENA Y DE YRIGROYEN's stated, was “to perpetuate the splendor of my house and lineage, and to better serve God and King.”

Entails included landed property, at times on a large scale, but also possessions such as houses, jewels, carriages, libraries, paintings, animals, slaves, and religious relics. Titles of nobility and some inheritable government positions, such as the office of alderman (*REGIDOR*), were also included. Founders of *mayorazgos* could impose a variety of conditions, for example, naming the initial heir and path of succession and excluding potential heirs with specified disabilities, such as deafness, blindness, and insanity.

Most titled nobles in NEW SPAIN were among the approximately 100 families that employed *mayorazgos*. The entails themselves varied significantly in value; most were between 30,000 and 300,000 pesos, but some found-

ers provided only modest assets. In some cases, a lengthy legal procedure could terminate an entail and divide the property involved. In 1789, the Crown required evidence that a proposed entail would provide an annual income of at least 4,000 pesos before authorizing its foundation.

From 1816, nobles with *mayorazgos* in Mexico increasingly sought disentanglement as a way to protect themselves from taxes and to raise cash. The Spanish Cortes on September 27, 1820, decreed an end to entail in both Spain and America. The return of FERDINAND VII resulted in its reestablishment in Spain in 1823, but it was finally abolished in 1836. The abolition of secular, as distinct from clerical, entail in the former Spanish colonies occurred between the 1820s and the 1850s. Brazil abolished entails in 1835.

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**media anata** A variation on the medieval papal annates, the *media anata* was a tax imposed by the Spanish Crown in 1631. It required royal officials to pay the Crown one-half of the first year's salary and emoluments of their position, the latter affecting provincial officials without fixed salaries and *encomenderos* (see *ENCOMIENDA*). The *media anata* was also to be paid on nonecclesiastical *mercedes*, honors, and *rentas* given by the monarch or his delegate, for example, the COUNCIL OF THE INDIES, a VICEROY, or a captain general. In 1664, the Crown ordered the tax to be paid in two equal payments, the first in cash at Court and, after having arranged for a bondsman, the second at the treasury office (*real caja*) where the position was located; in the latter case, the person paying the tax was also to pay the cost of shipping the money to Spain and all applicable taxes. In times of extraordinary fiscal penury, the Crown required that new appointees pay an *anata entera*, or entire year's salary, rather than the *media anata*.

Officers were not required to pay the *media anata* if their responsibilities were solely MILITARY. If assigned to administrative posts with civil responsibilities such as governor or captain general, however, they were assessed.

In a *cédula* of May 26, 1774, CHARLES III allowed the *media anata* to be paid in four parts rather than two. When the Crown created new positions for the American *AUDIENCIAS* in 1776, the appointees were exempt from the tax simply because the positions were new. Another change required promoted employees to pay only on the increase of salary.

The *media anata* produced revenues of 40,000–50,000 pesos annually in Mexico during the 1790s. The figure for Peru was 8,000–15,000 pesos.

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**medicine** See *CURANDERA/CURANDERO*; *PROTOMEDICATO*, *ROYAL TRIBUNAL OF*.

#### Menéndez de Avilés, Pedro (b. 1519–d. 1574)

*Spanish naval commander and founder of St. Augustine, Florida* Born in Avilés into an Asturian hidalgo family with good connections, as a young man Pedro Menéndez de Avilés became a successful privateer. He first went to the INDIES in 1550 and quickly became a captain general for FLEETS sailing there. His Asturian origins and royal commission, however, provoked antagonism from the Consulado of Seville, which was accustomed to running the TRADE its own way (see *CONSULADO*; *SEVILLE*). Despite the French sacking of HAVANA in 1555, Menéndez made a safe round trip. Although enemies secured his arrest on charges that he and his brother had smuggled in a substantial amount of SUGAR and COCHINEAL, as well as passengers, he won the case on appeal (see *SMUGGLING*).

Having served the Crown in Europe and commanded successful fleets to the Indies, Menéndez was chosen to lead an expedition to Florida after PHILIP II determined to respond to the colony the French had established in 1562. After studying Menéndez's plan for creating a fort and settlement there, Philip licensed him to carry it out, rather than pursuing it as a Crown-sponsored expedition. Thus, Philip named the Asturian *ADELANTADO* of Florida, a title he could pass on to his heirs, and a detailed contract was signed. It committed the leader to providing settlers and slaves, livestock, and Christianization of the native population, and authorized him to grant land in addition to substantial trading concessions, among other privileges.

Menéndez recruited heavily from FAMILY and friends from Asturias and Santander. Accompanying him were artisans and craftsmen who could help establish a Castilian civilization in the new colony. After a difficult voyage that weakened the expedition, the soldiers, sailors, and others landed on September 8, 1565, claimed the land for Philip II, and quickly founded the municipality of St. Augustine. On the dawn of September 20, the Spaniards attacked the French fort Caroline and slaughtered the defenders. Menéndez quickly sailed to HAVANA to arrange for the delayed portion of his expedition to proceed to St. Augustine. Illness, starvation, desertions, and Amerindian attacks had reduced the first expedition, spread among several settlements, by nearly half. When Menéndez

reached St. Augustine, he found it burned; as a result, he returned to CUBA in May 1556 to seek supplies.

Although the Florida enterprise had not gone as anticipated, Menéndez received additional appointments and honors from a grateful monarch. In Menéndez's absence, in 1568, the French demolished the fort erected at San Mateo. St. Augustine was the only remaining Spanish outpost in Florida. Menéndez died in Spain.

See also MENÉNDEZ DE AVILÉS, PEDRO (Vol. I).

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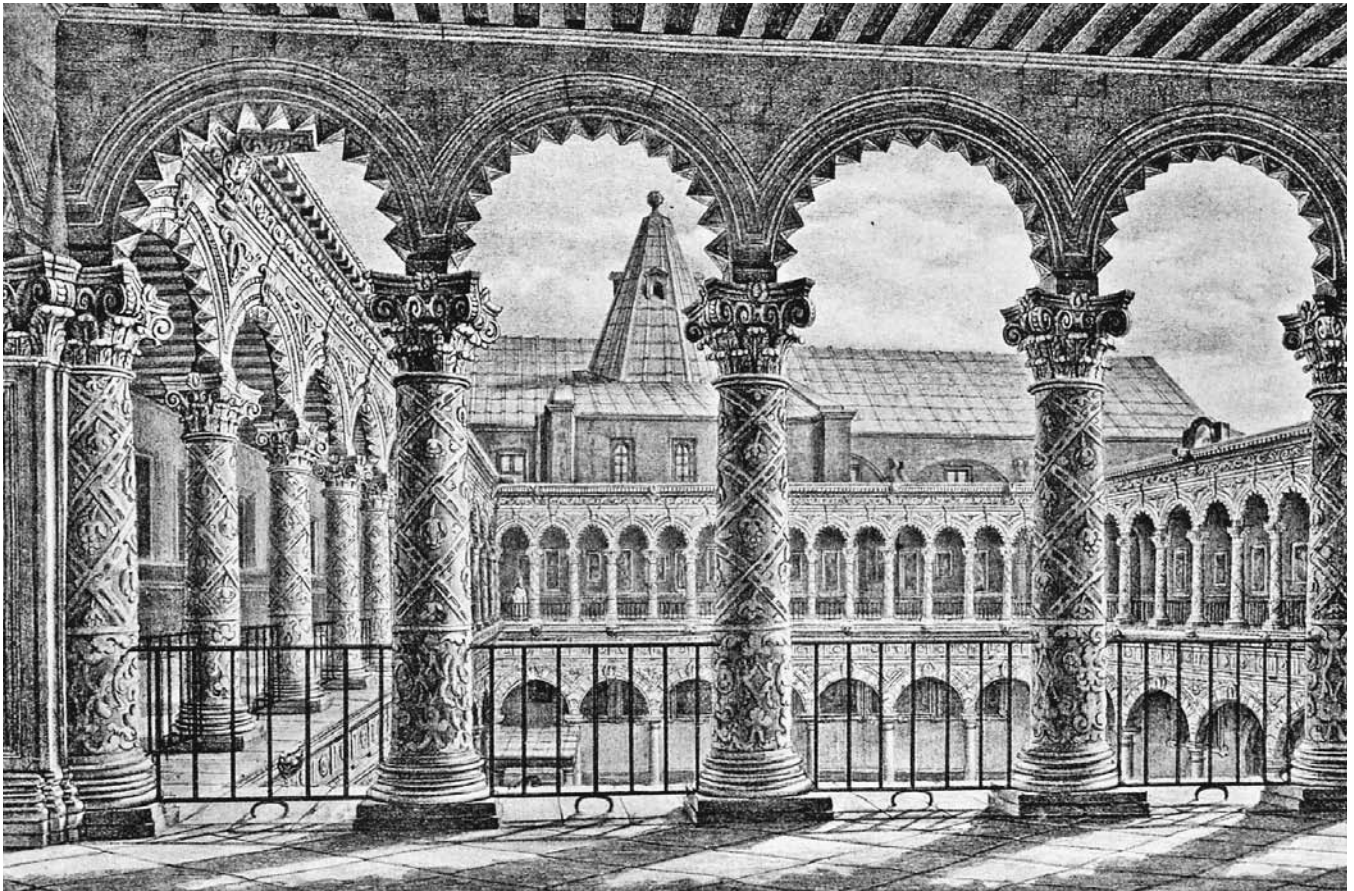
**Mercedarians** Friars of the Order of Mercy, founded in Barcelona by Saint Peter Nolasco in the early 13th century for the ransom of captive Christians, were present in the Americas starting with Christopher Columbus's second voyage in 1493. During the 16th century, the Order of Mercy sent 387 friars to Spanish America. Other PENINSULARS, as well as CREOLES, joined the order in the Americas.

By the middle of the 16th century, Mercedarians had established convents in HISPANIOLA, GUATEMALA, and in

a number of locations in the VICEROYALTY OF PERU. The convents served as bases from which to establish schools for Spaniards and Amerindians and to send missionaries to convert and minister to NATIVE AMERICANS in ENCOMIENDAS, indigenous villages, and the *congregaciones* and *reducciones* into which inhabitants of several villages were regrouped (see CONGREGACIÓN; REDUCCIÓN).

Mercedarians established their first convent in Spanish America in SANTO DOMINGO in 1514. Five years later, the Mercedarian Bartolomé de Olmedo was the first Spanish cleric in NEW SPAIN, arriving with Hernando Cortés in 1519 and baptizing some 2,500 indigenous people, including the interpreter La Malinche. The order, however, did not follow up on this initial advantage. Rather, its efforts accompanied conquest and settlement in Central and South America.

The order established a convent in PANAMA in 1522; in Santa Marta, NEW GRANADA in 1527; and in León, NICARAGUA in 1528. Convents followed in QUITO and CUZCO in 1534 and in LIMA and GUAYAQUIL in 1535. The first Mercedarian entered Guatemala in the mid-1530s, and the first church and convent were completed in Santiago de los Caballeros in 1538; by 1600, the order had six convents in Guatemala. Mercedarians established convents, especially in the 1540s, in a number of CITIES



Cloister in a Mercedarian convent, New Spain. The Mercedarians were one of the most important religious orders in the Spanish colonies. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

in Peru, including Huamanga and AREQUIPA in 1540, LA PLATA and La Paz in 1541, and POTOSÍ in CHARCAS in 1549. A convent was founded in Santa Cruz de la Sierra in 1557 and in Mendoza in 1562. CHILE received convents in SANTIAGO DE CHILE in 1548 and later in Concepción and other towns. By the early 17th century, the Archbishopric of LIMA had 16 Mercedarians serving parishes, part of a minority of 67 friars who joined 108 secular clergy in the 162 parishes. The order joined the AUGUSTINIANS in favoring the use of EDUCATION rather than force in dealing with native superstition and religious beliefs.

By the time the Mercedarians turned their attention to Mexico, FRANCISCANS, DOMINICANS, and Augustinians were well entrenched across the most populated regions of New Spain. Nonetheless, in 1597, the Mercedarians founded convents in Antequera and PUEBLA.

In BRAZIL, the Mercedarians were less numerous than the JESUITS but engaged in missionization as well as economic activities, including large-scale CATTLE RANCHING. The Portuguese Crown between 1693 and 1695 assigned regions of the Amazonia to different religious orders. The Mercedarians were charged with the Urubú, Aniba, and Uatuma Rivers in addition to parts of the lower Amazon. Their convent was located at Belém. In 1750, they had only three ALDELAS in the Amazon river valley while Jesuits, Carmelites, and Franciscans had a total of 60. In the 1760s, the Crown recalled the Mercedarians to Portugal and seized their cattle ranches on the island of Marajó.

The peninsular friar Diego de Porres was the Mercedarians' most illustrious figure in colonial Latin America. Entering the order in Peru at the age of 26 or 27, he became a zealous missionary in the highlands of Peru. In addition to preaching to, baptizing, and marrying many indigenous, he was responsible for the construction of more than 200 churches in native towns.

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**Mercurio peruano** This publication by LIMA's Amantes del País, a local economic society, appeared from 1791 to 1795 (see *AMIGOS DEL PAÍS*, SOCIETIES OF). At first it attracted writers who considered themselves adherents of the ENLIGHTENMENT's emphasis on useful knowledge. Initially shielded by pseudonyms, membership included CREOLES, notably university professor and future *OIDOR* of Lima José Baquijano y Carrillo and future *protomédico* of Lima HIPÓLITO UNANUE; PENINSULARS, especially *OIDOR* Ambrosio Cerdán y Pontero and Fray Diego Cisneros; as well as Italian-born Josef Rosi y Rubí.

The periodical appeared twice a week and through its articles aimed to inform readers about PERU and introduce scientific and modern methodology that could be used to address everyday as well as scientific problems. Thus the *Mercurio* published articles on the history of the UNIVERSITY OF SAN MARCOS and on commerce in Peru, mechanized MINING techniques, ways to avoid dangers during pregnancy, and the advantages of burial in cemeteries over that in churches. In many issues it also published a lengthy compendium of modern chemical terms.

Supported by VICEROY FRANCISCO GIL DE TABOADA Y LEMUS, the *Mercurio* caught the attention of royal officials in Madrid. Complying with a royal order of June 9, 1792, the viceroy sent a full run of the periodical with an endorsement that the publication was “very useful and desirable” and its authors deserved commendation. In anticipation of rewards in the form of government appointments, several of the leading contributors left for Spain in 1793. Their exodus foretold the end of the *Mercurio*. Short of both contributors and readers, the periodical succumbed. Its ephemeral existence testified to both the existence of enlightened individuals in Lima and their modest number.

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**mercury** Also known as quicksilver, mercury was essential for the amalgamation, or patio, process that enabled miners to separate SILVER from ore too poor for profitable smelting. The Spanish Crown quickly established a monopoly to oversee its sale (see MONOPOLIES, ROYAL).

The amalgamation process was introduced to the Americas in NEW SPAIN in the mid-1550s. It was adopted by nearly all mines in ZACATECAS by 1563, for miners could now make a profit processing ore that yielded no more than an ounce and a half of silver per 100 pounds (45 kg).

The capital investment required for the patio process included the construction of stamp mills and, in the early 18th century, a device known as the *arrastré* to crush the ore, powered mainly by MULES in Zacatecas and most other northern Mexican MINING centers. At Central Mexico sites, water powered the stamp mills. Other equipment had to be purchased as well. The mills employed mostly wage laborers.

Workers transported crushed ore to a large, circular, stone-paved patio and heaped it into large piles, to which water was added. After salt and mercury had been incorporated into the mixture, it was spread into a thin *torta* to the edge of the patio and then mixed by men with shovels or sometimes mules driven across the patio. The process

might take up to three months; it ended when the mercury specialist (*azoguero*) decided the mercury had “taken up” the silver in the ore.

Workers then removed the *torta* in small batches to washing tubs, where mules rotated paddles. The mixing caused the heavier particles of silver and mercury amalgam (*pella*) to sink to the bottom of the tub; the film on the top was removed and placed in settling troughs to capture any remaining amalgam. The amalgam was next squeezed through canvas bags to remove loose mercury. The remaining amalgam was then put into molds and placed in a conical form (*piña*) under a metal hood. Heated from below, the mercury separated as vapor that condensed in the bell-shaped hood and was captured for reuse. The silver that remained in the *piña* was of excellent quality; it was melted into bars, often under the watch of an assayer from the local treasury office. Subsequent substantial advances came from improving the washing process and by adding ores called *magistrales* (copper or iron pyrites), which enabled the processing of previously unworkable silver ores.

Processing was somewhat different at POTOSÍ. Amerindians dominated refining until 1572, grinding ore in stone mills and smelting it in small clay furnaces. After earlier failures, in 1572, the amalgamation process was introduced successfully. The major difference from processing in New Spain was that amalgamation took place in large containers rather than in patios.

The key to the amalgamation process was an adequate supply of mercury. Astonishingly, Spain enjoyed access to the three most important sources. ALMADÉN in Spain had been a source of mercury since Roman rule. Idrija, in Slovenia, was under the rule of the Austrian HABSBURGS. HUANCVELICA in the Peruvian Andes was the source of American mercury. Spaniards began to exploit mines near Huancavelica in 1563, especially after VÍCEROY FRANCISCO DE TOLEDO claimed the district for the Crown. Until its collapse in 1786, the famous mine of Santa Bárbara provided most of the mercury used by miners at Potosí and elsewhere in Peru and CHARCAS and at times for New Spain’s mines as well. Almadén, which had long supplied most of New Spain’s mercury, provided what miners in Peru and Charcas needed during the remainder of the colonial period.

In the latter half of the 18th century, the Crown lowered the price of mercury in both New Spain and Peru, an action that stimulated silver production. Not until the 19th century were mercury and the amalgamation process rendered obsolete by the use of cyanide in processing ore. American deputies to the CORTES OF CÁDIZ in 1810 called for the free and open exploitation of all mercury mines

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**mestizaje/mestizo** The offspring of unions between Spaniards and Amerindians were known as mestizos. The first generation of mestizos was almost all illegitimate children of Spanish men and indigenous women. Indeed, El Inca GARCILASO DE LA VEGA, himself a mestizo, noted that the term was originally an insult and, as used by Spaniards, signified illegitimacy. By the middle of the 16th century, the number of mestizos reaching adulthood was expanding rapidly. While those recognized by their fathers grew up in Spanish society, mothers reared many more mestizos in indigenous villages.

The Crown began worrying about the implications of *mestizaje* and a growing population of mestizos by the mid-16th century. Having settled on a policy of segregating NATIVE AMERICANS and Spaniards in separate communities, or two “republics,” there was no place for mestizos. Inheritance practices that favored legitimate, usually Spanish children over illegitimate children further clouded the latter’s future in an environment in which powerful *encomenderos* could not be certain that the Crown would allow any succession to *ENCOMIENDAS*. The failed “mutiny of the mestizos” in PERU in 1567 confirmed Spanish opinion that mestizos were dangerous and willing to promote violence. With Peruvian *encomenderos* failing in their bid to turn *encomiendas* into permanent and inheritable properties, a failure that adversely affected their mestizo children, the status of mestizos declined further.

Discriminatory legislation underscored the handicaps mestizos faced. At times these included restrictions on bearing arms and securing employment in the state or CATHOLIC CHURCH.

Mestizos did enjoy some benefits over indigenous people. Importantly, they were normally exempt from TRIBUTE, unlike free blacks and *MULATOS*. In addition, they were exempt from forced labor in the *REPARTIMIENTO* in NEW SPAIN and the *MITA* in Peru. More than one frustrated Spanish official noted that mestizos who had committed crimes subsequently dressed as Indians and took refuge among their mothers’ family.

Over time, *mestizo* as a synonym for illegitimacy and a particular racial combination gave way to a cultural category that was neither Spanish nor Amerindian. In the 18th century, mestizos were passing into the expanding CREOLE population. As mestizos married mestizos, moreover, their descendants were of legitimate birth. Mestizos in the late 18th century had no sense of group identity, but the fact that their numbers were declining suggests that they blended into the creole population.

See also *MESTIZAJE/MESTIZO* (Vol. I).

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**Methuen Treaty** (1703) The commercial treaty of 1703 between Portugal and England bears the name of its English negotiator, John Methuen. Under its terms, English woollens entered the Portuguese ports of Lisbon and Oporto duty free; Portugal, in turn, obtained favored treatment for its port wines. The Anglo-Portuguese trade was important to both parties and the treaty provided the basis for a thriving although imbalanced exchange based on the comparative advantages of each country.

The value of British exports far exceeded that of Portuguese wine, the balance Portugal paid from Brazilian GOLD. Substantial British exports went to BRAZIL via Portugal and then were smuggled into Spanish America in exchange for SILVER that, ultimately, supported British TRADE in Asia. By 1750, Portugal was an economic dependency of Britain, providing wine, gold, and, via trade in the Río de la Plata region, silver in exchange for textiles. British interest in Brazilian SUGAR and TOBACCO was nil, for its own colonies produced these commodities. As Brazil's gold remittances waned after 1760, trade with Britain declined. British exports to Portugal exceeded an average of 1 million pounds annually from 1731 to 1760 but then dropped by 1771–75 to less than half of the 1756–60 amount. The export surplus declined even more; from 1771 to 1775, it was less than 25 percent of that of 1756–60.

Under the Methuen Treaty, the amount of Portuguese wine exported to Britain increased substantially. From an average of 632 barrels annually in 1678–87, by 1788–89 exports amounted to 40,055 barrels. This equated to 90 percent of Portuguese wine exports and about three-quarters of British wine imports.

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**Mexico** See NEW SPAIN, VICEROYALTY OF.

**Mexico, independence of** Mexico as an independent country developed out of a desire in NEW SPAIN, especially among CREOLES, for greater political autonomy and explicit political equality with Spain. As 1808 opened, *novohispanos* were loyal to the Spanish

Crown; in 1821, independence was a fact. How New Spain moved from loyalty to independence in the early 19th century is a complex story that started in Spain and directly affected a substantial portion of the colony's population during the 1810s. While MIGUEL HIDALGO Y COSTILLA, JOSÉ MARÍA MORELOS Y PAVÓN, and Agustín de Iturbide are important to the story, so are royalists, notably FERDINAND VII, the CORTES OF CÁDIZ, Rafael Riego, and the MILITARY commander and VICEROY of New Spain FÉLIX MARÍA CALLEJA DEL REY. Even more important are the millions of Mexicans who paid the legal and illegal taxes and TRIBUTE that supported both insurgents and royalist forces.

Spain's most populous colony at the beginning of the 19th century had the empire's most productive SILVER MINING, most of its wealthiest families, and a per-capita income that has never since been closer to that of the United States. At the pinnacle of society were a group of families, some bearing titles of nobility, whose fortunes exceeded a million pesos. The families sometimes included successful PENINSULAR merchants, miners, bureaucrats, and planters and other large landowners; in these cases, the wife was typically a CREOLE of Mexican birth. Below this level, competition shading into antagonism between peninsulars and creoles was common.

The population of New Spain in 1810 was approximately 6 million. Of this number, about 15,000 were peninsulars; 1 million, creoles; 10,000, black slaves; and the remainder divided more or less equally between Amerindians and CASTAS, or persons of mixed ancestry (see SLAVERY). Of the small number of peninsulars, approximately half were in the military, about 1,500 in the clergy, and the remainder in the bureaucracy, commerce, and land ownership. Strikingly, about two-thirds of these peninsulars wore uniforms or robes of office and were quickly identifiable.

Although nominal silver production was at its colonial apogee on the eve of the revolt launched by Hidalgo and was by far New Spain's most valuable export, it accounted for less than 5 percent of gross domestic product, and its value compared to that of GOLD had declined in recent years. Real wages had been dropping for unskilled and semiskilled workers for over half a century, reducing their purchasing power by about 25 percent.

Living conditions in rural areas of central New Spain had deteriorated as a result of both a rising population putting more pressure on the land and a decline in real wages. MAIZE prices rose in the fall of 1808, a consequence of inadequate supply. The following year, prices rose dramatically because of drought and a failed harvest, including in the breadbasket region of the BAJÍO, north and west of MEXICO CITY. Hunger was widespread, and unemployment, rife.

News of the fall of royal favorite MANUEL GODOY Y ÁLVAREZ DE FARIA, the abdication of CHARLES IV, and the accession of Ferdinand VII reached New Spain on June 18, 1808. Five days later, word arrived that the royal

family had departed for Bayonne, France. On July 14, came news that Ferdinand and Charles had abdicated to Napoleon. In light of these events, the city council of Mexico City asked Viceroy JOSÉ DE ITURRIGARAY Y ARÓSTEGUI to maintain authority in the absence of the monarch and to convoke a meeting of notables to discuss a course of action. Viceroy Iturrigaray did so, but before the group could meet, news arrived on July 29 of the rising against the French in Madrid on May 2. Word also reached Mexico on August 1 that SEVILLE had formed a junta known as the JUNTA SUPREMA DE SEVILLA.

The unprecedented events created a constitutional crisis centered on the question of who should rule in the absence of Ferdinand VII, who all parties agreed was the legitimate monarch. The *cabildo* of Mexico City argued that sovereignty returned to the people; the peninsular-dominated Audiencia of Mexico disagreed, claiming that the king's appointees continued as his legitimate representatives and that New Spain should recognize the Junta Suprema de Sevilla as the legitimate central authority (see *AUDIENCIA*). Viceroy Iturrigaray, who had amassed a fortune through corruption and was willing to continue benefiting from high office, seemed supportive of the *cabildo's* position. He convoked a group of 86 notables and peninsulars, thinking that the city fathers would back him as ruler of New Spain in the name of Ferdinand but without allegiance to a government of resistance in Spain. The arrival on August 29 of two representatives of Seville's Junta Suprema and, on August 31, of news that there was a junta in Asturias also claiming to rule in the absence of Ferdinand, pointed to the absence of a central government of resistance in Spain. This gave weight to the AUTONOMISTS' argument that New Spain should also have its own junta.

A group of peninsular merchants and their minions led by wealthy merchant and landowner Gabriel de Yermo, with the connivance of some peninsular *audiencia* ministers, ended the impasse by force. On the night of September 15, 1808, they staged a coup, arresting the viceroy, his family, and a small number of outspoken autonomists. The next day, the Audiencia of Mexico named as viceroy the senior military officer in New Spain, the octogenarian Field Marshal Pedro de Garibay. The coup d'état destroyed the legitimacy the Spanish Crown had cultivated and enjoyed for nearly three centuries. The involvement of peninsulars in the coup, moreover, sharpened creole antagonism, and antipeninsular rhetoric increased. With the premature end of the open political discussion that had marked the meetings of the notables in August and early September, some advocates of greater political autonomy and equality with Spain went underground. Creole conspiracies followed.

The timing of the Hidalgo revolt was a direct consequence of a leaked creole conspiracy. One of the conspirators, Father Miguel Hidalgo issued a call to revolt, the GRITO DE DOLORES, to assembled indigenous and *casta* parishioners on September 16, 1810, two days after

the new viceroy, FRANCISCO JAVIER DE VENEGAS, reached Mexico City. Antipeninsular in tone and declaring the abolition of tribute, Hidalgo and his coconspirators sought to attract popular support out of uncertainty that creoles would respond positively. When the undisciplined force sacked GUANAJUATO and murdered the INTENDANT, other peninsulars, and creoles who had taken refuge in the municipal granary, the massacre quickly convinced creoles to condemn the revolt and rally behind the government. Although he led his unruly force to the heights above Mexico City, Hidalgo decided not to attack the capital, probably from fear that he would lose any semblance of control. The revolt faltered, and after several costly defeats, Hidalgo was captured and executed in 1811.

The elimination of Hidalgo did not end the insurgency. Another cleric, the mestizo Father José María Morelos, charged by Hidalgo with taking ACAPULCO, continued to build a disciplined army and moved southward (see *MESTIZAJE/MESTIZO*). His successes would challenge the royalists for several years. For example, he held out at Cuautla for 72 days of siege by General Calleja's army before evacuating on May 2, 1812, albeit with heavy losses. He took the city of Oaxaca on November 25, 1812, a victory that gave him control of significant parts of southern Mexico and put him at the apogee of his power. His subsequent success in taking Acapulco, however, was basically a waste of time and resources. A congress he convoked at Chilpancingo explicitly declared the independence of Mexico on November 6, 1813, but Morelos's power was waning (see *CHILPANCINGO, CONGRESS OF*). Following internal bickering in the congress and military defeats at the hands of the royalists, Morelos was captured on November 5, 1815, and executed on December 22. With his death, the royalists no longer faced an easily identifiable leader who personified revolt. Rather, the insurgents were locally led and based groups of guerrillas and bandits that had multiplied since the time of Hidalgo.

Already in 1811, Viceroy Venegas had implemented a military strategy based on 12 regional commandancies and mobile armies, notably the Army of the Center commanded by Calleja. Within each region, villages bore the responsibility of levying and paying soldiers to protect them from guerrillas and bandits. The viceroy imposed additional taxes, while the prices of basic foodstuffs rose as a result of the rebellions. Mining production fell by perhaps 50 percent or more, most obviously in the mines around Guanajuato, site of an early rebel victory. Viceregal debt mushroomed, while commerce declined.

In addition to ongoing, localized guerrilla warfare in rural areas, royalist leaders faced the challenge posed by governments of resistance in Spain. Their repeated calls for American representatives selected through indirect elections temporarily reopened the possibility of *novo-hispanos* securing greater political autonomy and equality. The call for American representation on the JUNTA



The massacre of creoles and peninsulars who had taken refuge in the large public granary at Guanajuato, in New Spain, changed the course of Mexico's war of independence. (*Private collection*)

CENTRAL antedated the Hidalgo revolt. Issued on January 22, 1809, the document famously stated that “the vast and precious dominions which Spain possesses in the Indies are not properly colonies or factories . . . , but an essential and integral part of the Spanish Monarchy. . . [those] dominions should have immediate national representation before his royal person and form part of the Junta Central.” The number of representatives from the Americas was set at nine. On February 14, 1810, the decree calling for American representation to the CORTES OF CÁDIZ stoked the fire: “American Spaniards, from this moment you are elevated to the dignity of free men . . . your destinies no longer depend either on the ministers, the viceroys, or the governors; they are in your hands.” Complemented by unprecedented freedom of the press, these documents from Spain's successive governments of resistance confirmed that the colonists had previously not been “free men,” but now would be. As historian Jaime E. Rodríguez O. has noted, the second decree “seemed less a government decree than an insurgent manifesto.” Moreover, the colonists were again told to send instructions with their deputies to the Cortes; this open call for a list of grievances implied that redress would be forthcoming. For a second time, elections were held in Mexico

and briefly it seemed that greater political autonomy and even equality with Spain were possible.

Any illusion of equality disappeared when it became clear that peninsular deputies and some American deputies in the Cortes would not allow representation based on population; rather, it excluded men with identifiable African ancestry, a ploy that produced a majority of deputies representing Spain. Although it gave Americans unprecedented representation, this unsatisfactory result had a short life. Having returned to Spain, Ferdinand VII in May 1814 nullified all actions of the governments of resistance, including the CONSTITUTION OF 1812. He followed up by sending troops to the Americas. While the largest expedition went to northern South America under General PABLO MORILLO, several thousand soldiers were sent to New Spain.

Soon, the fervent royalist viceroy Calleja, who had replaced Venegas in March 1813, was congratulating himself on the defeat of Morelos. With Ferdinand VII in power and liberal politicians in retreat, the viceroy was ready to declare victory at hand, although in more realistic moments he knew that it was not.

The arrival of JUAN RUIZ DE APODACA as the new viceroy in September 1816, allowed Calleja to leave with



Mexico apparently largely pacified, but, in fact, roiling below the surface. The return of constitutional monarchy in Spain in 1820 opened the way for Agustín de Iturbide to forge an agreement with guerrilla chieftain Vicente Guerrero and issue a brilliant compromise, the PLAN OF IGUALA. The plan received widespread support and resulted in Mexico's independence on August 24, 1821, without any further major battles.

See also GUERRERO, VICENTE (Vol. III); ITURBIDE, AGUSTÍN DE (Vol. III).

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## Mexico, University of

See UNIVERSITY OF MEXICO.

**Mexico City** Initially referred to as *México-Tenochtitlán* and then only as *México* in the colonial period, the city was the political center of NEW SPAIN and the focal point for persons of wealth and influence. Built in the Valley of Mexico on the ruins of the Mexica capital of Tenochtitlán, Mexico City had a population in the mid-16th century that might have exceeded 95,000. Of this number, about 75,000 were Amerindians; 8,000, Spaniards; 3,000 *CASTAS*; and the remainder blacks, most of whom were slaves (see SLAVERY).

The viceregal capital of New Spain, Mexico City, by the 1550s, housed most major institutions of empire. The Audiencia of Mexico had been in place since the 1520s, although NEW GALICIA had received its own tribunal in 1548 (see AUDIENCIA). Royal treasury officials had established an office (*real caja*) in 1521, and a MINT had been operating since the mid-1530s. VICEROY Luis de Velasco, who succeeded Antonio de Mendoza in 1550, initiated a system of garrisons and towns along the highway from the capital to the recently discovered SILVER MINING center of ZACATECAS.

Mexico City also had an almost complete set of ecclesiastical institutions. The diocese of Mexico, erected in 1527, had become an archdiocese in 1547, with the archbishop a resident of the capital. FRANCISCANS, DOMINICANS, and AUGUSTINIANS were well established; the Society of Jesus would arrive in 1572 (see JESUITS). The UNIVERSITY OF MEXICO opened its doors in 1553, allowing local youth who had mastered Latin the opportunity to pursue higher

studies without travel to Spain. The Tribunal of the Inquisition opened its doors in 1571.

As the largest market in New Spain, Mexico City was the viceroyalty's base for numerous wholesale merchants who imported goods from Spain, Central and South America, and, systematically from the 1570s, East Asia via the PHILIPPINE ISLANDS. It was also the site of numerous artisans—shoemakers, silversmiths, tanners, and tailors, among others—as well as lawyers and a few physicians. *OBRAJES* in the capital produced inexpensive woolen cloth.

Mexico City was still home to *encomenderos* in the mid-16th century, but their number was declining as a result of both royal policy and a dramatic reduction in the indigenous population (see ENCOMIENDA). The number of *hacendados*, however, was undoubtedly increasing, and the most magnificent homes in New Spain were located in the capital (see HACIENDA).

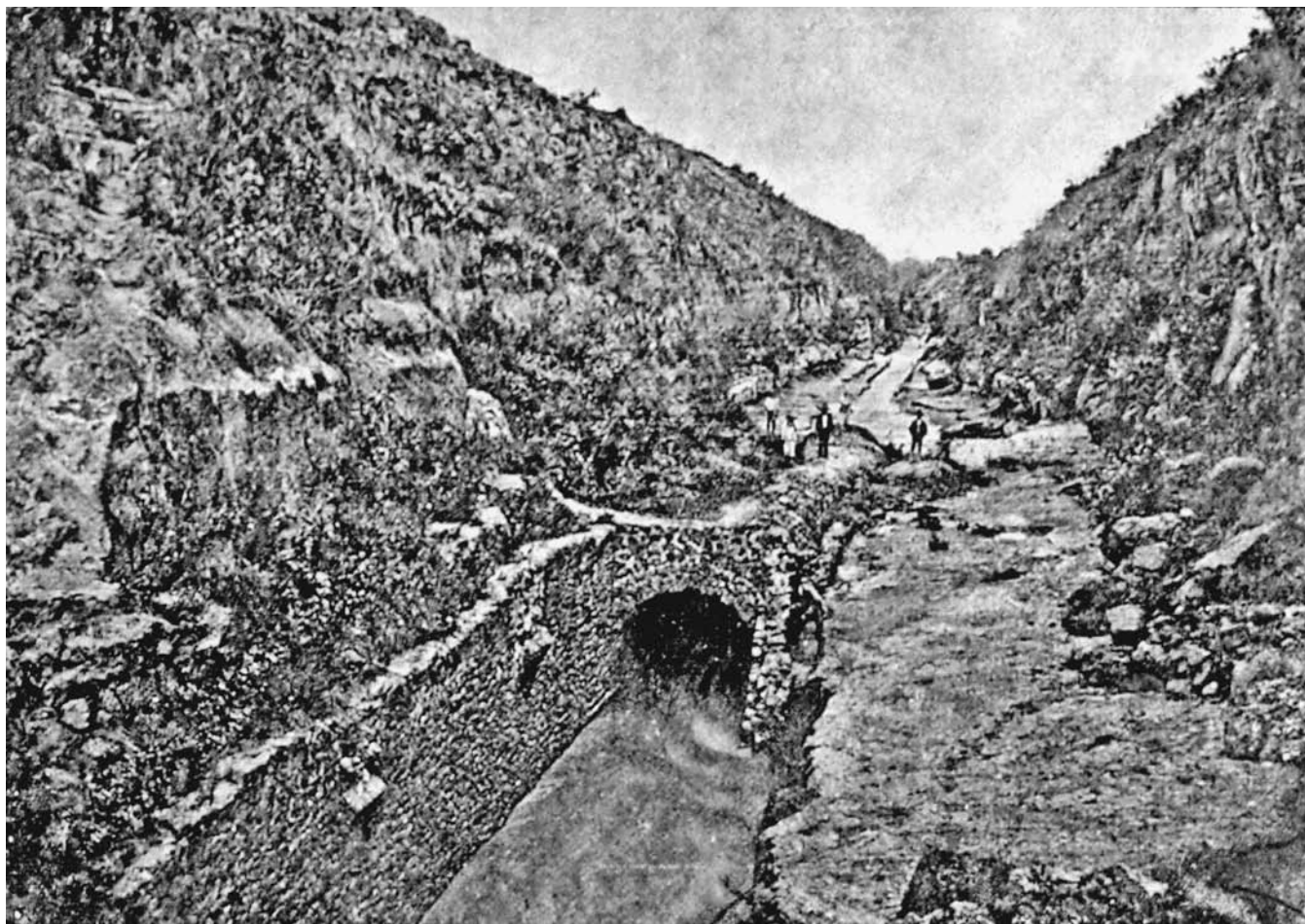
From the time of Hernando Cortés on, Mexico City was undisputedly the principal city of the colony, exercising a level of dominance that no other city of the viceroyalty could match. Its location, however, reflected a political decision rather than a consideration of inherent weaknesses. Built on an artificial island in Lake Texcoco, the city suffered serious floods more than a dozen times between 1555 and 1763. A flood in 1629 drove thousands of inhabitants from the city and took four years to recede. Despite massive expenditures of money and draft labor, the colonial state never solved the problem, as the Crown demanded the remission of revenue and the hinterlands of Mexico refused to contribute the sums needed for a permanent solution.

Mexico City repeatedly suffered from an inadequate supply of clean, potable water. Water in the city's canals was always polluted with sewage. Wells tapping into shallow springs several feet under the city provided impotable water for household use. Although Spaniards oversaw the reconstruction of a preconquest aqueduct from Chapultepec, this proved inadequate by the 1560s. More aqueducts were subsequently built to carry water from other sites, but the supply never met the entire city's needs.

Twice in the 17th century, in 1624 and 1692, Mexico City suffered serious riots. Both were related to the high price of MAIZE, but other causes were also present. The second riot was particularly violent, with rioters damaging, among other buildings, the viceregal palace, the offices of the city council, and the jail. In both cases, authorities restored order quickly.

As New Spain's capital, Mexico City enjoyed days of celebration with the arrival of each new VICEROY. The receptions for the HABSBURG viceroys were particularly lavish as the city council, guilds, and other corporate bodies competed for public and viceregal approval.

The city's population in 1790 was 113,240 and would rise to nearly 180,000 by 1820 as a result of significant migration associated with the war of independence (see MEXICO, INDEPENDENCE OF). As reported in the 1790 cen-



Built on a lake, Mexico City suffered repeated flooding that led to a massive project to drain the city permanently. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

sus, the number included 2,359 PENINSULARS, 49,587 CREOLES, 23,743 Indians, 269 blacks, and the remainder were persons of mixed ancestry (see *MESTIZAJE/MESTIZO*). One scholar has defined almost 90 percent of the total population at that time as “poor.” At the other extreme was a small number of extremely rich families with diverse assets, titles of nobility or other honors, success in placing children in prominent marriages and positions, and longevity at the apex of the social structure. The number of families with fabulous wealth—millionaires or nearly so—was about 100, a figure that was probably a multiple of all other millionaires in the Spanish Empire.

Mexico City was thus a city of extremes at the time of independence. While the few fabulously wealthy lived in mansions, 10,000–15,000 men, women, and children were homeless.

See also MEXICO CITY (Vols. I, III, IV); TENOCHTITLÁN (Vol. I).

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**migration** The movement of individuals and peoples within colonial Latin America took different forms: temporary, permanent, voluntary, and forced. By the mid-16th century, the forced migration to PERU of indigenous people enslaved in Central America had largely come to an end. The use of the *CONGREGACIÓN* and *REDUCCIÓN* in Spanish America and the *ALDELA* in BRAZIL involved the relocation of countless native villages, although the actual distances involved were often fairly modest. In 1591, the Spaniards sent more than 900 Tlaxcalans, descendants

of the famed allies of conquistador Hernando Cortés, as colonists to the CHICHIMECA frontier in northern NEW SPAIN. In return, the Tlaxcalans received noble status for themselves and their descendants, as well as exemption from TRIBUTE, certain taxes, and personal service; land; permission to restrict settlement in their districts; and other privileges.

The most extensive migration was related to the MITA of Potosí. While adult males were to work in the mines under this labor draft, wives and children routinely accompanied the men, and frequently the families then remained in Potosí rather than returning to their native villages. A second migration resulting from the mita was that of indigenous people who left their villages to avoid being sent to Potosí. The price of this flight was loss of access to their lands. In turn, numerous native villages received an influx of FORASTEROS, as these migrants were known.

In Yucatán, a standard indigenous response to excessive oppression was flight to the southern and eastern portion of the peninsula where Spaniards had only nominal power. In the AUDIENCIA district of QUITO, flight to avoid TAXATION, forced labor, or other exploitation was commonplace.

MISSIONS served as both magnets for migration and stimuli for flight. The largest and most famous missions, those of the JESUITS in PARAGUAY, became home to more than 140,000 GUARANÍ at their peak in 1732. In contrast, the Jesuit missions in Chiquitos, CHARCAS, had only about 25,000 NATIVE AMERICANS in 1766; the Franciscan missions in southeastern Charcas had about the same number in 1810.

While elite families generally stayed in a given location, nonelite CREOLES and CASTAS also migrated. Typically, the objective was a better life in a new location. Thus, miners moved from one mine to another with higher-quality ore. SILVER strikes in northern Mexico attracted miners, merchants, ranchers, transporters, and others who saw an opportunity for gain. The discovery of GOLD in MINAS GERAIS in the 1690s and DIAMONDS in the 1720s produced instant MINING camps and even some municipalities following the arrival of migrants from other parts of BRAZIL and immigrants from Portugal. African slaves were forcibly moved from the SUGAR PLANTATIONS in northeastern Brazil to the mining zone (see SLAVERY).

Migration was necessary throughout colonial Latin America to maintain the population of every city. Moreover, for the population to grow, the number of migrants into a city plus surviving children had to exceed the combination of those persons leaving and the number of deaths.

See also MIGRATION (Vols. I, III, IV).

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**military** Formal military units and installations were few and literally far between in colonial Latin America. Spaniards who were “Indian fighters” rather than soldiers conquered what became Spanish colonies. In response to foreign interlopers, by the late 16th century, the Spanish Crown had overseen the construction of substantial fortresses at HAVANA, San Juan de Ulúa, San Juan de Puerto Rico, and CARTAGENA DE INDIAS; fortifications at PORTOBELLO were under construction as a result of the decision to move the isthmian terminus of the fleet system from Nombre de Dios. On the Pacific coast, fortifications were built in the early 17th century for ACAPULCO, in NEW SPAIN, and in the mid-18th century for Valdivia, in CHILE, and CALLAO, in PERU, to replace the fortification destroyed in the tsunami that accompanied the earthquake of 1746. Callao had already had a permanent infantry garrison from 1615, although it typically had fewer men than it was supposed to have.

In BRAZIL, the Portuguese Crown fortified the port of RIO DE JANEIRO and created the fortified trading post of COLÔNIA DO SACRAMENTO. The primary purposes of the fortifications were to protect merchant ships, prevent invasions such as that by the Dutch in PERNAMBUCO in 1630, and defend against pirate attacks.

A second group of military installations consisted of frontier garrisons, or PRESIDIOS. These spread northward in New Spain along the Royal Road leading to ZACATECAS and then north, east, and west as part of the expanding frontier. In 1758, more than 1,000 presidial troops were stationed on the northern frontier. There was also ongoing frontier warfare in southern CHILE against the ARAUCANIANS (Mapuche), with nearly 1,000 regular troops involved.

Viceregal guards were a third type of military unit. By 1555, the VICEROY of Peru was assigned companies of lancers and archers as well as infantrymen; Viceroy FRANCISCO DE TOLEDO was allowed to expand the guard to 200 men. Among other benefits, these privileged guardsmen were immune from imprisonment for debt and after 1678 viceroys could legally name their clients and relatives to serve. By the mid-18th century, the viceregal guard in Peru had only 170 men. In New Spain in 1758, 356 men made up the viceregal guard’s cavalry, halbardiers, and infantry units.

Occasionally, regular forces were deployed to maintain internal order. Troops were sent to CARACAS from SANTO DOMINGO and an additional 1,200 were sent from

CÁDIZ to quell the rebellion against the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS that began in 1749. A permanent garrison of regular troops remained after the revolt had ended. In Peru, the most important military campaigns after the rule of Viceroy Toledo were responses to the 18th-century rebellions of JUAN SANTOS ATAHUALPA and TÚPAC AMARU II.

By 1540, the Spanish Crown had authorized militia companies of infantry and cavalry. Called “urban” militias because their responsibilities were within their localities rather than colonywide, they lacked organization and were frequently untrained and undermanned and without arms, uniforms, and equipment.

In New Spain, the militias included all groups in society other than Amerindians and were organized by perceived or claimed racial background. The use of free-colored militia units started in the 1550s but was brought to an end in the 1790s by the viceroy Count REVILLAGIGEDO.

In CUBA in 1737, militiamen and officers numbered 9,068 but were neither led by regular forces nor systematically drilled or provided with adequate weaponry. In Peru, the militia in 1760 consisted, on paper, of 50 companies of infantry and 26 of cavalry, totaling 4,209 men. Companies of Spaniards, Amerindians, *MULATOS*, and free blacks were in both the infantry and the cavalry.

There were also some militia units in CUZCO. With Spain’s involvement in the Seven Years’ War, Viceroy MANUEL DE AMAT Y JUNYENT in Peru resuscitated the militia of Peru and claimed to have increased it to some 50,000 men complemented by nearly 1,000 regular troops.

One of the most celebrated uses of militias occurred in the Jesuit MISSIONS in PARAGUAY. The JESUITS created trained and disciplined GUARANÍ units that Spanish authorities used on some 70 occasions. In response to the demand that they move in accord with the terms of the TREATY OF MADRID OF 1750, the Guaraní revolted. It took a joint Spanish and Portuguese military campaign to suppress them.

In Brazil, the most important military units of the interior were the private armies of *bandeirantes* who enslaved NATIVE AMERICANS, especially in the 17th century (see *BANDEIRAS*). In the 18th century, the CAPTAINCIES GENERAL normally had military forces comprised of white infantry regiments, a regiment of free mulattoes, and some Indian troops. Typically weapons, uniforms, and fortifications were in poor condition. Moreover, few young men had any interest in military service, for compensation was poor and usually late, and discipline was severe.

Under PHILIP V and his successors, the Spanish Crown organized the Army of the Americas to include a permanent group of battalions stationed in the INDIES, complemented by a reinforcement army of 2,500 stationed in Spain. Regular troops, usually battalions, were assigned to selected strategic locations, for example,

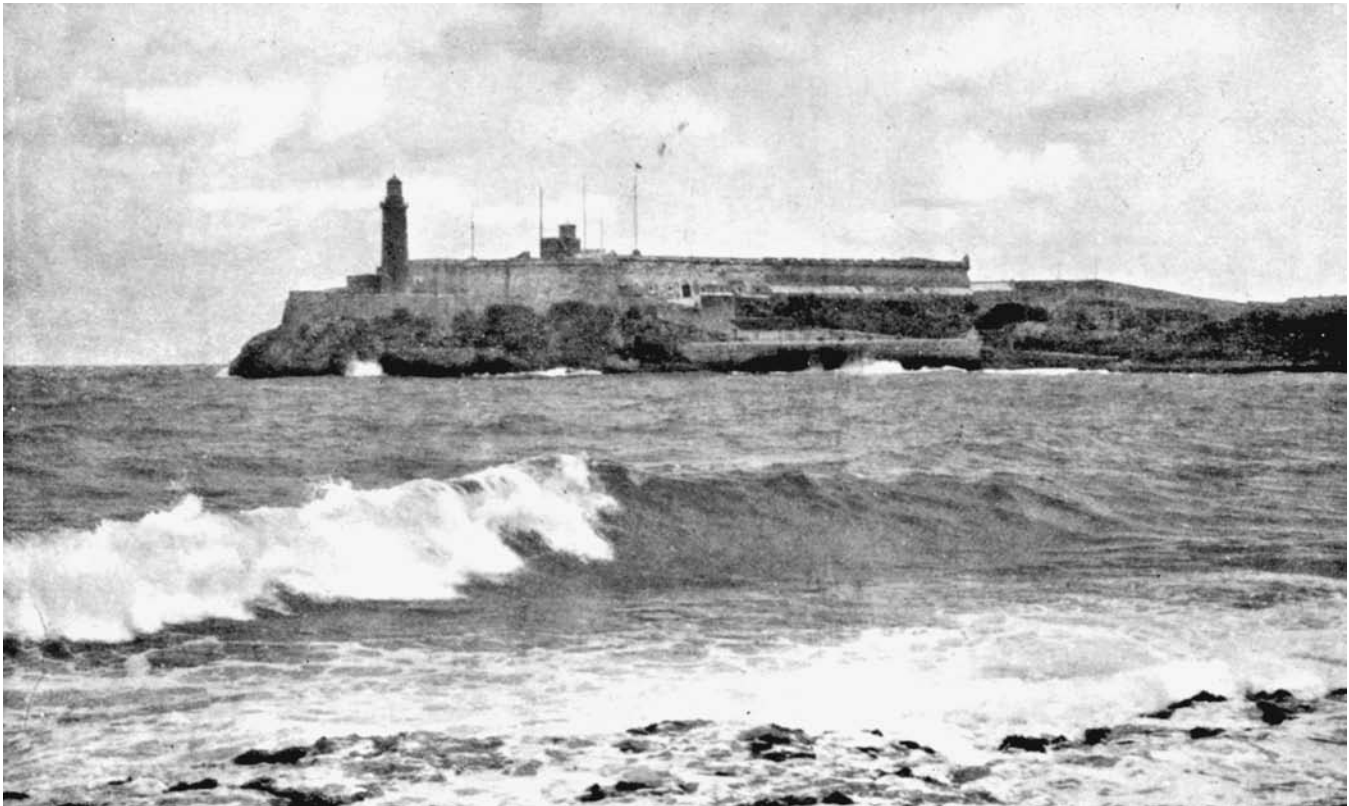
Havana in 1719; Cartagena in 1736; Santo Domingo in 1738; PANAMA and San Juan, PUERTO RICO, in 1741; Veracruz in 1749; Callao, Valdivia, and Concepción in 1753; Yucatán in 1754; Guiana in 1767; Cumaná and Trinidad in 1769; and Santa Catalina and Colônia in 1776; BUENOS AIRES in 1778; and Santa Fe de BOGOTÁ in 1798.

During time of war, Spanish battalions would provide reinforcements, while tropical diseases would ravage the enemy. In Havana and Cartagena, only one-fifth of each battalion was to be CREOLE, while in Santo Domingo and Puerto Rico this percentage increased to one-half. In practice, by the 1740s and 1750s, creoles exceeded their allotment, at least in Havana where 41 percent were officers in 1758, albeit almost exclusively in the lower ranks. Havana had regular troop strength of 2,330 men in May 1762. In Peru in 1760, the regular (*fijo*) forces consisted of two companies of the viceregal guard, one battalion at Callao, a detachment in Tarma and another in Jauja, for a total of 591 troops. Chile at the same time had 963 regular soldiers. The Spanish Empire as a whole never had more than 14,000 men in the Army of the Americas before the loss of Havana in 1762.

Military reforms after the Seven Years’ War were designed to provide a core of regular troops commanded by PENINSULARS in each colony. Since standing armies were very expensive, reorganized militia would provide much of the necessary manpower. After the shocking, although temporary, loss of Havana to the British in 1762, the Crown strengthened the regular forces in Cuba; the veteran garrison in 1769 was authorized 3,354 men plus officers; the reorganized militia following the Seven Years’ War was authorized 7,500 men plus officers. The militia included four white infantry battalions, one *PARDO* (mulatto) battalion, and one *moreno* (black) battalion. This was the first step in reforming the Army of the Americas.

While the reforms had merit as a way to stretch resources, they required regular rotation of new peninsular troops to work. In addition, the militia had to be disciplined, trained in the use of arms, and have access to adequate arms, ammunition, and uniforms. In all of these areas, the post-1763 military was only partially successful. A regular rotation of regular troops from Spain quickly became too expensive to continue, so units recruited in the Americas, often enlisting men, including criminals, who subsequently deserted. At the same time, the expansion of the number of military personnel encompassed by a military *FUERO* reduced respect for the civil judicial system in some regions of the empire.

The most contested colonial border involving regular armies was that between Brazil and the Río de la Plata region over what historian Dauril Alden has called the “debatable lands.” MONTEVIDEO was established in 1724 as a military base on the north shore of the estuary of the RÍO DE LA PLATA. In October 1762, a successful Spanish army wrested Colônia do Sacramento



El Morro was a major defensive bastion constructed at Havana, Cuba. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

from the Portuguese. Required to return the fort to the Portuguese under the ensuing Treaty of Paris, Spain sent an even larger force in 1776 and was again victorious. Spain's colonial army also proved successful as France's ally in war with Britain from 1779 to 1783, defeating the British in the Battles of Mobile and Pensacola, winning back East Florida, and gaining British recognition of West Florida as a Spanish possession.

Militia units in Buenos Aires proved indispensable in defeating the British invaders in 1806 and 1807. Their victory increased the creoles' self-confidence and facilitated the city's de facto independence from 1810.

The wars of independence in Spanish America were fought by military forces, although the armies were very small compared to European standards of the time. Commanders employed regular army troops and militias. The use of amnesties meant that some men fought both for and against independence at different times. Both royalists and insurgents used irregular forces such as the *LLANEROS* in Venezuela. Black slaves were often promised freedom in return for fighting—provided the side they chose won.

The creole elites of Spanish America, whose neutrality or support made achieving independence politically possible, lacked deep roots in military service. Ironically, it was the military that emerged as the most powerful political voice in many of the newly independent states.

See also *MILITARY* (Vols. III, IV).

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**Minas Gerais** Initially part of BRAZIL's captaincy of RIO DE JANEIRO, the region that would become the captaincy of Minas Gerais (general mines) in 1720 was first a site for *BANDEIRAS* from SÃO PAULO seeking Amerindians to enslave, although there was no substantial native

population there. This changed when in the 1690s GOLD was discovered along tributaries of the São Francisco River in the highlands of Minas. A rush of men seeking a quick fortune came from both elsewhere in Brazil and Portugal, especially from Minho. Minas's population may have included 50,000 miners by 1705, although there are no firm counts. The MINING camp of VILA RICA DO OURO PRÊTO (rich town of black gold) became a formal town in 1711 and a favored site of residence for successful miners and the merchants and officials who dealt with them. Vila Rica was to Brazil what POTOSÍ was to PERU. There were two other mining districts by 1710; their centers were São João del Rei and on the Rio das Velhas, where the leading camps were Sabará and Caeté. The discovery of DIAMONDS at Serro do Frio in the mid- to late 1720s initiated a new rush of miners in pursuit of the precious gems. The quantities unearthed were so great that the value of diamonds declined in Europe.

Prices in Minas Gerais were exorbitant compared to those on the coast. The demand for slaves resulted in prices more than doubling (see SLAVERY). This squeezed SUGAR planters in northeastern Brazil since price increases for the sweetener did not keep pace. Additionally, some planters sold slaves to men heading to the gold camps, thus increasing a shortage of labor in the sugar economy.

As was typical in mining camps elsewhere, those in Minas suffered from a surfeit of young males compared to the number of marriageable women. Men migrating from Portugal were apt to arrive with brothers, but neither wives nor sisters. In the district of Sabará, white males outnumbered white women by a ratio of three to two in 1776, well after the mining boom was over, and continued their numerical lead throughout the remainder of the colonial period. Established coastal elite families, moreover, preferred to send their daughters to convents in SALVADOR DA BAHIA or Portugal than have them marry a man in Minas. With white slaveowners and few white women, the MULATO population born out of wedlock expanded rapidly. In some cases, the white owner and father of illegitimate mulatto children freed them in his will and even named them heirs. Thus, mulattoes might inherit slaves and become slaveowners themselves. That over half of the population of Sabará was still enslaved in 1805, more than 50 years after gold mining had peaked, reveals the limits of manumission through will or purchase.

Black slaves were the preferred laborers in the gold camps of Minas Gerais. Their importance for royal revenue in the form of the QUINTO, or 20 percent tax, levied on gold was summarized by Brazil's governor in 1703: "no slaves, no fifth." Abandoning earlier limitations on the importation of slaves in Minas, in 1709, the Crown allowed the paulistas to purchase and sell slaves as they wanted.

Male slaves far outnumbered females. One owner had 28 males and one female slave. Typically, female slaves accounted for between about 12 and 20 percent of

a miner's slaves. Adult slaves numbered 100,141 in 1735 according to capitation tax records; the same source gives a figure of 86,797 in 1749. Both numbers are undoubtedly low. At the beginning of the 19th century, the slave population was approximately 216,000, 54 percent of the captaincy's total population. Of the free population, almost two-thirds were either black or mulatto.

With the decline in gold production that began in the 1750s, the prosperity of Minas Gerais yielded to economic stagnation that continued to the end of the colonial era and beyond. One symptom of the economic difficulties was the MINEIRO CONSPIRACY.

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**mineiro conspiracy** In December 1788, six Brazilian-born men met in VILA RICA DE OURO PRÊTO, capital of the once-booming captaincy of MINAS GERAIS, to plan a revolt that would occur at the time an anticipated per-capita tax (*derrama*) was imposed. They believed the occasion would be right for stimulating a popular revolt, assassinating the governor, and proclaiming a republic. The conspirators, all debtors with strong financial reasons to want a fresh start under a new regime, anticipated little public opposition. Some ideologues and other men who desired independence stood behind the conspirators. While not unanimous in a program of reform, they agreed on emphasizing the benefits for Minas Gerais. At its core, the revolt was proposed by men representing their own interests and those of other local oligarchs.

Word of the conspiracy leaked, and the *derrama* was not imposed by the governor of Minas Gerais as expected. The informer was one of the conspirators, who expected to have his debts waived in return for having exposed his companions. By early 1789, the conspirators were in disarray. In May 1789, conspirator Joaquim José da Silva Xavier, known as "Tiradentes" (tooth puller), was arrested; other conspirators were quickly taken as well.

In October 1790, the government in Lisbon rebuked the governor for his delay in informing it about the conspiracy and ordered him to live in Vila Rica. It also decided to rotate Portuguese troops through the capital every three years. In addition, it rewarded the persons the governor had recommended. Ultimately, Tiradentes became the scapegoat of the case and was hanged. The entire episode demonstrated arbitrary repression by the government and its need to change direction in order to

regain the support of alienated Brazilians of good family and substance. Tiradentes is now a symbol of nationalism in BRAZIL.

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**mining** GOLD and SILVER exerted a magnetic force on Spaniards in the New World. Without the discovery of metallic riches, Christopher Columbus's voyages would have been little more than expensive curiosities. Gold discovered in HISPANIOLA ensured that this was not the case, and conquistadores and early settlers invariably pursued leads strengthened by rumors of precious metals. While gold initially was on center stage, silver quickly surpassed it in quantity and total value in Spanish America. In BRAZIL, gold discovered at the end of the 17th century in MINAS GERAIS became a valuable export during the first half of the 18th century and enabled Portugal to make up its trading deficit with Britain.

By 1560, the most noted Spanish mining camps of the colonial era were in production. Although prospectors would find additional sites, including some that produced boomtown silver rushes, the importance of the mines at POTOSÍ in CHARCAS and ZACATECAS and GUANAJUATO in NEW SPAIN remained. Gold production in Spanish America was primarily in NEW GRANADA, although CHILE was also a source of gold, especially in the latter half of the 18th century.

Silver production required locating ore containing silver in sufficient quantities that it could be separated profitably with the technology of the time. This meant that miners had to break the ore loose and separate those parts with silver-bearing mineral. Workers then carried the silver ore to the surface where animals, MULES in New Spain and mules or llamas in PERU, carried it to the reduction works, or *hacienda de minas*. There, the ore was crushed in a stamp mill (*molino*) powered by mules. Initially, miners next employed smelting, a well-established process in Europe known by Basque and Andalusian as well as German miners who were in the CARIBBEAN in the early 16th century. Commercial smelting used a blast furnace three to six feet (1–1.8 m) high



The patio process using mercury enabled using lower-quality silver ore than smelting did. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

that was built of stone with chimneys of adobe. This vertical column was pierced for crushed ore and the introduction of charcoal as fuel, removal of slag and metal, and insertion of the nozzle of a bellows operated by mule power. To smelt small quantities of good ores, individuals often built smaller furnaces that were operated with a hand bellows. The only mineral needed in smelting was lead; if not present in the ore, it had to be added during the smelting process.

In the mid-1550s, miners in New Spain began using the amalgamation, or patio, process that employed MERCURY in separating silver from ore. Its great advantage over smelting was that silver could profitably be obtained from lower-grade ore. The new process spread quickly, and in less than a decade was being used in most reduction works.

In the mines at Porco and Potosí, indigenous miners employed native technology, notably the wind oven, or *guayra*, which dominated processing into the early 1570s. Although efforts to employ the amalgamation process were made in Peru in the 1560s, only in the following decade were they successful, thanks to the work of Pedro Fernández de Velasco, who brought knowledge of the process in New Spain and modified it to work in Peru.

The amalgamation process required mercury and salt; after its discovery in the first decade of the 17th century, *magistral*, probably a mixture of copper and iron pyrites, was added to the process. Salt and *magistral* were readily available. Mercury was another matter. Fortuitously, Spain possessed at ALMADÉN mercury mines worked from Roman times. The discovery of mercury at HUANCVELICA, Peru, provided a second source of considerable importance. The third source, although its mercury was only sent to the colonies occasionally, was Idrija, in Slovenia, which was under the control of the German HABSBURGS. The Spanish Crown made mercury a royal monopoly (see MONOPOLIES, ROYAL). Its sale was itself a source of revenue; by facilitating the production of silver, the Crown benefited from additional TAXATION, usually at rates of 10 to 20 percent, on the precious metal.

Large and successful silver mining operations required a substantial labor force and provisions to sustain it, as well as tools, mercury and salt, TRANSPORTATION, timber and charcoal, and significant capital investment in reduction works. Labor for the mines varied by location and over time, but Amerindian labor through ENCOMIENDAS was often the initial source. Rotational drafts were subsequently employed, the largest and longest-lived being the MITA at Potosí. Black slave labor was particularly important in the gold mines of the Chocó in New Granada and Minas Gerais (see SLAVERY). In some mines, especially in New Spain, wage laborers became important over time. An incentive available in some mines was ore known as the *pepena* or *partido* in New Spain, and the *guachaca* in Peru. Workers left the mines with this ore and sold it for a price that could exceed a day's wages. Indeed,

wage laborers in New Spain often migrated from mine to mine as richer lodes were discovered.

The Spanish Crown established royal treasury offices (*cajas reales*) near the sites of important finds. There, miners were to register and pay tax on their silver. The amount charged was normally 20 percent (*QUINTO*) but was reduced to 10 percent in New Spain in 1548 and finally, in 1736, in Potosí. The Portuguese Crown also charged 20 percent on gold.

The actual amounts of silver and gold that were mined remain unknown. In terms of silver, even the method of calculation that takes registered as well as unregistered bullion into account does not include the silver exported to Manila. Similarly, only a fraction of the gold production in New Granada, Minas Gerais, and MATO GROSSO was registered.

See also MINING (Vols. I, III, IV).

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**Ministry of the Indies** PHILIP V's victory in the civil war in Spain that accompanied the WAR OF THE SPANISH SUCCESSION enabled him to reduce his reliance on the councils favored by the HABSBURG monarchs and to create secretaries of state or ministers who reported directly to him (*vía reservada*). In 1714, he created the position of secretary of state for the Indies and endowed the office with responsibility for administrative matters (*de gobierno*). Simultaneously, he reduced the responsibilities of the COUNCIL OF THE INDIES to judicial matters, the *PATRONATO REAL*, patronage over judicial and ecclesiastical positions, and the *gobierno municipal*. Its reduced size, mandated in 1717, confirmed its more limited role.

In January 1721, the new organizational scheme took the form it would have for most of the 18th century with the creation of a Ministry of the Navy and the Indies. This included responsibilities for WAR, finance, and commerce as well as "grace and justice" (*gracia y justicia*). The minister was responsible for taking recommendations from the Council of the Indies to the monarch for his signature.

Between 1726 and 1754, the Ministry of the Navy and the Indies was also combined with Finance for 26 years, with War for 19 years, and with State for two years. After the fall of the marqués de la Ensenada in 1754, FERDINAND VI split the minister's three portfolios and divided the departments for the Indies and the Navy. Only the Ministry of the Indies was specialized geographically.



Nonetheless, Julián de Arriaga was responsible for both Navy and the Indies from 1754 to 1776. Following his death, JOSÉ DE GÁLVEZ Y GALLARDO became minister of the Indies, a post he held until his death in 1787, when CHARLES III divided his responsibilities between Antonio Porlier as minister of grace and justice of the Indies and Antonio Valdés as minister of the navy, war, and commerce. In 1790, the separate ministers for the Indies were abolished, and their responsibilities were combined with those of their counterparts for Spain. The CONSTITUTION OF 1812 created a minister of *ultramar*, as the overseas realms were then known. After abolishing the constitution in 1814, Ferdinand VII named a minister of the Indies but eliminated the position the following year. The RIEGO REVOLT of 1820 brought back the constitution and the position of minister of *ultramar*.

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**mints** The initial absence of coinage in the Americas meant that barter was the primary method of exchange in the early years of colonization. When GOLD and SILVER were available, they were exchanged on the basis of weight (*peso*), the origin of the monetary unit of the same name.

In 1535, the Spanish Crown ordered Viceroy Antonio de Mendoza to erect in NEW SPAIN the first royal mint (*casa de moneda*) in the colonies. Its charge was to coin silver upon which the royal *QUINTO* had been paid. The first silver coins probably were stamped in 1536. Copper coinage appeared in 1542. During the reign of PHILIP II, the copper coinage (*vellón*) was discontinued, and silver pesos of eight reales were minted; this peso of 272 *maravedís* was the famous Spanish dollar, or piece of eight, used around the world.

Although a mint was established in LIMA in 1568, it was too far from the sources of silver to be successful. Ostensibly transferred to POTOSÍ in 1572, it continued to issue coins on occasion for some 20 years more. In 1683, it was reestablished. Gold was minted in NEW GRANADA in at least part of the 17th century, but gold coins were rare throughout the Americas. SANTIAGO DE CHILE gained a mint in the 18th century.

Originally, the Spanish Crown awarded contracts to individuals who operated the mints and charged miners a set fee for coinage. Subsequently, it sold the position of treasurer-administrator of the mint; the post in MEXICO CITY brought 130,000 pesos in 1584, while in Potosí in 1656 it yielded 124,000 pesos. In 1728, the Crown assumed direct administration of the mints and took immediate steps to produce coins that could not be clipped or otherwise adulterated. Regardless of the administrative structure, the colonies always suffered a

shortage of coinage, and many merchants issued tokens in the absence of small change.

In BRAZIL, the only mint available in the early days of the gold boom in MINAS GERAIS was a portable model that produced low-value coins for the colony. Serious minting was done only in Portugal at the beginning of the 18th century, but in 1703, a royal mint was founded in RIO DE JANEIRO. By 1725, there were also mints at SALVADOR DA BAHIA and VILA RICA DO OURO PRÊTO.

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**Miranda, Francisco de** (b. 1750–d. 1816) *early creole advocate of Spanish-American independence* The son of Canary Islander Sebastián de Miranda Ravelo and Francisca Antonia Rodríguez de Espinosa, Francisco de Miranda was born in CARACAS. Educated at the University of Caracas, he received a baccalaureate in 1767 and in 1771 went to Spain for additional EDUCATION. His father bought him an appointment as captain in the Princess's Regiment in 1773, and Miranda served in North Africa. At his request, he was transferred to a unit going to America in 1780. In HAVANA, he became aide-de-camp to Juan Manuel de Cagigal, acting governor of CUBA and soon his supporter. Present at the successful Battle of Pensacola in 1781, Miranda went into exile in 1783 to avoid arrest on charges of espionage. Sailing to the United States with a recommendation from Cagigal, he quickly made influential acquaintances and determined to become a Spanish-American version of George Washington. By late 1784, he was committed to the independence of Spanish America.

For the next two decades, Miranda traveled in Continental Europe, Turkey, Russia, and Britain. A linguist, raconteur, and prevaricator, he was in France in 1789 and in England the following year talking with Prime Minister William Pitt about Spanish Americans' desire for independence from Spain. In Miranda's view, all they needed was British assistance. Miranda's plea failed, and in 1792, he was back in France, where he became a lieutenant general in the French army as a result of fabricated claims that he had been a brigadier general in the American Revolution. Caught in the political maelstrom of the French Revolution, he was ordered to leave the French Republic in 1796. He finally departed in 1797 but not before meeting with a handful of other Spanish Americans and signing a petition to Pitt that called for British support for independence in Spanish America. England then became the Venezuelan's base of operation.

Central to Miranda's argument was the belief that Spanish Americans wanted independence and

would immediately support an expedition to secure it. Unsuccessful in gaining British backing, he returned to the United States where he managed to obtain a ship and recruit mercenaries. Sailing to VENEZUELA in 1806, he landed near Coro. The welcome he expected, however, never materialized.

Although Miranda returned to England in 1808 with his credibility severely damaged, he devoted the next two years to keeping Spanish-American expatriates focused on independence, using a Masonic lodge he may have founded in 1797 as a means to do so.

Miranda's last hurrah was in Venezuela in 1811–12. A precocious independence movement had grown out of Caracas's response to the abdications of CHARLES IV and FERDINAND VII. Miranda, who had returned to Venezuela with SIMÓN BOLÍVAR, was active in promoting full independence; the First Republic was created on July 5, 1811. Faced with royalist resistance and then a terrible earthquake that struck Caracas on March 26, 1812, the republic gave military and political authority to Miranda. A royalist victory over Bolívar's forces at Puerto Cabello in early July 1812 led to surrender and Miranda's arrest. Sent to CÁDIZ as a prisoner, he died in jail.

An idealist, visionary, and self-appointed advocate for CREOLES' rights, Miranda was neither a skilled military commander nor a politician. His importance lies in keeping the idea of independence alive for more than a quarter of a century.

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**missions** The Crowns of Castile and Portugal accepted the responsibility and major expense of promoting the Christianization of indigenous peoples in the New World as the quid pro quo of papal grants creating the *PATRONATO REAL* and the *padroado real*. By the mid-16th century, the daunting magnitude of this responsibility was becoming clear. To carry it out, the Castilian monarchs turned to the mendicant orders of FRANCISCANS, DOMINICANS, AUGUSTINIANS, MERCEDARIANS, and, later, JESUITS for clerics. The Portuguese monarchs depended primarily on the Jesuits. These friars and priests, in turn, used missions as critical components of the conversion effort.

Evangelization efforts followed conquest throughout the Americas and in some cases proceeded into lands with no previous experience with Spaniards or Portuguese. In the early years of missionary activity, clerics devoted considerable time and effort to learning native languages so they could communicate with the NATIVE AMERICANS they sought to convert. NEW SPAIN in about 1570 had numerous mendicant establishments located between the Dominican outposts at Huamelulo and Tehuantepec in

the south and the Franciscan missions at Topia, Peñol Blanco, and Durango in the far northwest and Tampico on the Gulf of Mexico. In GUATEMALA in 1555, perhaps 50 or 60 Dominicans, Franciscans, and Mercedarians served about 90 towns. In PERU, the Franciscans had established convents in a number of locations by 1570 as places of rest and prayer for the wandering missionaries and begun to accept responsibility for indigenous Indian parishes (*DOCTRINAS DE INDIOS*). They were serving 59 parishes and nearly 120,000 indigenous people. Franciscans remained in charge of the *doctrinas* until 1752, when the Crown secularized them. In CHILE, the first Dominicans arrived in 1557 and the first Jesuits in 1593. Franciscans established missions in Araucanía, but they totaled only 15 in 1789 and served fewer than 2,000 Amerindians (see ARAUCANIANS). Among the most noted missions were the 30 established by the Jesuits in their province of PARAGUAY. At the time of the Society of Jesus's expulsion in 1767, between 70,000 and 100,000 Amerindians were resident in them.

Missions staffed by one or more clerics and often, by the late 16th century, complemented by a small garrison (*PRESIDIO*) were used in the north of New Spain for gathering together nomadic indigenous groups or those living in small villages (see CHICHIMECAS). In their bringing Native Americans together to facilitate Christianization, they were similar to the *ALDEIAS* in Brazil and the *reducciones*, *congregaciones*, and *doctrinas* in Spanish America (see CONGREGACIÓN; REDUCCIÓN).

The missionaries sought to indoctrinate their charges, always considered minors rather than full adults, with Christian beliefs and, ultimately, to integrate them into the European culture of the colonists. The approach employed by the Franciscans started by requiring native people to attend classes at which the Christian doctrine was taught. Children under the age of 10 attended for two hours a day; those from 10 to 16 attended three days a week. The clerics encouraged all persons of tributary age to participate three days a week. Among the articles taught were the Sign of the Cross, the Our Father, the Hail Mary, the Apostles' Creed, the Ten Commandments, the seven sacraments, and the seven capital sins.

The Spanish Crown's renewed decision to replace mendicants and Jesuits in long-standing missions with secular priests in 1749 resulted in an expanded missionary effort on the outskirts of the empire as the displaced clerics sought new opportunities. The activities of the Franciscans in Alta California beginning in the late 1760s exemplified this.

The missionary efforts of thousands of mendicants and Jesuits and subsequent ministrations by secular clergy were largely responsible for the imposition of Catholicism on millions of Amerindians and, indirectly, for the prevalence of Catholicism in Latin America today. At the same time, the well-intentioned desire to facilitate instruction in Catholicism and the introduction of Iberian customs by congregating the indigenous

in *reducciones*, *congregaciones*, *doctrinas*, and missions also unintentionally created living conditions conducive to the spread of infectious diseases and raised the rate of depopulation. In the Andes, which in the 1570s was spared the extent of epidemic disease that then afflicted New Spain, the creation of *reducciones* under Viceroy FRANCISCO DE TOLEDO changed settlement patterns from scattered small communities into villages with several thousand indigenous residents. Unfortunately, the new villages did ultimately prove lethal. Between 1585 and 1591, several EPIDEMICS ravaged the area. Demographic historian Noble David Cook summarizes: “Quickly, Toledo’s living utopia turned into a death trap for the Amerindian peoples of the Andes.”

Despite the tragedy of demographic disasters, the Christianization effort continued among the indigenous peoples. Missions were largely responsible for Native Americans throughout the Americas accepting Christianity, albeit with varying commitment and doctrinal purity.

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**mita** The term *mita* refers to a system of rotational labor drafts employed in the Andes in ways that, at least theoretically, benefited the public; *REPARTIMIENTO* was the term used for such drafts in NEW SPAIN. Indigenous rulers in the Andes used draft labor prior to the conquest, but colonial administrators adapted the system to their own ends, including most destructively in SILVER MINING at POTOSÍ and MERCURY mining at HUANCAMELICA. The objective was to provide cheap labor; the mandated wages were well below market value.

In the early 1570s, VICEROY FRANCISCO DE TOLEDO required most TRIBUTE-paying male Amerindians between ages 18 and 50 to spend one-seventh of their time on *mita* service, although in some places, for example, the Audiencia of Quito, one-fifth of the eligible population was drafted. The terms of service were one year out of seven for the Potosí mining *mita*, which affected indigenous people in 16 provinces, and two out of 14 months for indigenous people in the 11 provinces required to supply workers to Huancavelica, where mercury was mined. Other *mita* service included working in textile factories (*obrajes*), labor in AGRICULTURE, servicing the supply stations (*tambos*), domestic service, and public works. For example, indigenous people of the province of Huarochirí near LIMA were assigned, among other tasks, to supply Lima with ice from the mountains, to work on coastal HACIENDAS that grew food for the capital, and

to maintain the roads and *tambos* of the province on the route to Cuzco.

The *mita* for Potosí began in 1573 and was expanded twice before Toledo left office; his successors would periodically modify it. It drew upon 16 highland provinces—Chichas, Porco, Chayanta, Cochabamba, Paria, Carangas, Sicasica, Pacajes, Omasuyos, Chucuito, Paucarolla, Lampa, Asangaro, Canas y Canches, Quispicanchas, and Condesuyos—that extended some 600 miles (966 km) from Cuzco into CHARCAS and southern Peru. The objective was to provide a stable workforce of unskilled labor for the mines. At its inception, the draftees, or *mitayos*, were to spend one week out of three working in the mines and mills; during the other two weeks, they could earn cash by hiring themselves out for wages or engage in other activities. At its peak, the Potosí *mita* was to provide 14,296 *mitayos*; 4,426 were assigned to each of the three weekly shifts in the mines and mills and the remainder to other service. Initially, 1,119 were ordered into the mines and 3,073 to the mills each week. As the mines extended farther into Cerro Rico, however, a greater number of *mitayos* was assigned to them. Mine operators, moreover, callously disregarded safeguards that Toledo had built into workers’ assignments. For example, the viceroy had ordered that ore carriers (*apiris*) make no more than two trips into the mines daily; by the 1590s, a standard quota was 19 trips per day carrying a specified amount of ore, despite the viceroy’s prohibition. Mine operators refused to pay specified travel allowances and withheld some or all of the artificially low wages. Conditions within the mines, never good, worsened as the depth increased. Accidents and illness were common.

By 1603, the number of *mitayos* actually working in Potosí was about 4,600, some 4,000 in the mines and 600 in the mills. The total was less than a quarter of the indigenous people working in the Potosí mining industry, excluding some 10,000 engaged in transporting food from other areas and earning higher pay under better conditions. At root, the issue was simply that wage-earning and often higher-skilled Indians (*mingas*) refused to do the jobs forced on *mitayos* for low pay in terrible conditions. Thus, the presence of *mitayos* in the mines was central to the entire enterprise, while saving the mine owners five pesos a week for each ore carrier used.

Viceroy duque de la Palata reduced the size of the labor draft to 5,658 in 1688 and Viceroy count of la Monclova to 4,101 in 1692. Rather than changing the number of *mitayos* actually sent to Potosí, the latter figure confirmed it. Each week 27 mills received 40 *mitayos* in an allocation scheme followed throughout the 18th century, although the epidemic of 1719–20 reduced the ability of the affected provinces to supply the required number of workers. Despite a 1732 royal decision to include FORASTEROS when determining a province’s annual quota, the number of *mitayos* was reduced to 3,199 in 1736. As the 18th century drew to a close, the numbers of actual

*mita* workers and *mingas* in Potosí were 2,376 and 2,583, respectively.

The establishment of work quotas defined by weight of ore carried from the mines and the number of trips increased in the 18th century. The quota increased from 15 loads per night in 1750 to 30 in 1767. Although the number of loads varied, a *mitayo's* workload probably doubled during the 18th century, when family assistance became necessary to meet the quota. Instead of the statutory 17 weeks of *mita* labor, in the 18th century, *mitayos* worked for an average of 46 weeks; in addition, their hours of labor increased. The result was almost triple the amount of work per *mitayo* than various ordinances allowed. The protracted service inside mills, moreover, increased the risk of death by silicosis.

Not surprisingly, many indigenous people in the provinces subject to the Potosí *mita* fled to avoid serving. Others served once and then remained in Potosí, where they worked as wage earners; some paid their *KURAKA* the amount needed to hire a substitute. Regardless, *kurakas* in the subject provinces found it increasingly difficult if not impossible to send their assigned quota of *mitayos* to Potosí. In the early 1600s, *corregidores* of Potosí started fining *kurakas* for not meeting their quotas or for sending unfit *mitayos* (see *CORREGIDOR/CORREGIMIENTO*). Soon, the moneys collected were sufficient to hire *mingas* to replace the *mitayos*, and they regularly did so. By 1608, some 20 percent of the annual draft was provided by “delivery in silver” by the responsible *kurakas*. The practice mushroomed, and in 1626, the Crown asked Viceroy marqués de Guadalcázar to investigate the truth of a charge that 3,200 of 4,000 *mitayos* had been delivered “in silver.” In fact, mine owners frequently pocketed the money (a practice known as “Indians in the pocket,” or *indios de faltriquera*) rather than hiring *mingas*. By the late 17th century, mine owners were abusing *kurakas* for payments they could no longer make. Registered silver, meanwhile, had fallen to less than half the amount produced at the beginning of the century. Although other workers and reduced TAXATION helped increase production in the 18th century, in 1801–02, about 15 percent of *mitayos* were still commuting their service by cash payment.

The *mita* was also employed in the Kingdom of QUITO, although it lacked an equivalent to Potosí. Amerindians subject to *mita* service in the mines of Zaruma fled the *reducciones* (villages) in which they were *originarios* (native-born Indians with rights and responsibilities) in order to escape it (see *REDUCCIÓN*). Other *mita* assignments included working on Spanish farms and estates, personal service, and public works. By the late 16th century, the *mita* had replaced the *ENCOMIENDA* as the primary form of labor organization. In 1589, some 7,000 *mitayos* were distributed to landowners to provide labor in fields, watch livestock, and undertake other tasks. Beginning in 1609, Amerindians were to be paid for *mita* labor on Spanish properties, which included textile mills, farms, ranches, vineyards, and SUGAR PLANTATIONS (but

not sugar mills, or INDIGO or COCA plantations). Terms of domestic service were to be from 15 days to a year; service on ranches was from three to four months.

Fleeing *mita* service was widespread in the Andes, and by 1600, nearly every indigenous town had absentees whose flight might also free them from tribute. Some *mitayos* who served their term attached themselves to Spaniards and never returned to their indigenous village, giving up access to their communities's lands but gaining an exemption from future *mita* service.

For Amerindians, the *mita* became a hated symbol of colonial rule. One aged *mitayo* in 1797 reported having served six times in the *mita* for Huancavelica. Although the Potosí *mita* had long not yielded the number of workers intended by Viceroy Toledo, it lasted into the 19th century. The CORTES OF CÁDIZ abolished the *mita* on November 9, 1812, but FERDINAND VII reestablished it. Finally, the Liberator SIMÓN BOLÍVAR terminated it in 1825.

See also *MITA* (Vol. I).

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**Mogrovejo, Toribio Alfonso de** (b. 1538–d. 1606) *Spanish archbishop of Lima and saint* Born in Mayorga de Campos, León, Spain, educated in law at the University of Salamanca, and ordained in 1578, the austere and pious second archbishop of LIMA, Toribio Alfonso de Mogrovejo, arrived in the viceregal capital in 1581. He immediately started learning Quechua so he could converse with the indigenous population. A strong leader who firmly established the diocesan clergy in PERU, in 1582, he convoked the Third Council of Lima, a gathering of bishops from PANAMA TO PARAGUAY that he and his ally Jesuit JOSÉ DE ACOSTA dominated.

The council stimulated missionary activity. As part of this, Mogrovejo sponsored the publication of a widely used catechism written largely by Acosta. It was the first book to be published in Lima and appeared in a trilingual edition of Spanish, Quechua, and Aymara. Mogrovejo's personal travels in the viceroyalty set the precedent for episcopal visitation. During his visitations, he encouraged

indoctrination and conversion of the indigenous people and campaigned against their abuse by colonists. Nonetheless, he was no advocate for the ordination of Amerindians, the Third Council skirting the issue where the Second Council of Lima (1567–68) had forbidden it.

In 1591, the archbishop founded the seminary in Lima that bore his name. He died in Saña while on a visitation and was canonized in 1726 as Saint Toribio.

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**monopolies, royal** The ability to control the production, distribution, and price of commodities on the one hand and honors, appointments, and other rewards on the other were cardinal principles of Iberian rulers. Both underscored the centrality of royal rule and emphasized the monarch as the ultimate source of patronage and favor, even if he or she delegated powers of appointment and leased out monopolies over commodities.

The Spanish Crown established a monopoly over colonial TRADE through the CASA DE CONTRATACIÓN and the Consulado of Seville, which lasted into the 18th century (see CONSULADO; SEVILLE). For most of the colonial era, it granted monopolistic contracts for the importation of African slaves (ASIENTOS). In addition, it created monopolies for a number of commodities and services. These included MERCURY, alum, playing cards, gunpowder, salt, pepper, snow, stamped paper, cock fighting, TOBACCO, and minting coins. It also had a monopoly over the sale of bulls of the Santa Cruzada. Until the mid-18th century, when it began to administer the taxes directly, the Crown typically licensed or leased the operation of a monopoly for a specific period of time at a predetermined amount.

Of the monopolies over commodities and services, the most important ones were those associated with SILVER MINING, especially mercury. The Crown had a monopoly on production and distribution of mercury at ALMADÉN, Spain, and created a counterpart for the mercury produced at HUANCAMELICA in PERU. This enabled it to set the price of mercury and also to channel distribution. Tobacco monopolies set up throughout the colonies in the 18th century became important sources of income. The monopoly in NEW SPAIN controlled production, manufacture, and distribution of tobacco and its products. Much of the income from this monopoly was sent directly to Spain rather than expended in the colonies.

The Crown's right to sell bulls of the Santa Cruzada began as a reward from the papacy during the Reconquista fought against the Moors in Spain. These indulgences were sold annually at rates that varied according to the status of the purchaser. Although the funds collected

went into the royal treasury (REAL HACIENDA), they were considered an ecclesiastical tax, and clerics generally oversaw their collection.

The monopoly over snow was established in LIMA in 1634 and in MEXICO CITY in 1719. The tax farmer received the right to supply the relevant city with hard-packed mountain snow to be used for cooling drinks.

In the 18th century, both the Spanish and Portuguese Crowns supported monopolistic companies. The REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS operated as a joint stock company with a monopoly on legal trade between Spain and VENEZUELA between 1728 and 1785. In 1740, the Real Compañía de la Habana was established with a monopoly over trade between CUBA and Spain; it experienced heavy financial losses when the British took HAVANA in 1762. Both companies were charged with reducing contraband. The MARQUÊS DE POMBAL created the COMPANHIA GERAL DO COMÉRCIO DO GRÃO-PARÁ E MARANHÃO in 1755 with monopolistic trading authority for the two captaincies in its title and soon afterward, the Pernambuco Company (see PERNAMBUCO). Both exported agricultural products from their respective regions and imported slaves. With the fall of Pombal in 1777, the companies perished.

The American deputies to the CORTES OF CÁDIZ sought the elimination of all government monopolies. Their proposal was approved but not implemented.

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**Montevideo** The capital of present-day Uruguay was founded in 1724 by Bruno Mauricio de Zabala, governor of BUENOS AIRES, as a MILITARY base on the northern shore of the estuary of the RÍO DE LA PLATA. Created in response to Portuguese expansion, and quickly an important hindrance to communication between COLÔNIA DO SACRAMENTO and outposts in southern BRAZIL, Montevideo's location enabled it to become a commercial center and, as population increased, the administrative center of what was termed the BANDA ORIENTAL. Its MUNICIPAL COUNCIL held its first meeting in 1730.

Montevideo had some 450 inhabitants in 1730, reportedly nearly 1,700 in 1757, and almost 4,300 in 1769. In 1800, Montevideo had fewer than 10,000 inhabitants, about a quarter of whom were black and mulatto, a reflection of its role as a slave port (see MULATO; SLAVERY). The city is credited with a population of about 14,000 five years later. In 1775, a Portuguese fleet unsuccessfully attacked the city.

Montevideo's location made it a useful port of call. Foreign shippers engaged in TRADE with southern Brazil often stopped there. Merchants from Buenos Aires in some cases had assistants as well as warehouses in Montevideo. The expansion of *COMERCIO LIBRE* in 1778 opened Montevideo's port, as it did that of Buenos Aires. The former never had more than a quarter of the trade of the latter, but it was important in the trade of hides and slaves. In the 1780s, both Montevideo and Buenos Aires began to export jerked beef.

Prior to the second failed British invasions of Buenos Aires, Lieutenant General John Whitelocke arrived at Montevideo in 1807. He was immediately followed by British merchants. After his defeat in Buenos Aires, Whitelocke returned to Montevideo with his surviving soldiers before sailing to Britain. British merchants remained and were soon allowed into Buenos Aires to sell goods, the TAXATION on which provided revenue for SANTIAGO DE LINIERS Y BREMOND's government. Liniers's decision to allow the British merchants to trade in the city provoked an unsuccessful coup led by CONSULADO merchant MARTÍN DE ALZAGA.

As Buenos Aires moved toward de facto independence in 1810, Montevideo became the center of royalism. The forceful royalist governor FRANCISCO JAVIER ELÍO opposed Liniers in 1808; two years later, he returned with an appointment as VICEROY of RÍO DE LA PLATA but could not make his writ effective beyond Montevideo. Rural rebellion outside of Montevideo developed into a movement for independence under JOSÉ GERVASIO ARTIGAS, and soon the city was under siege. During the next three years, both the Portuguese and forces sent from Buenos Aires entered the conflict. In June 1814, Montevideo surrendered to the government of Buenos Aires in the face of attacks from land and sea. Spain no longer had a base in the estuary of the Río de la Plata.

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**Morelos y Pavón, José María** (b. 1765–d. 1815) *casta* priest and insurgent leader in Mexico's war of independence Born in Valladolid, NEW SPAIN (present-day Morelia, Mexico), José María Morelos y Pavón was the son of *CASTA* parents. He received his first schooling from his grandfather but dropped out of school following the death of his father in 1779 and worked for a decade as a mule driver for his uncle. In 1790, he entered the Colegio of San Nicolás in Valladolid, of which MIGUEL HIDALGO Y COSTILLA was rector. He subsequently studied for the priesthood at the Tridentine Seminary in Valladolid. After receiving a baccalaureate from the



The cleric José María Morelos kept the movement for independence alive after Miguel Hidalgo's execution. (Private collection)

UNIVERSITY OF MEXICO, he was ordained in 1797 and two years later became curate of Cuarcácuaro, where he stayed until joining the Hidalgo revolt in 1810. The revolutionary priest Hidalgo instructed his younger compatriot to take ACAPULCO.

Unlike Hidalgo's strategy of using a large number of indigenous people in assaults, Morelos trained a much smaller, disciplined force. His approach paid dividends, and in less than a year, he had defeated royalist armies repeatedly and made himself master of most of the modern state of Guerrero. Through four campaigns, he occupied much of southern Mexico. He took the city of Oaxaca in November 1812 and captured Acapulco in April 1813 and its fortress on August 20.

In 1813, Morelos convoked a congress at Chilpancingo that, on September 13–14, declared Mexico independent and approved important policies and an agenda for implementation (see CHILPANCINGO, CONGRESS OF; MEXICO, INDEPENDENCE OF). These included the determination that sovereignty resided in the people and was deposited in a national congress; Catholicism would be the only religion allowed in Mexico; judicial, executive, and legislative power would be divided; only Americans would hold public office; taxes would be reformed and affect all persons; racial distinctions would end and slavery would be abolished; and PENINSULARS' property would be confiscated. When the congress met again at Apatzingán on October 22, it created a strong legislature but a weak executive.

Morelos's unsuccessful fifth military campaign, begun in late 1813, culminated with his capture and imprisonment in November 1815. He was defrocked and executed on December 22, 1815.

Morelos made two major contributions to Mexican independence. First, he kept rebellion alive after the failure of Hidalgo's revolt. Second, he clarified and made explicit the goals of his own rebellion. After the meeting of the congress at Chilpancingo, there was no doubt that Morelos sought complete political independence and a constitutional form of government as primary objectives but had other social and economic objectives as well. If implemented, the changes would replace a social structure erected on the bases of discrimination and economic privilege with one that reflected a more modern approach to social organization. The city of Valladolid was renamed Morelia in honor of Morelos in 1828.

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**Moreno, Mariano** (b. 1778–d. 1811) *early creole advocate of Spanish-American independence* Mariano Moreno was born in BUENOS AIRES and studied at the university in LA PLATA (Sucre). He obtained a degree in theology, studied law, traveled to the mines of POTOSÍ among other destinations, and married. Returning with his new family to Buenos Aires in 1805 to practice law, he became a *relator* of the AUDIENCIA and a legal adviser (*asesor*) to the MUNICIPAL COUNCIL (*cabildo*).

Moreno and his family absented themselves from Buenos Aires during the British invasion of 1806. A supporter of MARTÍN DE ALZAGA's attempted coup on January 1, 1809, later in the year Moreno represented the region's stockmen in a strong position paper supporting free TRADE. An advocate of complete independence from Spain, he was named one of two secretaries (without votes) to the seven-member junta established on May 25, 1810. He resigned from the junta after a revolutionary faction he headed lost control in December 1810 and conservative delegates from the interior of the viceroyalty were admitted. In March 1811, Moreno's followers founded a political club, which would be refounded in January 1812 as the Patriotic Society. Moreno died at sea on his way to take up a diplomatic appointment in Britain that was, in essence, exile.

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**Morgan, Henry** (b. ca. 1635–d. 1688) *Welsh buccaneer leader in the Caribbean* A Welshman of good family who almost certainly arrived in the Western Hemisphere as a soldier with the English expedition that captured JAMAICA in 1655, Henry Morgan by the mid-1660s was a successful, married privateer starting to purchase PLANTATIONS. Armed with a commission from Jamaica's governor, Sir Thomas Modyford, he led some 500 men in the capture of PORTOBELLO in 1668, a success that brought substantial riches to himself and the 400 or so survivors of the expedition.

In 1671, Morgan led an even more audacious expedition of some 2,000 men, about a third French and the remainder English, across the Isthmus of PANAMA to its capital city. The buccaneers' victory was followed by the Spaniards setting the city on fire to prevent Morgan from using its arms, ammunition, and naval stores. Because the spoils were only about half of those taken in Portobello and owing to the much larger size of the expedition, the BUCCANEERS received only a fraction of the amount gained by the earlier victors.

Although sent to London as a prisoner in the general English crackdown on privateers, Morgan returned to Jamaica with a knighthood and an appointment as deputy governor. He devoted himself to local politics, food, and drink. He died in Jamaica of dropsy.

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**Morillo, Pablo** (b. 1778–d. 1837) *Spanish royalist general in Venezuela and New Granada* Born in Fuentesecas, Spain, Pablo Morillo entered the MILITARY as a soldier in 1791. Despite service in action and being captured and wounded at Trafalgar in 1805, he was still a sergeant when the French invaded Spain. The war of independence gave him multiple opportunities to display his skills, and he advanced to the rank of field marshal. He refused to support the CONSTITUTION OF 1812, a position that added to his credentials for appointment as the commander in chief of the Expeditionary Army sent to reconquer northern South America in 1815. His broad powers also included those of governor of CARACAS, president of the Audiencia of Caracas, and captain general of VENEZUELA; the ability to suspend the AUDIENCIA and to disband the predominantly PARDO armies led by JOSÉ TOMÁS BOVES and Francisco Tomás Morales; and the right to modify any or all of the instructions he had been given.

Morillo left Spain with an army of 10,500 men on February 17, 1815, and reached Venezuela in early April. Unfortunately for his mission, the expedition's flagship exploded between Margarita and Caracas. The loss of more than 1 million pesos for salaries, military supplies of all kinds, and the officer corps' personal equipment

meant that he immediately had to raise taxes from the Venezuelans in order to reconquer NEW GRANADA. To do so, he created a military government in Venezuela under Brigadier Salvador Moxó, a hardline royalist who soon began selling confiscated properties to raise funds. Moxó considered almost all inhabitants to be rebels and employed repressive measures that breathed new life into the republicans. On June 10, 1815, Morillo suspended the Audiencia of Caracas and appointed a Tribunal of Appeals; the action guaranteed that the ousted ministers would appeal to Spain against the general's dictatorship. On December 20, 1815, the COUNCIL OF THE INDIES ordered the *audiencia's* immediate reestablishment, which occurred on May 25, 1816.

Morillo's charge involved restoring royalist rule to NEW GRANADA as well as Venezuela. He left Caracas for Puerto Cabello on June 2, 1815, and departed for New Granada on July 13, 1815. Arriving at Santa Marta, he was soon engaged in a lengthy siege of CARTAGENA DE INDIAS that ended only with its occupation on December 6. Aided by the insurgents' war fatigue, royalist commanders took BOGOTÁ in May and Popayán in June 1816; by October 1816, the reconquest of New Granada was complete. In Bogotá, Morillo's designee, Juan Sámano, employed a variety of cruel punishments, including execution, fines, forced labor, imprisonment, and conscription, that left almost no elite family untouched. As in Venezuela, the savage repression created enemies and new resistance in New Granada. While both regions were under royalist rule, the demands of Morillo's commanders turned many members of local elites against Spanish rule and made them more receptive to the idea of complete independence from Spain.

Morillo left for Venezuela in November 1816 and arrived in January 1817. Advance forces under General Miguel de la Torre crossed the Andes, ran into José Antonio Páez and some 1,300 LLANEROS on January 28, 1817, and barely escaped. While Morillo was en route, SIMÓN BOLÍVAR reached Barcelona on December 31, 1816, with men, arms, and supplies from Alexander Pétiou's government in Haiti. Instead of staying near the coast, Bolívar went into the plains of the Orinoco River. In April 1817, he joined Manuel Piar in the siege of Angostura. The withdrawal of the royalists from the region in July and August left Bolívar to face rivals within the patriot ranks. On October 16, 1817, he executed Piar for conspiring against him. Leaving Angostura on December 31, 1817, Bolívar met Páez and his *llaneros* on January 30, 1818.

On March 16, 1818, Morillo's forces defeated those of Bolívar at Semen. The defeat of Páez on May 2 forced the rebels back to Angostura, where Bolívar called a congress that met on February 15, 1819. The following month the Liberator's forces left Angostura and fought Morillo's forces in the Apure. With news of Francisco de Paula Santander's victory over the royalists at Casanare, on May 27, 1819, Bolívar led his troops to

join Santander's and then led the combined forces across the Andes. Successful in battle at Boyacá on August 7, 1819, the way to Bogotá was open, and Bolívar's forces entered the capital on August 10. Meanwhile, Morillo continued to rule in Caracas.

The liberal government established after the RIEGO REVOLT that began on January 1, 1820, restored the CONSTITUTION OF 1812. Mistakenly believing that this would end the independence movements, Spain's government ordered Morillo to negotiate; on November 26, 1820, a six-month armistice was signed. Having turned his positions over to General Miguel de la Torre on December 3, Morillo left for Spain two weeks later. The defeat of the royalists at CARABOBO on June 24, 1821, meant independence for Venezuela.

Back in Spain, Morillo served as captain general of New Castile until FERDINAND VII's return to absolutism forced him into exile in France in 1823. Returning to Spain some years later, he served as a commander against the Carlists. He died in Barèges, France, where he had gone to improve his health.

Morillo's effectiveness as a military commander resulted in the reestablishment of royalist control in Venezuela and New Granada. Having won the civil wars, he proceeded to lose the peace, a process aided by hardline subordinates whose actions gave new strength to the patriots. By the time Morillo left Venezuela, the end of Spanish rule was imminent.

See also PÁEZ, JOSÉ ANTONIO (Vol. III); SANTANDER, FRANCISCO DE PAULA (Vol. III).

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**mulato (mulatto)** The terms *mulata* and *mulato* (rendered *mulatto* in English) most commonly applied to persons whose parents were European (typically the father was Spanish or Portuguese) and black (usually the mother). In GUATEMALA, *mulato* also applied to persons of Indo-Spanish descent, and in parts of NEW SPAIN, it included persons of Indo-Afro descent, a combination often referred to as ZAMBO. PARDOS were another term applied to mulattoes and, in Buenos Aires, to any person with some African ancestry.

The *sistema de castas* used the perceived proportion of Spanish ancestry as the basis for social hierarchy. Nonetheless, mulattoes fell below mestizos for, in addition to a background of SLAVERY, mulattoes, as other CASTAS, were damned by presumed illegitimacy. If free, they paid TRIBUTE, as did other *castas*, free blacks, and Amerindians. Mulattoes also ranked below Spaniards, Amerindians, and mestizos in their legal condition; only slaves were below them.

Colonists made a distinction between imported African slaves (*bozales*) and those born in the colonies



(creoles). The latter were reared in colonial settings in which they grew up speaking Spanish or Portuguese and, at least superficially, in the Catholic faith. They wore European-style clothing, ate food that included plants and animals of the COLUMBIAN EXCHANGE, and lived according to a European calendar. These characteristics gave the creole slaves an advantage over the *bozales*, most of whom were employed in fields, mills, mines, and other strenuous labor. Creole slaves and enslaved mulattoes were more likely to work for urban masters as domestics or to be taught artisan skills that furthered the master's interests and offered the opportunity to earn money that could be applied to buying freedom.

The continued importation of African slaves kept them more numerous than *mulatos*, but two censuses in LIMA in the early decades of the 17th century identified *mulatos* as a distinct group. Significantly, *mulatas* (female mulattoes) outnumbered *mulatos* (male mulattoes) in both cases.

Spanish and Portuguese males found *mulatas* very attractive, as did Thomas Gage who in MEXICO CITY observed them wearing fashionable necklaces, jeweled earrings, pearl bracelets, and clothing with GOLD and SILVER lace. Those who served as concubines and their female children were among the *mulatos* most likely to gain manumission. The offspring of free *mulatas* were free.

The most important distinction among mulattoes was between those who were slaves and those who were free. Nonetheless, mulattoes suffered numerous legal restrictions. In addition to being tributaries, they were liable to be sentenced to labor in mines for crimes; prohibited from carrying arms except when engaged in militia service; prohibited from becoming notaries (*escribanos*); and banned from residing in indigenous villages. *Mulatas* were subject to sumptuary legislation that, although often unenforced, forbade them from wearing gold, silk, and pearls.

Mulatto militia companies were present in many Spanish colonies, typically under the term *pardos*. CUBA, New Spain, NEW GRANADA, and PERU had *pardo* militia units. In some cases, mulattoes served as officers as well as common militiamen.

The number of mulattoes increased substantially over the colonial era. A census in Lima in 1614 revealed 10,386 blacks and 744 mulattoes, a number that is low. In 1790, the city had 8,960 blacks and 5,972 mulattoes. A summary of census figures for Peru in 1795 did not distinguish blacks from mulattoes; free blacks, however, numbered 41,004 and black slaves 40,385. In Mexico City at the same time, the mulatto population totaled 6,977, while the black population numbered only 269, a reflection of the relatively few African slaves imported after 1640. In New Spain as a whole, the black population increased from 20,569 in 1570 to 35,089 in 1646, and then declined to 6,100 in 1793. The mulatto population, in contrast, rose from 2,435 in 1570 to 369,790 in 1793, when it accounted for nearly 10 percent of the total

population of the viceroyalty. VENEZUELA's population count in 1810 did not distinguish free mulattoes from other *castas*, lumping them together as *pardos*, a grouping that constituted more than 45 percent of the population, or 197,740 people. Black slaves accounted for 15 percent of the population, numbering 64,462. In Cuba in 1778, the males of military age, 15–45, included 4,143 free mulattoes and 2,332 free blacks. Between 1774 and 1791, the free colored population grew more rapidly than either the whites or the slaves. The flood of African slaves imported to work on PLANTATIONS after 1791 resulted in the slave population totaling 199,145 and the free colored population numbering 114,058 in 1817.

See also *MULATO* (Vol. I).

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**mules** The offspring of donkey stallions, or jacks, and horse mares, mules reached the Americas with Christopher Columbus in 1495. Shipped from CUBA to the mainland by the early 1530s, they replaced indigenous porters in Mesoamerica and complemented the use of llamas in the Andes. With colonial “roads” often merely trails except on some plains and plateaus, mules became the major transporters of goods of all kinds in colonial Latin America. In addition to being stronger and less skittish than horses, their advantage was their ability to carry easily cargoes of 200 pounds (91 kg) 25 to 30 miles (40–48 km) a day or up to 300 pounds (136 kg) 12 or 13 miles (19–21 km) a day. In contrast, a llama could carry 50 to 100 pounds (22–45 kg) about 10 miles (16 km) a day, and a burro could carry 100 to 150 pounds (45–68 kg) about 20 miles (32 km) a day. Mules also were ridden like horses and reportedly were more comfortable.

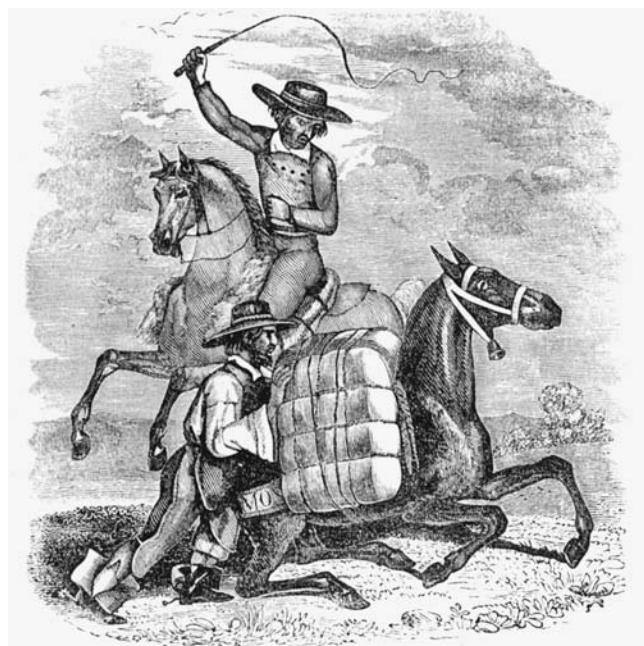
Mules and hinnies, the offspring of a horse stallion and a female donkey, or jenny, were bred throughout the colonies in large numbers. The largest-scale breeders were in present-day Argentina. Mules from the Pampas were driven north to Córdoba and then to a fair in Salta, a site with excellent pasturage. There, 60,000 might be sold to transporters doing business in the Andes. Carrying MERCURY, fuel, WINE, cloth, and other goods to POTOSÍ and other MINING districts and transporting SILVER and lesser quantities of GOLD to other markets and ports required enormous numbers of mules. Rio Grande do Sul was an important source of mules in BRAZIL, serving particularly the mining district of MINAS GERAIS, which was dependent

on slaves, burros, and mules for transport to SÃO PAULO and RIO DE JANEIRO. In PANAMA, mules to transport silver and other products across the isthmus were imported from NICARAGUA, HONDURAS, COSTA RICA, and CARTAGENA DE INDIAS; the brutal passage killed many of them.

Professional muleteers were most evident in the Andean regions of PERU, CHARCAS, and the Kingdom of QUITO. The mountains made TRANSPORTATION difficult and expensive, but the profit on shipped goods kept the muleteers busy. In the 18th century, a mule load of wine or brandy from AREQUIPA to CUZCO cost nine to 12 pesos, while the same load to Potosí was 24 or 25 pesos. In VENEZUELA, CACAO shippers employed mules when river transport, often used by smugglers, was not available, although the cost was significantly higher. Ready access to muleteers and their trains was critical for moving cacao to CARACAS in a timely manner.

Transporters charged on the basis of days of travel rather than distance, an approach that took into account terrain and season. And, the time of travel was often lengthy. From Arequipa, Peru, mule trains required up to 40 days to travel to LIMA, 60 days to Cuzco, 90 days to La Paz, and 150 days to Potosí. VERACRUZ to MEXICO CITY in 1803 typically took 20 to 35 days by mule train.

By 1550, about 100 mule trains were carrying goods between Mexico City and Veracruz. In 1803, Alexander von Humboldt estimated that 70,000 mules were used in the trade. Muleteers purchased them at minimal cost from northern Mexico and the lowlands near Veracruz. A mule train from Orizaba to Veracruz in 1812 contained more than 2,000 mules.



Mules were the most important form of land transportation in the Latin American colonies. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

At the beginning of the 17th century, the president of the Audiencia of Guadalajara and his relatives and dependents turned supplying mules to miners into a lucrative source of income. Miners used them for transportation as well as power for ore-crushing equipment.

CORREGIDORES distributed mules to Amerindians in *repartos de mercancías* at inflated prices; for example, in the 1720s in Chalco, Mexico, mules for which a *corregidor* paid six to 12 pesos were distributed to indigenous recipients, who were charged 28 to 30 pesos. Mules were also distributed to NATIVE AMERICANS by *corregidores* in Peru. When the *REPARTO* was legalized in Peru and an official list of the quantity of goods and their sale prices was compiled in 1753, 95,500 mules accounted for more than 3.4 million pesos, nearly 60 percent of the total *reparto*. About 20,000 mules were used annually in late 18th-century TRADE between Mendoza and SANTIAGO DE CHILE.

An estimated half-million mules were providing transportation in Spanish America at any one time in the late 18th century. A similar number has been suggested for Brazil.

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**municipal council** Spanish cities, villages, hamlets (*lugares*), and large indigenous *pueblos* had a municipal council as the institution of local government. With the exceptions of frontier posts that developed into municipalities and MINING camps, Spanish municipal councils known as *cabildos* or *ayuntamientos* were created immediately after a municipality was founded. In BRAZIL, the council was known as a *senado da câmara*. The male adult citizens (*VECINOS*) of towns were eligible for election or appointment to their positions. Racial and social restrictions could also come into play; generally, the smaller the municipality, the less important they were.

Spanish municipalities had jurisdiction not only of the urban area but also of a substantial surrounding hinterland that extended until it met that of the next town. Thus 17th-century BUENOS AIRES had a jurisdiction of some 300 miles (483 km) before meeting that of Córdoba. MEXICO CITY's city council originally claimed a jurisdiction that the Crown considered outrageous and in 1539 was limited to 15 leagues in each direction, still a substantial jurisdiction.

A Spanish municipality's councilmen or aldermen were known as *REGIDORES* and occasionally, for example, in Potosí, as *veinticuatro*s. The number varied from four

to six for small towns to 12 or more for the cities of LIMA and Mexico City. Each January 1, the aldermen in Spanish municipalities elected one or two *alcaldes ordinarios* who served as judges of first instance. The district *CORREGIDOR*, *ALCALDE MAYOR*, or governor normally chaired meetings of the council. In addition, municipalities had a number of other positions under its direction; these included a sheriff or chief constable (*alguacil mayor*), a municipal standard-bearer (*alférez mayor*), an inspector of weights and measures (*fiel ejecutor*), a public trustee (*depositario general*), and a collector of fines (*receptor de penas*). Other posts included notary (*escribano*), attorney (*síndico* or *procurador general*), overseer for city property (*mayordomo*), and rural constables (*alcaldes de la hermandad*). Whether a municipality had some or all of these positions, or even more, depended on the size of its population.

In Brazil, the jurisdiction of town councils extended into their hinterlands, and the general organization of the councils was very similar to that in Spanish America. The number of aldermen (*vereadores*) was usually three or four, and judges numbered one or two. Brazilian councils had more authority for many years, as it was only in 1696 that the Crown named royal judges (*juizes de fora*) to preside over selected town councils and their elections; this

ultimately enabled the Crown to reduce local privileges. Unlike in Spanish America, municipal councils remained elective rather than being sold or inherited. Town government in the Portuguese colony, however, only became an effective principle of territorial organization in the second half of the 18th century with the settlement of interior regions resulting from the GOLD boom.

Indigenous villages in Spanish America with at least 40 inhabitants also had municipal councils, the size depending on the number of residents. An *alcalde mayor* served as the local magistrate for minor infractions. *Regidores* issued local regulations; *alguaciles* were the villages' constables. Unlike in Spanish municipalities, *regidores* in Amerindian villages were elected annually, and the Crown did not sell the post. The positions of *alguacil* and *escribano*, in contrast, were salable and inheritable. There was no comparable indigenous village government in Brazil.

Municipal councils were responsible for the provision of public services and the regulation of a variety of activities for their communities following the initial distribution of lots for homes and gardens. For example, they oversaw public safety and public events such as holidays and processions; monitored weights, measures, and in some cases prices in the market; maintained a jail; responded to external threats; and represented the municipality in dealings with royal officials.

Municipal councils usually had limited resources at their disposal. Fees charged for use of common lands (*ejidos*) or other municipal property were sources of revenue. Others included fees for licenses or charges for using a public utility. Royal restrictions on local TAXATION, however, meant that the resources available to municipal councils were often inadequate to maintain streets, bridges, and a water supply.

INTENDANTS in the Spanish colonies had the responsibility to improve urban administration and services. This typically included increasing the resources available to the municipal councils through taxation. By the late 18th century, a number of municipalities were stronger than at any time since the first decades after their creation.

In times of crisis, the Spanish American municipal council could convoke a town meeting of prominent citizens. Known as a *CABILDO ABIERTO*, this expanded group became important in responding to the constitutional crisis of 1808.

See also *CABILDO* (Vol. I).

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Municipalities proudly displayed their coat of arms. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

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**music** Music was an important part of colonial life, both through its use in formal religious and secular events and as an entertainment. Musicians had a potentially marketable skill and might be Amerindian, European, or *CASTA*. Well before 1560, the religious orders were instructing NATIVE AMERICANS in music and using music in their services. Mestizos were performing musicians by the 1560s, and the mestizo Diego Lobato, in QUITO, in 1574 was hired to compose as well as to sing and play the organ (see *MESTIZAJE/MESTIZO*). In MEXICO CITY, the fledgling press first published music in 1556. The Third Council in Mexico in 1585 reaffirmed and in some cases tightened earlier regulations stipulating the level of musical proficiency required for certain ecclesiastical positions. The director (*maestro de capilla*) or precenter (*chanfre*) of music in a cathedral could be fined if the choir sang a wrong note.

Convents such as that of Santa Clara, founded in Cuzco in 1558, became centers of musical instruction and performance, as well as employers of musicians. In 1664, for example, the convent hired the cathedral's organist to teach music to the nuns for two years. His responsibilities were to provide daily instruction in singing, organ, and harp to a group of nuns and "all the music that might be required in the festivities organized by the convent," festivities that gave the convent an opportunity to display its musical excellence as well as flatter real or potential patrons and skewer its opponents. Playing polyphonic music was common.

Private music lessons might cost 50 to 150 pesos a year but after two years would have resulted in a saving of 800 or more pesos in a daughter's dowry to a nunnery. Convents at times considered musical talent worth reducing the dowry required for entry. In 1694, an organ builder offered to provide a new organ to a convent as a dowry for his daughter becoming a nun.

In contrast to the rich musical tradition of nunneries, many male convents were content with plainchant accompanied by organ; they hired professional musicians to perform more complex music. Others, however, placed more emphasis on musical instruction and performance. The JESUITS, in Cuzco at least, took pains to provide their students with musical EDUCATION; it included singing and playing keyboard instruments. The MERCEDERIANS in SANTIAGO DE CHILE, Chile, in the 17th century, owned instruments that included an organ, dulcian, cornets, and wind instruments. By the 18th century, they had added a clavichord, harpsichord, harp, and other instruments.

Besides keyboard instruments, colonial musicians used harps, guitars, drums, wind instruments including the bassoon (*bajón*) and shawm (similar to an oboe but with a double reed), flutes, small flutes (such as the flageolet, which resembles a recorder or *chirimía*), trumpets, sackbuts (an early trombone), crumhorns (double reed wind instrument with a curved end), string instruments, and others. African drummers were noted along the processional route of the new VICEROY OF PERU Antonio de Mendoza during his formal entrance to LIMA in 1551. Marimbas and jawbone clackers were other instruments favored and introduced by Africans. The renegade friar Thomas Gage commented on the castanets and guitars that accompanied dancers at Huejotzingo, between PUEBLA and Mexico City.

By 1553, the cathedral in Cuzco had two organs. A new organ in Lima in 1625 cost the substantial sum of 6,000 pesos, and in 1638, a Franciscan friar completed a 600-pipe organ for the order's convent in Quito. By 1625, the cathedral in Lima had recruited the best musicians from the other cathedrals in Peru and from that date forward led in musical talent and innovation. In 1631, the first piece of polyphony in the Americas was printed in Lima, and the first opera composed and produced in the Americas, by PENINSULAR Tomás de Torrejón y Velasco, chapelmaster (1676–1728), was performed in Lima in 1701. Joseph de Orejón y Aparicio, organist in Lima (1742–60) and briefly chapelmaster, was reputedly the finest CREOLE composer before independence.

The Viceroyalty of Peru had families of indigenous and creole musicians. In Trujillo, Bernardo García, his son, and his grandson were organists in the cathedral. In Lima, creole Miguel García del Águila was an organist, as were his two sons. In Quito, the Ortuño FAMILY dominated cathedral music for 70 years.

While some instruments were imported from Spain, others were made in the colonies. Workshops in Pátzcuaro, NEW SPAIN, manufactured high-quality bells, trumpets, sackbuts, guitars, harps, and organs. In the second half of the 18th century, pianoforte makers had orders, although pianofortes made in England, Spain, and Germany were being imported; one merchant in 1804 listed 14 from Cartagena, Spain, for sale. Church authorities were particularly partial to organs. One was in use in Mexico City in 1530, and some were even portable, being used in processions and theatrical performances.

One historian of colonial music has argued that peninsular Juan Gutiérrez de Padilla, the director of music (*maestro de capilla*) at the cathedral of PUEBLA from 1629 to 1664, was "the most competent and imaginative," as well as the most prolific, composer in the Americas. Both the polyphonic music and plainchant in Puebla's cathedral were considered excellent, a result of its substantial program of training boys and young men to sing, play instruments, and compose.

Music was a popular form of entertainment in the homes of the wealthy. Even in Santiago, CHILE, women in

the early 18th century were playing in salons instruments that included the harpsichord, spinet, violin, castanets, tambourine, guitar, and harp.

Popular music or the music of the street was often associated with Africans and typically involved rhythmic drumming and dancing. Already in 1563, authorities in Lima's city council were trying to restrict the places slaves could dance, but their efforts were never successful for long. In Mexico City in the 1570s, the city council prohibited dancing in the central plaza on feast days. Jesuits in Lima encouraged slaves' love of music, and in the 17th century assembled an excellent band of black musicians who played a variety of instruments, including drums, trumpets, and flutes.

Dancing and singing were allowed in taverns (*pulquerías*) in Mexico City, but these activities, accompanied by drinking and gambling, extended into the streets where musicians played as the poor of all backgrounds tried to forget their hard lives. Taverns (*chicherías*) in Potosí served the same purpose and were frequented by Andeans, Africans, poor Spaniards, and persons of mixed background. "At all hours of the night one hears the drums . . . and as they dance around in circles they keep drinking." An Italian friar in Mexico City in the 1760s noted that the aristocrats danced "French-style," and their parties caused no scandal. A second type of party, the *sarao* (soirée), involved "a medley of songs, music, dancing, drunkenness, and other ills." Even worse were the parties frequented by commoners and marked by a

variety of indecent dances. Although forced inside in late colonial Mexico, similar parties often included songs and dances described by the offended as "crude, scandalous, profane."

Portugal had a rich musical tradition, and at least some of this crossed the Atlantic to BRAZIL. Gregorian chanting accompanied by organ was a staple of the religious orders and evident in their convents in SALVADOR DA BAHIA, RIO DE JANEIRO, Recife, and elsewhere. In VILA RICA DO OURO PRÊTO in MINAS GERAIS, the religious brotherhoods (*irmandades* and *confrarias*) competed in their music as well as their buildings. Pipe organs were difficult to deliver to Vila Rica and accordingly prized and kept in good condition. Bassoons, trumpets, flutes, oboes, and other instruments also were available. Professional groups of 12 to 16 singers hired out to the brotherhoods. The city also had an opera house and a theater by 1770. In addition to the music of high religion and culture, noted professional mulatto musicians provided the music to accompany dancing in the streets (see *MULATO*).

See also MUSIC (Vols. I, III, IV).

#### Further reading:

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# N

**Native Americans** By the middle of the 16th century, Europeans and their descendants had encountered Native Americans throughout most of Spanish America and parts of BRAZIL. The most advanced cultures—the Nahuas (and others in the Aztec Empire) and the Incas—were under Spanish domination. Of the enormous variety of other native peoples, some were under Spanish and, to a much lesser degree, Portuguese rule, while others remained unconquered. By 1550, infectious disease, a change in diet, overwork, and a variety of abuses had already significantly reduced the number of indigenous people. Although location affected the virulence of diseases, the more advanced civilizations perhaps suffered the most, for their greater populations, social organization, and economic productivity made them especially attractive to conquistadores and early settlers. The remainder of the colonial period was marked on the one hand by the interplay of colonial institutions of exploitation, including mandatory labor and TRIBUTE, and imposed Catholicism and on the other by Amerindians' desire and ability to circumvent colonial exploitation and indoctrination by continuing some traditional practices, using the judicial system, passive resistance, and flight.

The decline in native population, the implementation of the *CONGREGACIÓN* and *REDUCCIÓN*, and concern over vagrants afflicting indigenous villages led the Spanish Crown, especially from the 1570s, to implement a policy of segregating Native Americans from Spaniards. This segregation into two “republics” (*república de españoles* and *república de indios*) sought to protect Native Americans by limiting their contact with non-Indians, other than their own mestizo children (see *MESTIZAJE/MESTIZO*). A 1578 decree ordered the complete exclusion of mestizos, mulattoes, and blacks from native villages; one in 1600

excluded Spaniards (see *MULATO*). Continued mixing and a lack of effort to create new towns for the excluded groups doomed the policy to widespread failure. Even in CITIES originally established with a separate indigenous district, for example, LIMA, segregation quickly failed.

The cultural variety among Native Americans continued after conquest, but the forms of imperial administration evident in the Aztec and Inca Empires disappeared. Importantly, however, at the subimperial level a great deal of preconquest culture and organization remained. The Spanish Crown recognized local rulers (*CACIQUES*, and *KURAKAS*) and nobles (*principales*) as hidalgos and permitted the continuation of some privileges that separated them from commoners (see *HIDALGUÍA*). Caciques and *principales*, for example, were allowed to ride horses and MULES, carry swords and firearms, and wear Spanish clothing.

The continuity of indigenous cultural practices was most evident at the village level where *caciques* and nobles tended to dominate despite Spanish efforts to restrict them. Even when Amerindian nobles continued to hold local offices, for example, in villages in the Andes, pressure by Spaniards rendered them unable to sustain the level of reciprocity and redistribution that had marked precolonial times. Thus, Native American commoners increasingly considered that native authorities were demanding labor and tribute in excess of the reciprocal benefits they provided.

Caciques, *kurakas*, and other local rulers, such as *batabs* in Yucatán, found themselves in the frequently difficult position of serving first as middlemen between Spanish *encomenderos* and then between provincial administrators (*alcaldes mayores* and *corregidores*) and their peoples (see *ALCALDE MAYOR*; *CORREGIDOR/CORREGIMIENTO*; *ENCOMIENDA*).

Assigned an amount of tribute based on usually outdated censuses, they were personally responsible for seeing that it was paid. Ongoing population decline, for example, in Central Mexico until the mid-17th century, meant that the survivors had to pay tribute for deceased persons still on the books. Shortfalls could result in the imprisonment of the responsible cacique. Over time, many but certainly not all local rulers became indistinguishable from commoners to Spaniards; within villages, however, caciques continued to have some authority.

The Spanish Crown's land policy ensured the continuation of settled indigenous groups with communal holdings. While the use of *congregaciones* and *reducciones* forced Native Americans to relocate, those who remained in the new locations had access to village lands. While Spaniards often usurped land or purchased it illegally, and might also have "legalized" these actions through a special payment for title confirmation known as a *composición*, many indigenous villages retained substantial amounts of land at independence.

Amerindians throughout Latin America were subjected to religious indoctrination by Catholic friars and priests. The result was typically a blend of preconquest and Catholic beliefs. Acting on the premise that Native Americans could never be full adults, the Tribunal of the INQUISITION in general exempted them from its jurisdiction.

The same attribution of permanent minority affected the standing of Native Americans in legal proceedings. No individual Amerindian's word was equal to that of a Spaniard in court. Nonetheless, native villages frequently and with considerable success used the legal process to protest land usurpation, in particular, despite the costs of litigation.

The Spanish Crown required Native Americans to pay tribute throughout the colonial era. This direct tax levied on the conquered peoples was evidence of their "commoner" status and implied, by extension, that Spaniards were of "noble" status. Indeed, paying tribute became, first and foremost, explicit documentation of Native American status, although in 1572, PHILIP II ordered free blacks, mulattoes, and ZAMBOS to pay it as well. Ostensibly a symbol of vassalage, in practice tribute was both a source of income, first to *encomenderos* and then, increasingly, to the royal treasury (REAL HACIENDA), and a way to force Amerindians into a cash ECONOMY. While *encomenderos* had accepted goods they could use or sell as tribute, by the mid-1560s, indigenous people in NEW SPAIN were required to pay in cash. This forced them to enter the market either as laborers or vendors of their produce in order to obtain the requisite cash. The amount of tribute varied by region.

The CATHOLIC CHURCH also required payment from Native Americans. This included either the tithe or a substitute for it. The tithe was also required of Spanish producers of agricultural products and livestock, as were fees for a variety of religious services. Between tribute and payment to the church, the fiscal demands on

Amerindians were substantial. In Yucatán, a family in the 17th century annually paid 38 reales to the state and 34.5 reales to the church. At that time, an adult male received three reales a week when engaged in the labor required by the state (*servicio personal*) but, of course, incurred expenses during the period of service.

In some areas of very early contact, abuse, and enslavement, for example, in HISPANIOLA, the indigenous population became virtually extinct. In many locations throughout Spanish America, however, native populations had increased from their 17th- or early 18th-century nadirs by the early 19th century, although nowhere did they return to precontact size. The total Native American population at the time of independence was probably between 5 and 6 million, or about 15 percent of its size before European contact.

See also AZTECS (Vol. I); INCAS (Vol. I); NATIVE AMERICANS (Vols. I, III, IV).

#### Further reading:

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#### New Christian See CONVERSO.

**New Galicia (Nueva Galicia)** The *AUDIENCIA* district of New Galicia, also known as GUADALAJARA, after its capital from 1561, encompassed the governorship of New Galicia; New Vizcaya, created in 1562; New León, established 1596; New Mexico, established 1598; and the Californias. It stretched north from the Audiencia of Mexico into present-day United States, west to the Pacific Ocean, and east to the Gulf of Mexico.

The Audiencia of Guadalajara was established in 1548. In the 1620s, the president of the *audiencia* named 90 *corregidores* and *alcaldes mayores*, and the governor of New Vizcaya appointed another 27 (see *ALCALDE MAYOR; CORREGIDOR/CORREGIMIENTO*). The introduction of the INTENDANT system divided New Galicia into the intendancies of Guadalajara, San Luis Potosí, and ZACATECAS.

From the initial brutal conquest by Nuño de Guzmán came the assignment of NATIVE AMERICANS in *ENCOMIENDAS* to conquistadores and subsequently to the first settlers. Following the Mixtón War of 1541–42, Spaniards continued to move north. The discovery of SILVER at Zacatecas in 1546 produced a boomtown and corresponding demand for laborers, beef, leather, tallow, and other supplies. The Royal Road north from MEXICO CITY led to Zacatecas, and a road from Guadalajara to Zacatecas was also developed. Within this triangle fell the BAJÍO, a fertile region that became a major source of agricultural products for the MINING areas (see AGRICULTURE).

The native population of New Galicia declined from an estimated 855,000 in 1519 to about 69,000 in 1650; in the latter year the non-native population, which had been expanding since the Spaniards' arrival, totaled some 61,500. Both native and non-native populations expanded subsequently, but at some point between 1650 and 1700, non-Indians exceeded the number of Amerindians. By 1821, there were some 350,000 non-natives, and 260,000 persons classified as Indians.

The population of the capital city of Guadalajara sextupled during the 18th century. It totaled about 35,000 in 1803, which put great pressure on the food supply and raised the number of underemployed.

### Further reading:

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**New Granada, Viceroyalty of** The New Kingdom of Granada, or simply New Granada, was but one name for the *AUDIENCIA* district of Santa Fe de Bogotá. Later, the name also applied to the viceroyalty of which Bogotá was the center. Despite an earlier, unsuccessful experiment with a VICEROY from 1717 to 1723, the Spanish Crown responded to continued foreign threats in the CARIBBEAN by establishing the Viceroyalty of New Granada in 1739. Created almost entirely from the VICEROYALTY OF PERU, the new viceroyalty's territory included most of present-day Colombia, VENEZUELA, Ecuador, and PANAMA: In the north, the viceroy's jurisdiction extended to the southern boundary of GUATEMALA; in the south, it ran to the Amazon River marking the southern limit of the province of Mainas; it included the presidency of QUITO in the west and claimed the province of Guiana to its boundary with BRAZIL in the east. Thus, the viceroyalty had a Caribbean coast, on which the ports of La Guaira and CARTAGENA DE INDIAS were most important, and a Pacific coast, where GUAYAQUIL was preeminent. The Andes mountain ranges were the dominant geographic feature in the *audiencia* districts of Santa Fe de Bogotá and Quito where, as a consequence, poor and expensive TRANSPORTATION was a constant limitation. Indeed, New Granada was fragmented in many ways thanks to long distances, rugged terrain, and effectively autonomous Spanish settlements and indigenous villages.

When founded, the viceroyalty had three *audiencias*: Quito, Bogotá, and Panama. The last was terminated in 1751 in belated acknowledgment that the era of galleons and transisthmian TRADE was over. A new tribunal was founded in CARACAS in 1783, complementing the captaincy general authorized in 1777 (see CAPTAINCIES GENERAL).

## DEMOGRAPHIC CHANGES

Estimates of the native population at the time of conquest of New Granada vary from 850,000 to more than 4 million. Scholars agree, however, that the number, as elsewhere in the Americas, declined disastrously. The decision of the conquistadores and early settlers to reside where there were large numbers of Amerindians, notably in the Chibcha region where Bogotá and Tunja were founded, facilitated the introduction of EPIDEMICS whose effects were exacerbated by abuses perpetrated by *encomenderos* and their successors (see *ENCOMIENDA*).

A census of 1778–80 revealed that New Granada's population was less than 800,000. Some 45 percent (360,000) of that number lived in the Eastern Cordillera of the Andes between Bogotá and Pamplona. About 10 percent (82,500) lived in adjoining areas. About 20 percent (162,000) of the population resided on the Caribbean coastlands in the provinces of Cartagena, Santa Marta, and Riohacha. Another 11.5 percent (91,000) lived in the province of Popayán and adjacent highlands. In the Western Cordillera, where Antioquia was the major settlement, were some 46,000 people. The Pacific lowlands, including Barbacoas and the CHOCÓ, had important GOLD fields, but only about 4 percent (30,500) of the colony's population.

By the time of the census, New Granada had become a society with a plurality (46 percent) of "free of all colors," in the census's terminology (see *MESTIZAJE/MESTIZO*). Whites accounted for 26 percent of the population; NATIVE AMERICANS, 20 percent; and black slaves, 8 percent. Amerindians were a majority in the province of Pasto, the Llanos of Casanare, and the frontier regions along the coasts.

## SPANISH CITIES AND INDIGENOUS VILLAGES

Located in a populous and fertile area of the Eastern Cordillera, Santa Fe de Bogotá became New Granada's capital and largest city. With the support of the *audiencia*, its merchants and *encomenderos* were able to develop a royal road to the Magdalena river port of Honda and use it to supply the highlands to the east; thus, Bogotá became a distribution center for imports. The city's population included only about 2,000 Spaniards in 1630, when LIMA had 9,500; by the 1770s, its population had increased to 19,000 inhabitants; further growth brought it to about 28,000 by the 1810s. Besides being an administrative center and home to a mint from 1620, in 1630 it was the see of an archbishop and had four parishes; Augustinian, Dominican, Franciscan, and Jesuit convents; three nunneries; a hospital; and a Jesuit college with 60 students (see MINTS). While the city was home to the elite of the region, their wealth was relatively modest, and few enjoyed titles of nobility.

Cartagena de Indias, with more than 1,500 Spaniards in 1630 and a total population of 14,000–16,000 inhabitants in the late 1770s, was the region's major port, a stop for the galleons that long sailed to NOMBRE DE DIOS and



PORTOBELLO, and an important MILITARY bastion. Whites numbered almost 4,400, and there were more than 3,000 black slaves. Popayán, with some 14,000 persons living in and near it, was an important link to MINING areas in the Pacific lowlands. Mompós was an important port on the Magdalena River and had 7,000–8,000 inhabitants in the 1770s. Gold from Antioquia and the Chocó exited the interior via Mompós.

### TRANSPORTATION

The terrain of the northern Andes made land transport unusually difficult in New Granada. A 16th-century observer in the province of Popayán reported that the roads were surely the worst in the world. An 18th-century traveler on the Royal Road from Honda to Bogotá described it as “a road the very sight of which will horrify your excellency,” particularly in the wet season. The Spaniards’ initial dependence on indigenous carriers gave way to reliance on MULES and mule trains, although human carriers continued to be used in regions that not even mules could negotiate. Amerindians or African slaves were used to transport goods to the mines and gold from them, for example (see SLAVERY). Unlike in NEW SPAIN or Peru, river travel was important in New Granada.

River travel allowed for transport in areas of New Granada. The Magdalena River is navigable from its mouth to the rapids at Honda, about 500 miles. The Cauca River is navigable for about 250 miles from which point it joins the Magdalena. In addition, the Atrato and San Juan Rivers provide access into the Chocó. River travel was almost invariably but one leg of transporting merchandise or other products, however. Not surprisingly, the cost of transport was very high in New Granada.

Transatlantic shipping from CÁDIZ to Cartagena de Indias took about a month. The return trip via CUBA required about 70 days.

### AGRICULTURE AND RANCHING

Gold mines provided an ongoing market for locally produced goods from the Cauca Valley and highlands near Popayán. Sugarcane grown in the Cauca Valley and turned into brandy (*AGUARDIENTE DE CAÑA*) was always in demand, as was TOBACCO. WHEAT, MAIZE, potatoes, beans, and other crops were grown near Popayán. Unlike in New Spain, however, geographical and climatic conditions precluded large agricultural properties near the mines.

Livestock were raised, among other places, in the Cauca Valley from Cali northward and in pastures of the Magdalena River. Meat and CATTLE products—hides and tallow—also found a ready market. Meat was so plentiful that it was a daily item in most people’s diets in the Cauca region. A few large landowners there focused on SUGAR production and livestock that could be sold to the mining camps; small farmers engaged in subsistence production and sold relatively few items including maize, plantains, and vegetables.

### ARTISANS AND DOMESTIC TEXTILES

New Granada had the usual array of artisans and, like other colonies, became increasingly self-sufficient in the 17th century. An incomplete list of 57 occupations in Bogotá in 1783 shows that tailors were the most numerous (104) followed by masons (90), cobblers (66), and carpenters (57). Silversmiths were considerably more common than goldsmiths. Among the more interesting occupations listed are vagabonds (seven), billiard-hall keepers (two), and penmaker (one). A more complete list of 835 artisans in Cartagena in 1779–80 showed 81 tailors, 79 carpenters, and 75 cobblers; masons numbered only 25. Five penmakers, three gunsmiths, two musicians, one physician, and one druggist were also listed.

The most important textile center in New Granada was based in Tunja. In 1571, CACIQUES in Chita received 6,825 *arrobas* of cotton; blankets were used to pay TRIBUTE. Toward the end of the 16th century, the first *OBRAJES* were organized in Tunja, a sign that SHEEP had adapted to the highland valleys. By 1610, the city had eight *obrajes* and was producing woolen cloth, skirts, blankets, and hats. Tunja also produced cotton cloth, obtaining cotton from Casanare. During the 17th century, New Granada became increasingly able to provide low-priced textiles to the regional market. A report in 1761 indicated that Tunja had long been supplying merchants and landowners from Maracaibo and Mérida with blankets, hats, linens, and shirts. By that time, however, Socorro had displaced it as New Granada’s leading textile producer.

### EXPORTS AND IMPORTS

New Granada’s primary export was gold from the 16th-century conquest onward. Mines in Popayán, Barbacoas, the highlands of the Central Cordillera in the province of Antioquia, and the Chocó in the Pacific lowlands produced more of the auriferous metal than any other Spanish colony. Its value, however, was far below that of the SILVER produced in Peru and New Spain and also well below that of the gold produced by BRAZIL during its 18th-century boom. The nature of gold mining in New Granada, moreover, did not result in substantial investment in mines and equipment. Labor costs, including slaves, were the primary expense. Through Cartagena came about 4,250 African slaves from 1704 to 1713, another 10,300 arrived from 1714 to 1736, and nearly 13,000 more were imported from 1746 to 1757. How many went to the mining district is uncertain, but about 4,000 slaves were working in the Chocó in 1759 and more than 7,000 in 1782. In early 18th-century Antioquia, on the other hand, expanded production rested on free labor provided by prospectors who panned for gold. By the latter part of the century, however, slave labor increased substantially, totaling between 9,000 and 13,500 persons in 1778.

Registered gold production in the 18th century showed a substantial, if not steady, increase, rising from the equivalent of 500,000 pesos annually from 1715 to 1719 to about double that in the early 1740s. After declining in the

1750s, it rose again in the 1760s to about 900,000 pesos a year and continued upward to almost 2 million pesos in the latter 1790s. How much actual production was remains unknown, but it certainly exceeded the registered amounts and probably by a substantial sum.

New Granada had a thin market for imports, especially luxury goods. Textiles were the most important import, accounting for about 60 percent of the volume Bogotá received in 1761. Other merchandise included hardware, paper, and spices. In that year, the city received 70 times more domestic products, including a substantial amount of molasses, than imports. In the 17th century, Cartagena regularly purchased flour for its own consumption and to provision the fleet from producers in the Eastern Cordillera. Grain shortages in the 18th century forced it to rely on external sources.

New Granada was renowned for its illicit commerce (see SMUGGLING). In the 17th and 18th centuries, the coastal provinces of Cartagena, Riohacha, and Santa Marta were well frequented contraband centers through which flowed textiles, slaves, manufactured items, spices, wine, and other items that were sold by foreign traders. In return, they received gold, pearls, hides, and other local products.

### ADMINISTRATION

Prior to the establishment of the viceroyalty in 1739, the *audiencia* districts of New Granada and Quito were under the jurisdiction of the viceroy of Peru, while Venezuela was under the Audiencia of Santo Domingo. The chief executive of New Granada was initially a president but from the early 17th century was a governor and captain general without legal training (*de capa y espada*). Cartagena, Antioquia, Los Museos and Colimas, Popayán, and Santa Marta–Riohacha were placed under governors by 1575, and 23 *corregidores* administered the remaining jurisdictions of New Granada (see CORREGIDOR/CORREGIMIENTO). Uniquely in the mainland empire, New Granada was not included in the intendant system that was introduced elsewhere in the late 18th century.

Treasury offices existed in 1630 in Cartagena, Santa Marta, Antioquia, and Bogotá. Bogotá also received a Tribunal of Accounts in 1605 and a mint in 1620.

### CHURCH

New Granada received its first bishop when Santa Marta was established as a diocese in 1531. A second bishopric was created for Cartagena in 1534. Popayán became a bishopric in 1546, and in 1553 the bishop of Santa Marta was moved to Santa Fe de Bogotá, which became an archdiocese in 1565. In 1574, Santa Marta again received a bishop. A final bishopric in the archdiocese was created for Antioquia in 1804.

The first DOMINICANS arrived in New Granada in 1529, when 21 reached Santa Marta. FRANCISCANS arrived in Bogotá in 1550, and AUGUSTINIANS established themselves in the 1570s. The first JESUITS arrived in the 1590s but were dependent on the province of Peru into the

17th century. Indeed, none of the orders had independent provinces in New Granada at the time that Bogotá became the see of an archbishopric. In 1609, the bishop of Cartagena reported there were 107 Dominicans, 77 Franciscans, and 65 Augustinians. A report in 1722 indicated 223 Dominicans, 257 Franciscans, 276 Augustinians, and between 150 and 200 Jesuits.

In 1630, Cartagena had a “very sumptuous” Dominican convent and also convents for Augustinians, Franciscans, and MERCEDARIANS. The Society of Jesus and two nunneries were there as well. In 1610, the third tribunal of the INQUISITION in the Indies was established at Cartagena, a response to the many foreign heretics who arrived to trade illicitly in New Granada’s coastal provinces.

By 1630, Franciscans, Augustinians, Dominicans, and Jesuits were well established in Bogotá. In addition, there were three nunneries and a hospital. The same orders were present in Tunja, which also had two nunneries and a hospital, and in Pamplona, which had a nunnery and a hospital. Mérida had Dominican, Franciscan, and Augustinian convents as well as a hospital.

### EDUCATION

In four cities in New Granada—Bogotá, Cartagena, Popayán, and Tunja—religious studies leading to ordination were available. In Bogotá, the Dominicans began teaching grammar in 1563 and added philosophy and theology in 1572. By 1583, they were also offering arts and theology in Tunja and Cartagena. The Jesuits established a *COLEGIO* in Bogotá that had 60 students in 1630. It also opened the Colegio-Seminario of San Bartolomé and the Universidad Javieriana there; the only other source of higher EDUCATION in Bogotá in the late 17th century was the Dominican University of San Tomás (see UNIVERSITIES). New Granada had no royal and pontifical university equivalent to those in New Spain and Peru.

The expulsion of the Jesuits and the need to replace their institutions of higher education resulted in the creation of chairs of natural science. José Celestino Mutis, a botanist teaching mathematics at the Colegio Mayor of Rosario, in Bogotá, promoted Newtonian science, and starting in 1777, one of his students began teaching Newtonian physics. New Granada also was the site of Antonio Nariño’s translation and publication of the French Revolution’s *Declaration of the Rights of Man and the Citizen* in 1794, an act that brought his immediate arrest and transport to Spain.

Although SIMÓN BOLÍVAR was able to create Gran Colombia, a political entity consisting of three *audiencia* districts from the Viceroyalty of New Granada, the construct foundered in 1830; it was no more effectively integrated than its predecessor had been.

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**New Spain, Viceroyalty of** By 1560, New Spain, the first of four Spanish viceroyalties in the Americas, had completed 15 years under its able first VICEROY, Antonio de Mendoza, and a decade under his successor, Luis de Velasco. Franciscan, Dominican, and Augustinian friars had been evangelizing the indigenous people for decades, and the diocesan clergy was in place in Spanish cities and towns. The viceroyalty's administrative structure had taken shape, with *AUDIENCIAS* established for GUADALAJARA, GUATEMALA, SANTO DOMINGO, and Mexico. Explorers spurred by hope and rumors had rapidly surveyed lands that extended from Florida into the present-day southwestern region of the United States. The majority of Spanish municipalities in New Spain had been founded, and VERACRUZ was firmly established as Mexico's legal port for Atlantic and Caribbean TRADE. SILVER had been discovered at ZACATECAS and GUANAJUATO. A university in MEXICO CITY was graduating students, and a printer had already published a few titles. The *ENCOMIENDA* system was disappearing, and labor drafts (*REPARTIMIENTOS*) were replacing it as a labor institution. Epidemic diseases had compounded the effects of mistreatment, and millions of NATIVE AMERICANS had perished as a result. African slaves were entering Mexico in rising numbers (see SLAVERY). Miscegenation had been occurring for 40 years, and concerns about the number of mestizos and soon mulattoes, normally of illegitimate birth, were troubling authorities (see *MESTIZAJE/MESTIZO; MULATO*).

Although smaller than the VICEROYALTY OF PERU, New Spain was more populous throughout the colonial era. Its geographic core, the *audiencia* districts of Mexico and Guadalajara, was more easily traversed than the Andes. Location also made its capital more accessible than LIMA from Spain. From the mid-16th century until the 1670s, however, registered silver production in Peru exceeded that of New Spain.

### DEMOGRAPHIC CHANGES

Profound changes in the size and composition of New Spain's population occurred during the colonial era. Although the data are not exact, they give a reasonable overview of the changes. Estimates for the indigenous population show continued decline into the 17th century, dropping from 2.65 million in 1568 to 1.9 million in 1585, 1.375 million in 1595, 1.075 million in 1605, and 750,000 in 1622. Thereafter remaining stable until the mid-17th century, the number of Amerindians grew to about 3.7 million by 1810. At that time, *CASTAS* numbered

1.35 million, blacks no more than 10,000, and whites about 1.1 million, of whom only about 15,000 were PENINSULARS, for a total population of slightly more than 6 million, or almost half of the total population of Spain's New World colonies. Although these numbers reflected perceived rather than exact racial backgrounds, they reveal that the Native American population never came close to regaining its preconquest size of probably 10 to 15 million, although estimates go as high as 25 million; indeed, the total colonial population never reached the 1519 precontact population. The figures also document the rise of the *casta* population resulting from the importation of more than 110,000 African slaves by 1640 and racial mixture among Spaniards, Amerindians, Africans, and their offspring. Despite its size in 1810, the Spanish population, which undoubtedly included a significant number of persons lacking *LIMPIEZA DE SANGRE*, had been smaller than the number of Africans and *castas* from at least 1570.

### SPANISH CITIES AND INDIGENOUS VILLAGES

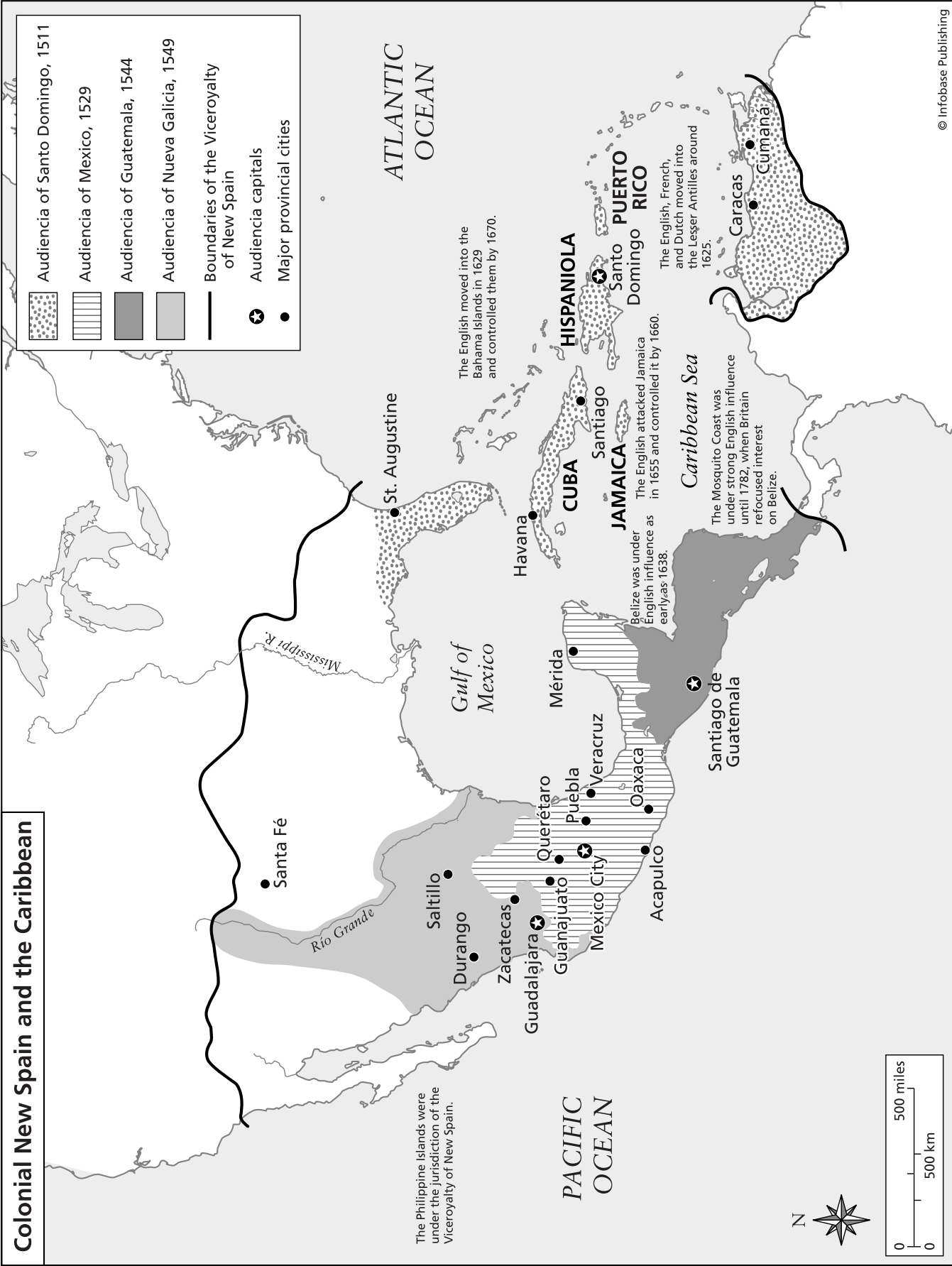
From the founding of Veracruz in 1519, Spaniards in New Spain routinely established towns at locations they considered desirable because of a dense indigenous population, proximity to natural resources, the availability of precious metals, favorable conditions for commerce or an administrative center, or a combination of these. By 1533, they had established 16 municipalities including Veracruz, Mexico City, Oaxaca (Antequera), PUEBLA de los Ángeles, and Guadalajara; by 1560, nine of the 12 cities that would become the capitals of intendancies in the late 18th century were in place (see INTENDANT).

The largest cities with their populations for 1803, as given by Alexander von Humboldt, were Mexico City (137,000), Guanajuato (70,600 counting adjacent mines; 41,000 in the urban center), Puebla (67,800), Querétaro (35,000), Zacatecas (33,000), Antequera (Oaxaca) (24,400 in 1793), Valladolid (Morelia) (18,000), Veracruz (16,000), and Mérida (10,000). Although Humboldt gave Guadalajara's population as 19,500, in reality it was about 35,000.

Mexico City was the viceroyalty's administrative, commercial, religious, cultural, and intellectual center. It was home to the VICEROY (from 1535), the Audiencia of Mexico (1527), a treasury office (*real caja*, 1521), an accounting office (*tribunal de cuentas*, 1565), a mint (*casa de moneda*, 1535), a merchant guild (*CONSULADO*, 1592), the bishop and then archbishop of Mexico (1528, 1547), a Tribunal of the INQUISITION (1571), the UNIVERSITY OF MEXICO (1553), and the first PRINTING PRESS in the Americas (1534). Although Puebla for a time rivaled the capital, it ultimately lost out; nonetheless, in 1803 it was larger than the viceregal capitals of LIMA, BOGOTÁ, and BUENOS AIRES. Outside of Mexico, only HAVANA surpassed Puebla in size.

Mexico's CITIES and towns were first and foremost the home of Spaniards. In 1630, Antonio Vázquez de Espinosa

# Colonial New Spain and the Caribbean



	Audiencia of Santo Domingo, 1511
	Audiencia of Mexico, 1529
	Audiencia of Guatemala, 1544
	Audiencia of Nueva Galicia, 1549
	Boundaries of the Viceroyalty of New Spain
	Audiencia capitals
	Major provincial cities

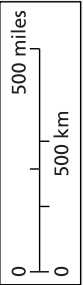
The Philippine Islands were under the jurisdiction of the Viceroyalty of New Spain.

The English moved into the Bahama Islands in 1629 and controlled them by 1670.

Belize was under English influence as early as 1638. The English attacked Jamaica in 1660 and controlled it by 1660.

The Mosquito Coast was under strong English influence until 1782, when Britain refocused interest on Belize.

The English, French, and Dutch moved into the Lesser Antilles around 1625.



listed 81 cities and towns for Mexico and Guadalajara: 15 in the district of the Audiencia of Mexico, six in the bishopric of Tlaxcala, five in the bishopric of Yucatán, eight in the bishopric of Oaxaca, 17 in the bishopric of Michoacán, 16 in the *audiencia* district of NEW GALICIA, and 14 in the bishopric of Guadiana in New Vizcaya. In the capital at the turn of the 19th century, 50 percent of the lay population of 104,935 was considered Spanish; in Valladolid, nearly 40 percent of the population was Spanish. In the early 1790s, Spaniards accounted for 56 percent of the population in the city of Guanajuato; at the same time, they were nearly 39 percent of Oaxaca's population. An exception was Querétaro, where the Spanish population was about 20 percent in 1803.

Amerindians were numerous in some Spanish municipalities, accounting for 43 percent of the population in Querétaro in the late 18th century, 28 percent in Antequera (Oaxaca), and 24 percent in Mexico City. Despite the presence of a few non-Indians, Native Americans were dominant in the many villages in Central and southern Mexico known as *congregaciones* in the late 16th and early 17th centuries or as outgrowths of missions; they remained heavily native in composition and culture in the 18th century. In the intendancy of Oaxaca, Amerindians accounted for 88 percent of the population. In the district of Xochimilco in the central plateau, Amerindians outnumbered the remainder of the population almost 10 to one (18,049 to 1,863). In the district of Juxtaluaca, also in the central plateau, the ratio was almost six to one (6,890 to 1,281). In the BAJÍO to the north, indigenous people outnumbered the rest of the population in Dolores 8,924 to 3,737. In Celaya, also in the Bajío, the ratio was about one to one (34,506 to 33,295).

Data on the *castas* in the late 18th century document them as the dominant population group in some locations. In ACAPULCO, *castas* numbered 5,557, and Spaniards, 122; no Amerindians were recorded. In Tepeaca, in the central plateau, *castas* totaled 14,444, and whites, 8,691; no Amerindians were noted. In Tlapa, also in the central plateau, *castas* totaled 3,246, and whites, 859; no Amerindians were recorded. Regardless of the exact ancestry of the *castas* in these locations, the population was thoroughly hispanized, and any indigenous people among them were perceived as mestizos (see *MESTIZAJE/MESTIZO*).

### TRANSPORTATION

By 1560, MULES, donkeys, and oxen had replaced some but certainly not all indigenous carriers (*tlamemes* or *tamemes*) in transporting goods. The seasonal movement of imported goods from Veracruz to Puebla, Mexico City, and then elsewhere in New Spain was more than the *tlamemes* could absorb, although they continued to be employed where mules could not negotiate the roads. Goods imported via the Manila trade that became regularized in the 1570s further showed the inadequacy of the pre-conquest TRANSPORTATION system based on human porters (see *MANILA GALLEONS*).

Creating roads adequate for mules and donkeys was essential for handling the goods funneled through Veracruz and Acapulco and equally so for moving silver from the mines to the mint in Mexico City and then to the ports (see *MINTS*). More difficult was creating roads capable of serving wagons drawn by mules and, less frequently, oxen. Although traffic between Mexico City and Veracruz began with the conquest, by 1570 a major road ran from Veracruz to Venta de Caceras and then divided, with the flatter southern branch favored by wagon traffic serving Puebla before going to Mexico City. By the mid-16th century, a road ran south from Mexico City through Cuernavaca to Antequera, and another went from the capital through Puebla and then through Tepeaca and other villages; the two routes passed through Seda and then went to Antequera. From that city, one road went to Huatulco and another to Tehuantepec. A route from Mexico City to Acapulco via Cuernavaca became important as a result of the Manila trade.

A key route developed after the discovery of silver at Zacatecas in 1546 was the Royal Road that went from Mexico City through Querétaro to Zacatecas and was extended northward as other mining areas were discovered; eventually it reached Santa Fe (in modern-day New Mexico). The terrain between Mexico City and Zacatecas permitted the use of wagons carrying up to 5,000 pounds (2,273 kg) pulled by six to 16 mules and thus facilitated the northward movement of MERCURY, lead, mining equipment, and other goods. The value of silver was sufficient to cover the high cost of transportation to Zacatecas and later mining districts.

Roads linked grain supplies to urban markets. Guadalajara, for example, long purchased grain mostly from growers located within 30 miles (48 km). Higher grain prices made shipment from distances up to perhaps 75 miles (121 km) profitable. Producers in the Puebla region also provided flour and hardtack to HAVANA, the latter for consumption by crews on the FLEETS. In the unique case of Mexico City and the cities around Lake Texcoco, canoes were a major means of transporting foodstuffs.

### AGRICULTURE AND RANCHING

Throughout the colonial era, the majority of New Spain's inhabitants devoted themselves to surviving. Aside from avoiding diseases, this meant growing enough food to feed a FAMILY. Indigenous people and increasingly *CASTAS* in rural areas raised MAIZE and to a lesser degree WHEAT and other grains, cultivated gardens and fruit trees, and tended livestock and fowl. After the high Native American mortality resulting from the terrible epidemic of 1576–79 threatened their food supply, Spaniards began amassing land for particularly wheat production (see *EPIDEMICS*). Although labor drafts (*repartimientos*) supplied adequate workers into the late 16th and early 17th centuries, *hacendados* turned to hiring wage laborers from indigenous villages and also to recruiting enough

resident laborers to perform essential tasks; day laborers were hired to assist with planting, weeding, and harvesting (see *HACIENDA*). Resident laborers were often able to obtain advances on their wages because owners realized the workers might leave if they refused. Usually, the more skilled the worker, the greater the advance the employer was willing to provide.

Major wheat producing areas of Mexico were Puebla and its surrounding region, the Valley of Mexico, the Bajío, northern Michoacán, and the region surrounding Guadalajara. Regions adjacent to successful mines also grew wheat for the immediate market.

Livestock were initially raised close to Mexico City but slowly pushed north and west as agricultural production of wheat, in particular, occupied land close to population centers (see *AGRICULTURE*). Aside from urban markets, livestock were necessary to meet the demand of the *MINING* centers for meat, hides, and tallow. In the early 1580s, ranchers south of Querétaro had some 100,000 *CATTLE*, double that number of *SHEEP*, and perhaps 10,000 horses (see *RANCHING*). The *CHICHIMECAS* harried livestock as well as Spaniards during the second half of the 16th century, but by 1600, peace in the Gran Chichimeca opened the northern lands for livestock. By his death in 1618, Francisco de Urdiñola, an extraordinary miner, administrator, and rancher had amassed more than 11 million acres (4.5 million ha) of northern lands; much of the *latifundio* was in New Vizcaya, but it also extended southward toward Zacatecas.

While the native population was declining, the land available for agriculture and ranching met demand. As the number of indigenous people and *castas* increased again in the 18th century and especially the beginning of the 19th century, the amount of land available for their communal use was no longer adequate. This was particularly true in the Bajío, where drought created a scarcity of maize, which led to escalating prices. Drought and frost produced famines in 1785 and 1786, and an estimated 85,000 died as a result in the latter year. Recurrent scarcity occurred in the 1790s, and the shortages in 1809 and 1810 helped *MIGUEL HIDALGO Y COSTILLA* initiate the revolt that marks the beginning of Mexico's struggle for independence from Spain.

### ARTISANS AND DOMESTIC TEXTILES

The civilizations of Central Mexico had a long history of producing outstanding decorative and utilitarian objects. The Spaniards' introduction of livestock and iron quickly expanded the supply of hides and opened up new areas for artisans. Although Spanish artisans at first tried to exclude Amerindians and *castas* from their craft guilds, they were ultimately unsuccessful, even though legislation supported their pretensions and, in the cases of silversmiths and goldsmiths, demanded that apprentices be able to document an unsullied lineage (*limpieza de sangre*).

In 1788, Mexico City had 54 craft guilds that covered a wide range of jobs in manufacturing and service. The

guild for masons was the largest with 2,015 members, 810 journeymen, and 1,205 apprentices. Tailors totaled 1,215, with 94 masters, 698 journeymen, and 423 apprentices. There were 825 carpenters, 137 lacemakers, 89 buttonhole makers, 110 ribbon makers, and 193 hatmakers. Silversmiths were 270 in number; an additional 69 men were silver sheet makers, and 22 made swords. Makers of gold wire drawers numbered 95, and 115 men were gilders. Shoemakers totaled 237; tanners were 167 in number. Candlemakers totaled 187. A variety of services were represented. These included 834 barbers and 200 hairdressers, 260 sculptors, 309 musicians, 11 architects, 513 grooms, 967 coachmen, and 1,209 carriers (*cargadores*). Not to be forgotten are artisans who made bronze bells that hung in churches all over Mexico.

While cloth predated their arrival, Spaniards introduced the unsavory manufactory known as the *obraje*. In 1600, *OBRAJES* in New Spain produced woolen cloth worth about 1.5 million pesos. Puebla and Mexico City were early centers of *obrajes*, but Querétaro and, from 1640, Coyoacán developed them as well. The expansion of *COMERCIO LIBRE* to New Spain in 1789 increased the market for Spanish and contraband English cottons. The war of independence opened Mexico to trade with Britain and spelled the end to *obrajes*.

Mexico also produced gunpowder for firearms and for blasting in the mines. The use of gunpowder for blasting rose exponentially in the 18th century. Miners at Zacatecas purchased only 13,000 pounds of powder in 1732. In contrast, miners at Guanajuato from 1778 to 1795 averaged 90,000 pounds annually. Alexander von Humboldt believed that about three-quarters of the amount produced at the royal manufactory was sold illicitly.

*TOBACCO* was grown in Mexico before the Spaniards arrived, but its use increased subsequently. In the 18th century, the Crown created a monopoly to oversee its planting and harvesting; its quality; the manufacture of cigars, cigarettes, and snuff; and its sale through state-operated dispensaries (see *MONOPOLIES, ROYAL*). Between 1765 and 1806, the value of harvests increased from 390,232 pesos to 1,378,016 pesos; the volume of tobacco registered with the monopoly rose from 1,768,851 pounds (804,023 kg) to 5,295,330 pounds (2,406,968 kg). The main areas of legal production after 1779 were Orizaba and Córdoba.

Although infrequently noted, the production of soap was important in Puebla, Mexico City, and Guadalajara. Puebla in the late 18th century produced almost 5 million pounds of hard soap a year.

### EXPORTS AND IMPORTS

Silver was New Spain's most valuable export. By the early 1560s, mines at Zacatecas were employing the patio, or amalgamation, process to such an extent that smelting had been reduced to a complementary method of separating silver from ore. The advantage of amalgamation was

that it made even ore with a relatively low silver content worth processing. The disadvantage was that MERCURY had to be available in sufficient quantity at a price that made processing both possible and profitable.

Although POTOSÍ was the byword for silver mining, Mexican mines ultimately produced much more than those of CHARCAS and Peru. This resulted from higher-quality ore and lower operating costs, including a lower rate of TAXATION until 1736 and lower labor costs. Combined, these advantages provided a greater incentive for merchants, in particular, to invest in the rehabilitation of mines, for example, by digging adits for drainage. This investment resulted in mines of unprecedented size with large workforces in the closing years of colonial Mexico. New Spain also had many more mines—some 3,000—and a number of major silver mining camps rather than just the handful besides Potosí in South America. In addition, the quality of mercury Mexico received from ALMADÉN was higher than what Peruvian mines received from HUANCAMELICA. Mexico's growth in registered silver production has been divided into three periods: The first, 1559–1627, had an annual growth rate of 2.5 percent; in the second, 1628–1724, the rate was 1.2 percent; in the third, 1725–1809, the rate was between 1.2 and 1.4 percent.

The result was that Mexico's registered bullion (primarily silver) production surpassed that of Peru in the 1670s. Starting in 1701, in every decade except the 1760s, Mexican production rose to new heights. Several figures illustrate this. From 1701 to 1710, Mexican production was 48,299,649 pesos; from 1751 to 1760, it was 111,751,450; from 1801 to 1810, the total was 216,430,466 pesos. Peruvian production, in contrast, peaked in the 1790s at 97,450,758 pesos before declining from 1801 to 1810 to 72,298,090. Overall, from 1524 to 1810, Mexico produced almost 2 billion pesos (1,946,439,377) of registered bullion; Peru's total to 1810 was just under 1.5 billion pesos (1,469,339,035).

While silver was New Spain's best-known export, other items had external markets as well. These included COCHINEAL, hides, SUGAR, flour, and vanilla. The dominance of bullion was greatest in 1595, when it made up 95.6 percent of Mexico's total exports by value. In that year, cochineal was 2.8 percent and hides were 1.4 percent. Cochineal registered in Oaxaca in 1760 was 1,067,625 pounds (485,284 kg); the figure for 1770 was 1,043,437 pounds (474,290 kg); and for 1780, 1,385,437 pounds (629,744 kg), the largest amount between 1758 and 1821. Humboldt averred that, in times of peace in the late 18th century, cochineal was Mexico's second-ranked export. Although only 14 percent of the value of silver, it was nearly double the value of sugar and eight times the value of flour, the fourth-ranked export from Veracruz. By this time, tanned hides were well down the list with a value of 80,000 pesos, only one-thirtieth of cochineal's value of 2.4 million pesos. Vanilla was an even less important export, valued at 60,000 pesos. In 1786, cochineal ranked fourth among 21 American

items imported at CÁDIZ, behind silver, INDIGO from Guatemala, and funds from the royal tobacco monopoly. It exceeded CACAO from VENEZUELA, hides from Buenos Aires, and a variety of other items.

In the early decades of Spanish settlement in Mexico, merchants imported wine and olive oil, fabrics, pottery, tools, weapons, finished leather goods and harness ware, household furnishings, expensive foods and spices, kitchen ware and cutlery, hardware, glass, paper, books, a variety of luxury goods, and a host of other items. With the introduction of amalgamation for processing silver ore in the mid-16th century, mercury from Almadén immediately became a staple. By the end of the 16th century, locally produced versions of many once-imported items had displaced them. Although Mexican woolen cloth dominated the low end of the market, textiles, whether arriving as bolts of cloth and even some ready-made clothing from Europe or as silks from East Asia via Manila, became and remained the single most important class of imports.

## ADMINISTRATION

The administrative system in place by 1560 expanded with colonization in northern Mexico but, aside from the addition of the TRIBUNAL OF ACCOUNTS in 1605 and the definitive creation of an *audiencia* for the Philippine Islands in 1595, changed little before the 18th century. Outside Mexico City and Guadalajara, royal administration was exercised through provincial officials generally known as *alcaldes mayores* (see *ALCALDE MAYOR*). Both Spanish municipalities and large indigenous villages had MUNICIPAL COUNCILS (*cabildos*) and a variety of local officials.

*Alcaldes mayores* were the link to royal administration for the majority of Mexico's inhabitants. Visitor General JOSÉ DE GÁLVEZ Y GALLARDO described them in 1771 as about 200 officials in the Audiencias of Mexico and Guadalajara who "generally do not overlook any means, however, unjust or extraordinary, that may be conducive to the accomplishment of their ends [of accumulating wealth]. Since they cannot attain their desire without evident harm to the interests of the king and of his vassals, they are equally prejudicial to the king's treasury and to his people."

Originally replacements for *encomenderos*, whose *encomiendas* had escheated to the Crown, and charged with ensuring that native tribute was collected, *alcaldes mayores*, as Gálvez indicated, quickly found ways to enhance their low salaries. A favored way was to represent merchants in Mexico City who had provided the bond the Crown required for each *alcalde mayor* before he could assume office. An *alcalde mayor* then monopolized commerce in his jurisdiction, extended raw materials on credit, and even provided cash loans to the indigenous people of the district. Payment and purchase of finished goods at low fixed prices that included interest on the advances yielded a tidy profit. Disagreeing with Gálvez's evaluation, the Crown's *FISCAL* in 1779 opined that of the

143 *alcaldías* in the Audiencia of Mexico, only 13, mostly in the cochineal-producing south, actually yielded a significant income; the majority barely got by while in office and could not put away earnings for the future.

As visitor general, Gálvez had tightened administration, brought about some personnel changes, and inaugurated an effective tobacco monopoly (see *VISITA*). In 1776, as minister of the Indies, he expanded the direct collection of excise duties, begun in 1754 for Mexico City, to 24 towns in New Spain, and revenues doubled within a few years (see *MINISTRY OF THE INDIES*). He was unable, however, to establish the intendency system in New Spain until 1786, the year before his death. Opponents of the system argued that it was unnecessary and would do little beyond adding another level of administration. Since *SUBDELEGADOS* dependent on Indian tribute for their inadequate salaries replaced the *alcaldes mayores*, the new system did not solve the problem of abuse of office at the district level. Revenues did not improve under the intendants, confirming the view expressed by Viceroy Antonio María de Bucareli and other critics.

### CHURCH

The “spiritual conquest” of Mexico undertaken by FRANCISCANS, DOMINICANS, and AUGUSTINIANS and a sparse diocesan clergy was nearing its end in 1560. The arrival of the first JESUITS in 1572 opened a new chapter for the CATHOLIC CHURCH in New Spain. By that time, an archbishop sat in Mexico City and bishoprics had been created for Puebla, Guadalajara, Oaxaca, Chiapa, Michoacán, and Yucatán. In 1620, a bishopric was erected in Durango (Guadiana), New Vizcaya.

Although there was an attempt to replace friars with secular clergy in the 1570s, it required a concerted effort, begun only in 1749, to effect the change. The most dramatic event in the 18th-century church was the expulsion of the 562 Jesuits in New Spain in 1767. The action provoked rioting in San Luis Potosí and elsewhere, to which the government responded harshly.

In 1790, Mexico City had 517 diocesan priests, 867 regular clergy, and 26 members of the CATHEDRAL CHAPTER, in addition to 923 nuns and 59 pastors and assistant pastors. The number of parishes expanded in the 18th century. Between 1746 and the early 19th century, the Diocese of Mexico grew from 189 to 243 parishes. In the Bishopric of Guadalajara, the number went from 76 in 1708 to 122 in the early 19th century, although a few had been transferred from the Bishopric of Michoacán. In 1810, there were 6,827 diocesan and regular priests in the Viceroyalty of New Spain; about one-third served parishes. While some clerics lived very comfortably, others, especially in poor rural parishes, did not. Their ranks supplied some support for the Hidalgo revolt in 1810.

### EDUCATION AND CULTURE

The clergy, both regular and diocesan, provided most of the formal education in colonial Mexico. Primary and

secondary EDUCATION was available to boys and a small number of girls; higher education was a male preserve. After their arrival in 1572, the Jesuits established *COLEGIOS* in Mexico City, Puebla, Valladolid, and other locations; following their expulsion, other orders and sometimes civil authorities took over their educational institutions. The University of Mexico opened its doors in 1553 and enjoyed the right to confer all degrees in the *audiencia* district of Mexico (see *UNIVERSITIES*). The University of Guadalajara opened in the 1790s.

Education favored rote learning and deductive reasoning from authoritative sources. The basic skills of reading, writing, and arithmetic were taught in the early years. Learning Latin was required for all boys planning to attend university. Theology and civil and canon law were the favored disciplines in higher education, although medicine attracted a few students. Faculty at the University of Mexico typically held other employment or benefited from other sources of income.

The first press in New Spain was publishing books from the 1530s. Many publications, including catechisms in Nahuatl and occasionally other native languages, were religious in nature. Other publications included eulogies of incoming viceroys, poetry read at poetic contests (*certámenes*), and legal materials. The Tribunal of the Inquisition had the responsibility of reviewing manuscripts prior to publication and censoring imported publications. As the career of Sor JUANA INÉS DE LA CRUZ illustrates, publishers in Spain sometimes brought out works by colonial authors.

Viceregal receptions, theatrical performances, poetry contests, and musical events added to the intellectual and cultural environment of Mexico City, in particular. In indigenous villages, clerics used music and theater as means of instruction.

Popular culture included music, dance, and public spectacles, for example, the activities associated with Corpus Christi throughout New Spain and the public entries of viceroys in Mexico City. Popular dances often were disapproved of by observing clergy. A visiting Italian described the songs as “quite shameless” but considered the dances “worse” for their “rather indecent gestures.” These joined singing, music, and drunkenness. He singled out the fandango, *chuchumbe*, *bamba*, and *guesito* as “all quite indecent” dances. Bullfights and cockfights, the latter invariably accompanied by betting, also vied for popular attention.

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**Nicaragua** With densely settled Pacific lowlands, lakes, naval stores, and highland GOLD fields, Nicaragua attracted Spaniards in the early 1520s; they founded the towns of Granada on Lake Nicaragua and León on Lake Managua at that time. Epidemic diseases between 1529 and 1534 may have reduced the native population by half. From the remainder, tens of thousands of Amerindians were enslaved and sent to PANAMA and then PERU; although banned by the New Laws of 1542 and despite another round of EPIDEMICS, the traffic continued until at least 1548. By 1560, the remaining indigenous population included some 6,000 tributaries, a small fraction of the number in 1520.

The appalling depopulation made land available for CATTLE and other livestock; MULES bred in Nicaragua were exported to Panama for many years. Efforts to promote COCHINEAL production in the late 16th and early 17th centuries came to naught. INDIGO production was more successful. Pine pitch harvested in the forests of New Segovia was briefly successful, with exports going to WINE producers in southern Peru.

The port of Realejo was a SHIPBUILDING center that competed with GUAYAQUIL in the 16th century but went into decline after 1610. It served as an exchange point for contraband TRADE in East Asian goods between New Spain and Peru after direct trade between them was banned in 1631. Nicaragua after 1560 could not find an export that would bring it prosperity and served largely as a source of supplies to Panama.

The creation of the INTENDANT system in New Spain in 1786 included an intendancy for Nicaragua, with its capital in León. At the beginning of the 19th century, the intendancy had a population of 159,000. Its capital had

a population of 7,571, which included 5,740 mulattoes, 1,061 whites, 626 mestizos, and 144 Amerindians (see *MESTIZAJE/MESTIZO*; *MULATO*).

Nicaragua joined cities throughout the Kingdom of GUATEMALA in declaring independence from Spain in 1821.

See also NICARAGUA (Vols. I, III, IV); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**nobility, colonial** Excluding clerics, society in Spain and Portugal was divided by law and less formally by status, the distinction being between nobles and commoners. Nobles enjoyed tangible benefits, for example, exemption from the direct TAXATION or TRIBUTE (known as *pechos* in Castile) paid by commoners (*pecheros*). They also benefited from access to royal offices unavailable to commoners.

The source of such benefits resided in the medieval division of society into functional categories: those who fought (nobles), those who prayed (clerics), and those who labored and paid (commoners). Over time, “nobility” changed from being an individual attribute based on bearing arms and possessing military skills to an inherited and thus perpetuated status. While inherited nobility and the associated *LIMPIEZA DE SANGRE* were the norm, Spanish monarchs could and did bestow nobility upon commoners, typically successful professionals and merchants.

While sharing legal privileges, the Spanish nobility was divided internally into the highest nobles (grandees), other titled nobles (for example, counts and marquises), and the most numerous, untitled nobles, or hidalgos (see *HIDALGUÍA*). By 1560, the number of bona fide nobles who had immigrated to the New World was still small. Within colonial society, however, a de facto nobility had arisen in the form of *encomenderos* and the earliest settlers, their social rank based on participation in conquest (see *ENCOMIENDA*). Seen by these early colonists as equivalent to fighting in the Reconquista in Spain, receipt of rewards such as town lots in new municipalities, and, more broadly, exemption from any form of tribute confirmed their elevated standing, at least in their minds.

A miniscule number of titled nobles and their untitled sons did go to NEW SPAIN and PERU as VICEROYS, but most titles in the colonies were the consequence of royal grants and, in some cases, sales to men who had either made fortunes or performed services to the Crown that warranted exceptional reward. While many recipients of titles were PENINSULARS, the titles themselves routinely passed to CREOLE heirs.

Even the highest-ranked colonial nobles differed from those in Spain in one crucial way: They lacked legal jurisdiction over vassals. *Encomenderos* sought this authority, but the Crown steadfastly refused to allow the emergence of a New World equivalent to the high nobility in Spain.

Although New Spain was always more populous than Peru and surpassed the southern viceroyalty in production of SILVER in the 1670s, the size of the titled nobility in LIMA surpassed that of MEXICO CITY. Francisco Pizarro received the first title in Peru in 1537. Of 115 additional titles granted during colonial rule, 64 went directly to creoles. While the Crown had granted only four titles in Peru by 1659 and a total of nine by 1679, it granted 27 between 1680 and 1699 and thereafter never granted fewer than four in a decade until the 1790s. The census of 1790 showed 49 titled nobles in Lima. The Crown granted 13 titles in New Spain during Habsburg rule and 46 more between 1700 and 1808. In GUATEMALA, only one title was granted during the colonial era. Independent governments soon abolished all titles of nobility throughout Spanish America.

Despite the wealth of SUGAR planters in BRAZIL, the Portuguese Crown neither bestowed nor sold titles of nobility on them and allowed only a few nobles to create entails on their property (*morgados*). Mostly commoner in origin, the planter class was unable to become a recognized nobility with the associated privileges and exemptions.

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**Nóbrega, Manoel da** (b. 1517–d. 1570) *Portuguese Jesuit leader in Brazil* Born in Portugal, Manoel da Nóbrega studied at the Universities of Salamanca and Coimbra, was ordained, and in 1544 joined the Society of Jesus. In 1549, he led the first group of six JESUITS to BRAZIL, accompanying the large expedition of settlers brought by the new governor, Tomé de Sousa, and soon based in the new town of SALVADOR DA BAHIA. During the next several years, Nóbrega traveled Brazil, encouraging the creation of MISSIONS and COLEGIOS. Jesuits had already built a church and residence in São Vicente, which Nóbrega considered an excellent base for their activities. Accordingly, he encouraged the establishment of a mission at what became SÃO PAULO in 1553.

As provincial of the Society of Jesus in Brazil, Nóbrega immediately began to Christianize the indigenous people, an effort helped by Father Juan de

Aspilcueta Navarro’s translation of prayers and songs into Tupí. Christianization meant Europeanization, and Nóbrega worked to get NATIVE AMERICANS to end their habitual warring and consumption of prisoners, as well as to wear clothing, repeatedly pleading for skirts for women to be sent from Portugal. He also set about trying to remedy the bad example set by Portuguese settlers, especially their failure to remain monogamous.

Nóbrega encouraged the creation of ALDEIAS, or mission villages, for the indigenous to provide an environment in which daily participation in Christian learning would prevent backsliding. The Amerindians in the villages also provided labor to sustain the village and its Jesuit fathers. The arrival of governor general MEM DE SÁ in 1558 and a new bishop, Pedro Leitão, in 1559 brought needed support for the use of *aldeias*. Colonists, not surprisingly, opposed the protection *aldeias* afforded the indigenous and coveted free access to their labor. A decree issued in March 1570 prohibited the enslavement of Amerindians in Brazil, but even Nóbrega came to believe that the use of force was necessary to “civilize” them.

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**Nombre de Dios** Established as a Spanish municipality in 1510, the port of Nombre de Dios is located on the Atlantic coast of PANAMA about 15 miles (24 km) east of PORTOBELLO. The port had a poor harbor and was known for its uncomfortable heat, humidity, bad water, diseases, and high mortality rate. A 1588 report asserted that more than 46,000 people had died in Nombre de Dios since 1519. Initially, few ships from Spain called there; in the early 1540s, only some 15 arrived annually with goods from Spain, including WINE, textiles, oil, and flour.

With Spanish SILVER MINING at POTOSÍ and the creation in the 1560s of a fleet system that included a convoy of galleons for the South American trade, Nombre de Dios became the official port through which passed the silver and less important trade items of PERU bound for Spain and imports destined for buyers in the Kingdom of QUITO, Peru, CHARCAS, CHILE, PARAGUAY, and the other provinces of the Río de la Plata region. MULE trains were routinely used to carry silver and GOLD from Panama to the mouth of the Chagres River; it then required a two-day trip by ship to Nombre de Dios. Trading fairs began in the 1550s when FLEETS arrived. By the mid-1570s, the temporary presence of several thousand people facilitated the exchange of goods.

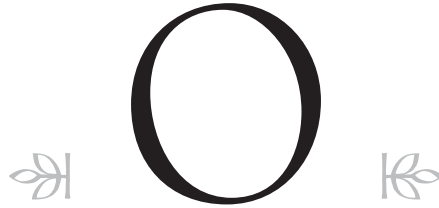
Corsairs increasingly frequented the coast around Nombre de Dios in the 1560s and 1570s. Between 1569 and 1571, 13 attacks occurred on shipping in the Chagres River. Escaped slaves attacked the transit route as well as Nombre de Dios. In 1572, the English corsair Francis Drake led a small expedition to Nombre de Dios but was

ultimately driven back. In the following year, he captured a mule train carrying bullion. After his success in a third effort in 1595, the Crown ordered the pillaged town replaced and its remaining inhabitants moved in 1597 to the new municipality of PORTOBELLO, henceforth Panama's CARIBBEAN terminus for the fleet.

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**obrajes** Castilians brought to the Americas expertise in raising SHEEP and the knowledge and technology for turning raw wool into cloth. Francisco de Peñafiel, an immigrant artisan from near Segovia, Spain, opened NEW SPAIN's first woolen textile mill, or *obraje*, in PUEBLA in 1539. MEXICO CITY, Valladolid, Texcoco, and Tlaxcala also became important production centers in the 16th century, and the first mill in Querétaro was established in the 1580s. Puebla and Tlaxcala were contracting by mid-17th century. While Mexico City and Coyoacán continued to be important, they were surpassed by the BAJÍO (specifically in Querétaro and San Miguel el Grande, present-day San Miguel de Allende) over the course of the 17th century.

Sheep were plentiful in the Bajío in the 17th century and provided a dependable supply of wool for *obraje* owners. Over time, however, owners had to obtain supplies from more distant locations, and prices rose for both raw wool and TRANSPORTATION. During the 18th century, the price of raw wool tripled.

*Obraje* owners were particularly interested in low-cost labor. Before 1630, most *obraje* workers were Amerindians paid wages and not held by DEBT PEONAGE. Indigenous labor became less important from 1630 to 1750, declining to less than 10 percent of the workforce as black slaves, in particular, replaced them (see SLAVERY). Slaves, whether owned or rented by *obraje* owners, became skilled laborers but were gradually replaced by indebted workers during the 18th century and were largely gone by the 1790s. In the *obrajes* of Querétaro, Amerindian labor was initially predominant, before black slaves became so. This changed in the 1640s, and thereafter, the slave population was most important at least into the 18th century. Some slaves still worked in Querétaro's *obrajes* in 1810.

In New Spain, the initial *obrajes* were manufactories that turned raw wool into cloth, usually for a local or regional market. They used a variety of laborers, including subsidized, unfree workers made available by civil authorities, as well as slaves and skilled free laborers. Although a few *obrajes* worked with cotton, artisan weavers using individual looms (*telares sueltos*) produced most of the cotton cloth in New Spain. Some wove at home, others in small shops known as *obradores* and *trapiches*. NATIVE AMERICANS made almost all of the clothing they wore. Cotton production expanded after 1750, and by the beginning of the 19th century, about 1.5 million part-time producers in the cotton industry wove cloth worth about 3 million pesos. The primary market for *obrajes* was the substantial group of consumers between the indigenous people who wore homespun cloth and those who purchased imported luxury fabrics.

Owners of *obrajes*, at least in Querétaro, typically had diversified economic interests, which might include TRADE, RANCHING, and sometimes officeholding. To be successful, they needed capital, a dependable supply of wool, an effective distribution system, and low labor costs.

The AUDIENCIA district of QUITO became a major center for textile production on the basis of *obrajes* in the city of Quito, Latacunga, and Riobamba. The indigenous had long woven wool from llamas and other cameloids. The introduction and rapid increase of merino sheep on highland pasture greatly expanded the wool supply. Textile mills in Quito expanded rapidly in the last third of the 16th century and especially in the early 17th century to take advantage of cheap wool, a substantial population of indigenous laborers, a market for cloth at the SILVER MINING center of POTOSÍ in CHARCAS, and a market around Quito itself. As in New

Spain, owners depended on cheap labor, and many paid workers in overpriced goods, thus binding them through debt peonage. Prodded by *encomenderos*, Amerindian communities established mills in order to earn a cash income with which to pay TRIBUTE, although privately owned mills proved more profitable and lasted longer (see *ENCOMIENDA*). By 1690, there were more than 100 privately owned mills.

Quito's *obrajes* flourished for decades; some 10,000 workers produced more than 200,000 *varas* (one *vara* equals 33 inches [84 cm]) of blue cloth worth 1–2 million pesos at retail. In the late 17th century, however, a demographic crisis brought on by drought, famine, and disease in the years 1691–95, a devastating earthquake in 1698, continued decline in registered mining production in PERU and Charcas, and competition from textile mills located closer to the mining centers combined to drive highland Quito into depression. The massive importation of French textiles during the first years of the 18th century and subsequent competition from foreign textiles worsened conditions. The production of Quito's textile industry declined between 50 and 75 percent over the course of the 18th century.

The widespread importation of inexpensive foreign, especially British, textiles brought an end to *obrajes* in the early 19th century.

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***oficios vendibles y renunciables*** Following the Crown's bankruptcy in 1557, PHILIP II extended in 1558 the sale of *oficios vendibles y renunciables* (offices that could be bought and transferred) from Castile to the INDIES. Initially, positions were sold for life, but later, the Crown was willing to allow owners to bequeath them to heirs on payment of a fee. Proceeds from the sales and transfers went to the royal treasury (REAL HACIENDA), ensuring the Crown a modest source of income.

The first offices sold were those of notary (*escribano*) and municipal standard-bearer (*alférez*). The former could be sold for life, the latter, in perpetuity. In 1581, Philip agreed that purchasers of the office of notary could

renounce the post on payment of a sum equal to one-third of its value. A decade later, he authorized the sale of the post of municipal alderman (*REGIDOR*) and other municipal offices for one lifetime.

PHILIP III completed in 1606 the process begun by his father. Henceforth, the list of salable positions included all fee-collecting, honorific, and municipal offices. Purchasers would own the positions and could renounce them on payment of the requisite tax. The initial renunciation carried a tax of half of the office's value; subsequent renunciations were taxed at a rate of one-third. The new policy ensured that local families throughout the colonies could legally maintain an inheritable and prominent presence in local offices.

The implementation of the 1606 policy meant that native sons of the district inherited positions and dominated local officeholding. In MEXICO CITY, CREOLES from NEW SPAIN made up the majority of alderman after 1590. In 17th-century LIMA, creoles from PERU constituted more than 70 percent of the aldermen.

The decision to permit resignations and transfers immediately pushed up the value of salable positions. For example, alderman posts in Mexico almost doubled in value in the early 17th century. The fee-earning potential of a post affected price as well. The post and associated rights of chief constable of the TRIBUNAL OF ACCOUNTS in Mexico City sold for the very high price of 45,000 pesos in 1655.

The sale of *oficios vendibles y renunciables* was most important for the influence it afforded in local administration. The practice continued into the 19th century, being abolished in Mexico in 1861 by interim president Benito Juárez. There was no equivalent practice in BRAZIL.

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**O'Higgins, Bernardo** (b. 1778–d. 1842) *creole liberator and president of Chile* Born in Chillán, CHILE, to Ambrosio O'Higgins, INTENDANT of Concepción and future captain general of Chile and VICEROY of PERU, Bernardo O'Higgins was sent to England for his education. There, he fell under the influence of FRANCISCO DE MIRANDA, the forceful advocate of Spanish-American independence. By the late 1790s, he was one of very few Chileans committed to independence of their homeland. He returned to Chile in 1802 to an HACIENDA inherited from his father.

The political crisis initiated with the abdication of FERDINAND VII in 1808 and the struggle against Napoleonic France by subsequent governments of resistance in Spain resulted in the deposition of Captain

General Francisco Antonio García Carrasco in SANTIAGO DE CHILE on July 16, 1810, and his replacement by Mateo de Toro Zambrano. A *CABILDO ABIERTO* convoked on September 18, 1810, produced a junta in which CREOLES held a majority of seats. This body proclaimed its rule in the name of Ferdinand VII, but O'Higgins and a few other radicals, including Juan Martínez de Rozas, sought absolute independence. In 1810, O'Higgins decided to support Martínez de Rozas with a militia and the following year was elected to the congress that began meeting in Santiago on July 4, 1811.

In the political kaleidoscope of the next several years, family factions struggled for power. José Miguel Carrera, a young officer with service in the war against the French in Spain, secured the most MILITARY backing and emerged as Chile's first military caudillo, dissolving congress. After Carrera deported Martínez de Rozas in 1812, O'Higgins, based in southern Chile, succeeded the radical as leader of the constitutional faction and, following the arrival of troops sent by Peru's viceroy JOSÉ FERNANDO DE ABASCAL Y SOUSA in December 1813, accepted an appointment as commander in chief of Chile's forces. With civil war between the forces of O'Higgins and Carrera, the royalists' veteran troops were successful at the Battle of Rancagua on October 1–2, 1814, and both O'Higgins and Carrera fled into exile. With Ferdinand VII restored in Spain, the royalists reestablished pre-1808 institutions in an environment of harsh reprisals against the rebels, which worsened when Francisco Casimiro Marcó del Pont became governor in 1815.

Meanwhile, in late 1814, JOSÉ DE SAN MARTÍN had begun assembling and training the Army of the Andes in Mendoza. O'Higgins joined him in 1816 with the understanding that he would become the head of government in independent Chile. The invasion was launched in January 1817 and following victories at CHACABUCO on February 12, 1817, and MAIPÓ on April 5, 1818, and despite a loss at Cancha Rayada on March 19, 1818, the Army of the Andes was successful. O'Higgins became supreme director of independent Chile, already proclaimed from Talca on February 12, 1818. He remained in power until forced out on January 28, 1823, by a revolt led by General Ramón Freire, intendant of Concepción.

Aside from O'Higgins's role in winning Chilean independence, his most important contribution was to support San Martín's invasion of Peru. As both men appreciated, until Peru was independent, Spanish South America would not be safe (see SPANISH SOUTH AMERICA, INDEPENDENCE OF).

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**oidor** *Oidores* were ministers who served on every *AUDIENCIA* in Spain and the INDIES. Their counterparts in Portugal and BRAZIL were *desembargadores* who served on the *RELAÇÕES*. *Oidores* were university-trained jurists; almost without exception, they had at least a baccalaureate degree in civil or canon law, and many held the higher degree of licentiate or doctorate as well.

While PENINSULARS received all *audiencia* appointments until the late 16th century, at least 68 CREOLES obtained them from 1585 to 1659; another 43 were named from 1660 to 1687. The high point of creole appointments occurred between 1687 and 1750, with 139 Americans accounting for 44 percent of *audiencia* appointments. In contrast, only 62 creoles, just 23 percent of the total, were named between 1751 and 1808. From 1809 to 1821, however, 61 creole appointees accounted for 52 percent of the total.

The most notable period of creole appointments occurred from 1687 to 1750, when the Spanish Crown systematically sold appointments as *oidor* to the American tribunals during every period of war. Creole *LETRADOS* in particular took advantage of these opportunities and entered the *audiencias* in unprecedented numbers, notably in the Audiencia of Lima. Not until 1803 was the last purchaser off the court.

Native sons, men named to their home court, were most evident from 1710 to 1715 and again from 1745 to 1770. The Audiencia of Lima alone had no fewer than 10 native sons holding appointments between 1745 and 1765. In contrast, the Audiencia of Mexico had no native sons in 1745 and only two in 1765. Adding *radicados*, non-native sons who were on the tribunals for five or more years or had confirmed local ties, local influence between 1687 and 1820 ranged from highs of 86 percent in 1755 and 1760 to a low of 20 percent in 1780. In short, the courts, led by their *oidores*, were significant repositories of local influence in colonial administration for protracted periods of time.

While *oidores* are most commonly thought of as judges, they had other responsibilities as well. For example, they sat with an *audiencia* district's chief executive as an advisory body (*real acuerdo*) whose decisions had the force of law unless reversed by the COUNCIL OF THE INDIES. *Oidores* also undertook inspection tours (*visitas*) and served a variety of commissions, for example, as governor of HUANCAVELICA or judge for a merchant guild (*CONSULADO*).

*Oidores* were the most numerous group in the hierarchy of advancement among the *audiencias*. They outranked *fiscales* in every tribunal and, indeed, held the rank to which *fiscales* were typically promoted (see *FISCAL*). Although no *audiencia* minister passed through every step of the hierarchy or ladder of promotion (*ascenso*), in general, advancement began from the tribunals in SANTO DOMINGO, PANAMA, and Manila; proceeded through a court in GUADALAJARA, GUATEMALA, CHILE, QUITO, Santa Fe de BOGOTÁ, or CHARCAS; and culminated on the

viceregal tribunal of LIMA or MEXICO CITY. The expansion of the number of *audiencias* in the 1780s placed the tribunals of CARACAS, BUENOS AIRES, and CUZCO below those of Lima and Mexico City. While the Crown made initial appointments of *oidor* to every court, relatively few men started their *audiencia* careers in the two premier viceregal courts. Beginning in the 1770s, *oidores* were named to the new position of regent on most of the tribunals. From the following decade, it became common for regents to advance to the COUNCIL OF THE INDIES.

As prominent government officials who ranked below only the president and, from the 1770s, the regent of the court, *oidores* enjoyed significant prestige, received a relatively good salary, and, barring serious abuse of office, held a royal post for life or until retirement. The Crown encouraged this recognition but simultaneously knew that the ability to render impartial decisions and advice was compromised when *oidores* served in the *audiencia* district of their birth or established extensive local ties. Consequently, from the mid-16th century onward, extensive legislation forbade *oidores* or their children to marry locally or hold real property without a specific royal dispensation, often obtained for a price.

The wars of independence brought an end to the colonial *audiencias*. In general, the peninsulars on the courts returned to Spain, and the creoles remained in the emerging countries.

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**Olañeta, Pedro Antonio** (b. 1770–d. 1825) *Spanish businessman and royalist general in Charcas* Born in Elgueta, Guipúzcoa, Spain, Pedro Antonio Olañeta immigrated to RÍO DE LA PLATA in 1789 with an uncle. In the late 18th century, he lived in Salta, where he was a successful businessman engaged in TRADE between Salta and POTOSÍ. After the war of independence began, he served as an officer under JOSÉ MANUEL DE GOYENCHE Y BARREDA and then under General JOAQUÍN DE LA PEZUELA in efforts to retain CHARCAS for the king.

After JOSÉ DE SAN MARTÍN had reached PERU, Generals José de La Serna, Jerónimo de Valdés, and José de Canterac moved troops to the north and, in 1820, left Olañeta in charge of the royalist army in Charcas. The constitutionalist generals then engineered a successful coup against Viceroy Pezuela in late January 1821. Receiving word that FERDINAND VII had been restored to absolutist rule in Spain on October 1, 1823, Olañeta defected, turning against Viceroy La Serna and his confederate generals Canterac and Valdés. He then pro-

ceeded to establish an independent ultraroyalist regime in Charcas, ousting the constitutionalists.

Sent to put down the rebellion, General Valdés recognized that Olañeta enjoyed ample local support and, on March 9, 1824, agreed that the royalist would remain as commander of his army but must recognize viceregal authority and send troops to support the conflict against the forces of the Republic of Peru. When Valdés left, Olañeta reneged on his agreement, denying La Serna's authority. The result was civil war among the royalists and the prevention of Valdés's forces from participating in the BATTLE OF JUNÍN.

On February 11, 1824, Olañeta entered the city of LA PLATA, proclaiming absolute monarchy and enjoying support from local aristocrats and his relatives. The regime was short lived, however, as Antonio José de Sucre advanced into Charcas and soon attracted support from many CREOLES. At the Battle of Tumusla on April 1, 1825, Olañeta was mortally wounded and his forces defeated. After this victory, no more battles were necessary. The republicans had triumphed.

See also SUCRE, ANTONIO JOSÉ DE (Vol. III).

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**orders, military and civil** The principal military orders of Spain—Alcántara, Calatrava, and Santiago—were founded in the 12th century as part of the Christian reconquest of Spain over the Moors (Reconquista). Emerging with substantial estates, income, and jurisdiction, they came under royal control during the reign of Ferdinand and Isabella. Adrian VI provided papal confirmation of this relationship in 1523, and the Crown created the Council of Orders to oversee their properties and incomes, as well as the entry of new knights. The incorporation of the orders in the Crown provided a significant source of patronage, which included ENCOMIENDAS and knighthoods (*hábitos*). In the early 16th century, there were approximately 180 *comendadores* (knights with *encomiendas*) with incomes and more than 1,000 knights without that source of income.

The Order of Charles III was created in 1771 to reward meritorious civil servants; 60 awards would be great crosses, and 200 recipients would be pensioned; beginning in 1783, the king granted supernumerary knighthoods as well. The Order of Noble Women of the Queen María Luisa was created in 1792 to recognize WOMEN of distinguished service or lineage. The Royal Order of Isabel the Catholic was created in 1815 to recognize meritorious service in the Americas.

Portugal had three military orders: Christ, Santiago, and Avis (see AVIS DYNASTY). In 1363, King Peter I named his illegitimate son John as master of Avis at the age of seven; he was the first son of a monarch to enjoy the honor. From 1434 to 1550, sons, brothers, nephews, or first cousins of monarchs held the masterships of all three orders. In 1550, King John III became master of the three orders; Pope Julius III sanctioned this in 1551 for John and his successors.

Not all men awarded knighthoods actually entered an order. Candidates for Portuguese orders had to be of legitimate and noble birth and descent, including both pairs of grandparents; none of the three generations could have Muslim, Jewish, New Christian (*CONVERSO*) or heathen ancestors. In addition, candidates were to be between the ages of 18 and 50 and were never to have worked as an artisan or in manual labor.

Knighthoods in Spain's military orders were to be granted by the monarchs in recognition of outstanding service to the Crown. By the 17th century, however, the service was often financial or performed by a recipient's father or uncle. The Portuguese Crown also expanded the original requirements for members, ultimately allowing royal administrators, merchants, physicians, and even seafarers to enter an order despite the regulations requiring ancestors through grandparents to be noble and the candidate to be of legitimate birth (see *LIMPIEZA DE SANGRE*). As in Castile, elaborate genealogical proofs (*pruebas*) were required. Although the king granted dispensations from impediments, the Portuguese Crown in the 16th and 17th centuries did not sell knighthoods on the scale carried out in Castile.

A close study of the membership in the Order of Christ has identified 3,710 new members between 1510 and 1621 and suggested a figure of 4,066 to account for missing or underreported years. From 1550 to 1750, about 2,000 new members entered the Order of Santiago in Portugal.

The first *comendadores* and knights in the New World were not far behind Christopher Columbus. Nicolás de Ovando was among the earliest *comendadores* to reach the Americas, arriving in 1502. New Spain's first VICEROY, Antonio de Mendoza, was a knight of Santiago.

The Crown awarded few knighthoods to men in the colonies in the 16th century. Conquistadores Hernando Cortés and Francisco Pizarro were among the exceptional cases. Spaniards born in the colonies had received only 16 *hábitos* by 1600. By 1820, however, the Crown had awarded CREOLES 516 knighthoods of Santiago, 164 of Calatrava, and 80 of Alcántara. Of the 152 Americans who entered the Order of Charles III by 1820, 92 did so during the years 1791–1800. Men from the AUDIENCIA district of LIMA were the most successful in becoming knights, far outstripping men from the *audiencia* districts of Mexico and GUADALAJARA combined.

The knighthoods of the military orders were important because they confirmed a family's nobility and unsu-

lied ancestry. They elevated the simple noble (*hidalgo*) within the Castilian hierarchy of nobility. A knight also had to obtain royal permission to marry in order to document the bride's purity of blood.

The first Afro-Brazilian to enter the Portuguese Order of Santiago was probably a mulatto, so honored in 1628 as a reward for his service in fighting the Dutch in BAHIA in 1624 and 1625 (see *MULATO*). By 1700, only 39 men born in BRAZIL had entered the Orders of Santiago and Avis.

#### Further reading:

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**Ouro Prêto** See VILA RICA DO OURO PRÊTO.

**Oviedo, Gonzalo Fernández de** (b. 1478–d. 1557) *Spanish chronicler of the Indies* A noble who served as a page to Prince Juan, heir to Ferdinand and Isabella until his death in 1497, Oviedo was suddenly forced to “wander through the world” seeking an income. He spent time in Italy and, in 1514, accompanied Pedrarias Dávila's expedition to Darien as notary and treasury official. Returning to Spain, he published, in 1525, *Sumario de la natural historia de las Indias*. He received an appointment in 1532 as constable of the royal fortress at SANTO DOMINGO on HISPANIOLA. He was also named royal chronicler of the Indies. The publication of approximately the first third of *Historia general y natural de las Indias* (General and natural history of the Indies) in 1535 added to his reputation, but he was unable to obtain a license when he returned to Spain in 1548 to publish the remainder of the work; it finally appeared in the 19th century.

Oviedo's natural history not only described plants and animals of the colonies but also recounted the exploration, conquests, and civil wars in Peru. He exalted the accomplishments of the Spaniards in the New World, none more than those of Hernando Cortés, conqueror of Mexico. God had favored the Spaniards and led them to the Americas and success. At the same time, Oviedo recognized the cruelty and destruction that accompanied conquest, the greed of the conquistadores, and their frequent movement to new frontiers at the expense of creating new homelands. The result was that merchants, lawyers, notaries, judges, and clerics were the beneficiaries of the conquistadores' successes.

In his early writings, Oviedo was highly critical of the NATIVE AMERICANS in the Indies. Among other things, he considered them cannibals and sodomists, lazy, cowardly, inclined to vice and evil, and incapable of becoming true Christians. His views changed somewhat over time, but overall his negative evaluations were stronger. Indeed, he



considered that the destruction of the indigenous people by disease, overwork, and abuse was divine punishment for their many sins. This attitude clashed with the favorable evaluation of Bartolomé de Las Casas that was triumphant at Court in the 1540s and was responsible for the denial of a license to publish the remainder of Oviedo's *Historia general y natural*. Nonetheless, Oviedo's detailed descriptions of plants and animals of the New

World and the facts he recorded have made his volumes important historical documents.

See also CHRONICLERS (Vol. I).

**Further reading:**

D. A. Brading. *The First America: The Spanish Monarchy, Creole Patriots, and the Liberal State* (New York: Cambridge University Press, 1991).



**Palafox y Mendoza, Juan de** (b. 1600– d. 1659)  
*Spanish bishop of Puebla* Born in Fitero, Navarre, Spain, an illegitimate son of Jaime de Palafox, an Aragonese noble, Palafox studied law at the University of Salamanca and followed a career in state and church. After an appointment as *FISCAL* of the Council of War, he was named *fiscal* of the COUNCIL OF THE INDIES in 1629 and advanced as a councilor of the Indies in 1633, a position he held in absentia after being named bishop of PUEBLA and visitor general of New Spain in 1539 and until being named bishop of Osma in 1653. He reached Puebla in June 1640.

Palafox was an active reformer who sought to reinvigorate the religious life of the diocese. Central to his agenda was bringing the religious orders under his jurisdiction. The result was a protracted dispute with the JESUITS.

As a secular cleric, Palafox supported the Crown's position that the *DOCTRINAS DE INDIOS* and missions of the Jesuits, FRANCISCANS, DOMINICANS, and AUGUSTINIANS should be placed under the bishops' control, transferring 36 parishes to secular clergy. Palafox recognized the adverse financial implications for the secular clergy of large, wealthy, and expanding Jesuit properties in the diocese. The orders, of course, opposed the transfer and the idea of being subject to a bishop. Particularly unpalatable to the Jesuits was the notion that the product of their HACIENDAS should be liable for the tithe.

With a royal appointment stating that he could serve as interim VICEROY if he thought circumstances warranted it, Palafox removed Viceroy duque de Escalona on suspicion of partiality to the Portuguese and ruled from June 8 to November 23, 1642. The arrival of the new viceroy, the count of Salvatierra, reversed the tables. The new

executive supported the Jesuits, and Palafox fled to escape arrest, emerging only when the Crown ruled in his favor. The victory was short lived, however, for Palafox was named bishop of Osma in November 1653. He yielded his office in Puebla the following year and returned to Spain, where he died in Osma.

As bishop, Palafox oversaw the completion of the Puebla cathedral in 1649, the construction of numerous churches, a seminary, and a convent. Also an author, his works were published in 15 volumes in 1762. Although a lengthy effort to canonize Palafox began in 1726, the Jesuits opposed it, and in 1777, Pius VI declined to conclude the process.

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**palenque** See *QUILOMBO*.

**Palmares** The longest surviving and most populous fugitive slave community (*mocambo*) in Brazilian history was Palmares (see *SLAVERY*). Located in the interior of southern PERNAMBUCO, it was established no later than 1606 and probably earlier. At its height, it had an estimated population of 30,000.

Although runaway slaves brought to BRAZIL from Central Africa may have predominated initially, by the mid-17th century, Palmares had a multiethnic population that included numerous blacks born in Brazil, NATIVE AMERICANS, and persons who had been captured in raids.

Palmares employed Central African practices and rituals, following an Angolan institution known as Kilombo, to bring together a community without common lineage for purposes of defense, raiding, and economic production. By the mid-1640s, Palmares consisted of 10 enclaves, including the royal enclave that was the residence of a principal chief, or king.

The biggest threat Palmares posed to Dutch, Portuguese, and Brazilian settlers was simply its existence. Planters complained that their slaves fled to Palmares and that, in addition, *palmaristas* raided their lands. The probable reason was to seize WOMEN, who were in relatively short supply in the enclaves.

During its existence, the *mocambo* repelled countless expeditions. It lasted until a force of 6,000, including a mercenary group of slave hunters from São Paulo led by Domingos Jorge Velho, finally triumphed in the mid-1690s (see *BANDEIRAS*). By that time, the lands of Palmares were coveted. Indeed, promises of land grants were an important inducement for the *paulistas*.

Brazilians of African descent celebrate the existence of Palmares and laud its last leader, Zumbi, as the country's most important Afro-Brazilian hero.

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**Panama** In the colonial era, the name *Panama* applied both to a city, now called Panama City, and the jurisdiction of a small *AUDIENCIA* district. Panama was most important because it connected the Atlantic and Pacific Oceans. Thus, it served as the primary transit site for merchandise carried by the galleons from Spain to the ports of NOMBRE DE DIOS and later PORTOBELO on its northern coast, and SILVER brought from PERU to the city of Panama on its southern coast.

Only the substantial profits to be made from the fleet system induced Spaniards to reside in Panama (see *FLEETS/FLEET SYSTEM*). Its climate was oppressive and even deadly. A 17th-century observer noted: "it is so humid here that it rains all year long and owing to this the country is very sickly, suffering from fevers and bloody hemorrhages, which are a great problem." One commentator claimed in 1588 that more than 46,000 people had died in Nombre de Dios alone since 1519.

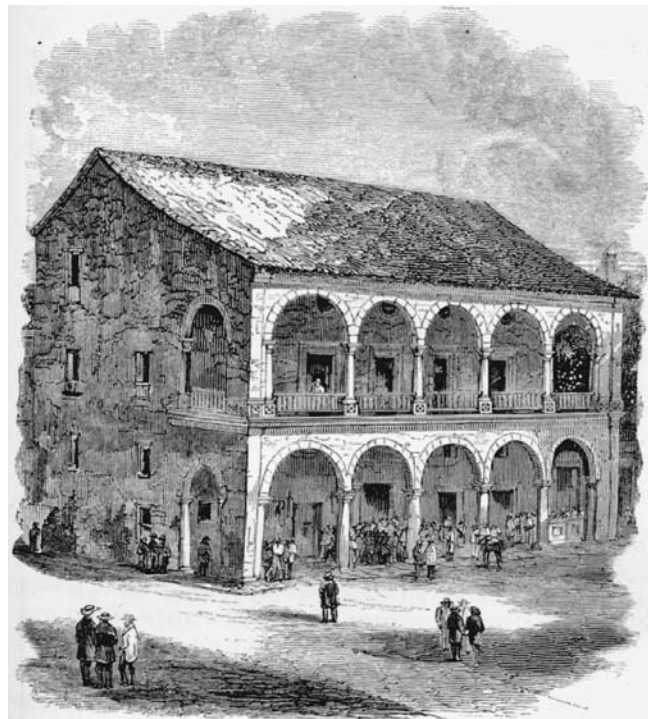
Panama City was founded in 1519 by Pedro Arias de Ávila (Pedrarias) and about 400 men with him. In the following decade, most of the indigenous people perished, but from 1532 to 1540, the city served as a way station for the Spanish conquest and settlement of Peru. After the latter date, its existence was tied to the fleet system. Its

location offered two advantages: Its climate was superior to that of Nombre de Dios, and it was more difficult for FOREIGNERS to attack.

Panama City's population between 1570 and 1676 was approximately 200 to 600 *VECINOS*; in contrast, Portobelo between 1597 and 1789 rarely had more than 50. With a negligible native population by 1540, Panama relied on the importation of African slaves for labor (see *SLAVERY*). It normally had between 3,000 and 5,000 slaves, although thousands more were imported for re-exportation to Peru.

After a brief existence from 1538 to 1543, the Audiencia of Panama was definitively created in 1564 and, except for the years 1718–23, remained in existence until 1751 when it was clear that the fleet system for South America would not be reestablished. Its chief executive was initially a president with a degree in law, but starting in 1604 governors of TIERRA FIRME without legal training headed the *audiencia*, with the major responsibilities of overseeing the defense of the isthmus and matters related to the TRADE fairs that were held in Nombre de Dios or Portobelo when the fleet was in port. A royal treasury office was also located in the city of Panama, as was a MUNICIPAL COUNCIL; a second municipal council was in Portobelo. The treasurer in Panama City sent a lieutenant to Portobelo to oversee TAXATION at the trade fairs.

By 1550, Panama City had been the home to a bishop for nearly 30 years. Its cathedral had a small chapter,



The municipal council building of Panama housed local government. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

but overall, the diocesan clergy was less important and more impoverished than clerics in the religious orders. Between 1519 and 1671, 10 of 20 bishops were members of religious orders. The orders' residences were important in providing lodging for friars on their way to Peru.

Despite its dependence on trade and the transit of goods across the isthmus, Panama had a miserable TRANSPORTATION system. There were two routes to cover the 18 leagues from Panama to the Atlantic ports. The Royal Road (Camino Real) went north from Panama to Nombre de Dios; the other road (Camino de Cruces) went more northwesterly to Venta de Cruces on the Chagres River, where goods were loaded on rivercraft, taken down the river, and then sent eastward along the coast to Nombre de Dios and, after 1597, to the closer Portobelo. Although freight costs were higher, the Camino Real was favored for transporting bullion because the river was indefensible against pirates. Merchants were more apt to use the river route for bulky goods.

MULES provided overland passage in Panama. Annually, as many as 1,000 mules, usually from EL SALVADOR and NICARAGUA, and the MAIZE to feed them arrived in Panama. In a normal year, about 1,000 mules, making one to three trips and carrying about 200 pounds (91 kg), were needed to transport goods from the trade fair. In many years, the cost of mules came to more than the defense of Panama.

The Peruvian silver transported across the isthmus drew international attention and envy. Between 1569 and 1571, some 13 corsair attacks took almost 340,000 pesos worth of goods from barges on the Chagres River. Francis Drake attacked Nombre de Dios in 1572 and then the mule train carrying Peruvian silver. Escaped slaves were eager to cooperate with corsairs and facilitated their success. Drake attacked Nombre de Dios in December 1595 but was unable to cross the isthmus to Panama City. Among many other attacks, those by HENRY MORGAN were particularly successful. In 1668, he captured Portobelo, and in 1671 he took Panama City. The devastation resulting from the BUCCANEERS' presence was so extensive that survivors subsequently relocated the city.

Taxes on silver also attracted attention. Merchants showed considerable ingenuity in working with corrupt officials to send unregistered, and hence more valuable, silver to Spain or, frequently, simply to the bay of CÁDIZ where it was offloaded by foreign merchants to pay for illegal merchandise purchased on CREDIT. The extent of contraband will never be known, but many sources suggest it was enormous in the latter half of the 17th century.

Although the Crown tried to resurrect the fleet system in the 18th century, the effort failed, and numerous Spanish merchants took losses. With the capture of Portobelo by Admiral Edward Vernon in 1739, the fleet system for South America came to an ignominious end. Panama, whose existence depended on the system, con-

tinued the decline begun when the system faltered more than a century earlier.

Included in the new VICEROYALTY OF NEW GRANADA established in 1739, Panama lost its status as a separate *audiencia* district in 1751. Economically depressed for the remainder of the century, Panama remained under Spanish control while New Granada went through internal struggles over independence. In November 1821, Panama declared its independence and rejoined New Granada in the republic of Colombia.

See also GRAN COLOMBIA (Vol. III); PANAMA (Vols. I, III, IV).

#### Further reading:

Christopher Ward. *Imperial Panama: Commerce and Conflict in Isthmian America, 1550–1800* (Albuquerque: University of New Mexico Press, 1993).

**Paraguay** Paraguay was on the periphery of the Spanish Empire. Located far upriver from BUENOS AIRES, itself a peripheral location until the late 18th century, the settlement of Paraguay by the Spanish began when Pedro de Ayolas, an associate of Pedro de Mendoza's ill-fated expedition to the RÍO DE LA PLATA, and would-be conquistadores followed the Paraná River northward for some 900 miles (1,448 km) in the hope of finding a rich native kingdom. Instead of GOLD or SILVER, they found the GUARANÍ.

Amicable relations encouraged the Spaniards to found the city of ASUNCIÓN on the Paraguay River in August 1537. Fertile lands, ample food, and gifts of WOMEN attracted additional settlers from the failing settlement at Buenos Aires, increased the number of Spaniards to some 350, and quickly resulted in a growing number of mestizos (see MESTIZAJE/MESTIZO). The Guaraní women provided food and worked as servants, as did their male relatives, as both normally did for their own leaders. The arrival in 1542 of 250 new settlers led by Alvar Núñez Cabeza de Vaca strengthened the Spanish presence but also added substantially to the demand for food and services. With their Spanish allies, the Guaraní enjoyed a number of MILITARY successes over the GUAYCURUANS and Payaguás. The settlers in Asunción pioneered a route to PERU in 1547.

In 1556, the relationship between the Spaniards and indigenous took a new turn when Governor Domingo de Irala implemented a royal order to create ENCOMIENDAS; this focused attention on permanent settlement rather than continued expeditions after mirages of precious metals. As a result, 38 new towns were created and populated with about 20,000 Amerindians in *encomienda* and the mestizo descendants of the Spanish settlers. The absence of mineral wealth or another immediately identifiable export was compounded by the isolation of Paraguay from any important market. As a result, *encomenderos* ignored restrictions the Crown had placed on *encomienda* labor.

The Paraguayan economy relied on barter and the relationship between *encomenderos* and their Native Americans in an environment of subsistence agriculture marked more by mutual assistance than exploitation. Moreover, the established practice of multiple Guaraní women and their male relatives providing service to an individual Spaniard was considered *encomienda originaria* and continued throughout most of the colonial era. Indigenous women, many brought from outlying villages (*encomienda mitaya*), considerably outnumbered men in Asunción.

As the native population declined over time, the number of Amerindians in *encomienda* fell from an original average of about 62 to 10 or fewer. Nonetheless, Philip II authorized grants of *encomiendas* for three generations.

From 1607, the Jesuits established mission villages (*doctrinas de indios*) or *reducciones* in the territory that became known as Misiones (see *reducción*). Located a substantial distance from Asunción along the Paraguay, Paraná, and upper Uruguay Rivers, 30 missions existed in 1739. In return for agreeing to provide military support to the Spanish governor if requested, in 1649, the Jesuits secured an exemption from *encomienda* and a reduction in tribute for their wards. The missions not only were self-sufficient, but collectively produced a superior grade of yerba maté, tobacco, sugar, and other commodities for export downriver. The profits made Jesuit churches the envy of the Río de la Plata region. Not surprisingly, from the 1630s, Paraguayan *encomenderos* coveted the labor available to the Jesuits.

The Comunero Revolt of Paraguay from 1721 to 1735 was a protracted dispute between the colonial elite in Asunción and the Society of Jesus and its supporters in the royal administration. The issues were both economic and political. The economic issue focused on access to Guaraní labor and the terms of its use, especially as these related to the production of yerba maté, used to make a tea popular in many regions of South America. Finally, in March 1735, the rebellion was virtually over, and in April 18 accused rebels were found guilty. The Jesuits that the *comuneros* had expelled returned to Asunción in October 1735, but Paraguayans' opposition to them persisted until the Society of Jesus was expelled in 1767.

After the expulsion of the Jesuits, the Crown assigned government officials to administer the 30 villages. The result was disastrous, as officials sought their own advantage over the well-being of the Native Americans. Stripped of clear oversight and protection, the missions' resources dwindled, and their population declined from 96,381 in 1768 to 42,885 in 1800.

Aside from being agriculturally self-sufficient, Paraguay was able to export yerba maté, tobacco, and a few other items to municipalities that included Corrientes, Santa Fe, and Buenos Aires. This limited commerce enabled colonists to purchase imported merchandise. Trade expanded in the late 18th century—for example,

more than 200,000 *arrobas* (5 million pounds [2.3 million kg]) of yerba, over five times the amount exported annually in the 1740s, were sent downriver from the port of Asunción in 1798—and brought growth to Asunción. From about 5,000 residents, including more than 2,700 blacks, in 1782, the population expanded to just more than 7,000 in 1793.

One of the most distinct features of colonial Paraguay, other than the longevity of *encomienda*, was the paucity of Spaniards who could claim *limpieza de sangre*. Few peninsulars arrived after the mid-16th century, and the polygyny practiced by the Guaraní and embraced by Spaniards resulted in a self-described creole population (55 percent of the Paraguayan population in the 1780s) that was, in fact, largely mestizo, as well as a mestizo culture. The use of the Guaraní language remains an obvious and important feature of this culture.

Paraguay's participation in the market economy increased after the introduction of *comercio libre*. The Buenos Aires market, in particular, remained central to Paraguay's economic growth and the presence of a viceroy ensured that *porteño* merchants' interests were protected at the expense of those of Asunción.

Immediately after Buenos Aires rejected the Council of Regency in Spain and created a junta on May 25, 1810, it sent representatives to Asunción requesting recognition of its authority. The city fathers, however, rejected the junta, and soon Manuel Belgrano led a military force northward. Two defeats prompted his retreat in March 1811, but Buenos Aires continued to threaten Paraguay and harass its trade.

A leading opponent of Buenos Aires was the university-educated creole José Gaspar Rodríguez de Francia. Through support from rural Paraguayans and political astuteness, Dr. Francia guided Paraguay to independence as a republic, declared on October 12, 1813, and became its perpetual dictator by act of a fledging congress in 1816. Under his rule, Paraguay's riverine trade declined rapidly, and many foreign-born merchants left. The isolation of Paraguay became a hallmark of Francia's rule.

See also FRANCIA, JOSÉ GASPAR RODRÍGUEZ DE (Vol. III); PARAGUAY (Vols. I, III, IV).

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**pardo** *Pardo* was one of many terms used to identify persons on the basis of ancestry or perceived skin color.

It applied to the offspring of an Amerindian and a black, a combination also known as *ZAMBO* or *MULATO*, depending on the location. More generally, *pardo* applied to persons of mixed ancestry with one or both parents of African descent. In the 18th century, the terms *pardo* and *mulato* were almost interchangeable and distinct from *moreno*, a black with both parents of African ancestry. *Pardo*, however, was the preferred term when applied to militia units filled with persons of varying degrees of African ancestry. The term *free-colored* could also be used for *pardo*, *mulato*, and *moreno* in reference to persons not enslaved.

Despite early and recurrent fears about arming blacks, free-colored persons were present as auxiliaries in NEW SPAIN soon after a 1540 decree authorizing the creation of formal militias. By the 1550s, they were important in the colony's defense strategy. In HAVANA, blacks served as auxiliaries to white militiamen during Jacques de Sores's attack in 1555. Other early examples include their use in PUERTO RICO in 1557 and in CARTAGENA DE INDIAS in 1560 and 1572. By 1612, the Crown strengthened the formal existence of free-colored militia in MEXICO CITY. When the Dutch appeared off CALLAO, PERU, in 1615 and again in 1624, colored militiamen were pressed into service and performed well. Independent militia units were usually present in larger CITIES and were known as companies of *pardos* and free blacks (*morenos libres*), thereby explicitly injecting race into their service. Other militia units had whites, blacks, and mestizos or other *CASTAS* (see *MESTIZAJE/MESTIZO*). Seventeenth-century legislation, however, prevented blacks from enlisting in the small regular forces.

In New Spain, the growth of militias between 1670 and 1762 resulted in greater levels of participation by the free-colored and brought them more privileges. Reforms instituted following the British occupation of Havana sought to strengthen the quality of military units and resulted in greater regulation of free-colored militia, as well as an injection of white regulars. The so-called provincial militia system required "disciplined" companies. Regular army veterans headed each regiment and supervised training. The years of VICEROY CONDE DE REVILLAGIGEDO (the Younger), however, brought serious losses for the free-colored units. The viceroy reduced the number of provincial militias; thus, the number of free-colored men serving declined precipitously.

In NEW GRANADA, the large number of *pardos* in coastal areas made their inclusion in military units unavoidable. The Cuban precedent after 1762 of granting *pardo* militiamen equal access with whites to the *fuero militar* was instituted in coastal New Granada (see *FUERO*). Nonetheless, white commanders took precedence in the units; *pardos* commanded *pardos*.

The use of free-colored men in military service was particularly important in the struggle for independence in VENEZUELA. They supported the Crown and helped to defeat the First Republic. Later, led by JOSÉ TOMÁS BOVES,

they helped to drive SIMÓN BOLÍVAR out of Venezuela and end the Second Republic.

#### Further reading:

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**Paris, Treaty of** (February 10, 1763) Signed on February 10, 1763, the Treaty of Paris ended the Seven Years' War (known in North America as the French and Indian War). Originally a war fought in North America between the British and the French, Spain entered it as a result of the Third Family Compact concluded with France in August 1761. CHARLES III's decision ended more than a decade of neutrality and provoked Great Britain into declaring war on January 4, 1762. Landing near HAVANA on June 7, British forces occupied the Cuban capital on August 14, 1762; British forces took Manila as well.

Most important for Spain under the Treaty of Paris, Britain returned Havana. Britain withdrew from the PHILIPPINE ISLANDS in 1764, leaving the islands to Spain. Spain gave up Florida to Britain but had already received Louisiana from France in compensation. Although France lost Canada and claims to territory east of the Mississippi River to Britain, as well as some islands, it regained Martinique and Guadeloupe in the CARIBBEAN. The treaty also called for a restoration of territory disputed in the borderlands between the River Plate and BRAZIL. The terms were contested, as Spain claimed much of Rio Grande, conquered in 1763; it did, however, return COLÔNIA DO SACRAMENTO, also taken by PEDRO DE CEVALLOS.

Although Havana was returned to Spain, temporarily losing a supposedly impregnable naval base shocked the Spanish government into action. Charles's ministers worked quickly to create a policy whose implementation would prevent another such humiliation. Earlier efforts to strengthen administration, increase tax revenues, and bolster defenses had produced some results, but the loss of Havana resulted in more comprehensive actions commonly termed the reforms of Charles III, or the BOURBON REFORMS.

#### Further reading:

Allan J. Kuethe. *Cuba, 1753–1815: Crown, Military, and Society* (Knoxville: University of Tennessee Press, 1986).

**patio process** See MERCURY; MINING.

**patronato real** Royal patronage refers to the bundle of rights and privileges over the CATHOLIC CHURCH that

the papacy granted to the Crowns of Castile (*patronato real*) and Portugal (*padroado real*) in return for undertaking the Christianization of the people of the INDIES. There were some Iberian precedents. In Castile, the Crown had obtained the right to nominate bishops in 1482, and shortly afterward, it obtained the right of patronage over all churches, benefices, and dioceses that would become available with the successful conquest of Granada. The Portuguese Crown secured royal patronage in an identifiable form as early as 1418, but efforts at missionization were never as vigorous as those supported by the Crown of Castile.

Although royal patronage was implicit in the papal bull *Inter caetera divinae* of 1493, future bulls made many rights and privileges explicit. The Spanish Crown and its legal experts fleshed out the *patronato real* even more, making the Crown's control over the church in the Americas much greater than in Spain. In 1501, a bull designated that ecclesiastical tithes would go to the Crown in return for instructing and converting the NATIVE AMERICANS; thus, the Crown would manage the resources of this enterprise. Another bull of 1508 granted the Crown control over filling ecclesiastical benefices and founding churches and convents. This meant that the Crown, normally through the COUNCIL OF THE INDIES or, later, the Cámara of the Indies, selected and presented bishops to the papacy for confirmation, and by delegation, VICEROYS selected parish priests after receiving recommendations from a bishop.

Further elaborations of the royal patronage required clerics to secure a royal license to travel to the Indies and limited where they could reside; the Crown paid the expenses of travel from Spain. The construction of churches required royal approval. No papal bull could be sent to the Indies without royal approval. The Crown, working mainly through the INQUISITION, also had authority to censor books and manuscripts. In addition, it exercised patronage over hospitals and educational institutions. The extent of royal control virtually turned Spanish Catholicism into a national church. In the colonies, viceroys exercised royal patronage within their domain.

The various features of Spain's royal patronage were brought together in the 1574 *Ordenanza del Patronazgo*. One of the most important doctrines it embodied was the subordination of religious orders to bishops and viceroys. Specifically, it sought to restrict the access of the orders to the papacy and to replace regular clergy with diocesan clergy in rural areas, forcing the regulars back into urban convents. Thus, the *Ordenanza* implied a turning point in the fortunes of the mendicants.

The *Ordenanza del Patronazgo* did not resolve all of the issues between Crown and church or secular and regular clergy. Whether or not indigenous people should pay the tithe was one important unresolved issue. Bishops wanted Amerindians to pay the tithe as Spaniards did; friars opposed this, both because they feared it would make

Catholicism unattractive to the indigenous and because they did not want the secular clergy to enjoy increased financial resources at their expense.

The importance of the *patronato real* was such that the Spanish monarchs considered it one of the jewels on their crown. Throughout Habsburg rule, the church and the Crown reinforced each other's authority. In the 18th century, the Crown sought to increase its authority at the expense of the church. This REGALISM was never made clearer than in the expulsion of the JESUITS from Spain and the empire in 1767, eight years after the MARQUÊS DE POMBAL had done the same in Portugal, BRAZIL, and the remainder of the Portuguese Empire.

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**peninsular** The term *peninsular* is used to distinguish a Spaniard born in Spain from a CREOLE, or a Spaniard born in the colonies. Derogatory terms including *chapetón* (poor, boorish greenhorn) and *gachupín* (routinely arrogant newcomer) also referred to peninsular Spaniards. The equivalent terms in BRAZIL are *européus* or *REINÓIS* for peninsulars and *pés de chumbo* (leaden feet) as a derogatory term.

In the earliest days of conquest and settlement, all Spaniards came from Spain. Since few Spanish WOMEN were yet present in the colonies, Spanish men typically fathered children with NATIVE AMERICAN women. If they married the indigenous women and reared the offspring, the children were considered Spaniards. These cases were relatively infrequent, however, and *mestizo* became synonymous with illegitimacy (see MESTIZAJE/MESTIZO).

By the middle of the 16th century, the number of Spanish women in the colonies rose, and the number of legitimate offspring increased as well. Continued emigration from Spain also expanded the number of peninsulars in the Indies. Already clear to contemporaries was that peninsulars, especially those who accompanied the Iberian-born VICEROYS of NEW SPAIN and PERU, AUDIENCIA ministers, and high-ranking clerics to the colonies, benefited from their contacts. Often, they received ENCOMIENDAS, land, and local and provincial positions more readily than did creoles. The creoles' perception of this discrimination throughout the range of royal and clerical positions was grounded in fact and was one reason that colonists anxious for their sons' advancement began lobbying before 1550 for the creation of UNIVERSITIES in MEXICO CITY and LIMA.

Although the number of married peninsulars who arrived in the colonies was higher in the late 16th century than before, many peninsular immigrants were young

males attracted by the presence of relatives or other persons from their hometown or region in Spain and the potential to secure a better life in the colonies. Females still accounted for less than 30 percent of identified peninsular emigrants between 1560 and 1600.

The continued arrival and presence of peninsulars meant that place of birth divided the Spanish population in the colonies. Peninsulars certainly considered themselves superior to Spaniards born in the colonies. Indeed, they were often contemptuous of creole males in particular, considering them indolent. For their part, creoles considered peninsulars arrogant, boorish, and, except for the highest-ranking officials, common.

In their mid-18th-century confidential account *Discourse and Political Reflections on the Kingdoms of Peru*, the young peninsular scientists and travelers JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA devoted many pages to the antagonisms between creoles and peninsulars. In their words, “Factional hatred increases constantly, and both sides never miss the opportunity to take vengeance or to manifest the rancor and antagonism which has taken hold of their souls.” The competition and antagonism persisted into the wars of independence, at which point it degenerated in VENEZUELA to “war to the death” against peninsulars who were not fighting for independence.

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**Peralta y Barnuevo, Pedro** (b. 1664–d. 1743) *creole polymath and author in Peru* Born in LIMA, PERU, Pedro Peralta y Barnuevo received degrees in civil and canon law from the UNIVERSITY OF SAN MARCOS, which he attended from 1680 to 1686. Although he practiced law for a while, he was more interested in poetry, science, and a wide range of academic disciplines; mastered eight European languages in addition to Spanish; knew Quechua; and read widely from both approved and prohibited literature.

Peralta secured employment in the same post of government accountant (*contador de particiones*) earlier held by his father. He also served as rector of the University of San Marcos for two years, advised VICEROYS, and wrote the *Relación* of the state of Peru that Viceroy José Armendáriz, marqués de Castelfuerte, left to his successor, the marqués de Villagarcía (1736). Additionally, the encyclopedist was an engineer for the reconstruction of the wall of CALLAO, which had been destroyed by the great earthquake of 1687, and participated in the most celebrated literary salons and academies of Lima,

including that of the Catalan viceroy, the marqués de Castell-dos-Rius.

Considered a “prodigy of nature” by some contemporaries and a talent in company with El Inca GARCILASO DE LA VEGA by Peruvian scholar Luis Alberto Sánchez, Peralta began to publish in 1687. Ultimately, more than 80 of his works were printed, and he left additional manuscripts at his death. Fray BENITO FEIJÓO Y MONTENEGRO, the celebrated Spanish author whose many volumes introduced Spaniards in the Old and New World to the intellectual foundations of the ENLIGHTENMENT, praised Peralta, although in a somewhat patronizing manner.

Considered to epitomize “the accomplished, intellectual criollo [creole],” Peralta is best known for *Lima fundada* (1732), a lengthy epic poem composed in rhyme. Literary scholar Jerry M. Williams notes that its style “bears witness to obtuse and archaic formulae that render meaning difficult and produce a soporific effect. . . . The poem is of dubious poetic merit, but is of outstanding historical importance for its literary and biographical notes on figures who shaped Peru.”

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**Pérez de la Serna, Juan** (b. ca. 1573–d. 1631) *Spanish archbishop of Mexico* Born in Cervera del Llano, Cuenca, Spain, Juan Pérez de la Serna was named the seventh archbishop of Mexico in January 1613 and ordained in the position in May 1613. Sensitive to a variety of social ills in the society of NEW SPAIN, he embraced causes on behalf of those in need and was more than willing to engage in conflict. A patron of OUR LADY OF GUADALUPE, he supported CREOLES angered by corrupt government officials that included ministers of the Audiencia of Mexico.

With authorization from the Crown, the archbishop sought in 1619 to exert authority over friars in Amerindian parishes, demanding to examine men recommended for curacies. The FRANCISCANS in particular opposed this innovation, seeing it as an opening gambit in an effort to replace them with secular clergy in the *DOCTRINAS DE INDIOS*. Defied by the religious orders and VICEROY Marqués de Guadalcázar, who supported them, the archbishop suspended his effort until the arrival of a new viceroy, the marqués de Gelves, in 1621. To the archbishop's disgust, Gelves also backed the friars. Other issues increased the archbishop's antipathy toward Gelves, and in late 1623, Pérez de la Serna excommunicated the viceroy, an unprecedented action in the history of New Spain.

Matters got worse when in early January the Audiencia of Mexico, perhaps pressured by the viceroy,



ordered the archbishop deported to Spain. Immediately facing strong public opposition, however, the *AUDIENCIA* suspended the sentence the following day, and Gelves responded by jailing several of its magistrates. This provoked a demonstration in the *PLAZA MAYOR*, which was dispersed by the viceregal guard. With Pérez de la Serna 25 miles (40 km) out of MEXICO CITY two days later, on January 15, 1624, the CATHEDRAL CHAPTER proclaimed an interdict, and church services ended in the capital. A riot followed, and Gelves agreed to free all confined magistrates and recall Pérez de la Serna. The concessions did not satisfy everyone in the mob, and faced with growing mayhem, the *audiencia* announced it was assuming the viceroy's powers. When the mob then stormed the palace, Gelves escaped to the safety of the Franciscan priory. After returning to Mexico City, Pérez de la Serna soon went to Spain, without royal permission, to explain the events. Forbidden to return to New Spain, he was named bishop of Zamora and died in that city.

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**Pernambuco** Located on BRAZIL'S northeast coast between Itamaracá and BAHIA, the captaincy of Pernambuco enjoyed geographic and climatic advantages that facilitated the production of SUGAR. Rich soil, easy access to water transport and power for mills, and adequate rainfall were among its assets. Benefiting from an alliance reached with the Tobajara, donatary Duarte Coelho proved himself a capable administrator who attracted Portuguese colonists and quickly made Pernambuco Brazil's leading source of dyewood and its most important sugar-producing and -exporting region.

With rising prices in Europe, access to adequate capital, and indigenous labor already supplemented by African slaves, between 1550 and 1583, the number of sugar mills in Pernambuco increased from five to 66, and the captaincy led Brazil in sugar production (see SLAVERY). By 1612, its *ENGENHOS* increased in number to 90, and by 1629, to 150. One of only two donatary captaincies to have some economic success by 1550 (the other was São Vicente, far to the south), it was the last donatary colony to come under the complete control of the Crown. Its capital of Olinda had some 4,000 inhabitants in 1630, while its port of Recife came into its own only when it served as the capital under Dutch occupation.

In 1630, the Dutch invaded northeastern Brazil, and Pernambuco came under their rule. By that time, BAHIA already had more slaves than Pernambuco and was emerging as Brazil's foremost sugar producer. Sugar production continued in Pernambuco, but a rebellion that began in 1645 and continued until the expulsion of the Dutch in 1654 adversely affected the colony's sugar ECONOMY. Moreover, during the years of Dutch

occupation, English, French, and Dutch colonies in the CARIBBEAN offered serious competition. The price of sugar in Lisbon fell by almost two-thirds between 1654 and 1689.

The gold rushes to MINAS GERAIS and then MATO GROSSO produced additional demand for African slaves and drove up their price by more than 50 percent between 1710 and 1720. Sugar planters were consequently beset by rising labor costs and lower sale prices. The result was declining production after 1730, a decline not made up for by exports of leather and hides.

Starting in 1788, cotton production in the interior of Pernambuco provided another export to Portugal. Benefiting from rapidly growing textile industries in Britain and France, by 1807, it was producing over 60 percent more than MARANHÃO, its only serious rival in Portuguese America.

At the end of the colonial period, Pernambuco's population of 392,000 was exceeded only by that of the captaincy of Minas Gerais, at 495,000. Totaling 42 percent, free blacks and mulattoes in Pernambuco were about 50 percent more numerous than whites (29 percent), slaves (26 percent) were slightly less numerous than whites, and Amerindians made up about 3 percent of the population (see *MULATO*).

On March 6, 1817, a rebellion erupted in Pernambuco. The next day, the rebels proclaimed a republic and put in place a provisional government. The rebellion quickly spread into Paraíba do Norte and Rio Grande do Norte. Although suppressed by late May, its call for "Religion, Homeland, and Liberty" demonstrated an alternative to the vision of cokingdoms of Brazil and Portugal created in 1815. Opposition to rule from RIO DE JANEIRO persisted beyond the declaration of independence from Portugal in September 1822.

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**Peru, Viceroyalty of** Created by the New Laws of 1542, the Viceroyalty of Peru encompassed all of Spanish South America, with the exception of the part of coastal TIERRA FIRME under the jurisdiction of the Audiencia of Santo Domingo into the 18th century. The viceregal capital of LIMA was the administrative center for these vast realms, many distant from it. As other municipalities gained prominence, one by one separate *AUDIENCIA* districts were identified within the viceroyalty: New Granada or Santa Fe de BOGOTÁ (1548), LA PLATA or CHARCAS (1559), QUITO (1563), CHILE (1563, definitively in 1606), PANAMA (1564), and, temporarily, BUENOS AIRES (1661–72). After an early unsuccessful effort, the

VICEROYALTY OF NEW GRANADA was definitively carved out of the Viceroyalty of Peru in 1739, bringing together New Granada, the Kingdom of Quito, Panama, and much of VENEZUELA. The VICEROYALTY OF RÍO DE LA PLATA was established in 1777, combining the extensive district of the Audiencia of Charcas with a province from Chile.

The *audiencia* district of Lima was sometimes called Bajo Perú (Lower Peru), as opposed to Alto Perú (Upper Peru), which referred to Charcas. Peru included a coastal plain along the Pacific Ocean cut repeatedly by rivers descending from the immense Andes and bounded by fertile valleys. The mountain ranges that made up much of Peru had induced preconquest civilizations to build numerous terraces for AGRICULTURE. Descending from the eastern slopes of the Andes were hot, tropical lowlands. The close relationship between Lower and Upper Peru, especially with Charcas's MINING center of POTOSÍ, resulted in the two *audiencia* districts being administered at times as a single unit, which they were prior to the creation of the Audiencia of Charcas in 1559. Lima, the viceregal capital and authorized distribution center for imported goods and the dispatch of SILVER, quickly became a bastion of Spanish rule and culture within the viceroyalty.

By 1560, a thin replica of Castilian society, save its peasantry, existed in Peru, which then had about 8,000 Spaniards. The vast majority of the population was Andean (Amerindian), although a small number of African slaves (both *bozales* and CREOLES), some mestizos,

and a few mulattoes (the term in 1560 applied to anyone with some African ancestry) were present as well; persons of African descent probably exceeded 3,000 (see *MESTIZAJE/MESTIZO*; *MULATO*; *SLAVERY*).

### DEMOGRAPHIC CHANGES

Epidemic disease reached Peru before the Spaniards. Between 1524 and 1560, nine EPIDEMICS had struck one or more parts of Peru and reduced the pre-epidemic indigenous population of perhaps 9 million to about 1.5 million. Population decline among NATIVE AMERICANS continued, most dramatically in lowland areas, as a result of later epidemics, Spanish abuse and exploitation, changed living locations and conditions, and other causes. The estimated Andean population in 1620 was 600,000, only about 150,000 below that of NEW SPAIN. The estimated colored population 30 years later was about 30,000, with some 10 percent free. Although the population stabilized in the mid-17th century, epidemics from 1719 to 1730 reduced it to its colonial nadir; by 1750, it had risen to 610,000. Peru's population according to figures from 1795 totaled 1,115,207. Of that number Amerindians were 58 percent, or 648,615; mestizos, 22 percent (244,313); Spaniards, 13 percent (140,890); and blacks, 7 percent (81,389), half of whom were free. Peru was both much less populous and more Indian than New Spain; Spaniards were an even smaller minority in Peru than in New Spain.

Another striking difference in Peru was the extent to which the Andeans had left their home villages and



Cerro de Pasco became Peru's most important mining center in the late colonial period. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

taken up residence elsewhere. These *FORASTEROS* reflected Andeans' reaction to both the resettlement program of *reducciones* and the *MITA* for Potosí initiated by VICEROY FRANCISCO DE TOLEDO Y FIGUEROA (see *REDUCCIÓN*).

### SPANISH CITIES AND INDIGENOUS VILLAGES

By the end of the 1560s, most of Peru's principal Spanish CITIES were founded, although several more, for example, HUANCAMELICA, would emerge out of later MINING camps. Francisco Pizarro reconstituted CUZCO as a Spanish city in 1534 and founded Lima the following year. Piura (1531), Trujillo (1533), Chachapoyas (1536), Huánuco (1539), and AREQUIPA (1540) were also established within the conquerors' first decade in Peru.

The Inca capital of Cuzco was the location of a dense highland native population, but Pizarro favored a site with easy access to the ocean as the Spanish capital. Close to its port of CALLAO, Lima initially grew rapidly. In 1593, the population was estimated at 12,790, with some 4,000 blacks, mulattoes, and *ZAMBOS*, almost a quarter of them free. In 1614, Lima had a total population reported as 25,167; of this number, 11,867 were Spaniards, and 11,130 were persons of African descent. An archbishop in 1636 indicated that the city's total population was 27,064, of which blacks numbered 13,620; Spaniards, 10,758; Amerindians, 1,426; mulattoes, 861; mestizos, 377; and Chinese, 22. A figure for 1687 credits Lima with almost 80,000 inhabitants, although this seems high; within five years of the catastrophic earthquake, the number was less than 40,000, a figure in line with the 35,000–37,000 estimated at the end of the century.

Lima's population grew modestly in the 18th century. In 1790, the city's census, including 4,831 people in religious establishments but excluding men in the MILITARY, revealed a population of 47,796. Spaniards at this time were 36 percent (17,215) of that number; blacks were 18.8 percent (8,960); *CASTAS*, 14.9 percent (7,106); mulattoes, 12.5 percent (5,972); mestizos, 9.7 percent (4,631); and Amerindians, 8.2 percent (3,912). There were 9,229 slaves drawn from the blacks, mulattoes, and perhaps other *castas*. Strikingly, Spaniards were very clearly a distinct minority, scarcely more than one-third of the total population and only slightly less than *castas*, mulattoes, and mestizos combined.

The minority position of Spaniards was even greater when determined for the intendency of Lima in 1795 (see INTENDANT). Out of a total population of 155,563, they numbered only 24,557, or under 16 percent. In comparison, black slaves numbered 29,781, and free blacks, 17,864. Amerindians totaled 69,614, and mestizos, 13,747. The figures for the intendency of Cuzco revealed 32,820 Spaniards of a total population of 208,791; while the percentage of Spaniards was about the same as in Lima, the percentage of Amerindians was nearly 73 percent, and black slaves were virtually nonexistent. In the intendency of Trujillo in northern Peru, Spaniards numbered 19,750 (7.8 percent) of a population of 251,994.

Spaniards were relatively numerous in the intendency of Arequipa, accounting for 30,587 (22 percent) of a total of 138,186 inhabitants.

Indigenous villages included both the remnants of the *reducciones* that Viceroy Toledo had established in the 1570s and the original native villages to which Amerindians had gradually returned. The native villages were strongest in the Andes, where epidemic disease had been less devastating than in the coastal lowlands. Although the massive internal migration of *mita* workers and their families to Potosí as well as the movement of other Amerindians to avoid the *mita* had shuffled the Andean landscape, some *KURAKAS* and ambitious *principales* had managed to survive and, in some cases, prosper. In 1754, there were still more than 2,000 *kurakas* in Peru, although maintaining the reciprocity and redistribution that had been the foundation of relationships prior to the conquest had been difficult and in some cases impossible under Spanish demands. Since indigenous communities believed that the Crown provided them with continued access to land in reciprocity for their tribute and labor, village conflicts were more frequently with other Andean communities or individual Spaniards than with the Crown.

A longstanding abuse against Amerindians was the *repartimiento de mercancías*, or *REPARTO*, perpetuated by *corregidores* and sometimes abetted by parish clergy and even *kurakas* (see *CORREGIDOR*; *CORREGIMIENTO*). MULES, but also cloth, razors, and even COCA were forced on the indigenous at prices that could be double or triple the free market rate. It was the collection of payment that elicited most opposition. How collectors dealt face to face with Native Americans was most apt to determine how the latter responded; if the *corregidores* and collectors' actions appeared "fair" and the indigenous perceived they were receiving something of value, often not part of the *reparto*, the exploitive system was accepted. On occasion, however, indigenous people rose violently against the exploiters, as Corregidor Antonio de Arriaga found out at the beginning of the TUPAC AMARU II rebellion.

### TRANSPORTATION

Ocean currents and mountainous terrain made transportation in Peru difficult and expensive. Even in the optimal months of January and February, ships from PANAMA often took two to three months to reach Paita as a result of the winds and currents. At Paita, passengers, including viceroys, often disembarked and proceeded by land to Lima from Piura. Sailing north was easier and the trip from Callao to the Isthmus of Panama was almost always quicker—15 days to six weeks—than the reverse, which took two to three months in the best of times and could take seven or eight months. Sailing from Callao to Chile became much easier after sailor Juan Fernández discovered in the 1580s an ocean route away from the coast that shortened the trip to a month, a length roughly equivalent to the return trip from Valparaiso to Callao.

Land transport depended on llamas and mules traveling in caravans known as *trajines*. MERCURY had to be transported from Huancavelica to Chíncha, where it was loaded and sent to Arica. Indigenous communities along the major route that developed from Arica to Potosí were pressed into providing llamas or mules and whatever else might be needed to keep the *trajines* moving along a route that passed through Cuzco and La Plata. Enterprising indigenous communities sent coca, salt, and other products with the *trajines*, thus making a profit out of what was potentially simple exploitation. While the length of the trip from Arica to Potosí varied, in 1611, it was reportedly made in only 24 days, although to the detriment of the mules. It required 21 days to transport mail from Lima to Cuzco and another 36 days from Cuzco to Potosí.

### AGRICULTURE AND RANCHING

Andeans before the conquest had a richer and more varied diet than Mesoamericans had, for the former farmed ecological niches extending from coastal valleys to the high plateaus in the Andes. In addition to MAIZE, grown in lower highland valleys, coastal valleys, and the eastern slopes of the Andes, were potatoes of many varieties, manioc and other root crops, squash, beans, chili peppers, avocado, chirimoya, and numerous other fruits and vegetables. Andeans obtained meat from both camelids and covies, guinea pigs owned by every household. Other Andean crops included TOBACCO, coca, and cotton, the latter two of great importance.

Spaniards quickly introduced their trinity of WHEAT, grapes, and olives as well as sugarcane, bananas, various Iberian fruits, vegetables, and other plants including alfalfa and clover. Horses, mules, donkeys, CATTLE, SHEEP, goats, pigs, and dogs also arrived. Wheat was as essential to Spaniards in Peru, as in SEVILLE, and its success as a crop heavily influenced where Spaniards remained after settlement. In Peru, wheat required irrigation in the coastal valleys and would not grow in the Andes at elevations above 12,000 feet (3,658 m). The valleys near Cajamarca, Chachapoyas, Huamanga, Cuzco, and Arequipa quickly became wheat and flour producers of such quantity that shortages might occur only once or twice in a lifetime. The result was fresh bread in every Spanish city. In Potosí in 1603, bakers were producing 36,000 pounds (16,364 kg) of bread daily.

Grapes did exceedingly well around Arequipa, Ica, Pisco, and other southern locations. WINE became an important export, being transported and sold in great quantity to Potosí, Lima, and other Peruvian markets, as well as to purchasers in New Spain, legally or otherwise. Brandy replaced wine as Arequipa's main export in the 18th century as a way to get more value from a surfeit of grapes.

Some small-scale Spanish and a few *casta* farmers in the Arequipa area succeeded in growing olive trees. They were shipping both olives and olive oil to Lima

in the early 17th century. JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA noted in the mid-18th century that "olive plantations appear like thick forests" and require little cultivation. The results are "an uncommon plenty of the finest olives, which they either commit to the press for oil, or pickle, they being particularly adapted to the latter, both with regard to their beauty, largeness, and flavour. Their oil is much preferable to that of Spain." The JESUITS both purchased and were given olive groves, in one case a grove in the Arequipa region worth 30,000 pesos. Producers in Lambayeque, Nazca, Pisco, and other locations also sent olives and oil to Lima; an ample supply of oil was available there in the mid-18th century.

Spaniards introduced sugarcane, and SUGAR became an important product in coastal valleys. Saña in the early 17th century was a prosperous trading center exporting sugar and conserves as well as other agricultural products to the regional market.

Spaniards initially devoted coastal lands to raising livestock. Horses, brought by Pizarro in 1531, were at first very valuable but after 1540 fell rapidly in price. Pigs, also introduced in Peru in 1531, were raised on coastal lands as well. In 1562, a deceased *encomendero* left 910 head of cattle, 680 pigs, 178 goats, and 37 horses; another coastal entrepreneur gave his daughter 500 head of cattle, 300 horses, and 200 goats in the Mala Valley in 1568. Three years later, an owner kept 1,114 head of cattle, 80 horses, and 800 pigs on land between the valleys of Huaura and Chancay. He also had about 30,000 sheep and an *OBRAJE* in the Mantaro Valley. Thus, stockraising began early; it continued throughout the colonial era, although was often moved to locations beyond cropland that supplied municipalities with agricultural products.

In the southern Andes, the native population had a long herding tradition with llamas and alpacas. Thus, the introduction of cattle and especially sheep found favor as a continuation of an old tradition, rather than a revolutionary change. Indeed, raising livestock seems to have contributed to the survival of indigenous communities, for it meant continued use of pastures. Sheep, in particular, served to reinforce preconquest traditions as well as to protect lands from Spaniards. And, of course, Andeans' camelids continued to need pasture. While sheep supplied wool used in *obrajés*, they were also a source of mutton, which Juan and Ulloa claimed was the most common meat eaten in Lima.

The major source of mules for the *trajines* used in the long-distance trade to Potosí was Salta, to which thousands of mules originating farther south were brought to winter. Mules were also raised in Peru. The Jesuit college in Arequipa kept both mules and donkeys available for transport. The Olmos district of Saña in northern Peru raised the mules employed on the Paita-to-Lima route. Chillaos was well known both for raising mules and for the high quality of its horses; it sold mules throughout the northern highlands.

### ARTISANS AND DOMESTIC TEXTILES

Peru had a rich history of skilled artisans and weavers. While this preconquest legacy continued, by 1560, more than 800 Spanish artisans had reached Peru. These included more than 150 tailors, 80 shoemakers, almost 150 workers in iron, 102 carpenters, 33 masons, 70 silversmiths, 47 muleteers, 36 barber-surgeons, 25 bakers and confectioners, and 24 musicians and instrument makers. African slaves came from a tradition of metal and wood-working, and the shortage of skilled labor was such that Spanish masters took creole slaves as apprentices; before the end of the 16th century, black artisans could be found in Lima and other Spanish municipalities in Peru, as well as on *HACIENDAS*. One sugar hacienda in 1636 had blacks working as potters, carpenters, blacksmith, charcoal-maker, and sugar master and his six assistants.

As in *MEXICO CITY*, Lima had craft guilds for tailors and hosiers, lacemakers and borderers, dyers, shoemakers, and other occupations. While Spanish masters tried to restrict entry, the need for craftsmen was such that skilled colored men were able to enter many guilds and became dominant in some. In early 17th-century Cuzco, the majority of artisans were indigenous, “very skillful and accurate in their professions.” Included in their number were many silversmiths, a craft that Spaniards wanted to restrict to themselves but were unable to do so.

Amerindians continued to dominate domestic textile production throughout the colonial era. Canas y Canchis and Quispicanchis were two important areas of textile production. Like the numerous *obrajes* in Cuzco, they produced a rough weave for sale to indigenous people. While small textile shops with a small number of workers were common, there were large *obrajes*; one in Oropesa had about 400 employees. *WOMEN* as well as men worked in *obrajes*, although in smaller numbers. Conditions in *obrajes* and sometimes in the smaller shops (*chorillos*) were oppressive, and some *obraje* owners used *DEBT PEONAGE* to secure workers.

Competition from the *obrajes* of the Quito region was fierce. Until the end of the 17th century, Quito’s *obrajes* were major suppliers of woolen cloth (*pañó azul*) for the Potosí market. The application of *COMERCIO LIBRE* led to additional competition from European textiles imported via Buenos Aires and Lima. In addition, Viceroy Agustín de Jáuregui’s abolition of the *reparto de mercancías* in December 1780 eliminated a distribution mechanism that had created a substantial market for domestic textiles. Production of cotton cloth in the *chorillos* also cut into the market. As a result, *obrajes* in Cuzco and Huamanga suffered.

### EXPORTS AND IMPORTS

The principal export from and through Peru was silver; the major import was textiles. Potosí in Charcas dominated silver production in 1560 and reached its apogee in the 1590s. Although registered production declined thereafter, Potosí continued to be the Viceroyalty of

Peru’s single largest producer throughout the 17th century. Between 1531 and 1660, almost 280 million pesos of registered private silver flowed through Panama, swamping other exports from Peru on their way to Spain. Silver continued to be Peru’s primary export for the remainder of the colonial era despite the transfer of Upper Peru and its silver to the new viceroyalty of Río de la Plata in 1777. Lower Peru’s silver production subsequently increased, more than doubling between 1777 and 1792 and peaking in 1799. Serious decline set in only in 1812.

As the legal hub for trade with Spain under the fleet system, Lima was the distribution center, as well as an important consumer, of imported goods (see *FLEETS/FLEET SYSTEM*). Initially, goods transported across Panama and shipped to Callao included a broad selection of European merchandise. Textiles; wine and brandy; olive oil; books, paper, ink, and quill pens; glassware; medicine; copper, tin, and lead; and iron fittings, nails, hoes, and plows were among the items regularly available at the Portobelo fairs. African slaves were also transported across the isthmus for sale in Lima and distribution elsewhere in the viceroyalty.

Silks, porcelains, ivory, some spices, and other luxury goods from East Asia were invariably of great interest to purchasers in Peru and were trans-shipped to Potosí. This merchandise came via the *MANILA GALLEONS* and *ACAPULCO* in exchange primarily for Peruvian silver, although mercury was exported intermittently from the 1560s, and wine entered the trade around 1600. Subject to unenforced limits of volume and value, the trade from Acapulco to Lima became a noticeable drain on Peruvian silver. In the 1590s, a viceroy noted that the imported textiles sold for a small fraction of the cost of European textiles sent from Spain. A royal order issued in 1631 and repeated in 1634 banned trade between Peru and New Spain. The prohibition lasted into the 18th century, but enterprising smugglers from New Spain transported goods to small Ecuadorean ports from which they were carried to *GUAYAQUIL*, described by Juan and Ulloa as “one of the main centers on the Pacific Coast for the flourishing trade in goods from the Orient” and then shipped farther south (see *SMUGGLING*).

The Tierra Firme fleet that used *CARTAGENA DE INDIAS* and Portobelo was in decline by the 1620s and became increasingly unreliable for the remainder of its existence. Beginning in 1695, expanding during the *WAR OF THE SPANISH SUCCESSION*, and persisting for some years beyond it, French ships sailed around Cape Horn carrying large quantities of Rouen cotton cloth. The trade was so vigorous that between 1701 and 1725 it produced nearly 55 million pesos in bullion. The demand was such that actual, as distinct from registered, silver production at Potosí must have increased to make the necessary bullion available.

Subsequent efforts to revive the fleet system failed. Admiral Edward Vernon’s destruction of the fortifications at Portobelo in 1740 eliminated the possibility of

resuscitation. Henceforth, single registered ships sailing around Cape Horn and then up the coast of South America became the major transportation system for legal trade from Spain. In 1774, Peru was allowed to trade in American products, with important exceptions including wine and olives, with New Spain, New Granada, and GUATEMALA but was not to receive East Asian goods or send precious metals in return.

The 1778 expansion of *comercio libre* included Peru. As Spain was at war with Great Britain from 1779 until 1783, the full implications were not clear until Spanish merchants flooded the Peruvian market with 24 million pesos worth of goods between 1785 and 1787; 33 million pesos of silver flowed back to CÁDIZ during the same years, causing hostile *CONSULADO* merchants in Lima to complain about the loss of circulating coin. Nonetheless, rising silver production enabled the trade to continue, with profits adequate that Cádiz merchants remained eager to ship merchandise to Lima.

### ADMINISTRATION

The administrative structure of the *audiencia* district of Lima by 1560 included a viceroy, *audiencia*, treasury office, and mint in Lima as well as MUNICIPAL COUNCILS in both Spanish cities and towns and substantial indigenous villages (see MINTS). The first effort to replace *encomenderos* with royal provincial officials known as *corregidores* began in the 1560s. In the early 17th century, the king was naming *corregidores* for 10 provinces in the Audiencia of Lima, and the viceroy was appointing them to an additional 46 provinces. The Crown's decision in 1678 to reduce significantly the number under the viceroy's patronage and to sell appointments to the remainder gave further impetus to the use of *reparto*, or *repartimiento de mercancías*. The practice of selling appointments continued until the mid-18th century.

Peruvians were particularly effective at obtaining *audiencia* appointments. Between 1610 and 1687, they accounted for 51 of 93 creoles named to *audiencias* in the Americas. Between 1687 and 1750, when the Crown systematically sold appointments, creoles not only were the majority named, 73 of 139, but 27 were named directly to the Audiencia of Lima, 25 of them purchasers. Only from 1751 to 1808 were they a minority of creole appointees.

In 1784, CHARLES III extended the intendency system to Peru, creating seven intendancies at that time; an eighth, Puno, was transferred from the Viceroyalty of Río de la Plata in 1787. Prior to 1810, nearly every intendant was a PENINSULAR. A significant number had prior military experience. The intendant system quickly produced increased revenue but soon the higher revenues tapered off. The *SUBDELEGADOS* who replaced the *corregidores* as provincial administrators were paid a fraction of the tribute collected and, as a result, some employed the outlawed practice of *reparto*.

As a consequence of the Túpac Amaru II rebellion, in 1787, the Crown created a new *audiencia* located in

Cuzco, a belated response to longstanding complaints about the time, distance, and cost of sending appeals to the court in Lima.

### CHURCH

Clerics accompanied conquistadores and early settlers to Peru, and by 1540 FRANCISCANS, DOMINICANS, and MERCEDARIANS as well as priests from the secular clergy had arrived. By the early 1550s, the Franciscans had established the province of Lima, and some 80 were present in Peru in 1559, a number later augmented primarily by creoles educated in Peru. By 1589, the province had 139 priests, plus students and lay brothers. The majority were men born in Peru, and the provincial, for the first time, was a creole. Jesuits reached Peru in 1568. While some missionaries were upright and enthusiastic, overall the Peruvian counterpart to New Spain's "spiritual conquest" was less satisfactory, perhaps because many of the finest and most enthusiastic clergy were involved in the northern viceroyalty.

By the 1560s, the Bishoprics of Cuzco and Lima had been established for a number of years, although the original incumbent in Lima, Jerónimo de Loaisa, was still serving as archbishop, the bishopric having been elevated to archiepiscopal status in 1547. The Bishopric of Cuzco was erected in 1537. Although the Bishopric of Arequipa was erected in 1577, it required a second effort in 1607 to make it effective; only in the late 1610s did the first bishop arrive. The same pattern occurred in the Bishopric of Trujillo, refounded in 1609.

On several occasions, some Native Americans in Peru supported millenarian movements that called for a return to preconquest religious practices. The first of these occurred in the province of Huamanga in 1564. Called Taqui Onqoy, or "dancing sickness," its leaders proclaimed that the Spaniards would be subdued by the traditional gods (*huacas*) and Amerindians would perish as well if they did not abjure Christianity, cease making tribute payments, and stop providing *mita* labor. Quickly suppressed by the Spaniards, Taqui Onqoy demonstrated both the shallowness of some conversions to Christianity and, given its lack of support outside Huamanga, the fact that Christianity had put down irradicable roots.

Twice in the 17th century, religious authorities in Peru initiated campaigns to extirpate idolatry. The first, in 1609–27, occurred in the province of Huarochirí in the Archbishopric of Lima. It was the result of an immoral and unscrupulous parish priest, Francisco de Ávila, who denounced pagan practices in the parish from which he had been removed and then to which he was named judge-inspector of idolatry after being cleared of wrongdoing. Under his campaign, idols, mummies, and Andean religious shrines were destroyed, and those responsible for idolatry were punished and instructed in Catholic doctrine. His systematic approach was outlined in a manual for extirpators published in 1621. Many clerics and indigenous communities protested the abuses and

financial demands of the visitors and the end of strong sponsorship by the archbishop and viceroy terminated the campaign. A second campaign began in 1641 under a new viceroy and persisted until 1671. After that date, a few idolaters were prosecuted, but churchmen increasingly viewed such infractions as not meriting the kind of persecution conducted earlier.

The Tribunal of the INQUISITION in Lima opened in 1570, but lacking jurisdiction over cases involving indigenous people, focused its efforts on the remainder of the population. While it policed morals, censored published materials, and sought to uproot the usual set of infractions, the most spectacular use and abuse of its authority was in the persecution of Portuguese Judaizers, including some very wealthy merchants in Lima, in the “great Jewish conspiracy” that culminated in an *AUTO DE FE* in 1639.

### EDUCATION AND CULTURE

As the center of Peru’s trade and home to a large well-to-do Spanish population, Lima emerged as Peru’s most vibrant center of EDUCATION and culture. The diocesan clergy and Jesuits in particular provided *COLEGIOS* for the sons of families who did not require their labor to subsist.

In Lima, the Colegio Mayor of San Martín, established in 1582, instructed students aged 12 to 24. The Colegio Mayor of San Felipe, founded in 1592, served as a residential facility for 16 students in the arts, canon law, and theology. The Seminary of Santo Toribio, opened in 1590, offered studies in theology and sacred scripture. A separate school for Amerindian *CACIQUES* opened in 1620–21; its objectives were to teach reading, writing, and civic and Christian principles.

Youth in Cuzco, Trujillo, Arequipa, and other locations had access to primary and secondary education as well. In 1598, the bishop of Cuzco opened the College and Seminary of San Antonio de Abad; this became home to a university in 1696 (see UNIVERSITIES). In 1619, the Jesuits opened the College of San Bernardo in Cuzco; four years later, they added to this foundation with the University of San Ignacio de Loyola, although lawsuits prevented it from functioning until mid-century. The College of San Francisco de Borja for the eldest sons of caciques was established in Cuzco in the early 17th century.

The UNIVERSITY OF SAN MARCOS, authorized in 1551 but not functioning until the 1570s, attracted students from throughout Peru as well as from Charcas, Chile, and other regions. It conferred baccalaureate, licentiate, and doctoral degrees and could boast a number of alumni who obtained positions of considerable responsibility, including on the Audiencias of Lima, Charcas, Chile, and Quito.

Lima had one of the first PRINTING PRESSES, as well as an active market for books imported from Spain. The first book published was a trilingual catechism resulting from the Third Lima Council of Bishops in 1582–83.

Written in Castilian, Quechua, and Aymara, this work and others originating with the council are credited with creating what is now termed *Standard Colonial Quechua*, a form of Quechua based on that used in the Cuzco region and the one that clerical authors employed for the remainder of the colonial era.

While Cuzco could claim El Inca GARCILASO DE LA VEGA, Lima was home to a literary society that included PEDRO DE PERALTA Y BARNUEVO and, at the end of the 18th century, periodicals that included the celebrated, although short lived *MERCURIO PERUANO*.

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**Pezuela, Joaquín de la** (b. 1761–d. 1830) *Spanish viceroy of Peru* Born in Naval, Huesca, Spain, Joaquín de la Pezuela followed a MILITARY career. He studied in the Artillery School of Segovia, participated in the WAR against the French in 1793 and 1794, and served as commander in chief of the royalist army in Upper Peru (CHARCAS) from 1813. He was victorious at Vilcapuquio and Ayohuma against a rebel army from BUENOS AIRES led by MANUEL BELGRANO and also against forces led by José Rondeau at Viluma. Promoted to the rank of field marshal as a result of these successes, Pezuela replaced JOSÉ FERNANDO DE ABASCAL Y SOUSA as VICEROY OF PERU, arriving in LIMA on July 7, 1816. His naming was initially interim, but FERDINAND VII granted him a regular appointment in March 1817.

A royalist and an absolutist, Pezuela faced an unenviable situation. He reached Lima two days before the UNITED PROVINCES OF THE RÍO DE LA PLATA declared complete independence from Spain. With the viceregal treasury more than 11 million pesos in debt, he lacked the financial resources to pursue rebels effectively. The victory of JOSÉ DE SAN MARTÍN’s Army of the Andes at CHACABUCO in 1817 quickly led to CHILE declaring inde-

pendence. Although the army Pezuela sent was victorious at Cancha Rayada on March 19, 1818, rebels triumphed over royalist forces led by his son-in-law Mariano Osorio at the BATTLE OF MAIPÓ on April 5, 1818, a victory that confirmed Chilean independence and made a seaborne invasion of Peru possible.

The independence of Chile meant that Peru's principal trading partner was now its enemy. The insistence of a majority of Lima's merchant guild (*CONSULADO*) on enforcing an 1812 ban on goods that went through Chile meant that approximately one-half million pesos of income derived annually from the TRADE was also lost. Consequently, Pezuela faced fiscal disaster that only permitting foreign shippers to sell their wares and pay taxes at CALLAO could mitigate. His dependence on foreign trade for WHEAT and income led him to circumvent restrictions, which further angered a number of merchants.

PENINSULAR officers with Masonic ties, including JOSÉ DE LA SERNA and José de Canterac, arrived from Spain from 1815. These liberals opposed Pezuela's belief in negotiation and compromise and soon began ignoring his orders. When San Martín's army began landing at Pisco on September 7, 1820, Pezuela had no available army to contest it. Between the *consulado's* unwillingness to provide adequate financial resources and the refusal of hardline officers to move troops from the Army of Upper Peru to protect the southern coast, Pezuela lacked the ability to respond. His enemies, however, criticized him for not employing what he described as "a system of oppression and bloodshed." With the liberals', or constitutionalists', return to power in Spain as a result of the RIEGO REVOLT in January 1820, no additional military support would come from Spain. Regardless, Pezuela's liberal critics believed that force was the only way to deal with rebels who rejected the restoration of constitutional government for the "Spanish Nation." The defection of an important regiment and the declaration of independence by the INTENDANT of Trujillo further weakened the viceroy. Indeed, Pezuela, by this time, considered independence inevitable.

On January 29, 1821, a coup led by army officers quickly replaced Pezuela with La Serna. Although the Crown had already named La Serna as Pezuela's successor in the event of the viceroy's death, it did not appoint him viceroy until December 19, 1823.

Returning to Spain via RIO DE JANEIRO and Plymouth, England, Pezuela reached Madrid on May 20, 1822. An unnecessary review of his political sympathies for possible liberal views resulted in approval of his conduct and, on June 17, 1825, an appointment as governor and captain general of New Castile, a post he served until his death. In March 1830, he was granted the title *marqués de Viluma*.

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**Philip II** (b. 1527–d. 1598) *Spanish monarch* The son of CHARLES I and Isabella of Portugal, Philip grew up in a court still without a fixed capital. In 1543, his father named him regent of his realms in Spain and left the peninsula for 14 years. The Holy Roman emperor's advice to his son was "keep God always in mind" and "accept good advice at all times." By the time Charles returned to Spain, Philip's first marriage, to Maria of Portugal, had ended with her death, and he was remarried to Mary Tudor of England; this marriage would end in 1558 with her death. By that time, Philip had been king of Naples since 1554 and king of Castile and Aragon since his father's abdication on January 16, 1556.

A hardworking, conscientious, and deeply religious monarch, Philip returned to Spain from the Netherlands in 1559 and never again left the Iberian Peninsula. European affairs, the bane of his father, remained at the center of Philip's concerns, but unlike his father, he viewed them from a Spanish perspective. He was particularly consumed with retaining his inheritance, preserving Catholicism from threats from both Islamic Ottomans and Protestants, and maintaining Spain's monopoly of TRADE with the INDIES. While Philip's third marriage, to Elizabeth of Valois, and the Treaty of Cateau-Cambrésis in 1559 brought conflict with France to an end, the revolt of the Calvinist provinces of the Netherlands that began in 1568 struck Philip to the core; it would prove an open sore that extended into the reigns of his son PHILIP III and grandson PHILIP IV.

With Protestantism in the ascendancy during the reign of Elizabeth I, the English provided support for the United Provinces that ultimately led to open warfare. Spain lost one armada in 1588 and a second in 1597; peace would not be achieved until the Treaty of London was signed in 1604, after Philip's death.

Naval victory over the Turks at Lepanto in 1571 was celebrated but did not end the Muslim threat. Indeed, the revolt of ostensibly converted Muslims (*Moriscos*) in the Alpujarras region of Spain, although quelled, also brought together the issues of Catholicism and the preservation of Philip's inheritance.

Only Philip's takeover of Portugal through a dynastic claim and military force seemed a major triumph and enabled him to be the monarch on whose realms the sun never set. The takeover brought both antagonism from the Portuguese and additional colonies that attracted foreign poaching.

A constant in Philip's reign was inadequate income to match expenditures. One of his first acts as monarch, in 1557, was to restructure the debt inherited from his father in what is usually called a bankruptcy. He was forced to do this again in 1575 and 1596.



Although Castile and especially its peasantry bore the major share of Philip's expenditures, the monarch benefited from empire. While the fabled conquests led by Hernando Cortés, Francisco Pizarro, and others were long past by 1556, on the periphery of empire, less well-known conquests and Spanish settlement continued. And in some cases, ongoing warfare with Amerindians persisted, for example, in southern CHILE and northern NEW SPAIN.

Philip received unprecedented revenues from the American colonies. The introduction of the amalgamation process in New Spain and subsequently in PERU raised SILVER production to previously unheard-of levels. POTOSÍ, the great mountain of silver in CHARCAS, yielded increasing sums into the 1590s. Accounting for just more than 10 percent of Philip's revenues when he became king of Spain in 1556, American silver shipped to SEVILLE provided about 20 percent of his revenues by the end of his reign in 1598, an amount roughly equal to royal revenues received from the CATHOLIC CHURCH in Castile. Despite the Viceroyalty of New Spain's greater population, Peru was the more valuable colony while Philip was king.

During Philip's reign, the fleet system of conveying goods to the colonies and principally silver from the colonies to Seville worked effectively (see FLEETS/FLEET SYSTEM). With Spanish "pacification" and settlement in the PHILIPPINE ISLANDS in the 1570s, the MANILA GALLEONS annually brought silks and other East Asian goods to New Spain and Peru, although this trade drained substantial silver from the Atlantic trade. Spanish immigration to the colonies continued in the second half of the 16th century, with the number of identified emigrants from 1560 to 1600 exceeding that from 1520 to 1559.

By the end of Philip's reign, nearly all major Spanish CITIES and towns in the colonies had been founded, marking out the regional and provincial capitals that would persist in most cases throughout the colonial era and beyond. The forced resettlement of NATIVE AMERICANS, a policy that met with varied success, had occurred in New Spain, GUATEMALA, NEW GRANADA, Peru, Charcas, and elsewhere.

Building on Spanish cities and towns, the colonial administrative structure that would last well into the BOURBON DYNASTY was almost completely in place by the end of Philip's reign. The years of VICEROY FRANCISCO DE TOLEDO Y FIGUEROA (1569–81) in Peru had solidified royal rule at the regional level and transformed the required rotational labor practice (MITA) employed by the Incas into a forced rotational labor system whose most visible use was in the silver mines of Potosí and the MERCURY mines of HUANCAVELICA. Philip's introduction of the sale and inheritance of selected positions (OFICIOS VENDIBLES Y RENUNCIABLES) resulted in local elites gaining long-term control over local affairs.

The church in the colonies was also entrenched by the end of Philip's reign. Friars in regular orders and priests from the Society of Jesus could be found throughout the colonies. The JESUITS, in particular, were starting

to establish missions and accumulate the rural real estate that would arouse the jealousy and cupidity of other religious, colonists, and the Crown. The hierarchy of the diocesan clergy was also in place throughout the colonies, but the effort to replace friars with secular parish priests had foundered. The Tribunal of the INQUISITION had been established in MEXICO CITY and LIMA in the early 1570s and would continue into the 19th century.

The number of Amerindians in the colonies declined even further during the reign of Philip II. By 1568, the native population in New Spain was roughly 2.6 million, a number sufficiently low that following the next major epidemic, from 1576 to 1581, Spaniards moved into direct oversight of agricultural production to ensure the continued availability of WHEAT and other foodstuffs (see AGRICULTURE). Population decline in Peru placed increased stress on KURAKAS' ability to maintain the traditional reciprocity and redistribution system employed by their ancestors.

As trading and raiding by English corsairs indicated, foreign interest in Spain's empire increased during Philip's reign. Spain's enemies believed that New World silver funded its foreign policy and armies. If they could capture the silver before it reached Spain, they could cripple Philip's ability to pursue his policy. For the English and Dutch, anti-Spanish sentiment fed the BLACK LEGEND of unique Spanish cruelty and justified whatever actions they themselves took.

At the end of his reign, Philip's empire in the Americas remained intact. Already, however, the colonies were becoming more self-sufficient. With access to East Asian textiles, moreover, their need for European textiles was declining. Philip II was largely spared the implications of the colonies' growing ability to do without Castile's agricultural products and merchandise, merchandise increasingly trans-shipped through Spain but produced elsewhere. His successors were not so fortunate.

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**Philip III** (b. 1578–d. 1621) *monarch of Spain* The son of PHILIP II and his fourth wife, Anna of Austria, Philip succeeded his father in 1598, two years after the government's most recent bankruptcy. He inherited a long-standing and punishingly expensive Protestant revolt in the Netherlands, conflict with England, concern about the loyalty of Morisco subjects, an overtaxed peasantry in Castile, an economy whose major domestic export—wool—was no longer competitive in the European market, and ongoing concern about FOREIGNERS penetrating

the markets of the INDIES. Although PERU's mines continued to produce great amounts of SILVER, the volume of legal goods shipped from Spain was in obvious decline by 1611. The colonies' ability to produce more of the food-stuffs they wanted, as well as artisanal items, reflected a growing self-sufficiency that augured poorly for Spanish exports. Spain increasingly could not produce the goods the colonies demanded and manufactures shipped to the colonies via SEVILLE, SANLÚCAR DE BARRAMEDA, or CÁDIZ originated elsewhere in Europe. Silks secured in the PHILIPPINE ISLANDS for American silver found markets not only in the colonies but in Spain itself.

Philip III's reign was plagued with financial problems. In 1599, his first full year as monarch, almost half of royal income was pledged to debt repayment, and expenses were nearly triple the unpledged income. Despite peace with France as a result of his father's Treaty of Vervins, with England by the Treaty of London (1604), and with the Dutch (1609–21) through the Twelve-Years' Truce, the latter reducing expenditures for the Army of Flanders by about 50 percent, Spain's treasury showed continued deficits as Philip III proceeded to outspend income.

The reign of Philip III marked the emergence of the *valido*, or royal favorite. The duke of Lerma assumed this role and, until his fall in 1618, was, at least in domestic affairs, the most important influence on the king and his delegate in overseeing many matters that Philip II had handled himself. Enjoying personal access to the monarch and controlling others' access through his appointment as grand chamberlain (*sumiller de corps*) and master of the horse (*caballerizo mayor*) and by placing relatives and supporters in other important positions in the royal household, Lerma was able to isolate the king from potential rivals as well as have access to all of his correspondence. The favorite's position enabled Philip III to spend a good deal of time hunting; it also enabled the duke and his supporters to become rich through royal largesse as well as less savory means.

In foreign policy, Philip himself made final decisions, typically after recommendations of the Council of State and, presumably, Lerma. This personal involvement allowed Philip, supported by a majority of his councilors, to impose the defense of Catholicism as a central tenet of his relationships with other rulers. While the truce with the Dutch gave tacit recognition to the Calvinists, Philip, who signed the truce only after extensive and difficult negotiations between the two war-weary and fiscally unsound countries, considered it a breathing space in preparation for resumption of WAR rather than a true peace and an opportunity to expel the Moriscos.

Philip married Margaret of Austria; their son Philip succeeded his father in 1621 as PHILIP IV.

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**Philip IV** (b. 1605–d. 1665) *monarch of Spain* The son of PHILIP III and Margaret of Austria, Philip inherited the “Spanish monarchy”—the aggregate of territories ruled individually by the monarch—while in his teens, in 1621, and would hold it longer than any other HABSBURG, until 1665. Within weeks, it became clear that the last cronies of the duke of Lerma had been cleared out and that Gaspar de Guzmán, the count of Olivares, was the royal favorite (*valido*) of the new king. In 1625, Olivares was made duke of San Lúcar la Mayor and was henceforth known as count-duke (conde-duque). He served until dismissed in 1643.

While historians debate over when Spain went into decline, there is no doubt that during Philip IV's reign, Spain was increasingly less able to achieve its foreign-policy objectives and to maintain its control over the INDIES, despite the best efforts of Olivares. The expiration of the Twelve-Years' Truce with the United Provinces in 1621 led to a renewal of war in the Low Countries the following year. The financial resources available to Philip, however, were already mortgaged until 1625. After peaking in the 1590s at more than 2 million pesos of 450 *maravedís*, average annual remissions of American SILVER for the Crown declined to about 1.5 million pesos from 1601 to 1610 and to less than 1 million pesos in 1620. They remained under 1 million through 1645 but then plummeted to less than 335,000 from 1646 to 1650, rose to just under 450,000 in the next quinquennium, and then dropped to barely 121,000 pesos a year between 1656 and 1660. While the decline in registered silver production from the mines at POTOSÍ certainly affected remissions for the Crown, increased expenditures for defense in the Americas and extensive illegal trading were also responsible.

Despite some military victories, overextension, a weak domestic ECONOMY, chronic indebtedness, and declining American revenues precluded ongoing success. Renewal of war in the Low Countries continued to drain Spanish resources until 1648 when Philip IV accepted the Treaty of Westphalia, which recognized both the republic of the United Provinces as an independent state and its islands in the Indies. France and Spain went to war in 1635 in a conflict not definitively resolved until 1659. One provision of the Treaty of the Pyrenees provided for the marriage of Louis XIV and the infanta Maria Theresa, eldest daughter of Philip IV; in return for the handsome DOWRY promised to Louis, the infanta renounced any claims to the Spanish throne for herself or any heirs resulting from their marriage, in an attempt to ensure that Spain would not become subservient to the French throne.

Philip's Spain suffered blows from within as well as without. In 1640, both the Catalans and the Portuguese

rose in revolt. The surrender of Barcelona in 1652 virtually ended the former, but the Portuguese did not gain Spanish recognition of their independence until 1668.

Spain's rivals did not spare the Indies. Earlier, a Dutch expedition had destroyed the South Sea Fleet off the Peruvian coast in 1615 (see *FLEETS/FLEET SYSTEM*). With the expiration of the Twelve-Years' Truce, the Dutch chartered the *DUTCH WEST INDIA COMPANY* with a monopoly on *TRADE* in the New World and part of the West African coast. A Dutch expedition blockaded *CALLAO* and sacked the port of *GUAYAQUIL* in 1624. In 1628, the Dutch West India Company had its greatest success when Admiral Piet Heyn captured the Spanish treasure fleet with nearly 5 million pesos off *HAVANA*. In 1630, the Dutch West India Company invaded *PERNAMBUCO* in northeastern *BRAZIL*, establishing the Dutch there for a quarter century. In 1634, the Dutch captured Curaçao from the Spanish; subsequently, they took St. Eustatius, Saba, and half of St. Martin. During Philip's reign, the French settled on Martinique and Guadeloupe, among other islands, and the western portion of *HISPANIOLA*. The English took Barbados in 1627, Nevis in 1628, Antigua and Montserrat in 1632, and *JAMAICA* in 1655.

With foreign raiders and settlers, irregular fleets to *NEW SPAIN* and *PORTOBELLO*, extensive contraband trade both on the fleets and by individual foreign merchants, increased public expenditures for defense in the colonies, and a growing population, Spain's American empire drifted ever further from royal control. Declining registered silver production in Peru and rising production in New Spain was turning the latter viceroyalty into Spain's most vital colony in the Indies. Philip was succeeded by his son *CHARLES II*.

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**Philip V** (b. 1683–d. 1746) *monarch of Spain* Born in France, Philip was the duke of Anjou, grandson of the *BOURBON* Sun King, Louis XIV, and Queen Maria Theresa, the daughter of *PHILIP IV* of Spain. The last will of *HABSBURG* king *CHARLES II* of Spain named Philip as his heir. Habsburg archduke Charles, son of Holy Roman Emperor Leopold I, however, also claimed the throne as Charles III, resulting in the *WAR OF THE SPANISH SUCCESSION*. Backed by France and with more public support in Castile than his rival, Philip V was ultimately confirmed on the throne of Spain and the Indies by the *TREATY OF UTRECHT* in 1713. Stripped of European possessions outside Spain as well as Gibraltar and Menorca, the new monarch devoted much of his reign (1700–46) to trying to restore a Spanish presence in Italy and to provide kingdoms there for his children with second wife, Elizabeth Farnese.

Domestically, Philip punished Catalonia, Aragon, Valencia, and Mallorca—that is, the historic Crown of Aragon—for supporting the Habsburg pretender, eliminating their *FUEROS* and, for the first time, making Spain a political reality rather than a geographical expression. He reduced the influence of the Habsburg councils, reassigning many of the original responsibilities of the *COUNCIL OF THE INDIES* to the *MINISTRY OF THE INDIES* and creating other ministries as well. He also experimented with introducing *INTENDANTS*, although only in 1749 would they be extended throughout Spain.

As a result of Philip's desperate sale of appointments during the War of the Spanish Succession and subsequent wars, *CREOLES*, including a number of native sons, enjoyed an unprecedented level of direct influence in administration in the colonies. Philip and his advisers realized the implications of this and sent Francisco de Garzarón to *NEW SPAIN* as visitor general in 1720 (see *VISITA*). Garzarón almost immediately suspended 11 of the 18 ministers on the Audiencia of Mexico (see *AUDIENCIA*).

The successful attack and destruction of *PORTOBELLO*'s forts by British admiral Edward Vernon with six ships and 2,500 men in December 1739 and early 1740 ended the last attempt to hold a trade fair there. Since ships had been routinely sailing to the Pacific coast around Cape Horn from the 1690s, Philip turned to register ships in an effort to maintain Spain's commercial monopoly with its South American colonies. The *WAR OF JENKINS' EAR* (1739–48) with Britain brought another spate of appointments sold by a penurious monarch and further strengthened the hold of creoles and native sons in the colonial *audiencias*.

Although Philip abdicated to his son Louis in 1724, Louis I's death within months brought the psychologically disturbed monarch back to the throne. He reigned until his death.

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**Philippine Islands** The arrival of Miguel López de Legazpi and his expedition initiated permanent Spanish settlement in the Philippine Islands in 1565. Unlike the earlier conquests in North and South America, settlement in the Philippines was to be peaceful, a tribute to the arguments of the Dominicans Bartolomé de Las Casas and Francisco de Vitoria. While there was some bloodshed, the Spaniards were able to establish themselves with relatively little force of arms. As on the American mainland, Spaniards received *ENCOMIENDAS*, but diligent clergy quickly informed the Crown of abuses.

While initial Spanish hopes of using the Philippines as a base from which to Christianize China and Japan and cut into the Portuguese monopoly on the spice TRADE went unrealized, the objective of Christianizing the native population of the Philippines was pursued. Aside from clerics, however, Spaniards soon became much more interested in the rapidly developing trade with China for which Manila served as the hub. The same trade attracted Chinese merchants, who quickly dominated retail trade and crafts in the capital city. Relations between Chinese and Spaniards were never good and, despite having forced the Chinese to settle in a separate area known as the Parian, four serious anti-Chinese riots occurred in the 17th century and a fifth in 1762.

Spanish colonists in the Philippines never numbered more than a few thousand. The length and difficulty of the journey made government service there unattractive for many Spaniards. Indeed, at times, the Crown essentially bribed young attorneys to serve on the *AUDIENCIA* created in 1595 by promising them advancement to the court in MEXICO CITY after a specified term of service. Also from 1595, the chief executive of the Philippines was a governor and captain general. Manila was the administrative capital and only real city, and there sat the usual city council. A *CONSULADO* was created in 1769.

More than 500,000 Filipinos were under the control of Spanish bureaucrats and clerics. In 1650, Manila and its suburbs had a population of some 42,000. The colony was never self-sufficient; subsidies (*situados*) arriving on the annual galleon or galleons from NEW SPAIN made up the deficits.

Spanish dependence on the MANILA GALLEONS caused serious difficulties when they failed to arrive. In 1636, no galleons were dispatched from Mexico, and in 1638, one was lost en route. Storms disrupted the sailing from Manila in 1645, and no ships arrived from Mexico in 1647, 1648, and 1652. Four galleons were lost in 1654, 1655, and 1657.

Since it usually took two years for communications between the islands and the court in Spain, authorities in the Philippines exercised considerable autonomy. Thus, conflicts between civil and ecclesiastical authorities in the islands could continue unresolved for years.

Although authorities in Spain tended to think of the Philippines as another province of Mexico, there were substantial differences. Not the least of them was that the Filipinos escaped the mass destruction by epidemic disease that plagued the Nahuas, the Incas, and other mainland NATIVE AMERICANS. In addition, Spaniards never developed the large estates characteristic of parts of Mexico. Although the Spaniards applied *encomienda*, Filipino chieftains were able to maintain local authority and, indeed, benefit from their role as intermediaries. Although clerics were often unhappy with the quality of Catholicism the Filipinos practiced, Christianity did help to hold the multiracial society together.

In 1762, the British took Manila. Since word of this victory did not reach Europe until after peace had been reached in Paris in 1763, however, the capital was not returned until 1764 and remained under Spanish rule until 1898.

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**physicians** See PROTOMEDICATO, ROYAL TRIBUNAL OF.

**plantations** Although colonials did not use the term, plantations were capital-intensive, large estates in Spanish America and BRAZIL on which slaves or forced labor performed most of the work (see SLAVERY). Plantations produced an agricultural product for sale beyond their locale, typically catering to an overseas or international market (see AGRICULTURE). SUGAR plantations, or *ENGENHOS*, were the most common type, but plantations, in some cases termed *HACIENDAS* or, in Brazil, *FAZENDAS*, were also created for the production of CACAO, INDIGO, TOBACCO, and COCHINEAL.

Although the Spanish colonies had plantations, for example, in coastal valleys of PERU, and, mostly from late in the 18th century, in CUBA; the British, in JAMAICA and Barbados from the mid-17th century; and the French, in Saint Domingue during the 18th century, Brazil was the cradle of *ENGENHOS*, starting from humble beginnings in the mid-16th century. PERNAMBUCO, the Recôncavo around SALVADOR DA BAHIA, and the captaincy general of RIO DE JANEIRO were three areas of plantation-based sugar production. Three major characteristics of Brazil's plantations were their location near water TRANSPORTATION; their use of African slave labor, usually 60–80 slaves and rarely less than 40; and their substantial capital investment both in labor and the processing equipment of the sugar mill.

While plantation owners were whites, the supervisors in the fields and the mill could be black freedmen or slaves. The fieldhands were almost exclusively African blacks (*bozales*) and exceeded in number all other slaves combined on a plantation.

With the exception of Haiti, all areas with plantations in the 17th and 18th centuries still had them in the early 19th century. Indeed, the slave revolution that created Haiti and literally destroyed Saint Domingue meant higher sugar prices for other plantation owners.

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**plaza mayor** The central plaza, or *plaza mayor*, was the heart of Spanish municipalities as well as new indigenous villages erected as a result of consolidation of populations from old villages (see *CONGREGACIÓN*; *REDUCCIÓN*). Whether established on the original central indigenous plaza, as occurred with MEXICO CITY, or on previously unoccupied land, as with PUEBLA, the *plaza mayor* provided a large rectangular public space that could be used for processions, public entertainments, and commercial activities. It was the center of a *traza*, or checkerboard layout, of surveyed and measured streets and lots.

Straight streets that intersected at right angles normally defined the plaza at a ratio of 3:2 for length and width. As specified in 1573, a plaza measuring 600 feet by 400 feet (182 × 122m) was ideal, for it allowed for equestrian sports. In Puebla, the streets were 14½ yards (13 m) wide, and each block was 200 by 100 yards (183 × 91 m) and divided into eight lots, each with 150 feet (46 m) of frontage. At a municipality's creation, the lots of the *traza* were distributed to the conquistadores and original settlers; the value and prestige of lots declined with distance from the *plaza mayor*.

Located within a *plaza mayor* was typically a fountain that provided drinking water and a pillory (*picota*). On two sides were a church and a municipal building and jail; in *AUDIENCIA* capitals, the chief executive, the *audiencia*, and other government offices were on the third side. Portals surrounded the remainder of the plaza, the site of numerous retail merchants.

In towns created by *congregación* or *reducción*, a rectangular *plaza mayor* was also the center of a grid plan, with the church and public buildings on sides of the plaza. The plaza was also used as the focal point of village life in the Andes and NEW SPAIN, even when the terrain required creating a substantial level space. Forcing NATIVE AMERICANS into Spanish-style villages gave spatial emphasis to colonial rule.

In colonial BRAZIL's municipalities, a *praça*, or plaza, often of irregular shape, was routinely located in front of a major building, but there normally was not a *plaza mayor* around which were located the town hall, governor's palace, and the major church. Early colonial elites, moreover, often resided on their PLANTATIONS and had only modest city homes. Unlike in the Spanish colonies, Brazilian elites did not make the squares important social centers.

#### Further reading:

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**Pombal, marquês de (Sebastião José de Carvalho e Melo)** (b. 1699–d. 1782) *Portuguese minister* Born in Lisbon, Portugal, into a family of the lower nobility, Sebastião José de Carvalho e Melo entered royal service

through the assistance of his relatives, served in London (1739–43) and Vienna (1745–49), and studied the works of ENLIGHTENMENT authors and enthusiasts. Following the death of his first wife, he remarried a favorite of Empress Maria Theresa. In Portugal in 1750 when John V died, Carvalho e Melo became a secretary of state to Joseph I, an indolent monarch with no interest in ruling.

Following the catastrophic earthquake that destroyed much of Lisbon in 1755, Carvalho e Melo took charge of its reconstruction along rational and geometric lines, emerged as the undisputed first minister and, with the titular support of the king, ruled Portugal and its colonies until Joseph's death in 1777. In 1769, he received the title by which he is best known, *marquês de Pombal*. Pombal believed that the state should take an active role in the ECONOMY by promoting and encouraging import substitution, strengthening the variety of exports, and developing the personnel who could move Portugal forward. This had to be done within the context of the METHUEN TREATY of 1703, which gave British woolens special access to the Portuguese market and in return Portuguese wines special access to the British market.

Pombal fully recognized that BRAZIL, although a colony, was economically more important than Portugal and the source of its wealth. Although his reforms in Portugal—in the areas of public EDUCATION, reorganization and revitalization of the University of Coimbra, abolition of SLAVERY, centralization of the royal treasury, modernization of the army, expulsion of the JESUITS, taming the INQUISITION, and a variety of economic measures designed to lessen dependence on Britain—were notable, he devoted substantial effort to improving colonial administration and the collection of revenue, TRADE, and defense.

Portugal's close relationship with Britain meant that British traders were able to use Lisbon and Oporto as bases for shipping extensive contraband to Brazil and, through Brazil, to the Río de la Plata region with its stream of SILVER from CHARCAS. Itinerant traders (*comissários volantes*) purchased goods on CREDIT, accompanied them to the Americas, and sold them on credit, thus defrauding the Crown and reducing demand for legally traded items. In 1755, Pombal expelled the itinerant traders and created the COMPANHIA GERAL DO COMÉRCIO DO GRÃO-PARÁ E MARANHÃO with a 20-year monopoly of trade to the two captaincies; his objectives were to strengthen Portuguese large-scale merchant-capitalists, to reduce contraband, and to increase imports of slaves to the two captaincies (see SLAVERY). The company also encouraged the development of new products; cotton was soon grown in such quantities that it exceeded Portugal's needs and could be reexported.

Accompanying these actions, Pombal ordered NATIVE AMERICANS in Brazil freed from Jesuit tutelage, a measure that struck at the heart of Jesuit involvement in the colony. While providing EDUCATION to the young

sons of colonists through their *COLEGIOS*, the Jesuits in Brazil were also prominent in the Amazon, PARAGUAY, and Misiones. Although the Society of Jesus had yielded to the TREATY OF MADRID in 1750, their GUARANÍ neophytes, who were to be moved along with their livestock, did not. It required a combined Portuguese-Spanish MILITARY force to break their resistance in 1756. Pombal considered the Jesuits enemies of the state.

An inquiry into an attempted assassination of Joseph I in September 1758 gave Pombal evidence that not only high-ranking aristocrats but also some Jesuits were involved. In 1759, the convicted aristocrats were executed, and Pombal ordered the Jesuits expelled from Brazil, Portugal, and other sites in the empire and their properties seized.

In 1759, Pombal created another trading company, this one for the captaincies of PERNAMBUCO and Paraíba, in an effort to aid SUGAR producers by providing merchandise and slaves on credit. The company also invested in sugar mills, and by 1780, the number of mills had more than doubled.

The TREATY OF PARIS that ended the Seven Years' War in 1763 also sought to resolve the disputed boundary with Spain in Río de la Plata. Spain returned COLÔNIA DO SACRAMENTO to Portugal but retained conquered lands in Rio Grande. In the same year, to strengthen Portuguese control of southern Brazil, Pombal moved the VICEROY'S capital from SALVADOR DA BAHIA to RIO DE JANEIRO. A large Spanish force under PEDRO DE CEVALLOS invaded the "debatable lands" and, after Pombal's fall, the 1777 TREATY OF SAN ILDEFONSO gave Colônia to Spain and Rio Grande went to Portugal.

The death of Joseph I in 1777 brought Pombal's immediate loss of office and power, as those alienated in Portugal and Brazil by his reforms struck back under Queen Maria I. The privileges enjoyed by the trading companies for several Brazilian captaincies were not extended, although investors continued trading into the 1780s.

Accused by his enemies of abuse of power, corruption, and other charges, Pombal fought in court. Maria I in 1781 declared that he warranted "exemplary punishment" but allowed the old and weakened man to die in peace.

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**population** Estimates of the indigenous population in the Americas at the time of Christopher Columbus's first voyage vary from under 10 million to more than 100 million. Whatever the figure, demographic historians agree that horrific population loss followed the arrival of Europeans, a consequence of epidemic diseases that included smallpox and measles, military action, mistreat-

ment, starvation, and other causes (see EPIDEMICS). Aside from the almost total elimination of Amerindians on some CARIBBEAN islands in the early 16th century, the lowest population figures were usually in the 17th century, although this was not the case in PERU.

The approaches that could be used to estimate population prior to modern censuses are varied. Area projection can be applied when one knows the population for part of a region believed to be of similar density throughout. If one knows the ratio of change between two dates for part of a region, the ratio is applied to the entire region. If one knows the number of, for example, tributaries in a region, applying a multiplier for average FAMILY size gives an estimate of the total population. While other approaches can be used, it is important to recognize that the results are only estimates. Contemporary estimates of populations in the 16th century are typically also flawed.

The utility of global estimates is limited, but they can highlight major changes or continuities in population over time. Distinct geographic regions had notable differences in population change as well. Population usually declined more in coastal than in mountainous areas.

The most thorough demographic studies have been done for Central Mexico. While the authors vary significantly in their estimates of the preconquest population, there is substantial convergence on a figure of about 2.65 million in 1568 and widespread agreement that the nadir of the NATIVE AMERICAN population was around 1625, by which time it was about 750,000. By the middle of the 17th century, the population began to increase and continued to do so with only occasional setbacks for the remainder of the colonial period. A census-based figure in 1793 revealed that the number of Amerindians was more than 2.3 million.

The native population of Central America declined precipitously between 1519 and the mid-16th century. Pandemics in 1519–20, 1529–31, and 1532–34 reduced the population by perhaps 70 percent or more. An epidemic of 1545–48, possibly plague, further reduced Amerindian numbers to the point that Spaniards began to ration their labor. There were six more pandemics before 1750.

Epidemic disease struck the population of Peru before the arrival of Pizarro's expedition of conquest, and the population fell further during and after conquest. The nadir was reached in the 1720s, following the final major epidemic of the colonial era. This epidemic, in 1718–23, took a fearsome toll. Porosí, already much reduced in size from its 17th-century apogee, reportedly lost 22,000 people, one-third or more of its population. Total mortality in Peru was at least 200,000, and higher estimates abound.

While overall the colonial population declined into the 17th century, population groups perceived as whites, blacks, and *CASTAS* expanded substantially. Spanish and Portuguese immigrants and especially their descendants increased in number from the times of exploration,

conquest, and settlement. The numbers were very modest at first; Peru had only about 8,000 whites in 1560. The whole of NEW SPAIN in 1570 had fewer than 20,000 whites, one-third of them immigrants. Between 1561 and 1600, an estimated 4,000 Europeans a year entered Spanish America. By 1650, an estimated 200,000 more had arrived. Also aided by natural reproduction, the white population had expanded noticeably by 1650 and may have totaled more than 650,000.

The number of imported African slaves dwarfed that of European immigrants (see SLAVERY). About 1,250 per year entered Spanish America, and 1,000 a year entered BRAZIL from 1551 to 1600. In the 17th century, these numbers rose to 2,925 and 5,600, respectively. Imports between 1701 and 1810 were far greater: 5,786 slaves arrived annually in Spanish America, and 18,914 in Brazil.

An estimated population of 12,577,000 for Spanish America in the early 19th century is divided as follows: New Spain, 5,837,000; Central America, 1,160,000; Caribbean islands, 550,000; NEW GRANADA, 1,100,000; VENEZUELA, 780,000; QUITO, 500,000; Peru, 1,100,000; CHARCAS, 560,000; CHILE, 550,000; BUENOS AIRES and Tucumán, 310,000; PARAGUAY, 100,000; and BANDA ORIENTAL, 30,000.

Using the percentages for whites, mestizos, Amerindians, and blacks provided by Alexander von Humboldt in the early 19th century and rounding the results, whites numbered about 2,400,000; mestizos (*castas*), about 4,000,000; Amerindians, about 5,700,000; and blacks, about 500,000 (see MESTIZAJE/MESTIZO). Regional variation across the Spanish Empire, however, was enormous, and these global figures apply to no specific region.

The largest CITIES in mainland Spanish America in the early 19th century were MEXICO CITY, with a war-swollen population of almost 170,000 in the 1810s; PUEBLA, with nearly 70,000; and LIMA and Buenos Aires, both with just over 60,000 in the 1810s. In Brazil, RIO DE JANEIRO had a population of about 100,000.

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**Porres, Martín de** See MARTÍN DE PORRES.

**Portobelo (Puerto Bello, Portobello)** In 1584, PHILIP II ordered that Portobelo replace NOMBRE DE DIOS as the Panamanian terminus of the fleet system, a decision implemented in 1597 (see FLEETS/FLEET SYSTEM). West of the older port, Portobelo was sited on the southeast side of an excellent harbor on the Atlantic side of PANAMA. Its unhealthy location, marked by malaria and yellow fever and more than 200 inches (5,080 mm) of rain a year, attracted few permanent residents, mostly of African descent. Despite often having only a few property owners (*VECINOS*), it had a MUNICIPAL COUNCIL. The arrival of the galleons, however, transformed the usual monotonous existence into a vibrant TRADE fair that brought together merchants, sailors, officials, muleteers, and various servants, slaves, artisans, and miscellaneous helpers.

Under the fleet system, which was regularized in the 1560s, the galleons initially docked at CARTAGENA DE INDIAS. Word was quickly sent to LIMA so that merchants, royal officials, and treasure could set sail to the city of Panama from there and more northern sites in PERU and the AUDIENCIA district of QUITO. In Panama was arranged transport for SILVER and other items across the 50-mile (80.5-km) wide isthmus by MULE trains or via a route employing the River Chagres for most of the trip.

During the nearly 150 years of their existence, the fairs at Portobelo were the primary venue for the exchange of silver from Peru and CHARCAS for European merchandise. The monopolistic merchants accompanying goods from Spain sought quick sales at the highest possible prices; merchants from Peru delayed purchasing as long as possible in order to get lower prices as European merchants tried to get rid of stock rather than shipping it back to Europe or having to sell it personally in Peru or Cartagena. All merchants were willing to defraud royal tax collectors in order to increase their own profits.

The wealth that passed through Portobelo and Panama attracted foreign interest, and Portobelo was attacked repeatedly. In 1668, the English buccaneer HENRY MORGAN led some 400–500 men in a successful attack on Portobelo and bargained for a ransom that diminished in amount, variously given as 100,000 to 250,000 pesos, as his men died of illness. This attack was but a prelude to the more destructive and profitable one Morgan led against Panama City in 1671. Bartholomew Sharp led 300 BUCCANEERS in pillaging Portobelo in 1679.

The successful attack and destruction of Portobelo's forts by the British admiral Edward Vernon with six ships and 2,500 men in December 1739 and early 1740 ended the last attempt to hold a trade fair. By that time, ships were routinely sailing around Cape Horn, and the use of a fleet of galleons for trade via Portobelo was neither profitable nor necessary.

**Further reading:**

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**Port Royal** The sole territorial gain resulting from Oliver Cromwell's Western Design, the island of JAMAICA passed from Spanish to English control in 1655, although the remnants of the 1,500 or so Spaniards present were not suppressed until 1660. For several decades, the city of Port Royal on the southern coast became the base for English BUCCANEERS who had earlier resided on Tortuga and HISPANIOLA. With the knowledge of the royal governor, the buccaneers recruited men and sailed from the port to raid Spanish towns and then returned with their ill-gotten ransom and spoils. Life in the pirate port was riotous, and its reputation for wealth and immorality was widespread.

The best-known buccaneer was the notorious HENRY MORGAN (later Sir Henry Morgan), who was renowned for his boldness and cruelty. Following his seizure of PORTOBELLO in 1668, he led his men back to Port Royal to spend the ransom gained. After the even more celebrated

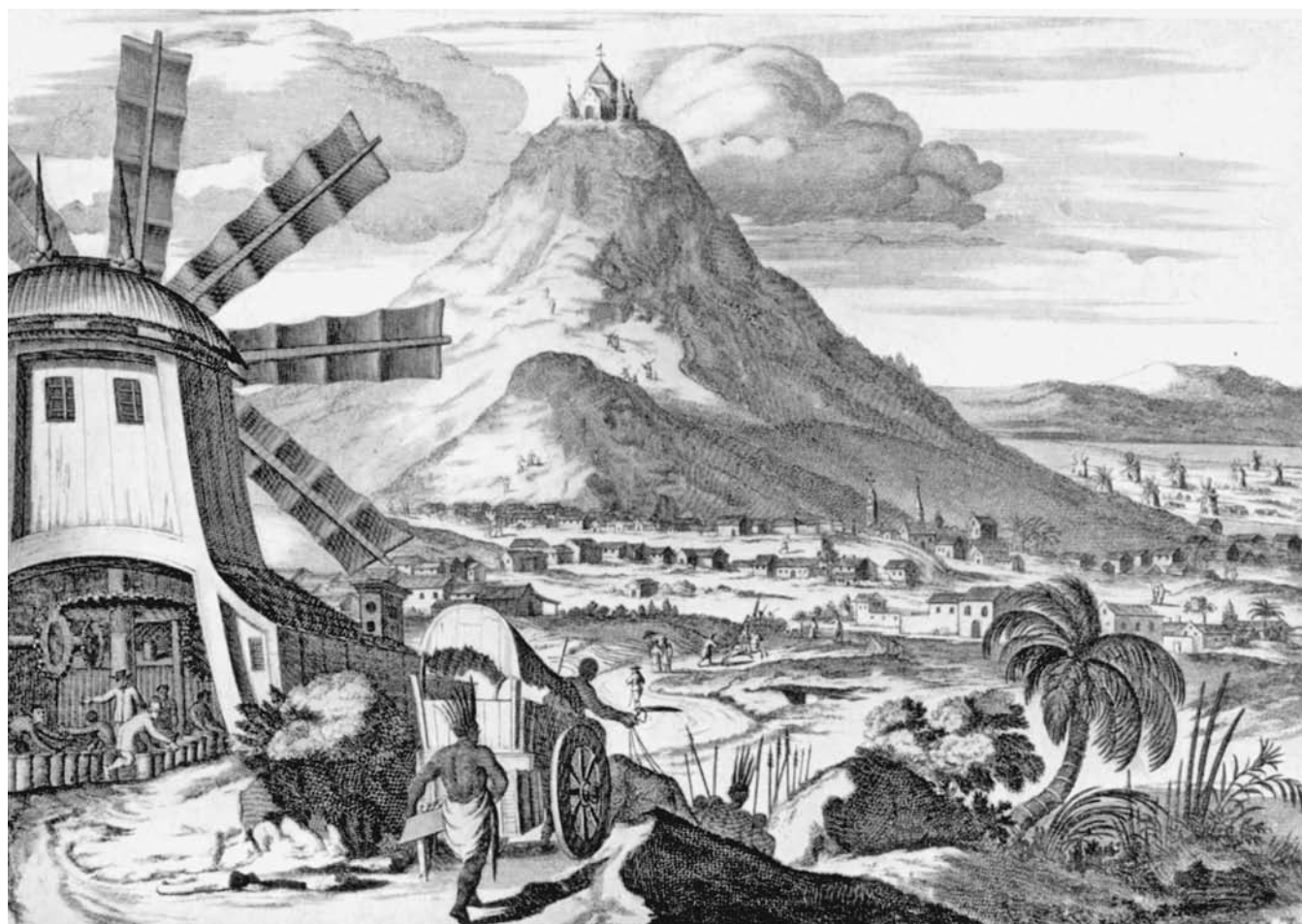
seizure, sack, and destruction of Panama City in 1671, Morgan again returned to his base and even served as lieutenant governor for some years (see PANAMA). The TREATY OF MADRID signed by Spain and England in 1670, however, anticipated the demise of the buccaneers in favor of TRADE. By the mid-1680s, the English government began to crack down on the remaining buccaneers and even sent a squadron to hunt them down.

The symbolic and literal end to Port Royal occurred on June 7, 1692, when an earthquake destroyed the city and most of it slid into the CARIBBEAN. Henceforth, Kingston became the leading English settlement in Jamaica, and the colony focused on SLAVERY, SUGAR production, and SMUGGLING.

**Further reading:**

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**Potosí** Located at the base of Cerro Rico (rich mountain), Potosí is the best-known SILVER MINING site in the VICEROYALTY OF PERU. The name applies to a city



The silver mining center of Potosí was legendary for the wealth it produced. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)



as well as the surrounding region. Located in colonial CHARCAS, or Upper Peru (present-day Bolivia), the Villa Imperial de Potosí is located as the crow flies some 265 miles (426 km) from La Paz, 360 miles (579 km) from Salta, Argentina, 585 miles (941 km) from CUZCO, 900 miles (1,448 km) from LIMA, 1,080 miles (1,738 km) from BUENOS AIRES, and almost 1,600 miles (2,575 km) from QUITO. Its altitude of more than 13,400 feet (4,084 m) above sea level places it well over 3,000 feet (914 m) above the highest municipality in mainland United States.

According to 16th-century Jesuit missionary and historian JOSÉ DE ACOSTA, an Amerindian named Hualpa discovered a lode of silver in early 1545, and on April 21, another Amerindian named Huanca and a Spaniard named Juan de Villaroel registered the find. As word of the bonanza spread, Spaniards and indigenous rushed to the area, initially from the nearby mines at Porco. The town of Potosí quickly became the most populous municipality in the viceroyalty. For many years, the mines there were the richest source of silver in the Spanish Empire.

Potosí already had some 14,000 residents when officially founded in 1547. Estimates of the population in the early 17th century place it between more than 100,000 and 160,000. By 1700, it had declined to perhaps 70,000; if correct, it was still the largest city in South America. The decrease continued, and the city's population was about 22,000 in 1779, equating roughly to the populations of Cochabamba, La Paz, and BOGOTÁ and below Mexico's mining centers of GUANAJUATO and ZACATECAS at the time of independence.

Although silver production peaked in 1592, in 1611, Potosí's population was at or near its apogee. A census that year indicated a total population of 160,000 divided as follows: 3,000 Spaniards born in Potosí and 35,000 other CREOLES; 40,000 PENINSULARS; a few FOREIGNERS; 76,000 NATIVE AMERICANS; and 6,000 blacks, MULATOS, and ZAMBOS. About 4,000 of the Spanish males were *VECINOS*, as the municipality's citizens and landowners were known. While the total may well be exaggerated and the categories imprecise, these figures do suggest the substantial presence of both creoles and peninsulars, the consequences of the *MITA* that forced thousands of indigenous to Potosí annually and resulted in many remaining as wage laborers, and the relatively modest presence of African slaves and their descendants (see SLAVERY).

Whatever the exact population figures, consumers in Potosí constituted a market for everything needed to sustain life, as well as many luxuries. Foodstuffs, WINE, olive oil, cloth, fuel, tools, timber for construction, these and all other items were imported from sites near and far. Potosí became the hub of a regional ECONOMY that extended from Quito in the north, the principal source of woolen cloth, to Lima, through which passed European and East Asian imports; to the Pacific port of Arica, from which MERCURY from HUANCVELICA and occasionally from Spain was transported; to AREQUIPA, a principal source of wine and later brandy; to Salta, site of the fair

in which tens of thousands of MULES were purchased to transport goods to Potosí and silver from it; to Buenos Aires and later the Portuguese contraband center of COLÔNIA DO SACRAMENTO, sources of African slaves and European goods. In relatively nearby regions, Spaniards grew the WHEAT their countrymen demanded, the newly commodified MAIZE, *chuño* (freeze-dried potatoes), and the COCA desired by the indigenous. Amerindians chewed coca, produced among other places in Cochabamba, to alleviate hunger; it quickly became a cash crop that enjoyed seemingly endless demand.

From its founding until 1777, Potosí was part of the Viceroyalty of Peru. It fell under the Audiencia of Charcas after that jurisdiction's founding in 1559. When the Crown decided to create the VICEROYALTY OF RÍO DE LA PLATA, it included Charcas and thus Potosí within it. Until the wars of independence, registered silver from Potosí went exclusively to Buenos Aires, where it was the most valuable export of the new viceroyalty.

Silver production was the motor sustaining Potosí and, for much of the colonial period, an extensive regional trade network. For the first 20 years, indigenous people employing traditional technology, especially the wind oven (*guayra*), dominated silver production. By the late 1560s, however, the highest-grade ore had been mined, shafts had to go deeper into the mountain, and the yields were less. As a result, indigenous laborers left for more promising sites or other occupations. The turnaround came with Viceroy FRANCISCO DE TOLEDO Y FIGUEROA, who personally arrived at Potosí at the end of 1572. In return for mine owners promising to construct new mills, he adapted a preconquest labor draft, the *mita*, and created a mandatory draft in which Amerindian males between 18 and 50 from 16 provinces would work one year out of seven in the mines of Potosí at low wages. In addition, he promised to make available mercury, discovered at Huancavelica in 1563, and its shipment to Potosí via the ports of Chíncha and Arica so that the amalgamation process could be introduced to process lower-grade ore. The result was nearly two decades of unparalleled growth in silver production, which peaked in 1592. Registered production subsequently declined, but exceeded 20 million pesos in every five-year period until 1661–65. The overall decline continued to a low of 5,704,135 from 1721 to 1725, before turning upward until 1800. Although an undetermined amount of silver went unregistered, the declining population of Potosí in the second half of the 17th century and beyond supports a conclusion that production fell substantially and, despite an 18th-century revival, never again approached the levels of the late 16th century.

The independence era brought Potosí to a new low. An army ordered north by the autonomist government in Buenos Aires entered Potosí on November 25, 1810. Led by Juan José Castelli, who had executed former VICEROY SANTIAGO DE LINIERS Y BREMOND, the army behaved like conquerors rather than liberators and profoundly

alienated the city's populace. When it returned to the city after six months of depredations in Chuquisaca, Oruro, and La Paz and a major defeat by royalist forces at Guaqui on June 20, 1811, the city exploded against the Argentines. Although a temporary peace was established, the Argentines' midnight looting of the mint and surreptitious departure at 4:30 A.M. with the silver ensured a welcome for royalist general JOSÉ MANUEL DE GOYENECHE Y BARREDA (see MINTS). Armies from each side would again pass through Potosí in 1813, and in 1815, the third army sent by the autonomous government of Buenos Aires arrived. Royalist general JOAQUÍN DE LA PEZUELA's decisive defeat of General José Rondeau's army at Sipe Sipe ended invasions from the south. Potosí's independence would come a decade later.

See also POTOSÍ (Vol. I).

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**presidio** Fortified garrisons along the northern reaches of the Spanish Empire that defended strategic locations and settlements were the quintessential frontier institution. These *presidios* embodied more than a MILITARY presence; they influenced their locales' ECONOMY, society, and demography. Amerindians were often present from the time a *presidio* was built. As families joined the soldiers, merchants, farmers, and ranchers added to the mix.

*Presidios* in NEW SPAIN were established initially along the Royal Road (Camino Real) between MEXICO CITY and the emerging MINING camps of the north. First created by VICEROY Martín Enríquez in the 1570s, more than 30 *presidios* were built by 1600. Another dozen were established in the 17th century and almost 40 more by 1800.

*Presidios* were typically rectangular fortresses of adobe brick, with circular towers at one or more of the corners. The perimeter walls varied from about 130 by 165 feet (40 × 50 m) for the smallest *presidio* to walls of 400 feet (120 m) on three sides and a fourth wall of 460 feet (140 m) for the largest. Inside were a patio, a chapel, barracks,

and other rooms. After 1772, new *presidios* were generally larger quadrangles, with sides of up to 415 feet (127 m) and angular bastions. Exterior walls might be nearly a yard (1 m) thick and 12 feet (3.6 m) high. Although primitive compared to contemporary European fortifications, the *presidios* almost always provided adequate protection against Amerindian attacks.

Presidial troops distinct from regular army troops and colonial militias manned the *presidios*. They were usually homegrown frontier cowboys accustomed to harsh conditions and fighting NATIVE AMERICANS. They enlisted for 10-year terms and served under a set of regulations specific to the *presidios*. More heavily armed than regular army troops, they were expected to maintain six horses and to carry a lance and shield as well as a musket, pistols, a saber, and a heavy leather coat that served as armor.

*Presidios* in the 1580s often had only a handful of men and one officer. The number of troops increased to a captain and 25 men by the middle of the 17th century and expanded to about 50 following the Great Northern Revolt (1680–98) that drove the Spaniards from Santa Fe (in present-day New Mexico). While numbers varied from nine to 105 in the early 18th century, by 1773, they had increased to a range of 73 to 144. In the late 18th century, a significant number of the presidial troops were *CASTAS* and indigenous, although the composition of each *presidio*'s garrison varied considerably. Soldiers' personal and service expenses routinely exceeded the pay received from officers, who profited from their men's need for credit. In addition, although their increased number elevated the total payroll, presidial soldiers earned less in the 18th century; their pay dropped from 450 pesos in 1701 to 240 in 1787.

The *presidios*' role in defense of the northern frontier of New Spain was important but even more so was their role in attracting civilians. Populated with families of soldiers and persons who sought protection and anticipated profit, *presidios* often became part of municipalities.

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**printing press** Conquistadores and early settlers brought books with them to the New World, but it took a few years before the first printing presses, paper, and other necessary supplies reached the colonies.

Bishop Juan de Zumárraga, who traveled to NEW SPAIN with a personal library of some 200 volumes, sought approval in 1533 for a commercial printing press. The printer, Esteban Martín, apparently reached MEXICO CITY in 1534; some historians believe the first book from his press was *Escala espiritual para llegar al cielo* (*Ladder of Divine Ascent*) by Saint John Climacus, published in 1535. A commercial printing firm was established in 1539 as

an offshoot of Juan Cromberger's publishing company in Seville.

Between 1539 and 1600, some 300 titles were published in Mexico City. Strikingly, the publications appeared in several languages: Castilian, 115; Latin, 86; native languages, 94; and some of these works were bilingual editions. From 1601 to 1700, 1,692 were published in Castilian, 219 in Latin, and 72 in native languages. While publications in Nahuatl accounted for the majority of works in native languages, at least one work was published in each of 18 other native languages.

In 1584, the printer Antonio Ricardo moved from New Spain to LIMA, PERU, where he set up a press. The first book off the new press was *Doctrina christiana*, a trilingual work in Spanish, Quechua, and Aymara that had been written by order of the Third Provincial Council of Lima. By 1699, the press in Lima had published 1,106 titles.

In the 17th century, presses were established in PUEBLA, New Spain, and GUATEMALA. In the years 1700–49, presses were set up in the Jesuit province of PARAGUAY, HAVANA, Oaxaca, and BOGOTÁ. From 1750–99, the JESUITS established a press that moved from the Ecuadorean municipality of Ambato to Riobamba and then to QUITO. Other presses inaugurated in the second half of the 18th century were located in Nueva Valencia, VENEZUELA; Córdoba; CARTAGENA DE INDIAS; New Orleans; SANTIAGO DE CHILE; BUENOS AIRES; SANTO DOMINGO; Puerto de

España; Santiago de Cuba; GUADALAJARA; and VERACRUZ. In the early 19th century, presses were established in MONTEVIDEO, CARACAS, PUERTO RICO, and GUAYAQUIL.

Among other things, colonial presses printed religious works, including sermons, hagiographies, catechisms, and confessionals; grammars; dictionaries; contributions to poetic contests; speeches; reprints of some European books; official documents; periodicals; and the occasional musical imprint. It has been estimated that some 30,000 titles were printed in colonial Spanish America, about 12,000 of them in New Spain.

BRAZIL lacked a printing press until the Court brought one when it transferred from Lisbon to RIO DE JANEIRO in 1808.

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**Protomedicato, Royal Tribunal of** Spaniards and Portuguese sought medical treatment from the time they arrived in the INDIES. Conquistadores suffered wounds that needed attention; unrecognized insects bit with painful results; some areas, particularly the hot and humid lowlands, were quickly recognized as zones of high mortality. While the conquerors applied the knowl-



The Royal Tribunal of Protomedicato licensed physicians. This is the uniform of Narciso Esparragosa, *protomédico* in Guatemala and surgeon of the royal chamber. (Private collection)

edge of folk medicine they brought from Spain, their preference was to employ a licensed Latin physician, a man who had university training in medicine. Such a man as Pedro de la Torre, “doctor to conquerors,” enjoyed a lucrative practice even when his credentials were questionable. The number of physicians was scant; between 1530 and 1545, MEXICO CITY had just four.

By the 1530s, the MUNICIPAL COUNCIL of Mexico City appointed physicians as *protomédicos* to inspect pharmacies and conduct medical examinations; it continued to do so until a royal appointee arrived in 1570. In LIMA, the first *protomédico* arrived in 1537 with a royal appointment; consequently, the city did not follow Mexico City’s practice.

“Romance surgeons” were present early in the colonial era. These men lacked university training and learned their trade through observation. Authorization to practice medicine, when it occurred, came from a municipal council. The lack of a professional approval process opened the way for charlatans; a public without alternatives employed them. In 1617, PHILIP III required that three examiners approve candidates to practice as physicians, surgeons, and pharmacists, but enforcement was episodic.

In 1646, NEW SPAIN received a Royal Tribunal of the Protomedicato in the form it would retain until independence. Its mandate was to oversee public health. The three members were the first (*prima*) professor of medicine at the UNIVERSITY OF MEXICO, a second professor of medicine at the university, and a physician selected by the VICEROY. In Lima, the *prima* professor of medicine at the UNIVERSITY OF SAN MARCOS became president of the Protomedicato and named two additional examiners. Although viceroys could make appointments, they needed royal approval within five years to be valid.

A license to practice medicine required, by royal mandate of 1639, four years of university medical study after the baccalaureate of arts degree, completion of the requirements for a baccalaureate in medicine, two years of residency with an approved physician, and passing the examination given by the Protomedicato (see UNIVERSITIES). Exemptions were common. The University of Mexico between 1607 and 1738 conferred only 438 baccalaureates in medicine, probably more than the total conferred by the other universities in the colonies. With so few graduates, licensed physicians were scarce. CHILE had only five in 1781. Querétaro had two in 1787; in 1800, BOGOTÁ had two; GUAYAQUIL had three; and CARACAS had six. The consequence of few licensed physicians was a plethora of quacks and folk healers, and self-curing (see CURANDERA/CURANDERO).

The Protomedicato was abolished by the CORTES OF CÁDIZ, reestablished by FERDINAND VII, and terminated again following the reinstitution of the CONSTITUTION OF 1812 in 1820. Final abolition in Lima came after the body had taken an oath supporting the declaration of independence.

See also MEDICINE (Vols. I, III).

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**provincial deputations** The CONSTITUTION OF 1812 for the Spanish nation, as Spain and the empire were therewith titled, devoted Articles 324–337 to “the political government [administration] of the provinces and the provincial deputations.” First proposed in fall 1811 by José Miguel Ramos Arizpe, deputy for the PROVINCIAS INTERNAS of NEW SPAIN, these new political bodies were to provide administrative oversight of their respective provinces. They included the province’s political executive (*jefe político*), who presided, the INTENDANT, and seven indirectly elected members who served two-year staggered terms. The elected members had to be more than 25 years of age and born in the province or a property holder (*VECINO*) resident for at least seven years; they could not hold a royal appointment.

The provincial deputations promised an unprecedented level of official political and administrative autonomy for 19 provinces in the overseas territories. In the former VICEROYALTY OF NEW SPAIN the provinces identified were New Spain, NEW GALICIA, Yucatán, San Luis Potosí, Provincias Internas de Oriente, Provincias Internas de Occidente, GUATEMALA, NICARAGUA, CUBA with the two Floridas, SANTO DOMINGO and PUERTO RICO, and the PHILIPPINE ISLANDS. The constitution also designated deputations in NEW GRANADA, VENEZUELA, QUITO, PERU, CUZCO, CHARCAS, CHILE, and RÍO DE LA PLATA.

While movements for autonomy and outright independence made the provincial deputations moot in Chile, Río de la Plata, and parts of Venezuela and New Granada, residents elsewhere approved of the new institution. After the period of absolutism inaugurated by FERDINAND VII ended in 1820, New Spain and the Kingdom of Guatemala (Central America) quickly established provincial deputations. In New Spain, the provinces with deputations became states following independence; the deputations were thus an important step on the way to the federalist republic created in 1824 (see MEXICO, INDEPENDENCE OF). The number in Guatemala was expanded from two—in Guatemala and Nicaragua—to six, with new deputations created for San Salvador, Costa Rica, Honduras, and Chiapas.

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**Provincias Internas** JOSÉ DE GÁLVEZ Y GALLARDO, former visitor general of NEW SPAIN and minister of the Indies, created in 1776 the Commandancy General of the Provincias Internas, a MILITARY and administrative unit designed to strengthen oversight of New Spain's northern provinces. The future VICEROY of Peru, Teodoro de Croix, was named the first *comandante general*, a position that reported directly to authorities in Spain rather than to the viceroy of New Spain until January 1785.

The Provincias Internas initially included Sonora, Sinaloa, Texas, Coahuila, the Californias, New Vizcaya, and New Mexico. Threats to the new administrative unit came from both unpacified Amerindian peoples and European powers. Throughout the existence of the Provincias Internas, the Crown could not decide whether a single or divided administrative structure would be preferable and whether the structure should report to the viceroy of New Spain or directly to a minister in Madrid.

The structure of the Provincias Internas was split in October 1786 into three commands. The commander in chief had authority over Sonora, Sinaloa, and the Californias and reported to the viceroy. Reporting to the commander in chief were a commander of New Vizcaya and New Mexico and a commander of Texas, Coahuila, New León, New Santander, and the districts of Saltillo and Parras. This structure lasted only until March 1788, when the Provincias Internas was reorganized as two equal commands, both of which reported to the viceroy. The Provincias Internas de Poniente included New Vizcaya, New Mexico, Sonora, Sinaloa, and the Californias; the Provincias Internas de Oriente included New León, New Santander, Coahuila, Texas, and the districts of Saltillo and Parras. Two years later, Jacobo Ugarte y Loyola was named supreme commander of both the eastern and western provinces but remained dependent on the viceroy. By royal directive of November 1792, the Provincias Internas again became a single administrative unit independent of the viceroy of New Spain; it remained in this configuration until 1813, when it was split into eastern and western units dependent on the viceroy. The Provincias Internas remained dependent on the viceroy until Mexican independence.

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**Puebla** The city of Puebla de los Ángeles was founded in 1531 as a municipality for Spaniards unsupported by *ENCOMIENDAS*, although provided with access to indigenous labor. It was located at more than 7,000 feet (2,134 m) above sea level some 70 miles (113 km) southeast of MEXICO CITY in fertile lands near streams and forests and not far from the provinces of Tlaxcala and Cholula.

The Crown in 1532 sought to attract Spanish residents by adding an exemption from all taxes for 30 years to the usual provision of building lots to first settlers. The following year, it formally made Puebla a city, allowing it to double the size of its council.

Capital of the province of Puebla, the city, in 1570 had about 500 citizens (*VECINOS*) and a total Spanish population that probably exceeded 2,500. Despite being founded for non-*encomenderos*, *encomenderos* also lived there, and there were about 1,000 indigenous tributaries in 1570. One hundred years later, the city had nearly 70,000 inhabitants, rivaling Mexico City. In 1786, the city became the seat of an INTENDANT, although its population had declined. A slight plurality of the population in 1791 was Spanish (35 percent). Amerindians accounted for 34 percent of the population, and *CASTAS*, 31 percent. The change from its Spanish foundations was clear. The German scientist and traveler Alexander von Humboldt reported its population in the early 19th century as 67,800, greater than any city in Spanish South America but behind Mexico City and GUANAJUATO. Its location on the route between Mexico City and VERACRUZ facilitated TRADE.

The city was a parish from its founding, and in 1543, it became the seat of the bishopric of Puebla, originally founded in Tlaxcala. DOMINICANS, FRANCISCANS, and AUGUSTINIANS had convents in the city by 1570. *COLEGIOS* offered young men an opportunity for EDUCATION. Preserved 16th- and 17th-century buildings testify to the city's importance and wealth during much of the colonial era.

Puebla served as a base for Spaniards to acquire rural lands suitable for the production of WHEAT. The decline in the indigenous population facilitated this, and Spanish entrepreneurs received, purchased, appropriated, and consolidated grants into large estates that often had access to preconquest irrigation systems. Producers sold wheat not only in New Spain but also to CUBA, Florida, and VENEZUELA.

By the mid-16th century, the region around Puebla was growing mulberries, and weavers in the city were producing silk. Although silk production was short lived, the city continued to be a site for textile production, and until the 18th century, its region—the Puebla-Tlaxcala basin—along with the Valley of Mexico and the BAJÍO, was a major location for *OBRAJES* producing woolens.

Puebla had 35 of New Spain's largest *obrajes* in 1604; they exported cloth via ACAPULCO to PERU, in particular, until the Crown banned this intercolonial trade in 1631. Thereafter, Puebla's *obrajes* declined in number and importance. Cotton spinning, mainly in individual households and other small units of production, emerged in the late 17th century and continued into the 19th century. While rural Amerindians did much of the spinning, Spanish and mestizo weavers produced the cloth whose export was managed by wholesale merchants or their agents (see *MESTIZAJE/MESTIZO*). The advent of neutral

trade in 1804 allowed foreign cottons to enter the New Spain market legally and presaged the decline of the industry.

See also PUEBLA (Vol. III).

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**Pueblo Revolt** (1680) The Pueblo Revolt of 1680 was the most successful indigenous uprising against Spanish rule in colonial NEW SPAIN. After two decades marked by drought; starvation; disease; raids by Navajos, Apaches, and other nomadic indigenous peoples; increased Spanish demands for labor and TRIBUTE; and attacks on their native priests, the Pueblos in more than 20 communities scattered across several hundred miles came together under religious leader Popé of San Juan Pueblo in a massive and successful effort to drive the Spaniards from their lands. While not all Pueblo communities were involved, most participated in the revolt, which began on August 10.

Driven from their lands along the Rio Grande and its tributaries, Spaniards took refuge in Santa Fe (present-day New Mexico) and Isleta Pueblo before fleeing to El Paso (present-day Texas) in September. The Pueblos destroyed Spanish buildings and fields and killed more than 400 of 2,500 Spaniards in driving their oppressors from New Mexico. Their anger against Christianity was manifest: They killed 21 of 33 missionaries and desecrated churches and religious objects.

Although the success of the Pueblo Revolt stimulated other NATIVE AMERICANS on the northern frontier to rebel against Spanish rule and religion, by the early 1690s, internal divisions had weakened the Pueblos. After a preliminary expedition in 1692, Diego de Vargas returned to New Mexico late in the following year with a substantial expedition that included 100 soldiers and some Pueblo allies. A difficult victory at Santa Fe encouraged the Spaniards, but it required war throughout 1694 to restore Spanish rule. Another indigenous revolt in 1696 failed, and Vargas reestablished Spanish rule over all but the most western rebel communities.

The cost of the revolt was high for both the Pueblos and the Spaniards. The population of the former declined from some 17,000 in 1680 to 14,000 in 1700, a drop that resulted in the abandonment of some villages. The revolt forced Spaniards to rethink their level of exploitation, and they reduced their demands. The ENCOMIENDA system, for example, was never reestablished in New Mexico.

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**Puerto Rico** Located in the Barlovento portion of the CARIBBEAN, Puerto Rico has an area of 3,435 square miles (8,897 km<sup>2</sup>). Although its GOLD was mined and its Amerindian population reduced to some 2,000 Tainos by 1540, the island, due to its location and good harbor, was an important defensive site.

The Spanish Crown underscored the strategic importance of Puerto Rico by designating the town of San Juan a PRESIDIO in 1582 and initiating in 1584 a financial subsidy program (*situado*) under which NEW SPAIN sent funds to HAVANA for redistribution to Puerto Rico and other locations. The fortifications constructed at San Juan proved adequate against an attack led by Sir Francis Drake in 1595, but an English invasion in 1598 captured the town, and Dutch attacks in 1625 destroyed it. The island's relative insignificance is indicated by the fact that between 1651 and 1662 not a single authorized ship called there. Between 1647 and 1689, the population of San Juan expanded by only 167 people.

Between the 1750s and the 1790s, the amount of the financial subsidy to Puerto Rico increased more than fourfold; while it had been less than half of what SANTO DOMINGO received in the 1750s, Puerto Rico's subsidy exceeded that of Santo Domingo in the 1790s. The colonies' combined support in that decade, however, was still less than 30 percent of what Havana received. The subsidies enabled construction of impregnable fortifications that repelled British attacks in 1797.

For three centuries, Puerto Rico's ECONOMY focused on hides and agricultural products—ginger, TOBACCO, and SUGAR—traded illegally with FOREIGNERS (see TRADE). The royal decision of 1765 to initiate COMERCIO LIBRE enabled Puerto Rico to trade legally with nine Spanish ports as well as CUBA, Santo Domingo, Trinidad, and Margarita. At the time, Puerto Rico had a population of some 45,000, and 82 percent of its land was pasture for CATTLE. During and after the wars of independence in mainland colonies, perhaps 7,000 royalist immigrants arrived in Puerto Rico with capital they invested in sugar, tobacco, and coffee. The population increased to about 100,000 by 1789 and more than 220,000 by 1815. Sugar production based on an increasing number of African slaves and abusive working conditions for landless laborers fueled economic expansion to the mid-19th century (see SLAVERY).

See also PUERTO RICO (Vols. I, III, IV).

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**pulperías** *Pulperías* were small grocery stores in colonial Spanish American CITIES. Their owners were independent entrepreneurs who fell under the jurisdiction of a city's MUNICIPAL COUNCIL, which determined where they could be located, when they could open, and what they could sell.

The capitalization of *pulperías* was often modest, for example, about half of the stores in BUENOS AIRES were capitalized at 500 pesos or less in the late 18th century. Occasionally, capitalization reached a substantial sum of more than 30,000 pesos. Men owned most of the grocery stores; in MEXICO CITY in 1781, women accounted for 11 percent of the owners.

Store inventories varied. In Mexico City, a storekeeper also had a WINE store. Among the items he stocked were beans, rice, wine and brandy, MERCURY, shrimp, grain, olives, garbanzos, candles, charcoal and firewood, and various types of cloth. A larger store also sold imported CACAO, MAIZE, and wooden shovels, among other items. Bread was sold at a price regulated by the municipal council. In CARACAS, grocery stores could also sell alcohol. Similarly, grocers in Buenos Aires sold wine and liquor.

The ratio of *pulperías* to population differed considerably by location. In Mexico City, there were well over 500 persons per store. This number was under 400 in Caracas and fewer than 100 in Buenos Aires in the early 19th century.

CREDIT was critical for the existence of *pulperías*. Grocers often purchased stock on credit from wholesalers. In addition, they extended credit to customers, a very important part of the business that literally enabled some lower-income customers to eat.

Grocery stores that were allowed to sell alcohol sometimes found themselves serving as a neighborhood tavern. In Buenos Aires, this was typically the case, and the usual problems associated with drunkenness arose on or next to the stores' premises. The fact that storekeepers often gave brandy as change for purchases contributed to the problems. In Mexico City, only those *pulperías* that were also wine stores faced similar problems, but the existence of hundreds of *pulquerías* made these purveyors neighborhood centers of social life (see PULQUE).

*Pulperías* were primarily an urban phenomenon. In small towns, a general store made available groceries as well as a wide range of other items.

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**pulque** Consumption of the alcoholic beverage pulque, a fermented product of the maguey plant in NEW SPAIN, was restricted among the Nahuas prior to the conquest of Mexico. The Nahua regulated public drinking, for example, by limiting participation in some ritual drinking to nobles and punishing severely commoners who violated the restriction. Moderation in drinking was determined by its frequency rather than the amount consumed. Under Spanish rule, Amerindian cultivation of maguey was second only to MAIZE, and the availability of and consumption of pulque increased, especially among commoners. The beverage did have some nutritional value and served as an alternative to frequently unsafe water supplies.

Deciding to profit from what it could not prevent, the Crown in the 17th century taxed commercial producers and licensed shops (*pulquerías*) that sold pulque. Since pulque produced by Amerindians for consumption at home went untaxed, indigenous producers sought to sell it commercially while avoiding TAXATION. In the mid-18th century, the count of Jala experimented successfully in planting maguey and soon found it more profitable than other agricultural or pastoral enterprises (see AGRICULTURE). A model for later maguey planters, he constructed fermentation factories on his lands and sold pulque in taverns he owned in MEXICO CITY. By 1746, the Jesuit HACIENDA of Santa Lucía was returning 18,500 pesos annually from pulque production (see JESUITS). The annual return was 32,000 pesos 20 years later.

A pulque tavern in Mexico City could cost as much as 30,000 pesos, although the average worth in the early 1790s was 13,300 pesos, still an impressive sum. The potential profits were sufficient to attract investors from Mexico's richest families. Typically, they leased out the taverns with a proviso that the lessee sell only pulque from the owners' estates. In 1770, the count of Regla, perhaps New Spain's wealthiest entrepreneur, made 40,000 pesos from maguey production and by 1780 owned four *pulquerías*. Another noble, the marqués de Selva Nevada, invested nearly 1 million pesos in the pulque business. So much land near Mexico City was converted from maize to maguey that it contributed to rising maize prices.

Historians agree that alcohol consumption, much of which was of pulque, in late colonial Mexico City was substantial. The nearly 900 *pulquerías* in the city, more than 90 percent of them unlicensed, sold pulque to nearly 62,000 customers a day; thus, perhaps 13 percent of the city's population was drunk every day. During the 85 religious holidays, the level of consumption among the urban poor was staggering. Indigenous village values approving drunkenness only on ritual occasions with religious signifi-

cance shattered in the urban environment. Poor Spaniards, mestizos, and mulattoes were also well represented among Mexico City's inebriates (see *MESTIZAJE/MESTIZO*; *MULATO*).

The pulque industry suffered more than any other agricultural sector during the wars of independence. Thirsty soldiers proved unable to restrain themselves from looting a convoy carrying pulque. More serious was damage done to the maguey plants themselves and the neglect that accompanied years of conflict.

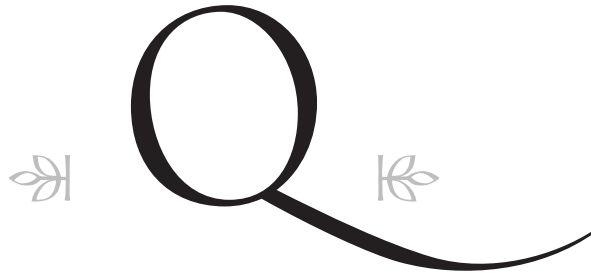
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**quilombo** (*palenque*) Fugitive slaves, or *cimarrones*, in BRAZIL created settlements initially called *mocambos* but known by the 18th century as *quilombos* (see SLAVERY). The comparable term in Spanish America was *palenques*. The communities frequently included persons other than runaway slaves, for example, free blacks, *CASTAS*, and Amerindians. Their locations could be either just outside of European settlements or distant from them.

African slaves fled from their owners throughout the history of the slave trade. By the mid-1540s, runaways were attacking travelers and farms near LIMA and Trujillo, PERU; a band of some 200 near the coast battled an ultimately successful Spanish force of 120 in 1545. From at least the 1550s, bands of male runaways near VERACRUZ, Jalapa, Orizaba, and Córdoba, NEW SPAIN, congregated in the mountains and from their bases raided for goods and WOMEN of any race or background. Some women they raped and left behind; others they forced to join them in “mountain marriages.” The presence of women and then children reduced the bands’ mobility, and over time, runaway communities became permanent villages that occasionally received charters as towns made up of free residents. For example, the runaway community led by the *cimarrón* Yanga near Córdoba became San Lorenzo de los Negros in 1612.

Slaves were capital, and owners were concerned about them fleeing from the time of purchase. Efforts to keep a close watch on the chattel were not always successful; nevertheless, most runaways were recovered. The presence of a *quilombo*, or *palenque*, resolved a runaway’s immediate concern of obtaining sustenance, while also offering a refuge that, in some cases, tried to re-create village life in Africa.

The longest-surviving *palenque* in Spanish America was San Basilio, near CARTAGENA DE INDIAS. Established

in 1599 or 1600, the inhabitants repelled repeated attempts to force them out of the village until finally, in 1613, the governor offered amnesty to those slaves who returned to Spanish rule. While some, including their leader, King Benkos, accepted the offer, others did not; their descendants were still in the region when rediscovered by Spaniards in the late 18th century.

Runaway slaves were causing trouble for Brazilian authorities by the 1570s, and *quilombos* existed from the 1580s, some in the interior (*SERTÃO*). Professional hunters of runaways (*capitães do mato*) existed from at least the 1620s with the specific charge of destroying *quilombos*. Of the 10 significant *quilombos* created in Brazil, all were ultimately destroyed, seven within two years of their founding. Two that lasted longer were in MINAS GERAIS (1712–19) and MATO GROSSO (1770–95). The longest lasting and largest was PALMARES, finally destroyed in the mid-1690s.

The inhabitants of *quilombos* usually engaged in agricultural activities that provided a surplus for TRADE (see AGRICULTURE). Often, they were left alone until their lands or products threatened colonists’ interests.

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**quinto** By law, all mineral wealth in the territories of the Spanish Crown belonged to the Crown. Ferdinand and Isabella, however, soon began to grant mineral rights

to individuals in return for mandatory registration and a share of the bullion. Eschewing the historic rate of two-thirds of the metal mined, the monarchs reduced the rate to 20 percent in 1504. This royal fifth, or *quinto*, remained the standard tax rate into the 18th century, although reductions to one-tenth (*diezmo*) or even less were authorized in particular cases, notably in NEW SPAIN. In the 18th century, the Crown reduced the tax on GOLD to 3 percent and on SILVER in PERU to 10 percent.

Theoretically, the *quinto* was collected on all minerals, but silver, gold, MERCURY, emeralds, other precious stones, and pearls constituted the normal sources of the tax. Before the *quinto* was collected, bullion was assayed, cast in bars, and stamped; these services, which were performed by a royal smeltery (*casa de fundición*), cost 1.5 percent after 1552. Only after the owner had paid for these and sometimes other services was the *quinto* charged on the remaining bullion. Gold and silver bars that had not been stamped were liable to confiscation. The *quinto* paid in full or at a reduced rate was an important source of income for the Spanish Crown.

The Portuguese Crown also charged the *quinto*. It was particularly important during the gold boom in 18th-century MINAS GERAIS and MATO GROSSO.

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**Quiroga, Vasco de** (b. 1477/1478–d. 1565) *Spanish audiencia minister and bishop of Michoacán* Born into a noble family in Madrigal de las Altas Torres, Galicia, Spain, Vasco de Quiroga obtained a university EDUCATION, including a licentiate in canon law. The *LETRADO* was a *juez de residencia* in Oran in 1525, dealing with issues related to dividing the spoils of victories over the Muslims (see *RESIDENCIA*). A friend of a councilor of the Indies, in 1530 Quiroga was named an *OIDOR* of the second Audiencia of Mexico. He arrived in MEXICO CITY late in the year, and it soon became clear that he was more interested in evangelization of the indigenous people than serving on the court.

Nominated to serve as the first bishop of Michoacán, Quiroga was ordained in 1538 in Mexico City and then relocated to Michoacán, home of the Purépecha, or, as they are often called, the Tarascans. There, he promptly undertook the construction of a cathedral in Pátzcuaro and established the Colegio of San Nicolás Obispo to train parish priests skilled in the languages of the diocese (see *COLEGIO/COLEGIO MAYOR*). He also created new villages (*congregaciones*) where relocated NATIVE AMERICANS would be taught Christian doctrine and encouraged to live in a way consistent with European humanistic values as the bishop interpreted them (see *CONGREGACIÓN*). Quiroga sought to create a “Christian social utopia” that included town-hospital communities, free education to

all community members, European-style clothing for all inhabitants, and confraternities (*COFRADÍAS*).

Quiroga met with expected difficulties from *encomenderos*, whose abuses he sought to curtail, and also from the bishop of GUADALAJARA when that see was created in 1548 (see *ENCOMIENDA*). FRANCISCANS and AUGUSTINIANS, the former arriving before he did and the latter at about the same time, also evangelized native peoples of Michoacán; conflict between the bishop and the mendicants was inevitable since both received revenues from indigenous tithes and TRIBUTE. Quiroga remained in his diocese for nearly three decades, dying in Pátzcuaro.

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**Quito** The name of a kingdom, an *AUDIENCIA* district, and the capital of both, Quito was an Inca city when Spaniards refounded it as San Francisco de Quito in 1534. It was located at an altitude of 9,200 feet (2,804 m) above sea level and some 20 miles (32 km) south of the equator.

Even before Spaniards reached Quito, pathogens struck the native population. In the 16th century, there were five major EPIDEMICS, probably smallpox and measles: 1524–27, 1531–33, 1546, 1558–60, 1585–91. By 1590, the population had declined probably by 85 to 90 percent from its 1520 level. The discovery of GOLD in southern parts of the *audiencia* district attracted Spaniards, who forced Amerindians to provide labor, exacerbating population loss in those parts.

At the end of the 16th century, the city of Quito had perhaps 10,000 permanent residents, over half of them probably Andeans; maybe 2,500 Europeans, about two-thirds of them Spanish males; 1,000 or so black slaves; and perhaps 100 free people of color (see SLAVERY). The rest of the population was of mixed ancestry—primarily mestizos, mulattoes, and ZAMBOS (see *MESTIZAJE/MESTIZO; MULATO*).

Gold mining around Popayán began in the 1540s, and by the 1570s, its product accounted for more than 70 percent of the gold taxed in Quito. This percentage increased to almost 90 by the 1590s. By charging Popayán miners one-twelfth instead of the usual one-fifth (*QUINTO*), of bullion, the Quito treasury sought to reduce the attraction of SMUGGLING and boost royal income. Economic success for the capital city and its environs, however, rested on a more prosaic product: woolen cloth sold in PERU and CHARCAS. Spaniards had introduced SHEEP early, and *OBRAJES* that turned wool into cloth enabled Quito to thrive until late in the 17th century, when an epidemic reduced the workforce. The importation of French textiles during the WAR OF THE SPANISH SUCCESSION was the death knell for Quito's

prosperity. Economic growth in the *audiencia* district for the next century derived from the SHIPBUILDING and CACAO production undertaken in GUAYAQUIL.

From the mid-16th century into the 1690s, the city of Quito was the undisputed economic capital of the *audiencia* district. Taking advantage of the purchasing power of gold, merchants in Quito stocked their shops with luxury items, for example fine textiles from Italy, France, and the Spanish Netherlands; spices, including saffron and cloves; and Spanish WINES.

The city of Quito was the site of a junta created in 1809 but quickly suppressed. An army led by Antonio José de Sucre defeated the royalists at the Battle of Pichincha in May 1822, and independence of the

Kingdom of Quito came soon afterward (see SPANISH SOUTH AMERICA, INDEPENDENCE OF). Initially included in SIMÓN BOLÍVAR's confederation of Gran Colombia, the Republic of Ecuador withdrew as an independent country in 1830.

See also QUITO (Vol. III).

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# R

**ranching** Early Iberian explorers and settlers took domesticated animals almost everywhere they went, including the Americas. Even when the explorers perished, animals often remained, multiplied, and were available for use by others later. The result was CATTLE, pigs, SHEEP, goats, horses, and donkeys in varying numbers and quality throughout the Spanish colonies in which the vegetation and climate were favorable to them. The Pampas of the Río de la Plata region and the Llanos of VENEZUELA were two regions where cattle thrived. When consumer demand created a market, *hacendados*, *estancieros*, *fazendeiros*, and cowboys (*vaqueros*, *vaqueiros*, GAUCHOS, or LLANEROS) obliged (see FAZENDA/FAZENDEIRO). In general, municipalities and AGRICULTURE forced cattle into more distant rangelands where the foundation of another municipality would start the cycle again. Similarly, in the coastal SUGAR-producing regions of BRAZIL, the interior and lands between the regions, for example, Sergipe del Rey from the late 16th century, were used for raising cattle.

Although untilled fields, pastures, and stubble after harvest belonged to the Crown according to Castilian practice, by the mid-16th century, MUNICIPAL COUNCILS as well as the VICEROY of NEW SPAIN were granting land for grazing with the restriction that recipients did not fence or otherwise block access to it. These grants became the foundation of HACIENDAS, particularly north and west of MEXICO CITY.

Herds expanded rapidly; for example, by the mid-1550s, there were some 150,000 head of cattle and horses on 60 ESTANCIAS in the Toluca Valley west of the Valley of Mexico. Cattle raising also occurred in coastal valleys and the northern plains of New Spain. The discovery of SILVER at ZACATECAS quickly attracted ranchers eager to sell hides, tallow, and beef to miners. Clergy who

benefited from the tithes paid on the annual increase of cattle joined stockmen in promoting the growth of herds. Consumers enjoyed cheap beef for decades; in Mexico City in 1575, consumption totaled about 16,000 steers with an average gross weight of about 330 pounds (149.6 kg). NATIVE AMERICANS suffered as cattle trampled their MAIZE fields.

The expansion of herds in Mexico's central and southern regions ended by 1570 as reproduction declined; a similar decline occurred in northern New Spain several decades later. One historian has estimated that New Spain had about 800,000 cattle in 1600. While beef, tallow, and hides had local and regional markets, stockmen also exported hides to Spain in large number. Profligate slaughter of cattle to obtain hides for export certainly affected reproduction.

The importance of settling disputes among cattlemen in New Spain was such that those residing in Mexico City created a *mesta*, or stockmen's association, in the late 1530s; it received royal approval in 1542 and in 1547 was given authority throughout the whole of New Spain. The *mesta* oversaw the use of brands, an owner's permanent, unique mark or initials burned with a branding iron into the hide of each animal, including sheep and horses two years' of age. The brand enabled each stockman's animals to be identified.

Roundups, or rodeos, in New Spain were the occasions from June to November when cowboys separated livestock according to brand and then drove them to their owner's land. Unbranded animals were divided up on a proportional basis related to the number of animals with owners' brands.

During most of the 17th century, planters in Brazil's Recôncavo protested livestock being raised near



Ranchers could be found throughout the Spanish- and Portuguese-American colonies. Here is a picture of a rancher from Chile. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

canefields; in 1700, they won an enforceable prohibition. In the 17th century, some herds already had 20,000 or more head, although 3,000 or fewer was more common. SALVADOR DA BAHIA and the *ENGENHOS* of BAHIA required leather, tallow, and beef, the most popular meat, as well as oxen for transportation and sometimes for power in the sugar mills. From early in the 17th century, cattle drives from the interior (*SERTÃO*) to a cattle fair town such as Capoame facilitated exchange. Brazil also exported hides; by the 1720s, they were an important product for Bahia. The rapid growth of MINAS GERAIS pushed the price of cattle upward quickly. Stockmen who had developed ranches in the valley of the São Francisco River drove cattle hundreds of miles to the MINING region. The lands of Brazil's southern frontier, São Pedro do Rio Grande, developed into the colony's finest cattle-raising area.

Sheep were widespread in the Spanish colonies, although their wool could not compete with the high-quality wool that came from merino sheep in Spain. Able to live almost anywhere except the lowland tropics, sheep reproduced at an astonishing rate for the first

few decades after their introduction to the New World. In Mezquital, north of the Valley of Mexico, there were an estimated 4 million by 1579; then, as the pasture became inadequate and underweight sheep could not reproduce as rapidly, the population dropped by about half before climbing back up to nearly 3 million by 1599. Sufficient wool was produced to sustain a textile industry throughout the colonial period. By 1571, more than 80 *OBRAJES* were in operation, and more were erected later.

Sheep and goats found a ready home in the Andes, where the indigenous had earlier woven wool from alpaca and other camelids. By 1585, there were 150,000 sheep and goats in the region around QUITO. Reportedly, some 600,000 were in Latacunga and Riobamba by 1620. With the availability of adequate labor and large quantities of wool, textile mills became numerous in the Quito region, supplying woolen cloth to miners at POTOSÍ and other highlanders of the Andes until the late 17th century.

Mutton was very popular, and Mexico City's inhabitants in 1575 consumed about 120,000 sheep, more than seven times the number of cattle. Travelers JORGE JUAN Y SANTACILIA and ANTONIO DE ULLOA commented that in LIMA in the mid-18th century "mutton is the most common food, and is very palatable." Only rarely did persons other than Europeans consume beef; consequently, only two or three cattle were slaughtered a week.

Horses were essential for driving cattle. By 1550, they were so numerous in New Spain that both Spaniards and mestizos owned them (see *MESTIZAJE/MESTIZO*). Later in the century, some 10,000 were being pastured not far from Mexico City.

MULES were used widely for TRANSPORTATION and raised on haciendas across the colonies. The Salta region in present-day Argentina was particularly noted for providing thousands of mules annually for the transportation of supplies and merchandise to and bullion from the mines of CHARCAS.

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### Real Compañía Guipúzcoana de Caracas

Created in 1728 as a joint stock company with a monopoly on legal TRADE between Spain and VENEZUELA, the Royal Guipúzcoana Company of Caracas facilitated the

development of CARACAS into Venezuela's most important city.

Based in San Sebastián in the Basque province of Guipúzcoa, the Real Compañía Guipúzcoana received monopoly rights on transporting CACAO from Caracas to Spain. Exempt from taxes on voyages from San Sebastián to Caracas, it had to stop at CÁDIZ to pay tax on the return voyage. Its responsibilities included employing a coast guard to reduce SMUGGLING along the Venezuelan coast.

Unable to effect an immediate, significant increase in cacao production, the company's agents benefited from the favor of Basque governors in Caracas and began to meddle in the long-standing cacao trade with NEW SPAIN, as well as to crack down on smuggling (see BASQUES). The company's actions drove cacao farmers, notably immigrants from the Canary Islands, to protest. When they marched on Caracas in 1749, the governor fled to a fortress at La Guaira and declared the protesters rebels. Royal troops sent from SANTO DOMINGO and Spain quelled the rebellion, and subsequently royal officials worked effectively to strengthen royal authority in Caracas through measures that foreshadowed a reform effort throughout the empire after the temporary loss of HAVANA in 1762.

With encouragement from Francisco Cabarrus, one of its directors and a prominent financial figure in government, in 1784, the Real Compañía Guipúzcoana dissolved itself. From its remains came the new Philippine Company, which was given a 25-year monopoly of direct trade from Spain to the PHILIPPINE ISLANDS and some lingering rights to transport a significant amount of Venezuela's exports.

The Real Compañía Guipúzcoana left Caracas and Venezuela more prosperous than it had found them. The growth in consumption of cacao in Spain was such that by 1750 the motherland was importing more Venezuelan cacao than New Spain. Between the 1720s and the 1770s, the amount of cacao produced in Venezuela had doubled. By the time of the company's demise, Caracas had become the most prosperous nonmining colony in the Spanish Empire.

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**Real Hacienda (*Fazenda Real*)** The royal treasury system, called the Real Hacienda in Spain and the *Fazenda Real* in Portugal, was central to the establishment and continuation of royal authority in the colonies. On the heels of Spanish conquest came royal officials—treasurers, accountants, business managers, and others—who comprised a fiscal structure considerably improved over the one in Castile.

The treasury system's chief responsibility was to oversee royal fiscal interests in the colonies. This required collecting royal taxes, expending funds for government salaries, defense, subsidies, buildings and other needs in the colonies, and remitting surplus funds to the treasury in Castile.

Overall, treasury policy originated in Spain, usually with the COUNCIL OF THE INDIES or, in the 18th century, the MINISTRY OF THE INDIES. In the colonies, a VICEROY'S primary responsibility was to oversee the remission of funds to Madrid. He was assisted by the AUDIENCIA, the TRIBUNAL OF ACCOUNTS (authorized for LIMA, BOGOTÁ, and MEXICO CITY in 1605), and governors. Treasury officials, provincial officials, town council officials, and tax farmers provided the hands-on administration and tax collection that, at least theoretically, implemented the policy decisions.

The colonial royal treasuries (*cajas*) themselves were quickly erected in major MINING, commercial, and administrative centers in the empire. In NEW SPAIN, five were created by 1550 and two more by the end of the 16th century: Mexico City, VERACRUZ, Yucatán, ZACATECAS, GUADALAJARA, ACAPULCO, and Guadiana (Durango). Five more were created in the 17th century, and 16 new *cajas* appeared in the 18th century. The most important *caja* was the first one, established in Mexico City in 1521.

In PERU, *cajas* were created for Lima and CUZCO in the 1530s and at HUANCAMELICA in the 1570s. By 1780, there were seven in existence: Lima, Trujillo, AREQUIPA, CUZCO, Huancavelica, Jauja, and Vico y Pasco. The *caja* in Carabaya reopened after the conclusion of the TÚPAC AMARU II rebellion in 1783, but still, four fewer existed in 1780 than in 1770. CHARCAS had a *caja* functioning at POTOSÍ by 1550 and later also had *cajas* at Arica, La Paz, Oruro, and other sites.

In CHILE, although treasury officials were collecting taxes in SANTIAGO DE CHILE, Concepción, and Valdivia by 1575, the only formal *caja* in the 16th century was at Santiago. A second *caja* was created in Concepción by the early 17th century, and *cajas* were established at Valdivia, Mendoza, and Chiloé between 1769 and 1782. A *caja* was created in BUENOS AIRES in 1634; a number of other treasuries were founded in the 18th century, including at MONTEVIDEO and ASUNCIÓN. Of several 16th-century *cajas* created in the Kingdom of QUITO, only those at Quito and GUAYAQUIL remained in the early 18th century; a new *caja* opened at Cuenca in 1725. *Cajas* also were present in other colonies, for example, in Bogotá, CARTAGENA DE INDIAS, Popayan, CARACAS, and GUATEMALA.

Despite the importance of the *cajas*, the Spanish Crown began selling appointments to the one in Lima in 1633 and undoubtedly to other *cajas* as well. The predictable result was an influx of men, often young and lacking significant if any prior relevant experience. When the Crown began to sell appointments of ALCALDE MAYOR

and *CORREGIDOR* in 1678, this placed even more pressure on royal income as purchasers sought to make a profit on their investment. Although appointments in some regions, notably New Spain, were withheld from the market, it was primarily in the second half of the 18th century that the quality of officeholders improved. When the Crown began to end tax farming in the 1750s, yields improved as well.

The introduction of *INTENDANTS* with authority over royal revenue in their districts and a charge to secure its increase were the capstone of royal efforts to obtain the income required to cover new administrative and *MILITARY* expenditures.

The treasury system in Brazil was smaller and developed later than in the Spanish colonies. A treasurer-general resident in *SALVADOR DA BAHIA*, and, after the transfer of the capital in 1763, in *RIO DE JANEIRO*, was the chief fiscal officer, but each captaincy had a royally appointed treasurer. The Crown routinely sold appointments to treasury positions.

The colonial treasury arranged leases for royal monopolies such as brazilwood and salt, although in some cases, for example the diamond monopoly, created in the 18th century, the lease was made in Lisbon. The colonial treasurers used a bidding system to select tax farmers to collect revenues. The most important tax prior to the *GOLD* boom was the ecclesiastical tax known as the tithe that was collected on crops and domestic animals. The discovery of gold in *MINAS GERAIS* in the 1690s, however, quickly led to the royal fifths collected on the metal, exceeding the tithe in importance. Although export duties on items to Brazil were collected in Portugal, only in the early 18th century were import duties on merchandise as well as African slaves assessed in Brazil.

Following the Lisbon earthquake in 1755, the *MARQUÊS DE POMBAL* undertook a major reorganization of the treasury in the 1760s. Henceforth known as the *Real Erário*, the Royal Treasury was run by accountants employing the modern double-entry bookkeeping. Each captaincy-general in Brazil received a treasury board (*junta da fazenda*) that reported directly to a comptroller-general in Lisbon. Boards began to function in Rio de Janeiro in 1767, Salvador de Bahia in 1769, and Minas Gerais in 1771–72. In addition, inspection boards were created in Brazil's major ports.

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***recogimiento*** Among its many definitions, *recogimiento* meant a spiritual method associated with mysticism; a virtuous form of conduct usually related to *WOMEN* that involved modesty, control of behavior, and a retiring manner; and an institutional practice that involved living—voluntarily or not—in convents, schools, hospitals, or lay pious houses (*beaterios*) on a temporary or permanent basis. The *recogimiento* as an institutional practice was found in *MEXICO CITY*, *LIMA*, and other *CITIES* in the colonies and Spain.

In Lima, a *recogimiento* was founded in 1553 for the mestiza daughters of Spanish men and Amerindian women; it lasted into the 1570s (see *MESTIZAJE/MESTIZO*). After 1580, *recogimientos* in Lima catered to the daughters of the elite. The Casa de Divorciadas founded in 1589 and the Recogimiento de María Magdalena established in 1592 originally served women who were considered sexually deviant or awaiting a decision by the ecclesiastical court on their pending divorces. Soon, the institutions also became associated with women who had gone beyond acceptable moral and sexual conduct. The Casa de Divorciadas existed until 1665 and the Recogimiento de María Magdalena failed through inadequate funding in 1710. In 1619, a school known as the Recogimiento or Colegio del Carmen was founded for girls of Spanish nobility; it merged with the Monasterio de Carmelitas Descalzas in 1643. A number of *beaterios* for laywomen were established between 1669 and 1704; a few remained in that status while others became or merged with convents.

The institutional foundations of the *recogimientos* were varied. Weak ones closed; others might merge or reconstitute themselves as convents. Worldly and spiritual concerns combined in different proportions over the colonial period and reflected different social realities as the variety of *recogimientos* and the related convents ultimately provided opportunities for enclosure for women of all backgrounds.

#### Further reading:

Nancy E. van Deusen. *Between the Sacred and the Worldly: The Institutional and Cultural Practice of Recogimiento in Colonial Lima* (Stanford, Calif.: Stanford University Press, 2001).

#### ***Recopilación de leyes de los reynos de las Indias***

The four oversized tomes that comprise the *Recopilación de leyes de los reynos de las Indias* were first published by royal *cédula* of November 1, 1681; 3,500 sets were printed, of which 500 were soon dispatched to the five *AUDIENCIAS* of the *VICEROYALTY OF NEW SPAIN* and 1,000 were sent to the *VICEROYALTY OF PERU*. Far from a complete collection of laws related to the colonies, they were the end result of compilation projects begun in the 1570s.

The *Recopilación* was divided into nine books with the following content:

Book 1: The CATHOLIC CHURCH and clerics, *real patronato*, hospitals, the INQUISITION, UNIVERSITIES, *COLEGIOS* and seminaries, books and printing

Book 2: The COUNCIL OF THE INDIES, *audiencias*, visitors general

Book 3: Dominion and royal jurisdiction in the Indies, provision of positions and grants, defense and MILITARY personnel

Book 4: Discovery, “pacifications” (that is, conquest), settlement, municipal administration, land, roads, MINING, textile mills (*OBRAJES*)

Book 5: Provincial administration, medical practitioners, notaries, *RESIDENCIAS*, judicial procedure

Book 6: NATIVE AMERICANS, TRIBUTE, *ENCOMIENDAS*, personal service and other labor

Book 7: Special investigations, gamblers, married men with wives in Spain, *CASTAS*, jails and punishment

Book 8: Taxes and related officials, tribute, sale of offices

Book 9: CASA DE CONTRATACIÓN, Consulado of Seville, FLEETS, passengers to the INDIES, FOREIGNERS, TRADE with the PHILIPPINE ISLANDS, *CONSULADOS* in LIMA and MEXICO CITY

The *Recopilación*'s publication, of course, meant that legislation issued subsequently was not included. Since it was not inclusive, judges, other officials, and lawyers turned to other compilations for guidance. While these sources included Castilian compilations and commentaries on them, there were also compilations focused specifically on Spanish colonial law (*derecho indiano*).

#### Further reading:

M. C. Mirow. *Latin American Law: A History of Private Law and Institutions in Spanish America* (Austin: University of Texas Press, 2004).

*Recopilación de leyes de los reynos de las Indias*, 4 vols. (reprint, Madrid: Ediciones Cultura Hispánica, 1973).

**reducción** Clerics and colonial officials considered the consolidation of rural indigenous communities into a much smaller number of settlements—sometimes new towns and sometimes built on prior towns—highly advantageous. Called *reducciones* in PERU and *congregaciones* in NEW SPAIN, the towns were constructed on a grid that placed a church and the town council on a central plaza, or *PLAZA MAYOR* (see *CONGREGACIÓN*). Clerics supported *reducciones* for they substantially simplified the task of ministering to the NATIVE AMERICANS. Colonial officials supported them because they facilitated collection of tribute and the organization of *MITA* labor. Colonists appreciated the vacant lands left by the transfers.

In Peru, VICEROY FRANCISCO DE TOLEDO Y FIGUEROA imposed *reducciones* in such numbers that more than 1 million and perhaps more than 1.5 million Amerindians were forced to relocate. Colonial officials tried to create

new villages that had around 500 adult males and a total population of 2,500 to 3,000 people, a size considered appropriate for a single cleric. In practice, *reducciones* varied from this target. In CHARCAS, 901 villages averaging 143 persons in six provinces were reduced to 44 averaging 2,920. Although land was assigned to each village, the amount per person was almost certainly less, for colonial officials recognized that epidemic disease had already reduced the villages' populations.

Resettled Amerindians often disliked their new conditions. While some new villages survived, resettled neighbors frequently returned to their original communities. The imposition of the POTOSÍ *mita* on the resettled population in Charcas's highlands, moreover, profoundly affected the *reducciones*. Men anxious to avoid the forced service fled to other, often lower zones, where the hated MINING *mita* was not in effect.

#### Further reading:

Ann M. Wightman. *Indigenous Migration and Social Change: The Forasteros of Cuzco, 1520–1720* (Durham, N.C.: Duke University Press, 1990).

Ann Zulawski. *They Eat from Their Labor: Work and Social Change in Colonial Bolivia* (Pittsburgh, Pa.: University of Pittsburgh Press, 1995).

**regalism** Increased subordination of the CATHOLIC CHURCH to a monarch characterized the relationship between the two during the 18th and early 19th centuries. Known as regalism, or, among some writers in Spain, Jansenism, the implications of turning the traditional partnership between church and state into a hierarchical relationship with the monarch at the apex affected the church in a variety of ways and ultimately turned many clerics in Spanish America toward the movements for autonomy and independence.

Although there had been earlier uncoordinated efforts to expand royal authority over the church, in 1749 the Crown ordered the FRANCISCANS, DOMINICANS, and AUGUSTINIANS to turn over their parishes to diocesan clergy. Unlike previous efforts, this one was generally effective by the mid-1760s. Another 1749 decree required that priests know the language of their parishioners; non-compliant priests were to be removed. The following year, the Crown expanded its supervision of community property, reducing the purview of parish priests.

In the 1760s, decrees reduced religious asylum, created new parishes, encouraged the use of Castilian rather than native languages, and required priests to secure licenses to leave their parishes. During the 1770s and 1780s, the Spanish Crown continued to increase its jurisdiction over cases that previously were heard in episcopal courts and reduced its already modest subsidization of priests' compensation, pushing the expense to bishops and parishioners. Subsequent legislation emphasized increased uniformity in ecclesiastical activities and continued reduction of the



ecclesiastical courts' jurisdiction. Royal justice tended to favor civil administrators in cases of conflict with clerics. A 1795 *cédula* reduced priests' immunity from prosecution in royal courts. The most dramatic 18th-century example of royal power over clerics was the expulsion of the Society of Jesus from Portugal and its colonies in 1759 and from Spain and Spanish America in 1767 (see JESUITS). The extension of the *CONSOLIDACIÓN DE VALES REALES* to the Spanish colonies in 1804 gave painful further evidence that royal interests outweighed those of the church.

The Spanish Crown ultimately paid a high price for its regalistic policies. Regalist bishops were increasingly at odds with parish priests. The alienation of both regular and diocesan clergy in NEW SPAIN fed into MIGUEL HIDALGO Y COSTILLA'S revolt. Hidalgo and JOSÉ MARÍA MORELOS Y PAVÓN were the two most prominent of hundreds of clerics who supported autonomy and, in some cases, independence for New Spain before 1821.

### Further reading:

- D. A. Brading. *Church and State in Bourbon Mexico: The Diocese of Michoacán, 1749–1810* (New York: Cambridge University Press, 1994).
- N. M. Farriss. *Crown and Clergy in Colonial Mexico, 1759–1821* (London: Athlone Press, 1968).
- William B. Taylor. *Magistrates of the Sacred: Priests and Parishioners in Eighteenth-Century Mexico* (Stanford, Calif.: Stanford University Press, 1996).
- Miles L. Wortman. *Government and Society in Central America, 1680–1840* (New York: Columbia University Press, 1982).

**Regency, Council of** See COUNCIL OF REGENCY.

**regidor** The foundation of cities and towns was a hallmark of Spanish colonization. Their MUNICIPAL COUNCILS (*cabildo* or *ayuntamiento*) had aldermen, or *regidores*, whose number varied with the municipality's importance. Since the councils oversaw the distribution of town lots and garden plots, access to common lands, and establishment of regulations for services and retail sales, the benefits of serving as a *regidor* were potentially numerous. Newly created indigenous villages (*reducciones* and *congregaciones*) also had municipal councils on which sat *regidores* (see CONGREGACIÓN; REDUCCIÓN).

Municipal councils in Spanish towns were most vigorous in the decades following the conquest. In general, decline set in by the last quarter of the 16th century as the Crown expanded its authority through the use of other administrative institutions and the opportunities associated with initial settlement had passed. In the late 1550s, the Crown began selling positions of *regidor* for life. By the early 17th century, purchasers and their native son heirs filled the municipal councils of the largest cities. Initially, the aldermen of Spanish municipali-

ties were PENINSULAR Spaniards, but their CREOLE SONS soon dominated. In virtually every town and city, the municipal councils became strongholds of native sons representing their versions of local interests. In LIMA, PERU, native sons began serving as aldermen almost as soon as the first reached the requisite age of 18; three entered the *cabildo* in 1561. Lima-born creoles (*limeños*) secured a third of subsequent *regidor* appointments in the 16th century and held a majority of the seats in 1575. Peninsulars subsequently secured a majority only from 1595 to 1605. At times supplemented by other American-born *regidores*, *limeños* dominated the city's *cabildo* for the remainder of the colonial era. Indeed, from 1741 to 1783, only *limeños* were *regidores*. Their ascendancy corresponds reasonably closely with the Crown's decision to sell and then, in 1606, to make inheritable the position of *regidor*.

Native-son dominance in Lima meant that *hacendados* were the preeminent group among the *regidores* by the 1620s (see HACIENDA). Although wholesale merchants were an important secondary group from the 1620s to 1650s, their heirs formed part of the *hacendado* elite. A few lawyers, university professors, and bureaucrats also were aldermen.

In the latter half of the 18th century, municipal councils took on new life. Often stimulated by INTENDANTS, they expanded their revenues and consequently their political power. Peninsulars returned to a few positions of *regidor*; although they tended to be *radicados*, men who had lived in the municipality for many years and often shared the perspectives of native sons. With the Crown engaged in a conscious effort to reduce native-son presence throughout colonial administration, the municipal councils remained a stronghold of local interests. Starting in 1808, they often became vigorous advocates of increased political autonomy.

### Further reading:

- Guillermo Lohmann Villena. *Los regidores perpétuos del cabildo de Lima (1535–1821): Crónica y estudio de un grupo de gestión*, 2 vols. (Seville: Excma. Diputación Provincial de Sevilla, 1983).
- Peter Marzahl. *Town in the Empire: Government, Politics, and Society in Seventeenth-Century Popayan* (Austin: University of Texas Press, 1978).

**reinóis** A term applied in BRAZIL to Portuguese people born in Portugal, *reinóis* (those from the kingdom) were also known as *européus*; thus, they corresponded to the terms PENINSULARS and *españoles europeos* in Spanish America. The derogatory Portuguese term *pés de chumbo* (leaden feet) corresponded to *chapetón* and *gachupín* applied to peninsular Spaniards. The terms *reinóis* and *européus* contrasted with *brasileiros*, *americanos*, and *filhos da terra* (offspring of the land), the counterparts of CREOLES and *americanos* in Spanish America.

The Portuguese Crown's legislation to prohibit native sons from serving on a *relação* documents its presumption that place of birth made a difference in the way even professional magistrates carried out their duties when on home soil. It is also clear that the Portuguese Crown favored *reinóis* for posts on the *Relação* of Bahia, although to what extent it did so for lower-ranking positions is unclear. Nonetheless, at least 10 *brasileiros* were named to the *Relação* of Bahia by 1759.

The heaviest Portuguese immigration before 1808 followed the discovery of GOLD in MINAS GERAIS; it made the distinction between Portuguese born in Portugal and Brazil more important. *Reinóis* considered American-born Portuguese to lack industry, EDUCATION, morality, and purity of blood. Correspondence by VICEROYS and governors referred disparagingly to *brasileiros*. Such charges of ignorance, laziness, and sullied ancestry were analogous to assertions peninsulars in Spanish America made of creoles. Clearly, *reinóis* could more easily meet requirements for *limpeça da sangue* (LIMPIEZA DE SANGRE), or unsullied ancestry.

The need for *brasileiros* to go to Coimbra, Portugal, for a university education had at least three consequences. First, the students from Brazil got to know one another and thus increased their awareness of being *Brazilian*, as distinct from Bahian or Pernambucan. Second, by sharing the educational experience with *reinóis*, they could develop relationships that enabled them to secure royal positions in Portugal itself, as the example of JOSÉ BONIFACIO DE ANDRADA E SILVA indicates. Third, Brazilians who shared experience at Coimbra, as 102 graduates did between 1816 and 1826, returned to Brazil to emerge as an identifiable group of nationalists tempered by the ostracism, criticism, and ridicule of *reinóis* students at the university.

#### Further reading:

Roderick J. Barman. *Brazil: The Forging of a Nation, 1798–1852* (Stanford, Calif.: Stanford University Press, 1988).

**relação** The *relação* was a royal high court of appeals in the Portuguese world, a counterpart to the AUDIENCIA in the Spanish colonies. After a failed effort in 1588, the Crown in 1609 created a *relação* for BRAZIL in SALVADOR DA BAHIA with 10 university-educated (LETRADO) judges, or *desembargadores*; the governor general of Brazil was to preside. A second tribunal was established in RIO DE JANEIRO in 1751 with jurisdiction over the captaincies south of Espírito Santo and lands to the west. In addition to judicial duties, the magistrates provided advice to the governor general and fulfilled various administrative responsibilities. Appeals of judicial cases went to the High Court of Appeals (Casa de Suplicação) in Lisbon.

As was the case for *audiencia* ministers in Spanish America, the magistrates on a *relação* were to have only limited contact with residents of their district. A royal

license was required to marry or to engage in commerce. Other restrictions designed to limit local contact required that a magistrate not be named to his home district. Thus, magistrates were to be free of personal, FAMILY, or local interests and work only in the royal interest. As in Spanish America, there was often considerable divergence between legislative intent and reality.

Between 1609 and 1759, the *Relação* of Bahia had 168 magistrates. All had been approved to serve as *desembargadores*. Approval required a baccalaureate in law from the University of Coimbra, two years of law practice, an age of at least 28 years, and *limpeça da sangue*, or purity of blood (see LIMPIEZA DE SANGRE). Applicants who met these requirements then took an examination to demonstrate their knowledge of law. The entire process was designed to ensure that the Crown had competent magistrates with appropriate social backgrounds and religious beliefs. Although patronage and bribes undoubtedly assisted in securing appointments, there is no evidence that the Portuguese Crown sold them, a notable contrast to many appointments to Spain's colonial *audiencias* between 1687 and 1750. Appointments were to be for a six-year term followed by promotion to another tribunal, but this was often ignored and, if the magistrate had ties within the jurisdiction, undesirable from his perspective. About 20 percent of the magistrates married locally and at least 10 were born in Brazil, seven of them in BAHIA.

The creation of the second *relação* in Brazil preceded the transfer of the viceroy from Bahia to Rio de Janeiro in 1763. Both actions provided administrative sanction to the changing balance of regional power from north to south.

#### Further reading:

Stuart B. Schwartz. *Sovereignty and Society in Colonial Brazil: The High Court of Bahia and Its Judges, 1609–1751* (Berkeley and Los Angeles: University of California Press, 1973).

**religion** Religion provided an important social and spiritual tie among copractitioners. For Iberians and the converted NATIVE AMERICAN and African population, Catholicism was the bonding religion, although often in a form that incorporated indigenous or African gods and traditions (a process called syncretism). In some cases, antagonism to Catholicism in combination with continued or renewed support of traditional religious beliefs served as a social and spiritual adhesive. While the tenets of Catholicism were taught, or least made available, to almost the entire native population of the Indies, for many it was pageantry, theater, and fiestas celebrating religious events that were important.

The institution of lay religious brotherhoods, or COFRADÍAS, brought from Spain and *irmandades* and *confrarias* from Portugal found widespread support throughout colonial society. They appeared soon after municipalities

were established and continued throughout the remainder of the colonial era. For example, BASQUE merchants in MEXICO CITY formed the confraternity of Our Lady of Aranzázu. Their Cantabrian, or *montañés*, rivals' confraternity honored Christ of Burgos.

*Cofradías* found favor with indigenous people as well, and hoping they would serve to end idolatry and link Amerindians more closely to Christianity, Spanish friars encouraged indigenous villages to adopt them. Many if not all did, although, certainly in Yucatán and doubtless in many other locations, Amerindians modified them to become community-wide institutions equivalent to a community chest (*caja de comunidad*), which brought together public resources for the spiritual and material well-being of their members. Much more than burial societies, the *cofradías* became property owners and bankers that handled the community's corporate financial obligations. Most of their funds, however, were spent on the cult of the saints, since securing favorable intervention by saints was central to the Maya's efforts to survive. In Tepoztlán, NEW SPAIN, designated pasture and herds of CATTLE as well as land devoted to MAIZE cultivation helped provide resources for the native *cofradía*. Its officers were also members of the community's political elite. Andean *cofradías* also held land that produced income devoted to celebrating their respective patron saints and assumed many of the responsibilities performed by *ayllus* prior to conquest.

While Native Americans had to keep non-Christian beliefs hidden or risk violent anti-idolatry campaigns such as that conducted under Bishop Diego de Landa in Yucatán and those that occurred in PERU, friars and other religious worked to ensure that the CATHOLIC CHURCH's presence was highly visible. The central location of cathedrals, churches, and convents in the largest CITIES, the presence of a church on every town square, the religious art that decorated the homes of the poor as well as the wealthy, and the catechisms published in New Spain and Peru in the 16th century and later testified to the church's omnipresence.

In Peru, the first *cofradía* for African slaves was created in Lima in the 1540s as an affiliate of a Spanish *cofradía* of the Most Holy Sacrament (see SLAVERY). In 1549, the city council restricted group meetings to those the brotherhood held in the cathedral. Other sodalities for Africans appeared as the number of slaves increased. Periodically, the white population voiced concern that the *cofradía* meetings were used for seditious or criminal purposes. Nonetheless, the number of sodalities grew. By 1619, Lima had six brotherhoods restricted to blacks; three restricted to mulattoes; and six that allowed both blacks and mulattoes (see MULATO). FRANCISCANS, DOMINICANS, AUGUSTINIANS, JESUITS, MERCEDARIANS, and six parishes of the city sponsored the *cofradías*. In addition, another brotherhood for blacks and one for mulattoes were sponsored in CALLAO by Franciscan and Dominican convents there. Typically, the early black

sodalities were organized along African ethnic lines, but as the number of American-born blacks and mulattoes increased, they wanted separate organizations. In Lima, at least, it appears that sodality members were among the more favored blacks and mulattoes in the city. Not surprisingly, many Africans retained beliefs that the INQUISITION, to whom they were subject, considered heretical and superstitious.

Slaves in Mexico City had sodalities as early as 1572; they used them as a means of socializing and participating as a group in processions, as well as gaining support for FAMILY members at burials. As in Lima, there were concerns about behavior at their meetings and in their processions. After an abortive rebellion in 1612, the VICEROY of New Spain banned the brotherhoods, but they clearly did not disappear, since in 1623, Viceroy marqués de Gelves reiterated the prohibition and ordered them banned from processions under threat of 200 lashes and three years of servitude in an *OBRAJE*. Fear that *cofradía* members were plotting against the government formed the backdrop of this draconian measure.

In BRAZIL, brotherhoods were popular with all segments of society. In VILA RICA DO OURO PRÊTO, 10 brotherhoods competed among themselves in constructing churches and chapels. Whites, mulattoes, and blacks had separate brotherhoods.

The fees required for religious services such as baptism, marriage, and burial attested to the centrality of religion as well. At the same time, they served to dissuade some non-Spaniards from using the services of clergy.

See also RELIGION (Vols. I, III, IV).

### Further reading:

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 Bailey W. Diffie. *A History of Colonial Brazil, 1500–1792* (Malabar, Fla.: Robert E. Krieger Publishing Co., 1987).  
 Nancy M. Farriss. *Maya Society under Colonial Rule: The Collective Enterprise of Survival* (Princeton, N.J.: Princeton University Press, 1984).  
 Colin A. Palmer. *Slaves of the White God: Blacks in Mexico, 1570–1650* (Cambridge, Mass.: Harvard University Press, 1976).  
 A. C. van Oss. *Catholic Colonialism: A Parish History of Guatemala, 1524–1821* (New York: Cambridge University Press, 1986).

**religious orders** See AUGUSTINIANS; DOMINICANS; FRANCISCANS; JESUITS; MERCEDARIANS; RELIGIOUS ORDERS (Vol. I).

**repartimiento** As a result of a declining indigenous population and an increasing number of Spaniards who wanted access to labor, the labor draft known as *repartimiento*, or *MITA* in PERU, already complemented the *ENCOMIENDA* system in NEW SPAIN by the mid-16th



These Ecuadorean brush and water carriers exemplify the manual labor required by *repartimiento* and the *mita*. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

century. Initially, the *repartimiento* consisted of a weekly distribution of involuntary indigenous laborers drawn from surrounding villages by an official known as the *juez repartidor*. The recipients included Spanish landowners who needed labor to plant, weed, and harvest crops. Some *repartimiento* Amerindians were assigned to work in mines or construction.

In the Valley of Mexico, *repartimiento* Indians worked from Tuesday through the following Monday, with Sunday off. They received modest pay and returned to their villages. By the early 17th century, some *repartimientos* required indigenous people to work up to 10 weeks, and 10 percent, rather than the original 2 percent, of a town's tributaries were forced to serve.

As the agricultural *repartimiento* was dying in Central Mexico, the severe flooding of the capital that occurred in 1629 resulted in labor drafts for the great drainage project (*desagüe*) that was not completed until the 19th century.

The use of *repartimiento* labor in the SILVER mines of Taxco, New Spain, began in the 1550s and continued for more than two centuries. Although hated by the laborers forced to participate, the Taxco *repartimiento* used far fewer workers brought from lesser distances than did the Potosí *mita*. Often, however, workers went home with minimal or no pay, injuries, or MERCURY poisoning.

Others remained at the mines as free wage laborers, a hardship for families left behind without an adult male during crucial seasons for AGRICULTURE.

*Repartimiento* also was an important source of agricultural labor, especially for planting and harvesting, in New Vizcaya's central plateau between Durango and Chihuahua from initial Spanish settlement until the late 18th century. The efforts of Franciscan and Jesuit missionaries to congregate Amerindians in a limited number of villages facilitated *repartimientos* for both agricultural work and MINING (see CONGREGACIÓN; FRANCISCANS; JESUITS).

In Central America, the *repartimiento* became an important institution after the EPIDEMICS of the 1570s and into the 1630s. As in Central Mexico, it overlapped with and largely replaced *encomienda*. As was the case everywhere, the Amerindians detested it, not least because they were assigned to work for Spanish landowners at a time that their own fields (*milpas*) needed attention. A general effort to abolish *repartimiento* in 1671 failed and the institution, despite never having worked well in Central America, persisted at a low level.

In Yucatán, the *repartimiento* was termed *servicio personal* and continued throughout the colonial era and beyond. Its nature, however, was similar to that required before the Spaniards arrived and did not cause the social

disruption that occurred in Central Mexico or under the *mita* in Peru.

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- Charles Gibson. *The Aztecs under Spanish Rule: A History of the Indians of the Valley of Mexico, 1519–1810* (Stanford, Calif.: Stanford University Press, 1964).

**reparto** The forced distribution of manufactured goods and animals known variously as *reparto*, *repartimiento de bienes*, and *repartimiento de mercancías* was a central source of income for the *corregidores* who practiced it in PERU and for some *alcaldes mayores* in NEW SPAIN (see *ALCALDE MAYOR*; *CORREGIDOR/CORREGIMIENTO*). Originally conceived as a means to provide tools and useful animals to NATIVE AMERICANS, the *reparto* was made possible because the provincial administrator or his associate (*teniente*) not only distributed goods at prices they established but also collected payment and prosecuted recalcitrant recipients. A variant on this approach was used in New Spain, where raw materials were distributed on CREDIT and finished products were bought at low prices. Although some Amerindians sought this access to credit, as the arm of the state in their districts, *corregidores* were ideally placed to benefit from their offices.

Since *corregidores* and *alcaldes mayores* were appointed to relatively short terms (three years if already in the Americas, five years if coming from Spain), usually received inadequate salaries, and were often in debt for the purchase of the appointment (whether legal or not) and TRANSPORTATION to the site of the post, they embraced the opportunity to relieve Amerindians of their money by charging many times the normal price for distributed items. Acting in concert with wholesale merchants in LIMA or MEXICO CITY, from whom they obtained goods on credit, they made one or sometimes two or even three tours of their *corregimiento* to distribute merchandise and often animals. These transactions forced indigenous people to earn the cash required for payment. Tlaxcalans in the late 17th century complained bitterly about the "many *repartimientos*" by which *alcaldes mayores* forced them to buy MULES, CATTLE, clothing, WINE, and other items at high prices. The COUNCIL OF THE INDIES in 1680 referred to "the calamities the Indians suffer" because of governors in Yucatán who were forcing raw cotton on them and demanding that they spin and weave it into mantles and other items made of cloth.

The *reparto* began in the 16th century. The Crown's decision to sell appointments of *corregidor* and *alcalde*

*mayor* in 1678 increased the pressure on purchasers to benefit from their terms in office. A decline in overseas TRADE also made the internal market and thus the use of *corregidores* an attractive opportunity for merchants. A priest of Quiquijana wrote in 1689 that the *corregidores* of Quispicanchis were violently forcing Amerindians to take clothing and mules. For much of the 18th century, abuse of the *repartimiento* by *corregidores* was the norm. In 1750, Huarochiri's *corregidor* distributed 200,000 pesos worth of mules. The Crown sought to exercise some control over the practice in 1753 by legalizing it, establishing official prices for items distributed, and taxing the sales. Clothed in this new garb, the practice continued and, indeed, worsened. In 1766, for example, a priest in CHARCAS claimed that the local *corregidor* had distributed 300,000 pesos worth of goods when the official allotment was 112,500 pesos. Abuses of the legal *reparto* persisted until VICEROY Agustín de Jáuregui officially abolished the institution on December 18, 1780, in the heat of the TŪPAC AMARU II revolt, a revolt in which one grievance was the *reparto*. The Crown approved the action on July 12, 1781.

The introduction of INTENDANTS in Peru and Charcas replaced *corregidores* with these more powerful officials and *SUBDELEGADOS*; the latter paid 3 percent of the tribute collected in their district. This compensation was inadequate and soon subdelegates were again imposing the now illegal *repartimiento*. In Huamanga, Peru, in 1804, the intendant claimed his subdelegates were using TRIBUTE collected as capital, buying 10,000 mules annually to distribute forcibly, and then not paying the sales tax (*ALCABALA*) on the transactions.

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- Jorge Juan and Antonio de Ulloa. *Discourse and Political Reflections on the Kingdoms of Peru*, translated by John J. TePaske and Besse A. Clement and edited by John J. TePaske (Norman: University of Oklahoma Press, 1978).

**residencia** A *residencia*, or judicial review of an official's tenure in office, was employed in Castile with some frequency by Ferdinand and Isabella and routinely by PHILIP II. Carried to the INDIES, the review normally occurred following the official's service, but it could take place during his tenure. The person assigned to take a *residencia* was known as a *juez de residencia* and could hold an office at the time or be specially commissioned.

The *residencia* was to ensure that an official had labored in the Crown's interest and to document that he had not misused his authority to the detriment of

the people in his jurisdiction. Through its routine usage throughout the empire, the *residencia* also was to demonstrate that the monarch, distant though he was, had a genuine concern for the well-being of his vassals and was willing to punish officials who abused their positions.

The *residencia* was employed against royal employees high and low, notably those with judicial responsibilities. VICEROYS, captains general, presidents, *oidores*, provincial officials, and judges who assigned workers to *OBRAJES* were among those subjected to judicial reviews (see *OIDOR*). As spelled out in 1667, *residencias* of viceroys were to be completed within six months of the date on which the edict was announced, and citizens, including Amerindians, were invited to register their complaints. The reviews of *AUDIENCIA* presidents and ministers promoted to other posts were to take place immediately after they received word of the advancement but were not to delay their departure; in cases of prior departure, those being reviewed were to post a bond to pay any resulting fines. Most *residencias* were to be completed in 60 days.

Employing a practice he routinely used in Spain, Philip II ordered that *corregidores* and *alcaldes mayores* in the Spanish colonies were to take the *residencia* of their immediate predecessors in office (see *ALCALDE MAYOR*; *CORREGIDOR*/*CORREGIMIENTO*). Although he subsequently clarified that the successors had to be persons of “satisfaction, sufficiency” and other laudable qualities, provincial officials routinely took the *residencia* of their predecessors and predictably revealed few major problems.

Penalties imposed by judges of *residencias* included fines, imprisonment, and confiscation of property. An unsatisfactory *residencia* could spell the end of an official’s career.

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**Revillagigedo, II conde de (Juan Vicente de Güemes Padilla Horcasitas y Aguayo)** (b. 1738–d. 1799) *creole viceroy of New Spain* The future second count of Revillagigedo, Juan Vicente de Güemes Padilla Horcasitas y Aguayo was born in HAVANA, the son of Juan Francisco Güemes y Horcasitas, captain general of CUBA and soon to become VICEROY of NEW SPAIN and 1st count of Revillagigedo, and Antonia de Padilla. He began service in the MILITARY as a young boy, obtaining the rank of captain of an infantry company of the palace guard in MEXICO CITY almost simultaneously with being named a knight of Calatrava in 1747. Despite his American birth, Revillagigedo considered CREOLES of questionable loyalty and opposed giving them significant authority, a position that undoubtedly reflected his failure in 1768 to reorganize the provincial militias of PANAMA. Only the friend-

ship of the powerful count of Floridablanca enabled him to resurrect his career.

In March 1789, Revillagigedo was appointed viceroy of New Spain to replace Manuel Antonio Flórez. He arrived at his post convinced that Amerindians, blacks, and *CASTAS* were of little worth and immediately disbanded militia units in Mexico City and PUEBLA composed of *castas*. Nonetheless, he believed that continued colonial rule required keeping the overseas population reasonably content, while making it aware that Spain had the military power to crush a revolt. He proposed the creation of a small, well-trained army of PENINSULARS and creoles that would help to instill a martial spirit and be supported by provincial reserves, but funding was not available for such an army, and creoles were not interested in a force in which they would not be able to obtain militia commissions.

Revillagigedo represented the enlightened despotism associated with Floridablanca and the count of Aranda in Spain. He supported the INTENDANT system ordered for New Spain in 1786, preferably with military officers serving as intendants. While recognizing that it would not solve all of the vicerealty’s problems, he considered the new system an important means for addressing administrative abuses and usurpations of property, as well as economic problems. Thus, he ordered full compliance with the prohibition of *REPARTIMIENTOS* previously employed by *alcaldes mayores* (see *ALCALDE MAYOR*). The dispute over the use of *repartimiento*, however, was unresolved by the time Revillagigedo’s tenure as viceroy ended.

Revillagigedo championed an improved work ethic and demanded that the thousands of workers in the royal TOBACCO manufactory in Mexico City wear uniforms; the result, according to one official, was that “now they are like new workers.”

Revillagigedo also worked to enforce existing restrictions on drinking establishments and inebriates. With each person over 15 years of age in Mexico City consuming an average of about 187 gallons of PULQUE in some form each year, drunkenness and alcohol-related crimes were rampant. Two approaches he enforced were to prohibit the sale of food in and near the taverns by itinerant vendors and to eliminate seating in the *pulquerías*. His unpopular efforts did not survive his tenure in office.

Viceroy when New Spain was included in the policy of *COMERCIO LIBRE*, Revillagigedo supported the new policy and defended it from the attacks of *CONSULADO* merchants. He also sought to reduce contraband trade, especially that carrying cheap British textiles into Mexico. More broadly, he encouraged the growth of AGRICULTURE, MINING, and economic activities that did not compete with Spain.

Revillagigedo believed that useful public works such as paving, lighting, and cleaning the streets of the capital were appropriate activities for the government and would contribute to a contented populace. Thus, he took steps to clear the plaza in front of the viceregal palace of unsightly vendors’ stalls, repave it, and provide four fountains of drinking water on its sides to replace the

single central one. He also oversaw the renovation of the Coliseo, where theatrical productions were performed. In addition, Revillagigedo supported enlightened publications, notably the *Gaceta* of JOSÉ ANTONIO ALZATE Y RAMÍREZ.

CHARLES IV named the marquis of Branciforte, brother-in-law of royal favorite MANUEL GODOY Y ÁLVAREZ DE FARIA, to replace Revillagigedo in January 1794. The viceroy left office later in the year and returned to Spain, where he died. Mexicans later considered the count of Revillagigedo to be the most enlightened of New Spain's viceroys.

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**Riego Revolt** (January 1–March 11, 1820) On January 1, 1820, Rafael de Riego y Flórez (b. 1785–d. 1823), commander of the Asturias battalion stationed in Andalusia in anticipation of being sent to fight the rebellion in the Americas, raised a call to restore the CONSTITUTION OF 1812 and started leading his troops to Algeciras, Málaga, Antequera, and other municipalities of southern Spain. His action caught many liberals by surprise, and only after he declared an end to the tithe and the TOBACCO monopoly and offered an additional tax reduction did he start gaining support. Málaga joined the revolt, as did La Coruña, Zaragoza, Barcelona, and other cities, which quickly reestablished PROVINCIAL DEPUTATIONS and constitutional city councils. With his palace surrounded by rioters, FERDINAND VII announced on March 7 that he would swear allegiance to the Constitution of 1812, something he had refused to do on his return from France in 1814. Spain's first experience with constitutional monarchy and second experience with liberal rule had begun.

No form of government in 1820 could solve Spain's fiscal problems. Neither a Provisional Junta of Government established on March 9, nor the Cortes that opened on July 9 was able to provide effective rule. Indeed, the liberals split into two groups, the moderates, as the men of the earlier liberal period were called, and the radicals (*exaltados*), typically younger men who found themselves denied the spoils of victory they expected with the revolt's success.

Under the Constitution, Ferdinand retained substantial authority over appointments. By using it, he was initially able to thwart the radicals, who had expected to control the government. He also secretly sought to

undermine the liberals by obtaining French military support. In April 1823, French troops invaded Spain at his invitation. Unlike the widespread opposition to the French from May 1808 through their defeat in 1813, this time the French army was able to drive the liberals from power and restore Ferdinand to a throne without constitutional restrictions.

The Riego Revolt had important consequences for the Americas. The army intended for reconquest never left Spain, and the new regime ordered a cease-fire and negotiations. This left royalists in areas still beset by civil war and movements for independence without hope for reinforcements. When a new Cortes with 29 American temporary deputies (*suplentes*) met in July 1820, it ended the taxes that supported local MILITARY units; in response, numerous villages in NEW SPAIN removed their defenses. When the Cortes attacked the *FUEROS* of the clergy and military, moreover, it threatened important interest groups in NEW SPAIN, in particular. Although elections for the new Cortes were carried out in regions still under royalist rule and more than 40 proprietary deputies reached Spain by June 1821, it was quickly clear that Spain and the colonies remained unequal. American deputies returned home convinced that Ferdinand and the Cortes would never grant the autonomy they sought within the Spanish nation.

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**Rio de Janeiro** Along with its economic dependent MINAS GERAIS, the small, tropical captaincy of Rio de Janeiro became the political and economic leader of BRAZIL in the 18th century. Although only PERNAMBUCO exported more dyewood, commerce and a MILITARY base formed the foundation of Rio's rise to power. From Rio went the expedition that established COLÔNIA DO SACRAMENTO in 1680. In the late 17th and 18th centuries, only BAHIA imported more African slaves than Rio (see SLAVERY). A road opened in 1707 to the GOLD MINING district of Minas Gerais enabled Rio to replace SÃO PAULO as the source for slaves, imported merchandise, and food; it also served as the port through which passed gold and DIAMONDS to Portugal.

In 1763, the city of Rio de Janeiro became the new viceregal capital of Brazil, although the change was more titular than substantive, since VICEROYS had little authority beyond their own captaincy save in time of emergency. Already the city was an administrative center with a captain general, a mint since 1703, a *RELAÇÃO* since 1751, an intendency general of gold, and a board of inspection for SUGAR, TOBACCO, and other crops (see MINTS). The viceregal palace was previously the home of the Bureau of Accounts and proved an unsuitable residence for either

Regent John or his wife Carlota Joaquina when they escaped from Portugal in 1808 (see JOHN VI). The city's main fountain was located in the square in front of the palace. Those thirsting for more than water sought the taverns and the sugar brandy (*cachaça*) they offered. An opera house provided formal entertainment.

When the Portuguese Court reached the city of Rio in 1808, it had between 60,000 and 100,000 inhabitants. Waste flowed through channels in the streets, often collecting in undrainable pools. The relatively well-to-do and soldiers traveled through the streets on horse, MULE, occasionally coach, sedan chair, the shoulders of slaves, and sometimes a litter; the unfortunate majority walked.

Nonetheless, Rio de Janeiro remained the capital through the process of obtaining independence under Emperor Pedro I and into the 20th century.

See also RIO DE JANEIRO (Vols. III, IV).

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**Río de la Plata** The estuary of the Río de la Plata lies between present Argentina and Uruguay and is the result of drainage from the Paraná and Uruguay Rivers. The provinces of Río de la Plata were BUENOS AIRES, PARAGUAY, Tucumán, and Santa Cruz de la Sierra. The original province of Buenos Aires included the BANDA ORIENTAL, Santa Fe, Entre Ríos, and Corrientes. In 1777, the region's provinces were incorporated into the VICEROYALTY OF RÍO DE LA PLATA.

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**Río de la Plata, Viceroyalty of (Viceroyalty of Buenos Aires)** The Viceroyalty of Río de la Plata was permanently established in 1777 with PEDRO DE CEVALLOS, the successful commander of the force that captured COLÔNIA DO SACRAMENTO, serving as the first VICEROY. The viceroyalty included the governorships of BUENOS AIRES, the BANDA ORIENTAL, PARAGUAY, and Tucumán, the *corregimiento* of Cuyo, and CHARCAS (see CORREGIDOR/CORREGIMIENTO). Under the new structure, POTOSÍ'S SILVER, 63 percent of the total registered in PERU in 1776, was to be sent to Buenos Aires rather than LIMA. Largely as a result of this, 42 million pesos of

revenue flowed through Buenos Aires rather than Peru between 1770 and 1800.

The founding of the viceroyalty initiated a flurry of administrative changes. By 1782, nine intendancies were created: Buenos Aires, Paraguay, Córdoba, Salta, Potosí, LA PLATA, Cochabamba, La Paz, and Puno, the last transferred to Peru in 1796. In 1783, the Crown approved an *AUDIENCIA* in Buenos Aires, thus limiting the jurisdiction of the long-established tribunal in La Plata. The royal bureaucracy in Buenos Aires grew from four agencies with 14 employees in 1767 to 10 agencies with more than 125 employees by 1785. The number continued to expand, reaching 164 employees in 1803 before declining, largely because of reductions in the TRIBUNAL OF ACCOUNTS, to 142 in 1810.

#### COMMERCE

The creation of the Viceroyalty of Río de la Plata was a boon for Buenos Aires in general and its merchants in particular. Although contraband and legal TRADE from the city had been growing since at least 1730, the inclusion of the silver-producing region of Charcas in the viceroyalty immediately provided a legal liquid commodity to export. Implementation of *COMERCIO LIBRE* also ensured that the capital's wholesale merchants, who soon increased in number, would have legal access to the Spanish market. An improved external market furthered expansion of CATTLE raising and the preparation of hides, tallow, and jerked beef to sell abroad. In addition, the expulsion of the JESUITS in 1767 made YERBA MATÉ for export more easily available. The expansion of the bureaucracy increased the size of the market for imported goods. The Crown's approval of a merchant guild (*CONSULADO*) for Buenos Aires in 1794 institutionalized the wholesale merchants' ascent.

#### BUENOS AIRES

The population of the city of Buenos Aires expanded from 26,125 in 1778 to 42,540 in 1810. The prominence of commerce in 1810 is evident; 1,591 (29 percent) of persons with identifiable occupations were merchants, a number equal to combined officials in the MILITARY, CATHOLIC CHURCH, and government. About 30 percent of the 1810 population was of African origin.

Compared to the viceregal capitals of LIMA and MEXICO CITY, government and religious buildings in Buenos Aires were modest. The surroundings became more pleasant by the end of the 18th century, with lighting and pavement on the major streets. A theater named Casa de Comedias had opened, and educational opportunities had improved, although young men wanting a university EDUCATION had to pursue it in Córdoba, La Plata, or elsewhere (see UNIVERSITIES). Viceroy JUAN JOSÉ DE VÉRTIZ Y SALCEDO in 1780 ordered that the PRINTING PRESSES owned by the Jesuits before their expulsion be brought to Buenos Aires.

The relatively recent creation of the viceroyalty, its size, and the way in which Buenos Aires served as a funnel



for its exportable resources resulted in limited political integration, economic competition, and envy of the capital by the other provinces. A political organization mandated from Madrid placed Charcas under a viceroy located in Buenos Aires and an *audiencia* there as well. Neither outlying parts of the viceroyalty nor nearby MONTEVIDEO shared the perception of *porteños* that the organization made perfect sense.

### BRITISH INVASIONS

Uniquely, in the early 19th century, Buenos Aires was invaded by the British. On June 27, 1806, an expeditionary force of 1,500 soldiers dispatched from the Cape of Good Hope landed near the capital and captured its fortress. Viceroy RAFAEL DE SOBREMONTÉ abandoned the city and fled to the interior with the royal treasury. From there, he planned to oversee efforts to remove the invaders. The population of Buenos Aires, however, viewed his rapid departure as cowardice. When he returned after SANTIAGO DE LINIERS Y BREMOND had led a successful counterattack and forced the British to surrender, Sobremonte found, on August 14, 1806, that the city council, supported by the Audiencia of Buenos Aires, demanded that he turn over military affairs to Liniers. Thus, the hero against the invaders oversaw the organization of new militia units in anticipation of another British attack, while the viceroy assumed responsibility for readying resistance in Montevideo. The first British invasion had changed the political dynamics in Buenos Aires, and Viceroy Sobremonte and the royal authority he represented had lost.

The second British invasion occupied Montevideo on February 3, 1807. Now the city council of Buenos Aires demanded and the *audiencia* acquiesced in the dismissal of Sobremonte, described as a resignation for reasons of ill health, after this second failure and his replacement by Liniers on an interim basis. General John Whitelocke landed near Buenos Aires on June 28, 1807, with a force of 8,000–9,000 troops. Led by MARTÍN DE ALZAGA, a wealthy merchant who presided over the city council, the local militia held firm, and Whitelocke failed to dislodge the defenders. After his troops suffered heavy losses, Whitelocke surrendered on July 7, 1807. That local militia units rather than royal forces were responsible for the victory strengthened *porteños'* desire for autonomy. At the same time, relations between Liniers and the city fathers deteriorated as he drew closer to the *audiencia* and other royal officials on the one hand, while he and his mistress allegedly favored associates and friendly merchants on the other. The city fathers asked that the Crown replace Liniers as viceroy.

### POLITICAL CRISIS

The abdications of CHARLES IV and FERDINAND VII in May 1808 provoked a crisis in Buenos Aires, as elsewhere. When the news reached Buenos Aires in July, some politicians toyed with the idea of Princess Carlota

Joaquina, sister of Ferdinand VII and resident in BRAZIL as the wife of Prince Regent John, becoming queen of a Spanish monarchy that lacked a legitimate ruler in Spain. When the scheme failed, city councilors opted for a government ruling in the name of Ferdinand until his return. This meant both the rejection of Napoleon's representative when he arrived in mid-August and suspicion, particularly by PENINSULARS, that acting viceroy Liniers was pro-French. Governor of the Banda Oriental FRANCISCO JAVIER ELÍO declared Liniers guilty of treason and orchestrated the creation of a junta of peninsulars in Montevideo to rule in Ferdinand's name. Inspired, some peninsulars in Buenos Aires followed their example and conspired to take control of the city council of Buenos Aires in the elections of January 1, 1809. The CREOLE militias, however, responded forcefully and exiled peninsular merchant and hero in the second British invasion Alzaga and his allies to Patagonia. Creole proponents of autonomy controlled Buenos Aires and expected the remainder of the viceroyalty to acquiesce.

French military success in southern Spain forced the JUNTA CENTRAL to flee from SEVILLE to the Isle of León. On January 29, 1810, it named a COUNCIL OF REGENCY to oversee the resistance to the French and to convoke a CORTES. The new government assumed power on February 1, 1810, and two weeks later instructed the "kingdoms of Ultramar" to elect representatives to the Cortes. News of the Junta Central's demise reached Montevideo on May 13. Viceroy BALTASAR HIDALGO DE CISNEROS publicly announced the change of government on May 18, 1810. On May 25, the city council of Buenos Aires named a seven-member Provisional Governing Junta of the Provinces of the Río de la Plata. The Junta quickly discovered that the fragile unity of the Viceroyalty of Río de la Plata had disintegrated.

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**riots and rebellions** Riots and rebellions punctuated the years between 1560 and 1808 in Spanish

America and BRAZIL. Typically, they had a local cause and short duration. Exceptionally large and violent cases led regional administrators to apply significant force to suppress them. The causes of rural rebellions included abuse by local or district officials, including the forced distribution of goods, or *REPARTO*; the imposition of new or increased taxes; more effective tax collection; land hunger and disputes; and forced labor drafts, notably the *MITA* in PERU.

Although the Tepehuán rebellion from 1616 to 1620 temporarily wrested control of part of northwestern Mexico from the Spaniards, the most devastating rebellion in colonial NEW SPAIN was the variously termed “Great Northern Revolt” and “Great Southwestern Revolt” (1680–98). It began with the PUEBLO REVOLT of 1680 in New Mexico. Pueblos and Apaches killed nearly 400 colonists and 21 missionaries; some 2,000 or so remaining colonists fled to the El Paso (Texas) district. Almost the entire northern frontier of New Spain was affected during this long rebellion.

The Tzeltal Revolt of highland Chiapas of 1712 arose from increased demands by clerics and governors that included ecclesiastical *VISITAS* and *reparto de mercancías*, as well as their meddling in municipal elections. Employing a defense of the Mayas’ view of Catholicism, an ambitious indigenous elite sought to establish itself through escalating conflict. The resulting four-month rebellion involved a number of Tzotzil and Tzeltal communities and some 5,000–6,000 men, who slaughtered other Maya who refused to support them.

Riots in important administrative centers were rare but particularly unnerving to colonial authorities. An early example was the riot in QUITO, which began in 1592 after the announcement that a 2 percent sales tax (*ALCABALA*) would be collected. The opponents to the tax fought against its imposition but ultimately lost. The penalty imposed on the city council in 1594 was loss of the privilege to elect municipal justices, a loss that lasted until 1699. In 1765, Quito experienced another insurrection. Against a background of economic decline that began in the late 17th century, angered citizens rioted against the *AGUARDIENTE DE CAÑA* factory. Part of the government’s effort to control production and sale of the alcoholic beverage, the factory represented a threat to small distillers. A temporary coalition of members of the CREOLE elite in Quito and plebeians forced royalist administrators to capitulate but soon broke apart. When a royal army arrived in September 1766, it was greeted warmly. Royal authority was safe until 1809.

A count of village riots and uprisings between 1700 and 1799 reveals 107 in New Spain, 27 in GUATEMALA, 133 in PERU, and 22 in the *AUDIENCIA* district of Quito for a total of 289. In all of these regions, the number

increased after 1750. In Central Mexico and Oaxaca, at least, most rebellions were brief, spontaneous affairs that arose in indigenous villages from arbitrary actions by public officials of state or church and were directed against them. WOMEN were often at the forefront of riots and rebellions, hurling stones and epithets. Such rebellions, however, were neither wars against the colonial system nor class struggle.

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**Rosa de Lima (Isabel Flores de Oliva)** (b. 1586–d. 1617) *creole Peruvian saint* Born in LIMA, Isabel Flores de Oliva entered the Third Order of Saint Dominic as a young woman and took the name Rosa de Santa María. The name by which she is known recognized both her beauty and that she wore a crown of roses on top of her veil and a crown of thorns underneath it. Living a life of piety, chastity, prayer, seclusion, and mortification of the flesh, she was associated with “many, and very exceptional, miracles.” Eight days after her death, the DOMINICANS began the process of compiling evidence that would document her sanctity. This included numerous testimonials and responses to an extensive list of questions.

In due course, the documentation was sent to Rome, and on Sunday, December 16, 1668, the official papal document conveying word of the beatification of Rosa de Lima was made public in the Peruvian capital of Lima. As a contemporary chronicler noted, “all the religious orders, the viceroy Count of Lemos, and all the tribunals walked in the procession from [the church of] San Francisco to the cathedral.” When canonized in 1671, Santa Rosa de Lima was the first American so honored, demonstrating that Americans could reach this exalted state.

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**Sá, Mem de** (b. ca. 1500–d. 1572) *Portuguese governor general of Bahia* Governor General Mem de Sá arrived in SALVADOR DA BAHIA on December 28, 1557, and held his post until 1572. His charges included expelling the French from BRAZIL, dealing with NATIVE AMERICANS angry because colonists had taken their lands and forced them to labor, and ensuring the survival of the colony.

Mem de Sá oversaw the consolidation of indigenous peoples in ALDEIAS under the JESUITS, and the number of these villages increased to 11. The governor subjected to WAR those indigenous who resisted relocation, sending three expeditions to capture or kill them. The colonists applauded the latter approach.

Although the threat of French settlement had prompted King John III to establish the donatary system in Brazil in order both to defend the land against French settlement and to buttress Portugal's claim to it through effective occupation, French attacks on Portuguese vessels continued. In 1555, an expedition to Antarctic France resulted in a French settlement and fort on Sergipe Island in Guanabara Bay, as well as a village created by deserters of the expedition on the mainland. Mem de Sá obtained reinforcements from Portugal and also used Amerindian allies to destroy the fort in 1560. A lack of resources to drive the French from their mainland settlement or to rebuild and occupy the fort on Sergipe Island, however, forced him to send a second force in 1563; following its success, the town of RIO DE JANEIRO was founded on March 1, 1565.

Although the Portuguese Crown had sent a few African slaves to Brazil since 1550, in 1559, it authorized the governor of São Tomé to begin sending up to 120 slaves for each plantation (*ENGENHO*) owner (see SLAVERY). The number of slaves in the colony would grow into the 19th century.

When Mem de Sá died in Salvador, he left a safer and more prosperous colony than he had found upon his arrival. His family's fortune had increased as well; at his death, he owned the largest *engenho* in the colony, with 21 African and 90 Amerindian slaves and 109 other workers.

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**Saint-Domingue** See HISPANIOLA.

**Salvador da Bahia** Located on a peninsula separating the Bay of All Saints from the Atlantic Ocean, the city of São Salvador da Bahia de Todos os Santos, later known as Salvador, was founded by Governor Tomé de Sousa in 1549. It was the capital of royal government in BRAZIL until 1763, and its status documented the transformation of the donatary province of BAHIA, between Ilhéus and PERNAMBUCO, into a royal province. The governor brought with him artisans and supplies to use in building the city, and construction began on public and private buildings immediately. The bay was surrounded by lands known as the Recôncavo, which became the location of innumerable SUGAR PLANTATIONS that made use of water from the bay and the rivers entering it.

Salvador served as the port from which sugar, TOBACCO, and other products were exported but depended

on the Recôncavo for food and wood for construction and fuel. The MUNICIPAL COUNCIL quickly proved itself a representative of planters and merchants. A high court (*RELAÇÃO*) opened in 1609 and, aside from a break between 1626 and 1652, operated much like an *AUDIENCIA* in the Spanish colonies for the remainder of the colonial era. Royal fiscal officials also had their headquarters in Salvador. JESUITS arriving with Sousa in 1549 quickly created a *COLEGIO*. The city became the see of a bishop in 1551 and an archiepiscopal see in 1676. A number of religious orders had arrived by 1600, but it was not until 1677 that the first female convent opened. The population of the city was around 4,000 in 1587, perhaps 15,000 in 1681, and close to 25,000 in 1724, 34,000 in 1775, and 51,000 in 1807.

Long Brazil's most active center for slaves, used in both sugar and tobacco production, Salvador was the colony's most important port for many years. The Recôncavo also produced large amounts of cassava, a staple for much of the population. In addition to sugar and tobacco, Salvador's merchants exported, among other things, wood, brandy, hides, molasses, and products derived from whaling. They imported a variety of foodstuffs, beverages, textiles, and metals from Portugal.

Although Salvador continued as Brazil's leading port for exports, its early political preeminence was successfully challenged in the 18th century. In 1763, RIO DE JANEIRO became the viceregal capital, although the office of VICEROY was functionally almost identical to that of captain general. The change reflected Rio's importance as a MILITARY base and sugar producer as well as its emergence as the major source of slaves, Brazilian foodstuffs, and European goods for the GOLD and DIAMOND fields of MINAS GERAIS.

The arrival of the Portuguese Court in Brazil on January 22, 1808, and use of Rio de Janeiro as its capital, confirmed the political eclipse of Salvador. In 1817, a Portuguese regiment was stationed in Salvador, and in February 1822, conflict between the Portuguese troops and local soldiers and militia resulted in civilian deaths. Although the forces of the Cortes in Lisbon were victorious, Bahians considered this evidence of their tyranny and willingness to subdue Brazil by force. Bahian deputies in the Cortes considered that body's decision on May 23, 1822, to send additional troops to Salvador a clear confirmation of this approach. What Bahia wanted was regional autonomy under Pedro, a far cry from a united, independent Brazilian nation-state.

Holding the city of Salvador was essential for the Cortes; its freedom from Portuguese control was central to the new Brazilian empire. The Cortes had located Portugal's best military forces in Salvador and, in early 1823, sent nearly 4,000 men to reinforce them. THOMAS, LORD COCHRANE, then in Pedro I's employ, demonstrated his remarkable bravado and, on May 4, 1823, tricked the Portuguese fleet into withdrawing, thinking Cochrane's squadron was much larger than its three ships. By the end

of the month Bahia was free from Portuguese rule (see BRAZIL, INDEPENDENCE OF).

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**San Ildefonso, Treaty of** (October 1, 1777) Signed on October 1, 1777, the Treaty of San Ildefonso ended nearly a century of conflict between Spain and Portugal in the River Plate region. The conflict began in 1680 when Portugal constructed a trading fort at COLÔNIA DO SACRAMENTO. With Spain having ousted the Portuguese from Colônia in 1762, only to have it restored to them in the TREATY OF PARIS in 1763, PEDRO DE CEVALLOS sailed from CÁDIZ in mid-November 1776 to the River Plate region with the largest Spanish force ever sent to the overseas territories; it included nearly 10,000 troops, 8,500 sailors, and other personnel. His attack on Colônia was successful, and on June 4, 1777, the Portuguese surrendered, enabling the Spanish to destroy the fortress.

The Treaty of San Ildefonso fixed BRAZIL's southern boundary beginning at the Chuí River and prevented Cevallos from attacking the Brazilian province of Rio Grande. It did, however, confirm Spain's full sovereignty over the River Plate region, including seven Jesuit mission villages that the 1750 TREATY OF MADRID, subsequently abrogated in 1761, had ordered transferred to Portugal. The Treaty of San Ildefonso also recognized Portuguese possession of the Amazon Basin, thus giving Brazil its western boundary and a landmass of nearly 3 million square miles (7.8 million km<sup>2</sup>). The Treaty of Tordesillas of 1494 was now defunct, and the Spanish set to work establishing the VICEROYALTY OF RÍO DE LA PLATA.

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**San Marcos, University of** See UNIVERSITY OF SAN MARCOS.

#### Sanlúcar de Barrameda (San Lúcar de Barrameda)

Located at the mouth of the Guadalquivir River downstream from SEVILLE, the port of Sanlúcar de Barrameda was a base for early Spanish expeditions to the New World. It quickly benefited from the Andalusian monopoly of TRADE to the Americas created in the 16th century. By the beginning of the 17th century, the outgoing FLEETS assembled at either Sanlúcar or CÁDIZ; larger

ships returning from the INDIES unloaded at Cádiz, while the smaller ones proceeded to Sanlúcar and, after unloading some cargo, to Seville. Although Sanlúcar was better protected than Cádiz and enjoyed better access to Seville, its treacherous sandbar and the increased size of merchant ships, from 70 tons in 1504 to 391 tons in the early 1640s, made its use increasingly dangerous. Indeed, Sanlúcar had a bad reputation resulting from the many shipwrecks in its vicinity. Its liability benefited Cádiz, from which most sailings to the Indies departed from the 1630s onward. The opposition of the merchants of Seville to Cádiz's growing preeminence, however, resulted in a royal decision in 1666 to suppress the latter's Customs House and Juzgado de Indias and to move immediate administrative oversight to Sanlúcar under the supervision of the CASA DE CONTRATACIÓN (Board of Trade) and Customs House of Seville. Bitterly opposed by Cádiz merchants, Sanlúcar was stripped of its gains in 1679 when its rival offered a donation of 70,000 escudos to the Crown. Cádiz was henceforth the master of the Atlantic trade to the colonies, although the Board of Trade was not transferred to it from Seville until 1717.

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**San Martín, José de** (b. 1778–d. 1850) *creole military leader in wars for independence in South America* Born in Yapeyú in the Misiones district of Corrientes in present-day Argentina, José de San Martín moved with his family to BUENOS AIRES in 1781 and then to Spain in 1783. After some schooling in Madrid and Málaga, he began a MILITARY career in 1789. He reached the rank of lieutenant colonel before leaving CÁDIZ on September 14, 1811, for London and, the following year, for Buenos Aires. There, in March 1812, he founded the Cavalry Grenadiers as authorized by the First Triumvirate.

San Martín led his grenadiers to victory over the royalists in the province of Santa Fe on February 3, 1813. MANUEL BELGRANO's defeats in October and November resulted in San Martín's appointment as general in chief in January 1814, but he resigned in April 1814, having no interest in leading another Buenos Aires army to CHARCAS. He envisioned independence for PERU coming via CHILE and secured an appointment in August 1814 as governor intendant of Cuyo in the Andes adjacent to Chile.

With the blessing of the government in Buenos Aires, especially after Juan Martín de Pueyrredón became supreme director of the UNITED PROVINCES OF THE RÍO DE LA PLATA in May 1816, San Martín formed at Cuyo's capital of Mendoza a small, well-disciplined Army of the Andes. By the end of 1816, the force had 4,000 men, most of them from the Río de la Plata region. It included about



Portrait of José de San Martín, hero of independence in Chile and Peru (Private collection)

700 black and *MULATO* slaves and several hundred political exiles from Chile, most notably BERNARDO O'HIGGINS. In January 1817, San Martín, titled commander in chief of the Army of the Andes by Pueyrredón, sent the first part of the army over the Andes and into Chile. By early February, the entire force was in Chile.

The Army of the Andes won the first engagement, the BATTLE OF CHACABUCO, on February 12, 1817, and moved into SANTIAGO DE CHILE where on February 15 the city fathers asked San Martín to become head of state, an honor he declined, opening the way for O'Higgins's selection. Although subsequently defeated at Cancha Rayada, the invaders were again successful at the BATTLE OF MAIPÓ on April 5, 1818; Chile's independence would never again be in doubt, although Valdivia was not taken until early 1820.

From the beginning, San Martín considered the independence of PERU his ultimate objective. The naval successes of THOMAS, LORD COCHRANE, a skilled soldier of fortune, both gave Chile a small fleet and eliminated Spanish warships from coastal waters. With the support of O'Higgins and Cochrane, San Martín was able to land an invading force at Pisco, about 150 miles (240 km) south of LIMA, in early September 1820. There, he waited for the Peruvians to rise against the Spaniards. The delay angered Cochrane, and his relations with San Martín got progressively worse. When the British admiral captured the *Esmeralda*, Spain's best warship, on November 5, 1820, it bolstered his desire to attack Lima directly.

San Martín advanced to Ancón, a few miles north of Lima but would not attack the city. On January 29, 1821, a coup in Lima replaced Viceroy JOAQUÍN DE LA PEZUELA with José de La Serna, but Cochrane's blockade of CALLAO created conditions in Lima that made the royalists withdraw from the city into the interior of Peru following the signing of a 20-day truce on May 23, 1821. General José de Canterac led half of the cavalry and infantry out of Lima on June 25, and on July 4 La Serna abandoned Lima as well. After panic in the capital, the MUNICIPAL COUNCIL, believing it had no choice, drew up a declaration of independence that was proclaimed on July 28. On August 3, San Martín became protector with supreme authority in both civil and military affairs.

San Martín had taken Lima but not defeated the royalists in Peru. It quickly became clear to him, moreover, that he lacked the financial resources to build an army adequate to challenge the undefeated royalist forces. Additionally, enough people in Lima had supported independence through intimidation that his position soon became untenable. Aside from the political and military challenges, the general in chief was suffering from asthma and a stomach ulcer and addicted to opium; as a leader, he was failing, and his supporters were leaving him. In October 1821, Cochrane seized the bullion reserve to pay his sailors and sailed away with his fleet. Desertions from the army, which had never been large, increased to the point that some contemporaries thought all the remaining soldiers were slaves.

Neither paper money issued out of desperation nor the persecution of PENINSULARS orchestrated by his compatriot and minister of war Bernardo Monteagudo solved San Martín's financial problems. In despair, the protector met with the Liberator SIMÓN BOLÍVAR on July 26–27 in GUAYAQUIL. No one else was present, but the two greatest leaders of the wars of INDEPENDENCE OF SPANISH SOUTH AMERICA certainly discussed how to complete independence in Peru, as well as the form of government it should adopt. On the latter point, they could not have agreed, for San Martín was a monarchist, and Bolívar, a republican.

Following the meeting, San Martín returned to Lima. When the Peruvian Congress finally met on September 20, 1822, he relinquished his authority to it and the same evening sailed south. After stops in Chile and Buenos Aires, he went to Europe, dying in Boulogne-sur-Mer, France.

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**Santiago de Chile** Founded on the Mapocho River in 1541 by Pedro de Valdivia and a small group of conquistadores, the capital of colonial CHILE was located in the central valley of an administrative unit that became known as the Audiencia of Chile. To the north, lay a desert region that provided access to the Pacific Ocean for CHARCAS, or Upper Peru, but did not become Chilean until the War of the Pacific, 1879–84. South of the Bío-Bío River lived ARAUCANIANS, who periodically destroyed fortified frontier towns located there.

After successfully fighting NATIVE AMERICANS in the valley of the Mapocho, Valdivia awarded ENCOMIENDAS, the standard reward of conquest, to his followers. Although in 1542 the Crown issued the New Laws restricting *encomienda*, in Chile the institution had a long life as descendants of conquistadores and early settlers sought to retain control over labor. Valdivia also used the creation of the town and its MUNICIPAL COUNCIL as a way to reward the other conquistadores through town lots and offices, himself accepting the governorship of Chile offered by the council.

Santiago lasted seven months before the indigenous burned it to the ground, prompting Valdivia and the other conquistadores over the next 12 years to found a small number of frontier forts; at each, the governor assigned *encomiendas*. Following his death at the hands of the CACIQUE Lautaro, who had earlier been his groom, Chile remained a frontier, and Santiago, a modest frontier town that served as a base for expeditions north, south, and east over the Andes. Periodic aid sent by the VICEROY OF PERU helped it survive.

By 1600, the population of Santiago was perhaps several thousand Amerindians and 500–700 Spaniards and mestizos (see MESTIZAJE/MESTIZO). Surrounding estates grew WHEAT and other grains, grapes, fruit, vegetables, and livestock, paid for originally in GOLD dust. Communication with LIMA went through the port of Valparaíso, although the voyage to CALLAO could take three to four months.

The continued precarious existence of Santiago and other Chilean towns led the Crown to order the Lima treasury to send it funds annually (*situado*) to support MILITARY expenses and thus enable the residents to devote themselves to agricultural production, livestock, TRADE, and other ventures; in practice, however, much of the *situado* was spent in Lima (see AGRICULTURE). Santiago, of course, had a small complement of officials and some priests and friars.

As Chile's largest city, Santiago offered the best educational opportunities in the colony (see EDUCATION). A seminary and a Jesuit COLEGIO were located there, but Chileans pursuing degrees typically went to the UNIVERSITY OF SAN MARCOS in Lima until the Royal University of San Felipe opened its doors in Santiago in the mid-18th century (see JESUITS).

By 1780, Santiago had a population of 25,000 that increased to well over 30,000 by 1810. Undoubtedly, an important fraction of the 24,000 immigrants to Chile from Spain between 1701 and 1810 settled in the capital;

a significant number of **BASQUES** were among them. Home to an **AUDIENCIA** that was permanently established in 1606, Santiago became the capital of one of the two intendancies created in 1787 (see **INTENDANT**).

Aware of the benefits of office, Santiago families were well represented in administrative positions, and **CREOLE** daughters often married **PENINSULARS** appointed to high positions. They also often had ties to elite families in Lima, a relationship encouraged by the substantial exportation of wheat to Lima following the earthquake that struck the Peruvian capital in 1687. The construction of a mint in Santiago testified to the increase in gold production in the 18th century; the establishment of a merchant guild (**CONSULADO**) in Santiago in 1795 provided the wholesale merchants with a corporate foundation comparable to that enjoyed by merchants in Lima (see **MINTS**).

The constitutional crisis that gripped Spain in 1808 quickly affected Santiago as well. Within months, a group of creole **AUTONOMISTS** wanted a junta. Following the *audiencia's* deposition of the captain general on July 16, 1810, a **CABILDO ABIERTO** of September 18 established a junta in the name of **FERDINAND VII** and announced that a national congress would be convened. Despite most Chileans' pursuit of autonomy rather than independence, Viceroy **JOSÉ FERNANDO DE ABASCAL Y SOUSA** in Lima sent forces in 1813 that harshly reestablished royalist rule in 1813–14. It required an invasion led by **JOSÉ DE SAN MARTÍN** in 1817 to achieve independence in 1818 (see **SPANISH SOUTH AMERICA, INDEPENDENCE OF**). Santiago continued as Chile's capital.

See also **SANTIAGO DE CHILE** (Vols. III, IV).

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**Santo Domingo** Santo Domingo was the name of the first true city Spaniards established in the New World (see **CITIES**). Located on the island of **HISPANIOLA** (la Española), the name *Santo Domingo* was used for the city and also for the **AUDIENCIA** that resided there. After the French formally obtained the western part of Hispaniola in 1697, referring to it as Saint Domingue, the Spaniards referred to their remaining portion of the island as Santo Domingo.

See also **SANTO DOMINGO** (Vols. III, IV).

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**São Paulo** **BRAZIL's** donatary captaincy of **RIO DE JANEIRO** was the original administrative unit from which

the Captaincy General of São Paulo evolved (see **CAPTAINCIES GENERAL**). Located about 30 miles (48 km) inland from the port of Santos but separated from the coast by mountains, what became the city of São Paulo was initially a small frontier community that resulted from the merger of a secular village and a Jesuit mission in 1564. The town's residents included persons of Portuguese descent, but the paucity of Portuguese women resulted in numerous **MAMELUCOS**. The Brazilian equivalent of mestizos in Spanish America, *mamelucos* not only had Amerindian ancestry but also could often speak a common native language (*lingua geral*) and demonstrate mastery of native material culture (see **MESTIZAJE/MESTIZO**). São Paulo in 1600 had fewer than 2,000 inhabitants; widespread poverty and the need for cooperation against much more numerous non-Europeans in the region reduced the social distance among the Europeans and their descendants.

With difficult communication with the coast and no obvious source of wealth, the *paulistas*, as the frontier town's citizens were called, focused on the possibilities offered by the interior (**SERTÃO**) of **BRAZIL**. Already in the late 16th century, **BANDEIRAS** had pushed into the interior in pursuit of **NATIVE AMERICANS** to enslave, mineral wealth, and precious stones. Success as a *bandeirante* could lift a man of humble birth into the upper strata of local society. Enslaved Amerindians provided labor on the *paulistas'* landed estates and could also be sold, although their value was far less than that of African slaves (see **SLAVERY**). The number of Amerindian slaves a man owned largely determined his wealth.

In the 1590s and early 17th century, Spanish **JESUITS** moved into territory about midway between **ASUNCIÓN** and São Paulo. Between 1610 and 1630, they established 15 **MISSIONS** (*reducciones*) in several valleys in their missionary province of Guairá. Natives fleeing Paraguayan Spaniards who had tried to establish the towns of Ciudad Real and Villa Rica in the region quickly populated the missions. Their presence proved irresistible to *bandeirantes*. *Paulista* attacks on the outskirts of the missions began in 1616; a raid in 1623–24 netted more than 1,000 neophytes. A raid in 1629 entered a **REDUCCIÓN** and seized some 4,000 Amerindians. This precedent stimulated other raids, and in 1631, the Jesuits led some 10,000 indigenous from their remaining villages down the Paraná River. A *bandeirante* raid against Ciudad Real and Villa Rica brought both towns to an end. The Jesuits led their neophytes east of the upper Uruguay River in present Rio Grande do Sul, but in 1636, 1637, and 1638, *paulistas* raided the new locations. Finally, securing permission to arm and train the Native Americans in military skills, the Jesuits and the native people defeated the *paulistas* at Mboreré in 1641. A final *bandeirante* expedition in 1648 brought the Jesuit province of Itatín to an end while serving to support Portuguese claims on Brazil's southern and western frontiers.

As the time and distance required for *bandeirante* raids increased, the number of expeditions declined. Explorers of the vast interior increasingly sought precious metals and jewels, but not until the last decade of the 17th century would they be successful, with remarkable finds in what became known as MINAS GERAIS.

The estates (*FAZENDAS*) of São Paulo relied on Amerindian labor in producing WHEAT, grapes, MAIZE, CATTLE, and their byproducts. *Paulistas* also sold indigenous slaves to landowners in Rio de Janeiro and São Vicente. By the end of the 17th century, the city of São Paulo was a respectable urban center that dominated its surroundings. Prominent families fought over local affairs and royal authority was minimal until after the *paulistas* were defeated in the WAR OF THE EMBOABAS in 1708–09 in Minas Gerais.

Joined to Minas Gerais as a joint captaincy general from 1709, São Paulo became an independent captaincy general in 1720 that included what in the 1740s became the Captaincies General of Goiás and MATO GROSSO. The creation of a second *RELAÇÃO* in Rio de Janeiro in 1751 reflected the growing importance of southern Brazil, as did the decision to move the VICEROY from SALVADOR DA BAHIA and make Rio de Janeiro the viceregal capital of Brazil in 1763. Although Jesuits had been present in São Paulo since the 16th century, the region had no bishop until 1745.

The population of the city of São Paulo around 1800 was some 24,000; the captaincy as a whole had perhaps 160,000. This placed the captaincy behind Minas Gerais, PERNAMBUCO, Rio de Janeiro, and BAHIA, all of which had between 247,000 and 407,000 inhabitants. The city, however, grew little between the mid-1760s and early 19th century, and its share of the captaincy's population declined from about 25 percent to less than 12 percent.

By the end of the 18th century, SUGAR had become the most important export of the Captaincy General of São Paulo; it would remain so until displaced by coffee in the mid-19th century. By the early 19th century, the captaincy was also exporting rice to Portugal, although less than 50 percent of the amount sent by Rio de Janeiro and less than one-sixth of the amount sent from MARANHÃO. Coffee was first exported from São Paulo in 1796, decades later than from northeastern Brazil, but the amount in 1807 was still very modest, about 2 percent of what Rio was exporting.

With JOHN VI in Portugal and the captaincies of Brazil divided in their loyalty toward the Cortes and Prince Regent Pedro, in late December 1821 the governing junta of São Paulo formally and graphically attacked the Cortes as “a small group of incompetents.” It protested to Pedro that, if he returned to Portugal as the Cortes demanded, a “river of blood. . . [would] flow in Brazil because of your departure.” São Paulo supported independence from Portugal (see BRAZIL, INDEPENDENCE OF).

See also SÃO PAULO (Vols. III, IV).

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**sertão** The *sertão* was the frontier and the wilderness, the backlands and all unexplored and unsettled land of BRAZIL's interior. Forested, often mountainous, sparsely inhabited, and broken by rivers that served as roads, it was home to numerous relatively small indigenous groups. Its mystery and potential resources attracted Portuguese explorers, slavers, and prospectors.

Although missionaries and slavers started entering the *sertão* in the 16th century, effective settlement began, with few exceptions, in the 17th century, and most municipalities were founded after 1700. By that date, Brazil's borders extended from the headwaters of the Amazon in the north to the RÍO DE LA PLATA in the south and to the Andes in the west. Establishing these boundaries had required ejecting the French, English, and Dutch from the Amazon Delta, founding the fortified trading post of COLÔNIA DO SACRAMENTO at the upper end of the estuary of the Río de la Plata, and the work of countless *BANDEIRAS* from SÃO PAULO in the central and western interior. The latter's depredations left the *sertão* with fewer inhabitants.

During the Dutch occupation of northeastern Brazil, ranchers moved CATTLE into the interior west of PERNAMBUCO and BAHIA. This initiated the conquest and settlement of lands along the São Francisco River and the plains of Piauí. In the south, herds of feral cattle populated the plains of Rio Grande do Sul and the BANDA ORIENTAL.

The discovery of GOLD in MINAS GERAIS in the 1690s and MATTO GROSSO subsequently resulted in permanent Portuguese settlement in these inland regions. In the north, the exploration and limited Portuguese settlement of the Amazon Valley originated from Belém at the mouth of the great river. The *sertão* west of Pernambuco and Bahia attracted runaway slaves and some freedmen, as well as extensive herds of cattle (see SLAVERY).

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**Seville** More than any other Spanish municipality, 16th-century Seville benefited from the development of empire. Located on the Guadalquivir River some 70 miles (113 km) from CÁDIZ, the Andalusian city was a



modest river port when Christopher Columbus first set sail in 1492. Estimates of its population vary significantly, but the city had perhaps 50,000 inhabitants in 1530. Toward the end of the 16th century, it might have had about 90,000 or even 150,000; a parish count in 1588 revealed just over 120,000; in any case, Seville was the largest and most vibrant city in the realms of Castile and Aragon.

Across the Guadalquivir River and beyond the city walls lay the district of Triana, connected to Seville by a pontoon bridge and home to sailors who manned the ships to the Americas. During the 16th century, an enormous cathedral was completed, as were buildings for the mint, the merchants' exchange (Lonja), and the customhouse.

The creation of the CASA DE CONTRATACIÓN (Board of Trade) in 1503 and the Consulado of Seville in 1543 gave the city's merchants a formal monopoly over TRADE to the colonies (see CONSULADO). As the embarkation point for the INDIES, Seville became the temporary residence of thousands of immigrants to the New World. The city and surrounding region of Andalusia provided nearly 40 percent of immigrants between 1493 and 1600, an amount greater than the next highest regions—Extremadura and New Castile—combined.

The opportunities for profit in the colonies attracted to commerce Andalusian nobles whose ancestors would have shunned trade. This new interest facilitated marriages between young noble heirs and daughters of wealthy merchants and thus broadened the social base of the NOBILITY.

The region around Seville produced grapes and olives, the former turned into WINE and the latter used for oil and soap. Manufactured goods—textiles and other products—were imported from elsewhere in Spain or abroad. Foreign and naturalized merchants, particularly the Genoese in the 16th century, were active in Seville, providing capital and foreign-manufactured textiles and other merchandise that increasingly filled the holds of ships bound for the colonies.

Seville's early control of the Indies trade slipped to CÁDIZ in the early 17th century. Silting in the Guadalquivir River prevented large ships from reaching the river port, and in any case, ships sailing to the Indies carried primarily products from manufacturers elsewhere in Europe. With its superior location on the Atlantic, Cádiz emerged as the port of choice for legal as well as contraband trade.

The formal demise of Seville in the Indies trade came years after its actual occurrence. In 1717, the Board of Trade was formally transferred to Cádiz in belated recognition of that city's ascendance. The population of Seville reflected its decline. In 1650, it had dropped to perhaps 65,000, a number it had again in the mid-18th century, although there are indications that it had risen and fallen during the intervening century. The census conducted under the count of Floridablanca in 1786 indi-

cated 76,463 inhabitants. An epidemic of yellow fever in 1800, however, resulted in the population declining again to about 65,000.

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**sheep** Sheep were central to the Castilian ECONOMY and diet. High-quality wool was the major Castilian export during the years of exploration, conquest, and settlement of the Americas; mutton was a favorite item for Castilian dinners. Given the importance of sheep in Spain, it is not surprising that Christopher Columbus introduced them to HISPANIOLA in 1493. They did poorly on the islands of the CARIBBEAN, but when introduced into central NEW SPAIN soon after Hernando Cortés's arrival there, they multiplied rapidly. Although VICEROY Antonio de Mendoza introduced into New Spain merino sheep, the source of very high-quality wool, sheep with lower-quality, long-staple wool were more common.

Sheep were important to colonists, who used them for food, wool, and dressed sheepskins. Mutton continued to be popular, and dressed sheepskins could be used in a variety of ways, including for clothing and as storage containers for the MERCURY used in SILVER production. Producing woolen textiles became central to a number of colonial economies, including those in New Spain and QUITO.

Spaniards introduced sheep into the Valle del Mezquital north of the Valley of Mexico by the 1530s at the latest. Their numbers remained low until the 1550s when the flocks roughly quadrupled, to some 3,900 head. Rapid growth continued in the 1560s and 1570s, and land grants of three square miles (7.8 km<sup>2</sup>) that were to hold 2,000 head were stocked with 10,000 to 15,000 animals. By the end of the 1570s, nearly 4 million grazing sheep had displaced irrigation AGRICULTURE, as well as indigenous agriculturalists. At this point, the ovine population had exceeded the degraded land's carrying capacity and plummeted as the rate of natural increase slowed. By 1599, the estimated number of sheep was 72 percent of its peak two decades earlier.

In the Valley of Mexico, flocks of 12,000 to 15,000 sheep were present by 1560 and 50,000 to 70,000 by the end of the century. Reportedly, there were nearly 1 million sheep near Querétaro by 1630. The famed Jesuit HACIENDA of Santa Lucía had 100,000 sheep in 1620 and 150,000 sheep in the 1730s (see JESUITS).

Sheep in southern Mexico provided wool for Amerindian villagers, who used it in making a variety of clothing. Large northern flocks provided wool for the

*OBRAJES*, as well as mutton and hides. As with *CATTLE*, large-scale sheep raising moved toward the north of New Spain, away from the more populous central region. New Spain as a whole had an estimated 4.6 million sheep and goats by 1600. Demand for wool by *obrajes* in *PUEBLA* started declining by 1580 and by *obrajes* in *MEXICO CITY* from the early 17th century. In Querétaro, however, the manufactories continued to use large quantities of raw wool until *MIGUEL HIDALGO Y COSTILLA*'s revolt in the early 19th century.

In the Andes, *NATIVE AMERICANS* raised sheep by at least the 1560s. More than other livestock, sheep were valuable because of their multiple products: wool, mutton, tallow, dung, and sometimes milk. In the basin around *QUITO*, 150,000 sheep and goats were present by 1585 and perhaps 600,000 were grazing in Latacunga and Riobamba. The *obrajes* in the Quito region continued to require large quantities of wool until the late 17th century. Demand then declined, and by 1768, only a few manufactures there remained in business due to the increasing popularity of cotton cloth.

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**shipbuilding** Colonists began building ships soon after reaching the Pacific coast of the American mainlands, for European ships rarely reached the western coasts before the 1690s. The demand for foodstuffs, domestic animals, merchandise, and slaves created by the conquest and colonization of the Inca Empire and the availability of these items in *NEW SPAIN* and Central America spelled opportunity for those who could construct ships to transport them to *LIMA*, in particular (see *SLAVERY*).

By the middle of the 16th century, ships were constructed in ports of *New Spain*, *GUATEMALA*, *EL SALVADOR*, and *GUAYAQUIL*, but Realejo, *NICARAGUA*, had emerged as the major shipbuilding site. Although hot, humid, and unhealthy, it had a fine port and was near to the timber, pitch, and resins needed in a shipbuilding industry. Indeed, only iron, used principally in anchors, had to be imported from Spain. The ships constructed handled most of the intercolonial *TRADE* along the Pacific coast as well as the trade with Manila until 1585, after which the galleons

were built in Manila much less expensively (see *MANILA GALLEONS*). The size of ships built at Realejo could be very large; one constructed in 1579 had a cargo capacity of 700 tons. After Sir *FRANCIS DRAKE* and his fleet threatened the port in 1579, John Cavendish in 1587 seized the 700-ton galleon, and the city of León was moved to within three leagues of the port in 1610, Realejo's fortunes declined, although it remained capable of building one 300-ton vessel a year as late as the 1740s.

In the 17th century, between 30 and 70 ships, collectively known as the Royal South Sea Fleet, were plying the waters of the Pacific coast (see *FLEETS/FLEET SYSTEM*). Most were privately owned and carried goods from Lima to other Pacific ports in the *VICEROYALTY OF PERU* and to *New Spain*, although the latter was generally prohibited from 1631 until the 1770s. Builders in the Gulf of Guayaquil emerged as the most important source of these ships.

The Gulf of Guayaquil had advantages of natural resources, including an excellent variety and quality of timber, and needed to import only iron for anchors, hardware, and nails. The city of Guayaquil served as the port for the *GOLD* and textiles from *QUITO* and, starting in the early 17th century, *CACAO*. The nearby resources and location enabled it quickly to become a center of shipbuilding. It was building galleys commissioned by the *VICEROY* of Peru probably from the 1550s and certainly from the 1570s. Already in the 16th century, Guayaquil was building large ships of 300 to 400 tons. In 1644, it produced an enormous ship of nearly 1,000 tons, the biggest ship to sail on the *CALLAO-PANAMA* run. About once a decade in the 17th century, the viceroy of Peru commissioned the construction of two ships, usually galleons built in response to threats or rumors of *FOREIGNERS*. Between private and public commissions, there was enough work that Guayaquil's shipyard developed a skilled workforce of blacks and mulattoes (see *MULATO*). A 1736 compilation revealed that at least 176 ships had been constructed at Guayaquil, many if not most of them of substantial size.

*HAVANA* became the most important American shipyard for the Atlantic fleet, accounting for about three-quarters of American ships used in the fleets. Until 1590, the ships were relatively small, but after that date, builders constructed galleons. Ships constructed in American shipyards by the 1640s accounted for at least one-third of the ships used in Spain's transatlantic trade and, overall, were much more common than those built in Spain. Although it had to import naval stores, *CUBA* had adequate timber until the 1620s and, as the last *New World* stop for the returning fleets, repair facilities.

Entrepreneurs in Maracaibo and *CARTAGENA DE INDIAS* built ships for Caribbean navigation. By the early 17th century, the latter's shipyards were building ships for the fleets, and by the middle of the century, some of these were more than 600 tons.

Shipbuilding continued in the 18th century. Increased cacao exports from Guayaquil beginning in the 1780s

stimulated the industry. Between 1779 and 1788, the shipyard built a dozen new ships and repaired more than 60 others. The Havana shipyard, employing some 800 workers including over 250 slaves, constructed 47 ships for the Royal Navy between 1700 and 1760, but after the Seven Years' War produced far fewer as resources went into increased fortifications for Cuba.

Beginning in 1549, BAHIA became a shipyard for Brazil. Benefiting from access to excellent timber, private contractors constructed ships that sailed to Portugal and Africa. Ship construction continued throughout the colonial period, and in 1795, the shipyards of Bahia were credited with "having built the greater part of the Portuguese marine."

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**Siete Partidas** The law of Siete Partidas (seven parts) was compiled in Castile during the reign of Alfonso X the Learned (1252–84). The jurists who compiled it tried to bring together Roman civil law and Castilian *FUEROS*. The introduction of legal innovations that modified the *fueros*, however, produced enough objections that Alfonso X never promulgated the new code. Alfonso XI finally did so in 1348.

Despite its troubled beginnings, jurists and magistrates used the Siete Partidas, and slowly, various provisions entered Castilian courts and, after the code was translated, Portuguese courts as well. The Laws of Toro (1505) confirmed the ongoing importance of the Siete Partidas, although its precedence came after, first, royal laws, which superseded *fueros* and customs, and, second, *fueros* and municipal legislation.

Because the overseas territories belonged to the Crown of Castile, Castilian legal tradition was employed in them. A law issued by CHARLES I in 1530 that appeared in the *RECOPILACIÓN DE LEYES DE LOS REYNOS DE LAS INDIAS* (1681) stated that if no specific legislation concerning a particular matter had been issued for the Indies, Castilian law was to be followed as outlined in the Laws of Toro, unless specifically prohibited. Of the various compilations of Castilian law, the Siete Partidas proved the most important juridical source in colonial private law, serving as a framework for civil procedures.

The Roman legal tradition (*ius commune*) of civil and canon law was taught in Spanish and colonial UNIVERSITIES. All Castilian and colonial lawyers were thus trained with an emphasis on legislation and learned commentary rather than the custom and case law so important in the English tradition.

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**Sigüenza y Góngora, Carlos de** (b. 1645–d. 1700) *creole savant in New Spain* Born in MEXICO CITY, Carlos de Sigüenza y Góngora became a novice in the Society of Jesus in 1660, took his first vows in 1662, earned expulsion in 1668, and was never permitted to rejoin the JESUITS. In the meantime, he had studied the humanities and theology. He continued to study theology at the UNIVERSITY OF MEXICO, applied himself to mastery of mathematics, and nurtured a spirit of intellectual inquiry and interest in science. In 1672, he secured the university's chair of mathematics and astrology although he had little regard for the latter. Because he was not a cleric and thus lacked the financial support enjoyed by many professors, he pieced together a variety of modest employments, the most valuable of which was chaplain of the Love of God Hospital.

A close friend of Sister JUANA INÉS DE LA CRUZ and Archbishop of Mexico Francisco de Aguiar y Seijas, Sigüenza stimulated others to write on topics about NEW SPAIN and its past. His broad and eclectic intellectual interests included pre-Hispanic civilizations, the history of both the cathedral and University of Mexico, astronomy including the "Great Comet of 1680," and OUR LADY OF GUADALUPE. The controversy that he had with Father EUSEBIO KINO, a Jesuit missionary in northern New Spain, over the meaning of the comet provoked Sigüenza to parade his erudition, disdain for astrology, and rejection of the traditional idea that the comet portended coming disasters.

The last important pre-ENLIGHTENMENT intellectual in New Spain, Sigüenza championed both the past and the present in Mexico. His life and work has won him acclaim as a CREOLE patriot.

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**silver** The value of Spanish American silver production surpassed that of GOLD by the mid-16th century.

Rich lodes discovered at POTOSÍ (1545), in CHARCAS, and ZACATECAS (1546), in NEW SPAIN, were the most important, but other mines were already in production, and more would be established. For the remainder of the colonial era, silver production and the precious metal's remission to Spain were central to Spain's colonial economic and commercial policies.

More than gold MINING, much of which was undertaken by individual miners with minimal investment, successful silver production required substantial capital; a dependable supply of labor; sources of equipment; timber, charcoal, foodstuffs, and other items, for example, COCA in Charcas; processing mills; a TRANSPORTATION system that could move supplies to the mines and silver to the treasury offices and MINTS; and access to CREDIT. A regular and adequate supply of MERCURY for processing silver was also extremely important.

Silver was PERU's principal export during the colonial era. Potosí dominated silver production in 1560 and reached its apogee in the early 1590s. Although regis-

tered production declined thereafter, Potosí continued to be the Viceroyalty of Peru's single-largest producer throughout the 17th century and until its transfer to the newly founded VICEROYALTY OF RÍO DE LA PLATA in 1777. Its transfer meant that Charcas's silver would flow through BUENOS AIRES. Silver production in the truncated Viceroyalty of Peru subsequently increased, more than doubling between 1777 and 1792 and peaking in 1799. Serious decline set in only in 1812.

Silver was also New Spain's most valuable export. By the early 1560s, mines at Zacatecas were employing the patio, or amalgamation, process to such an extent that smelting had become a complementary method of separating silver from ore. Although Potosí was the byword for silver mining, Mexican mines ultimately produced much more than those in Peru. This resulted from the higher-quality ore and lower costs of operation, including lower TAXATION until 1736, and lower labor costs. Combined, they provided a greater incentive to invest in the rehabilitation of mines, for example, by digging



Llamas and mules were the primary means of transporting silver in South America. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

adits for drainage; the investment, in turn, resulted in mines of unprecedented physical size and large workforces, as well as high levels of production toward the end of colonial Mexico. In addition, Mexico had many more mines—some 3,000—and a number of major mining camps, rather than just one. Finally, the quality of MERCURY that New Spain received from ALMADÉN was higher than what Peruvian mines received locally from HUANCVELICA. Mexico's growth in registered silver production has been divided into three periods: The first period of production, 1559–1627, had an annual growth rate of 2.5 percent; from 1628 to 1724, the rate was 1.2 percent; and from 1725 to 1809, the annual rate was between 1.2 and 1.4 percent.

The result was that Mexico's registered bullion (primarily silver) production surpassed that of Peru in the 1670s. Starting in 1701, in every decade except the 1760s, Mexican production rose to new heights. Several figures illustrate this. From 1701 to 1710, Mexican production was 48,299,649 pesos; from 1751 to 1760, it was 111,751,450; from 1801 to 1810, the total was 216,430,466 pesos. Peruvian production, in contrast, peaked in the 1790s at 97,450,758 pesos before declining from 1801 to 1810 to 72,298,090. Overall, from 1524 to 1810, Mexico produced almost 2 billion pesos (1,946,439,377) of bullion; Peru's total production to 1810 was just under 1.5 billion pesos (1,469,339,035).

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**slavery** Slavery was a legal condition in which a person was held as chattel, a piece of property that could be bought and sold. The condition passed through the mother; thus, in the Americas, the *MULATO* child of a slave mother and a Spanish or Portuguese man was born a slave. By the 1560s, Amerindian slavery, which predated the arrival of and continued under the Spaniards and Portuguese, was in decline in Spanish America except in frontier regions. Indigenous slaves were taken as a spoil of WAR in CHILE until late in the 17th century and in northern NEW SPAIN into the 18th century. In contrast, African slavery, brought to America by 1502, was of a much larger scale and predominated in mainland Spanish America into the independence period and, in CUBA,

PUERTO RICO, and some independent states, beyond. The institution remained extremely important in BRAZIL for much of the 19th century.

Estimated slave imports to Latin America between 1551 and 1810 reveal the magnitude of this business. Spanish America imported 62,500 African slaves from 1551 to 1600, 292,500 from 1601 to 1700, and 578,600 from 1701 to 1810, for a total of 933,500. For the same periods, imports to Brazil were 50,000, 560,000, and 1,891,400, for a total of 2,501,400. The number of imported slaves varied substantially by region. Between 1521 and 1639, New Spain received 110,525 slaves, about half of the estimated number imported to Spanish America during those years. In 1646, it had 35,089 Africans, and 116,529 persons of African descent. The effective termination of the slave TRADE to New Spain in 1640 resulted in the number of slaves declining and free persons with black ancestry increasing.

Slaves received directly from Africa were termed *bozales*. They reached the Americas with no knowledge of Spanish or Portuguese languages and culture or Catholicism. The number of men imported consistently exceeded that of WOMEN. The dehumanizing term *pieza* referred to a prime slave, who could be either male or female, although the precise meaning of the term varied; two-thirds or half a *pieza* referred to a young, old, or somehow physically defective slave.

The vast majority of *bozales* purchased in Latin America spent the remainder of their relatively short lives engaged in hard physical labor, living in cramped and poorly equipped space, and eating new and often limited amounts of food. Many worked on SUGAR PLANTATIONS in Brazil and *ingenios* in Mexico and the coastal valleys of PERU and, in the late 18th and well into the 19th centuries, in CUBA; in CACAO fields of VENEZUELA; and in GOLD mines in MINAS GERAIS and MATO GROSSO, Brazil, and CHOCÓ of NEW GRANADA (see *ENGENHO*). Few ever gained their freedom.

Slaves who worked in urban areas, especially blacks and mulattoes born in the colonies and able to speak Spanish as a native tongue, were relatively favored. Often domestic servants or artisans, they were sometimes able to join *COFRADÍAS*, were better positioned to amass savings through working on their days off, and were more likely to purchase their freedom.

More male than female slaves entered the colonies, and many masters, especially of field slaves, considered it cheaper to import new slaves than to encourage reproduction. This made marriage often difficult to arrange and sustain. Nonetheless, by 1650, the sex ratio among slaves in Mexico was nearly even. While a number of slaves married, less formal arrangements were common and frequently involved male slaves and Amerindian and *CASTA* women (see FAMILY). The importation of slaves and their reproduction, thus, had an important effect on the racial composition of Latin America (see *MESTIZAJE/MESTIZO*; *PARDO*; *ZAMBO*).

Fear of African slaves prompted numerous restrictive laws, for example, limiting the number of slaves who could congregate and prohibiting certain types of dress. Runaway slaves were an ongoing problem, and sometimes groups of them remained in *palenques*, or *QUILOMBOS*, for years.

Slaves had a significant presence in urban life, starting in Mexico City and LIMA, before spreading to the countryside. In 1570, Mexico City had 8,000 black slaves, 1,000 mulattoes, and 8,000 white males. By 1600, persons of African descent accounted for 40 percent of the non-Amerindian population in PUEBLA and 65 percent in VERACRUZ.

Opportunities for manumission in Latin America were much greater than in the English colonies, although it was almost exclusively slaves born in the Americas and usually those in urban areas that secured it. Slaves obtained their freedom in one of several ways. Release by a master through a will sometimes occurred after a slave had performed excellent service over many years or, in more cynical cases, to spare the master's heirs from taking care of old and infirm slaves. A slave could purchase freedom, but this required having the opportunity to earn cash over a number of years. Females were more likely than males to gain manumission. Being the concubine of a master sometimes brought manumission, as did being a *mulato* child fathered by the master.

In 1800, between 550,000 and 750,000 slaves lived in Spanish America. Cuba had by far the largest number, with some 212,000. Peru, Venezuela, and New Granada had between 70,000 and 89,000. Brazil in 1823 had about 1.2 million slaves, about 400,000 of them in BAHIA and PERNAMBUCO.

Slaves, free blacks, and *castas* were important militarily for both royalist and insurgent forces during the wars of independence in Spanish America. In BUENOS AIRES, slaves had gained freedom through fighting the British in 1806 and 1807. In the following decade, governments in Buenos Aires promised freedom in exchange for five years' of MILITARY service. In Chile, the rebel government promised freedom in August 1814 to male slaves who enlisted. JOSÉ DE SAN MARTÍN'S Army of the Andes had two regiments of blacks (*morenos*) and *pardos* (mulattoes and others with some African ancestry) that included some 1,550 former slaves. In the BANDA ORIENTAL, JOSÉ GERVASIO ARTIGAS'S forces included many blacks and mulattoes. Both royalists and republicans in Venezuela used the promise of freedom to attract them. In New Spain, which had few black slaves in 1810, rebel leader JOSÉ MARÍA MORELOS Y PAVÓN called for an end to slavery and all discrimination based on race, but only in 1829 was the institution formally terminated.

See also SLAVERY (Vols. I, III).

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**smuggling** The shipment and sale of untaxed, undertaxed, or prohibited items to, from, among, or within colonies was the bane of honest officials and a potentially lucrative source of income for dishonest ones. The higher the cost of items bought or sold legally, the greater the incentive for sellers and buyers to resort to contraband and avoid TAXATION. The ability to purchase at lower cost illegal merchandise of equal or greater quality to that purchased legally enabled the buyer to sell it at a lower price with the same or greater profit margin, or to sell at the market rate for legal merchandise at a still higher profit. Because smuggling was illicit, documentation of it is sporadic rather than systematic, and its exact magnitude will never be known. Nonetheless, it is possible to outline some major routes and commodities involved in colonial smuggling.

Leaving aside the practice of bribing officials and thus assuming some risk of detection, items of high value and small size were much more attractive to smugglers than large items of little value. For example, smuggling GOLD or DIAMONDS was particularly advantageous because their value was high for their relatively small size. Throughout the colonial era, gold smuggling from NEW GRANADA was common. Similarly, especially in the first half of the 18th century, contraband gold from MINAS GERAIS and MATO GROSSO defrauded the Portuguese Crown. The efforts to prevent diamond smuggling from the Diamond District of BRAZIL were draconian for the 18th century but never solved the problem. As long as adequate demand for gems made smuggling profitable, it continued.

The Atlantic fleet system, designed to protect the movement of goods from Spain to the colonies and of precious metals from the colonies to Spain, turned into a major conduit of smuggled goods sent west and bullion carried east (see FLEETS/FLEET SYSTEM). While some smuggling undoubtedly antedated the system, its scale seems to have been reasonably modest for most of the 16th century. Following Sir Francis Drake's raid on CÁDIZ and the loss of the Spanish Armada in 1588, the Spanish Crown increased the tax paid to defend the fleet (*avería*) from under 2 percent to 8 percent in 1591. By 1635, the *avería* was 35 percent. The incentive to smuggle grew with each increase.

The effect of the *avería* compounded that of customs duties, which were assessed at a rate of 15 percent on value until 1660 on goods leaving Spain and 17.5 percent on goods shipped from the colonies. Merchandise being

sent to PERU across the Isthmus of PANAMA attracted an additional 5 percent duty at CALLAO because of its higher value resulting from the cost of TRANSPORTATION. In addition, some commodities, for example, COCHINEAL, attracted special taxes. Cochineal in 1616 was taxed at 50 ducats an *arroba*, which was 40 percent of its selling price of 126 ducats an *arroba*. By the time the system of taxation was changed in 1660 to quotas largely paid by the merchants involved in the TRADE, the damage had long been done.

By 1560, colonists were producing some of the foodstuffs that had originally been imported. Growing self-sufficiency eliminated the importation of grains and, in some markets, of WINE. The progressive decline of Spanish textile producers in the 16th century as a result of inflation, which priced them out of European markets, diminished the attractiveness of Spanish textiles in colonial markets as well.

Spain's inability to supply the goods that colonists wanted resulted in Spanish merchants often serving as agents for foreign merchants whose countries' produced the merchandise, especially textiles, that colonials wanted to buy. Foreign wholesalers, moreover, were willing to sell on CREDIT. To the extent that their goods had dominated exports sent on the fleet to the colonies, the returning fleet brought silver to cover the debts. The Spanish Crown's habit of seizing private SILVER made it necessary to pay debts literally in the Bay of CÁDIZ, rather than on land at the port. The real loser was the Crown itself, for probably few if any Spanish merchants in the late 17th century actually made honest declarations of the silver they remitted.

Although JOHN HAWKINS tried in the 1560s to sell goods in the Spanish CARIBBEAN after paying taxes, the Crown quickly made clear its opposition to the approach. A century later, JAMAICA was under English rule and, as the raiding of the age of the BUCCANEERS gave way to trading, English merchants proceeded, as the Dutch had been doing on TIERRA FIRME from their base on Curaçao since 1634, to take manufactured goods directly to inlets and bays and sell them to Spanish contraband traders. French smugglers followed suit.

A major outlet for contraband slaves and merchandise exchanged for silver was the RÍO DE LA PLATA estuary (see SLAVERY). The Portuguese construction of the fortified trading post of COLÔNIA DO SACRAMENTO in 1680 provided a convenient point of exchange for silver from CHARCAS in return for English manufacturers and African slaves. This illicit trade drained silver from the legal trade conducted via the fleet system while reducing the market for goods brought across Panama and down the coast to LIMA.

Trade with Manila in the PHILIPPINE ISLANDS added a Pacific dimension to contraband. East Asian silks and other exports purchased with Mexican and, legally until 1631, Peruvian silver undercut Spanish and other European products against which they competed. In

addition, they often addressed issues of taste and style more effectively. The price of silks was so low that the fabric could be trans-shipped across NEW SPAIN and reexported to Spain to be sold at a profit, a practice the Crown, of course, banned. To the extent that the amount of silver sent to Manila on the galleons exceeded the official limit, the Crown was again the loser as untaxed goods purchased with contraband silver entered the colonies (see MANILA GALLEONS).

To some degree, all contraband trade rested on complicit officials that benefited from it. Within the fleet system, contraband goods were sent without registration on warships rather than merchant ships. Goods were falsely declared, with the Consulado of Seville adamantly refusing to allow CASA DE CONTRATACIÓN officials to open the containers (see CONSULADO). Merchants connived to avoid showing the registration from SEVILLE in PORTOBELLO and vice-versa.

The ability to use unregistered silver increased the metal's value. Merchants avoided taxation by avoiding registration; they also reduced the risk of confiscation in Cádiz or Seville. Efforts to avoid registration of silver began when the ore was processed. Since royal officials knew how much silver could be produced at a given site using a given amount of MERCURY, the use of unregistered mercury had two advantages: circumventing tax on the mercury itself and not paying the tax on silver.

Anecdotal evidence suggests that contraband was extensive by the 1620s and continued at some level throughout the remainder of the colonial era. In 1624, some 85 percent of the merchandise on the fleet to Portobello had escaped registration in Seville. In 1642, the commanders of the combined fleets arranged to declare less than half of the private silver being taken to Spain. Officials in Spain estimated in 1698 that the fleets' commanders were carrying 21 million pesos illegally. Riohacha, New Granada, received smuggled goods worth more than 3 million pesos a year in the early 18th century. In 1737, a Spanish official estimated that three-quarters of New Granada's annual gold production was leaving CARTAGENA DE INDIAS illegally. And, bullion was not the colonial item being smuggled out of the Americas. In the early 18th century, less than one-third of VENEZUELA's cacao production was being exported legally; the creation of the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS in 1728 was an effort to force production into a legal distribution system.

While the financial benefit of using unregistered mercury in processing silver ore is obvious, historians do not agree on how much mercury escaped taxation. Estimates of unregistered mercury mined at HUANCVELICA vary from no more than 25 percent in the worst of times to as much as half. How much unregistered mercury from ALMADÉN crossed the Atlantic to VERACRUZ is totally unknown. Mercury, of course, was but a means to the end of securing silver.

There is no agreement on the amount of silver produced, and the disagreement is greatest in relation to the

half-century from 1660 to 1710, precisely the time when contraband was arguably at its highest level. Figures based on silver taxed in the colonies provide the minimum quantity of silver produced; the amount for 1660–1710 was 471 million pesos. Based on published newspaper reports read by Dutch merchants, a calculation of the amount of bullion that reached Europe in those years yields more than 693 million pesos. Some additional millions went to Manila. If the reports on the amount of American bullion reaching Europe were correct, the amount of smuggled silver for 1660–1710 exceeded 200 million pesos.

The WAR OF THE SPANISH SUCCESSION brought numerous French merchant ships around Cape Horn to the west coast of South America. Between 1701 and 1725, French traders sold goods, principally textiles, for almost 55 million pesos to purchasers in the Viceroyalty of Peru. With nearly 40 percent of this amount in unminted chunks of silver, it appears that production at POTOSÍ was increasing from the beginning of the 18th century.

The TREATY OF UTRECHT, which ended the War of the Spanish Succession, gave Britain the right to an annual ship sailing with each fleet to Portobelo and Veracruz as well as a monopoly on the introduction of slaves. Both rights resulted in considerable contraband trade until the outbreak of the WAR OF JENKINS' EAR in 1739 effectively terminated them.

Slowly, Spain turned to COMERCIO LIBRE in an effort to make legal trade more attractive. Phased in over a quarter of a century, from 1765 to 1789, the new policy brought gratifying results, as legal trade increased substantially. Contraband, however, was never fully eliminated and probably increased when the Crown's inability to challenge British naval supremacy forced it to concede neutral trade with the colonies during much of the reign of CHARLES IV, a measure that helped merchants from the United States, in particular.

While not getting the formal free access they wanted from Spain, despite their country supporting Spain's struggle against the French 1808 to 1813, British merchants benefited from the wars of independence in the colonies and quickly established themselves in the newly independent countries.

Although contraband gold and diamonds were the most valuable items smuggled out of Brazil, by the late 17th century, East India shippers on their way to Portugal stopped in BAHIA and loaded contraband TOBACCO. Fraud also occurred in the SUGAR trade, with crates mismarked regarding weight and quality. Finally, in 1751, the Portuguese Crown created boards of inspection at major Brazilian ports in an attempt to eliminate it; planters and merchants were outraged. CATTLE were smuggled into Minas Gerais from Bahia. The border with the Spanish side of the Río de la Plata was porous, and smugglers sent contraband hides across it for sale in the MINING districts.

Smuggling was thus an ongoing activity in which citizens of the Iberian countries and colonists worked, often with FOREIGNERS, to defraud their own governments.

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**Sobremonte, Rafael de** (b. 1745–d. 1827) *Spanish viceroy of Río de la Plata* Born in SEVILLE, Spain, Rafael de Sobremonte followed a MILITARY career from 1759. After tours in both the colonies and Spain, in 1779, he was appointed secretary of the VICEROY of RÍO DE LA PLATA. Advanced to the rank of lieutenant colonel in 1780, he was named governor-intendant of the province of Córdoba de Tucumán in 1783. He proved an excellent INTENDANT, creating a number of new towns, establishing a chair of civil law at the University of San Carlos in Córdoba, and installing lighting in the city, among other improvements. In 1797, he held the rank of brigadier and the inherited title of marqués de Sobremonte when appointed inspector general and second in command to the viceroy. Upon the death of Viceroy Joaquín del Pino, on April 28, 1804, Sobremonte became viceroy. He held that position when a British expeditionary force came into view on June 25, 1806.

The British occupied BUENOS AIRES on June 27, but Sobremonte had fled to the interior of the viceroyalty with the royal treasury. His flight did not sit well with the city's populace as SANTIAGO DE LINIERS Y BREMOND led the successful effort to expel the enemy on August 12, 1806. Sobremonte's return was viewed with scorn, and when a second British expedition landed on the coast of the BANDA ORIENTAL on January 16, 1807, and took MONTEVIDEO on February 3, a prominent PENINSULAR merchant and city official, MARTÍN DE ALZAGA, led a successful effort to force the Audiencia of Buenos Aires to remove Sobremonte from office. He was replaced by Liniers and in 1809 allowed to return to Spain, where he died in Cádiz many years later, his reputation still lost.

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**society** The structure of colonial society varied by region and even locale, but several characteristics were common throughout Spanish America and BRAZIL. Conquest provided the initial division between European conquerors and settlers and the indigenous peoples; this



often meant a de facto division between “nobles” and “commoners,” although only a small number of genuine nobles had immigrated (see NOBILITY, COLONIAL). The importation of African slaves added a third, immediately identifiable group at the bottom of this hierarchical society (see SLAVERY).

Racial mixing among Iberians, NATIVE AMERICANS, and Africans led to a plethora of combinations of which the most important were mestizo, or *MAMELUCO*, and *MULATO* (see *MESTIZAJE/MESTIZO*). Legal condition as enslaved or free and, additionally in the Spanish colonies, tributary or not, further modified the social categories. Wealth, occupation, honor, lineage (both *LIMPIEZA DE SANGRE*, or blood purity, and descent from a conquistador or early settler), recognition as *don* or *doña* in Spain’s colonies, and legitimacy, legal status, and location of birth also contributed to the place that Spaniards and Portuguese held in colonial society.

The hierarchical ranking of the *sistema de castas*, or caste system, of Spanish America depended on the extent or perceived extent of Spanish ancestry. Its order held Spaniards at the top, followed by *castizos*, Moriscos, mestizos, mulattoes, other *CASTAS*, Amerindians, and blacks. As the colonial period progressed, class—a division between rich and poor with relatively few families between—became increasingly important and resulted in a few indigenous in the upper group and more Spaniards in the far larger lower group. Urban or rural residence also affected the shape of social structures. The term *elite* is often applied to powerful, wealthy, and often extended families that dominated a given city, town, village, or rural area.

By the mid-16th century, Spain’s initial attempts to segregate Spaniards and Amerindians into “two republics,” as, for example, in separate municipal districts in MEXICO CITY, were already failing. When founded as a Spanish city, the central district (*traza*) of Mexico City was 13 square blocks designated for Spanish occupation. Surrounding it was San Juan Tenochtitlán, the indigenous community divided into neighborhoods (*barrios*). It proved impossible to maintain the separation. With as many as 18,000 Spaniards living in Mexico City in 1574, the central district could not accommodate them. Following the pattern of settlement in which the most prominent families lived closest to the city’s *PLAZA MAYOR*, poor Spaniards wound up living outside the *traza* in indigenous neighborhoods. Movement went the other way as well; some indigenous servants lived with Spanish masters in the *traza*.

The introduction of significant numbers of African slaves also affected the two republics. The best estimates indicate that between 1521 and 1594, some 36,500 entered NEW SPAIN; another 50,000 arrived between 1595 and 1622, and 23,500 more in the years to 1639, for a total of 110,525, or almost half of the total imported in the Spanish colonies. By the 1570s, some 8,000 of 20,000 slaves in New Spain lived in Mexico City. While some

lived in the *traza* with Spanish masters, others resided in indigenous neighborhoods.

The appearance of numerous mestizos not reared by Spanish fathers, mulattoes, and other combinations further confounded the notion of two republics. The first generation of mestizos was largely of illegitimate birth, as were many mulattoes and other *castas*. Their origins, perceived vicious and immoral habits, and abuse of Amerindians led the Crown, in 1563, to prohibit non-natives from residing in Indian districts and villages. Repeated subsequently on several occasions, the legislation implied they were to reside in the republic of Spaniards. Rather than two separate republics, Mexico City by the early 17th century had three distinct racial groups and a growing population resulting from their combination. As the importation of African slaves into New Spain dwindled to a trickle after 1640, the tripartite division slowly gave way to a continuum extending from Spaniards to Amerindians to black slaves.

While Spaniards preferred living in CITIES rather than rural areas and about 30 percent of the Spaniards in New Spain in 1574 lived in Mexico City, Native Americans residing in villages made up most of the colony’s population. Despite wide variation in estimates of the size of the indigenous POPULATION of Mexico when the Spaniards arrived, there is general agreement that by 1568, it numbered about 2.65 million on the way to its nadir of 750,000 in the 1620s. Despite demographic disaster, the indigenous population was larger than all other groups combined.

Amerindian villages continued preconquest social distinctions, although Spanish administrative offices were often imposed. *CACIQUES* in MEXICO and *KURAKAS* in PERU headed their villages, owned land, and, in the 16th century, might receive land grants. In many cases, they used their positions to further personal as well as village interests; their estates (*cacicazgos*) were inheritable by heirs. Heads (*principales*) of lesser noble families and relatives of caciques made up the remainder of the local nobility and thus were positioned above indigenous commoners. The social and economic distance between local notables and commoners could be significant, as illustrated in Yucatán by the wealth, material goods, and display of the *batabs*, on the one hand, and the modest conditions of the commoners. To pay TRIBUTE when of tributary age defined an Indian commoner.

The Spanish Crown recognized the existence of indigenous nobilities and provided various status symbols to help them uphold their positions and encourage gratitude for Spanish support. For example, caciques and their eldest sons were exempt from tribute, as were *principales* in many cases, and they typically wore Spanish garb. An 18th-century cacique of Tepoztlán claimed that he would “rather be dead” than dress like a commoner.

Frequently, caciques obtained licenses to own and ride horses with saddles and bridles, carry swords, daggers, and even muskets; other caciques simply did these



Various forms of Peruvian dress on the eve of independence. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

things, considering them necessary and appropriate for their status. Special *COLEGIOS* were established to educate the sons of caciques. In Oaxaca, for example, the caciques dressed in Spanish-style clothing, spoke and wrote Spanish, and, after 1600, lived in the city of Oaxaca rather than their village if their resources permitted. By the second half of the 17th century, however, their powers were waning, although this was not true in all native communities.

Spaniards and Portuguese imported numerous African slaves. Until 1600, more slaves went to Spanish America than to Brazil, but the totals paled compared to what followed. Between 1601 and 1700, Brazil received 560,000, and Spanish America, 292,500; between 1701 and 1810, the number for Brazil was 1,891,400, while Spanish America received 578,600. Reduced to more manageable numbers, about 1,000 to 1,400 a year entered Peru between 1620 and 1640. In the latter year, metropolitan LIMA had a black and mulatto population of about 20,000, a number nearly double the number of Spaniards. The remainder of Peru had perhaps 10,000 blacks and mulattoes.

African slaves engaged in domestic service in a city usually had more opportunities and variety in their lives than those forced to labor on SUGAR or other PLANTATIONS. The former were typically born of a slave mother

in the colonies and thus grew up learning Spanish or Portuguese. The gap between slave and freedman, however, was greater than social distance among slaves. Those slaves who obtained freedom were rarely born and reared in Africa (*bozales*). The largest number of imported slaves worked as fieldhands or in the sugar mills under conditions that led to high mortality rates, but most plantation owners preferred to buy new slaves rather than promote reproduction.

*Castas* typically occupied intermediate social space between Spaniards, on the one hand, and Amerindians and Africans, on the other. They spoke Spanish and dressed in Spanish-style clothing. An important indicator of their status within the range of *castas* was tribute; if they paid it, they were lower than those who did not. While *casta* status appears racially based in a list of categories in the *sistema de castas*, contemporary observers' perceptions were an important determinant, underscoring the cultural and social nature of the classifications as opposed to genealogical determinism. For example, as more than one official complained, Amerindians who spoke Spanish, cut their hair, and wore Spanish-style clothing could go to a city and pass as mestizos and thus avoid tribute.

Free persons of color had to pay tribute. *ZAMBOS* were ordered to pay it in 1572, and in 1574, free blacks and

mulattoes were added to the tributary category, although they escaped enforcement until the mid-1590s. Free women of color were exempted from tribute in 1631, as were free men of color in the militia. Slave and free black women, however, were subject to sumptuary legislation. By 1600, some freedmen were obtaining minor offices sold at auction, especially when Spanish fathers took an interest in their careers.

The presumed illegitimacy of *castas* provided the Spanish population with clear evidence of a *casta's* inferiority and thus an argument against providing him with an EDUCATION. All persons of African descent were excluded, for example, from Lima's Royal Colegio of San Felipe, although such institutions could grant exceptions. Institutions such as the orphanage of Our Lady of Atocha in Lima could not turn away foundlings, regardless of their perceived ancestry.

By the late 17th century, *castas* were marrying with some frequency. An examination of marriage patterns in two Mexico City parishes in the 1680s and 1690s reveals that indigenous people married mestizos more often than other non-Indians; similarly, blacks married mulattoes more often than other non-blacks. Mestizo-mulatto marriages were the most common *casta* marriages.

Although Spaniards capped the *sistema de castas*, their status varied substantially. The conquerors and first settlers included few nobles sufficiently elevated to warrant use of *don*, or "lord." The feminine form, *doña*, was used more widely for Spanish women. By 1560, Peru might have attracted about 150 *dons* since the 1530s; they were from the bottom of the category—poor relatives and descendants of true *dons*—but knew and transmitted the culture and lifestyle of Spain's nobility. More numerous were *hidalgos*, the lowest level of nobility (see *HIDALGUÍA*). The vast majority of Spanish immigrants were commoners; the range of their occupations indicates that by 1560 in Lima, and a bit earlier in Mexico City, a complete society had taken root with artisans of varied skills, businessmen, professionals, and other occupations necessary to replicate, at least in outline, society in Spain. The most obvious differences were the paucity of titled nobles and rural laborers willing to engage in manual agricultural labor in the colonies (see *AGRICULTURE*).

As the number of CREOLES began to rival and then exceed that of PENINSULARS, place of birth became an easy point of differentiation. Spaniards born in Spain considered themselves superior by that reason alone. Claiming *limpieza de sangre*, they looked down on their creole cousins, assuming they had one or more Amerindian or African ancestors. In addition, they considered creoles lazy and improvident. By the late 18th century, they added to presumed defects that of living in the Americas, a geographical location where, according to numerous European writers, all species, including humans, unavoidably deteriorated. As Alexander von Humboldt noted in his *Political Essay on the Kingdom of New Spain*: "The lowest, least educated, and uncultivated European

believes himself superior to the white born in the New World." Peninsulars, of course, were a single-generation phenomenon since their children born in the colonies would be creoles, mestizos, mulattoes, or *castas*. The number of peninsulars, in any case, only briefly exceeded that of creoles.

For their part, creoles who could locate their origins among the conquistadores and early settlers considered most peninsulars ill-mannered, poorly educated, pushy men of modest origins who arrived in the colonies with nothing but connections and took jobs that Americans considered rightfully theirs. Although some peninsulars became wealthy, they were *nouveaux riches* who lacked culture and refinement. At the same time, creole fathers were more than willing to have daughters marry peninsulars who had become men of substance and connections or at least had considerable promise. The loss of creole women in marriage to peninsulars was another reason for creole males' antagonism.

Spaniards born in Spain and the colonies together spanned the entire range of economic possibilities and occupation. With rare exceptions, they held all upper-level administrative appointments in church and state, dominated local offices in Spanish CITIES, and monopolized provincial administration as well. VICEROYS, AUDIENCIA ministers, treasury officials, *corregidores* and *alcaldes mayores*, city councilmen, sheriffs, and many other officials were Spaniards (see *ALCALDE MAYOR*; *CORREGIDOR/CORREGIMIENTO*). High-ranking CATHOLIC CHURCH officials—archbishops, bishops, and members of CATHEDRAL CHAPTERS—were Spaniards, as were curates of the most desirable parishes. Wholesale merchants, major retailers, MINING magnates, and the largest landowners and stockmen were Spaniards. Lawyers, Latin physicians, and university professors were also of Spanish birth (see *UNIVERSITIES*).

Although a few high-ranking officials, especially viceroys under the HABSBURGS, arrived in the colonies with titles of nobility, the Crown granted titles almost exclusively to Spaniards. Even when peninsulars were the original recipients, creoles normally inherited them. Knighthoods in the MILITARY ORDERS of Santiago, Calatrava, and Alcántara and the later civil order of Charles III were also a preserve of Spaniards of documented pure ancestry.

The majority of Spaniards, however, held neither title nor knighthood, owned no wholesale or retail business, owned little if any land, and never held an *ENCOMIENDA*. Numbering perhaps 550,000 in the mid-17th century, the number of Spaniards continued to increase. With the total estimated population of Spanish America between 12 and 13 million by the early 19th century, peninsular Spaniards totaled perhaps 30,000–40,000, 15,000 of them in New Spain. Creoles numbered about 2.5 million. While Spaniards tended to be endogamous, a significant minority that married chose non-Spanish partners.

Not surprisingly, some Spaniards were among the dregs of society. Crime statistics for Mexico City in the

early 19th century reveal that Spaniards were responsible for over one-third of all crimes, including violent crimes, property crimes, sexual offenses, adultery, vagrancy, drunkenness, and gambling. Over half of the inmates in the royal poorhouse in Mexico City in 1811 were Spaniards. Recruiting teams for the army in Mexico regularly scoured the taverns searching for vagabonds and other potential soldiers who could be enlisted while inebriated. One peninsular vagabond who daily toured the taverns in Mexico City looking for odd jobs found himself sentenced to an eight-year appointment in PUEBLA's infantry regiment.

Once established, the *sistema de castas* continued throughout the colonial era in Spanish America. Indeed, in the late 18th century, discrimination against *castas*, notably those with some African ancestry, intensified. While the wars of independence did not lead immediately to the abolition of slavery in emerging countries where it was considered economically important, racial attribution such as parish priests had made in recording baptisms and marriages since the 16th century was outlawed in numerous places.

Brazil also had a hierarchical social structure, with the Portuguese born (*REINÓIS*) at the apex, followed by those born in Brazil (*brasileiros*). These included the owners of *ENGENHOS* and *FAZENDAS* and high-ranking officials. None prior to 1808 received titles of nobility, and few entered the military orders. In SÃO PAULO, the rich and powerful were of *mameluco* descent. Mulattoes, free blacks, African slaves, and Amerindians made up the remainder of the major social categories. In contrast to Spanish America, slaves and their descendants were much more numerous in Brazil, and Native Americans and their descendants were far fewer.

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**Society of Jesus** See JESUITS.

**Solórzano y Pereyra, Juan de** (b. 1575–d. 1655) *Spanish leqist and councilor of the Indies* Born in Madrid, Juan de Solórzano y Pereyra studied law at the

University of Salamanca starting in 1587. He received a licentiate in civil law in 1599 and a doctorate in 1608. After some substitute teaching, he obtained the second chair of civil law in 1606, a position he held until 1609, when he was named *OIDOR* of the Audiencia of Lima. He arrived at his post in mid-1610 and served, including two years as GOVERNOR of HUANCAMELICA, until 1627, when he returned to Spain. After brief service as *FISCAL* of the Council of Hacienda and COUNCIL OF THE INDIES, he was appointed a minister of the latter in 1629, one of the very few men with American *AUDIENCIA* service so honored before 1700. In 1633, PHILIP IV named him *fiscal* of the Council of Castile with retention of his post in the Council of the Indies, but Solórzano begged off serving because of growing deafness. Made a knight of Santiago in 1640, he sought honors of the Council of Castile but was given a full position and allowed to retain his post in the Council of the Indies. At last granted retirement in 1644, he died in Madrid.

Solórzano authored or compiled at least a dozen works, many published multiple times. The first volume of the Latin edition of his most important work, *De indiarum iure*, was initially published in Madrid in 1629. The five-volume Spanish edition, *Política indiana*, appeared in 1647. Unlike many of his contemporaries, Solórzano had a modern view of public office, considering it a public trust rather than a form of property. He was also unusual in recommending that, unless they were native sons, lawyers who practiced before colonial *audiencias* be named to the high tribunals, a recommendation that would have increased the number of CREOLES on the courts. Not surprisingly, creole authors cited Solórzano's work repeatedly.

#### Further reading:

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**Spanish South America, independence of** Independence in mainland Spanish America grew out of a political crisis in Spain, heightened expectations that were dashed, and, ultimately, an awareness that the Spanish government was incapable of addressing what at least some literate Americans thought needed to be changed. As a backdrop were grievances that had stimulated some CREOLES to desire greater autonomy within the empire, but there was no creole movement toward independence prior to 1808. Creoles such as FRANCISCO DE MIRANDA, who actively pursued independence for the colonies before that date, probably numbered no more than a few dozen.

The ties between creoles, who bore the major responsibility for bringing about political independence,

and Spain were long standing and numerous. They included ancestry, language, religion, political heritage, institutions, mores, and customs. Achieving independence required often fervent supporters of the monarchy and FERDINAND VII to move from opposition to neutrality, if not active support of a break with Spain.

### BACKGROUND TO THE CRISIS OF 1808

When CHARLES IV ascended the throne in December 1788, he inherited an empire that had arguably never been more prosperous. Aside from the 1760s, registered SILVER production in NEW SPAIN had increased from early in the century. Registered silver production in PERU had also increased, ultimately peaking in the 1790s but remaining at a high level until 1812. Even POTOSÍ had registered growing production from the 1730s until 1800.

From the royal perspective, legal colonial TRADE with Spain was also doing well under *COMERCIO LIBRE*, in place everywhere but New Spain and VENEZUELA; it would take effect in those colonies the following year. WAR with Great Britain initially disrupted the impact of the new policy, but colonial exports to Spain totaled 176 million pesos from 1785 to 1788; goods shipped to the colonies in those years, 48 percent of which were declared to be Spanish, totaled just over 68 million pesos. Annual imports from the colonies for the succeeding eight years would average more than 50 million pesos; exports would average more than 15 million pesos in value each year.

Overall tax returns were also higher than prior to the introduction of the INTENDANT system, although the extent of change varied (see TAXATION). Peru's increase was substantial, while New Spain's was negligible.

Rising revenues over the preceding quarter-century had enabled the strengthening of the colonies' defensive capacity, at least on paper. Rebellions in NEW GRANADA and Peru in the early 1780s had been defeated, and the border issue with BRAZIL had been resolved by force and sanctified by the TREATY OF SAN ILDEFONSO in 1777. The presence of a VICEROY in BUENOS AIRES testified to both the Crown's seriousness about retaining the new border and the increased importance of that city since PEDRO DE CEVALLOS inaugurated the VICEROYALTY OF RÍO DE LA PLATA in 1777. Spain's navy, moreover, was substantial, although not well tested in battle.

Population growth throughout the empire was evident by 1788 and would continue throughout Charles IV's reign. Several cities—including MEXICO CITY, HAVANA, LIMA, and PUEBLA—were the largest in the hemisphere.

In short, conditions in the empire in 1788 looked good, certainly better than they had been a century, a half-century, or even 25 years earlier. This optimistic scene disintegrated rapidly during Charles IV's reign. By late spring 1808, Spain was in a political crisis as well as a fiscal crisis arising from war with France starting in 1793 and worsening rapidly after that date. The long years dominated by royal favorite MANUEL GODOY Y ÁLVAREZ

DE FARIA, moreover, had disgraced the monarchy. By early 1808, a French army was on its way to Madrid, and the Portuguese monarchy was already in BRAZIL. The abdication of Charles IV after a riot in the royal residence of Aranjuez in March was followed by Ferdinand VII's abdication and Charles's second abdication, this time to Napoleon, in Bayonne, France, in May 1808.

### RESPONSE TO THE ABDICATIONS: SPAIN

The spontaneous formation of local and provincial JUNTAS in Spain that followed the abdications demonstrated immediately that Spaniards would contest French rule, soon to be embodied in Napoleon's brother, JOSEPH I. According to their supporters, the juntas had reassumed sovereignty in the absence of a legitimate government. Thus, they were legitimate and could act in Ferdinand VII's name until he returned. The junta of Asturias quickly sent representatives to Britain seeking aid against France and, as did the JUNTA SUPREMA DE SEVILLA, dispatched agents to the colonies seeking their recognition and support. More juntas appeared in Granada, Valencia, Catalonia, León, Toledo, Jaén, and other locations.

Despite the Spaniards' remarkable victory over the French at Bailén on July 19 and 20, 1808, it soon became apparent that the juntas needed to cooperate so that a single authority could be empowered to act in the name of Ferdinand until his return. From this belief was born the JUNTA CENTRAL. It met initially in Aranjuez, convening on September 25, 1808, and had a full complement of 34 representatives by October 12. Desperate for financial support, the Junta Central decided in October to add deputies from the colonies, although it was not until January 22, 1809, when it was resident in SEVILLE, that it issued a call for their election.

The language of the call was remarkable. "Considering that the vast and precious dominions owned by Spain in the Indies are not properly colonies or factories . . . but an essential and integral part of the Spanish monarchy . . ." each of the four viceroyalties and six captaincies general "must be represented" by a person selected by indirect elections. This promise of a new, inclusive relationship encouraged those who wanted greater autonomy for their colonies. On January 24, 1810, the Junta Central abandoned Seville, to which it had fled after leaving Aranjuez on December 1, 1808; it named a COUNCIL OF REGENCY on January 29, 1810, which assumed authority on January 31 and transferred to the Isle of León the following day as Seville surrendered to the French.

Even more remarkable than the 1809 call for American representation to the Junta Central was a decree the Regency issued February 14, 1810, ordering the election of representatives to the Cortes. "From this moment, Spanish Americans, you are elevated to the dignity of free men; you are no longer as before, doubled over under a yoke that was heavier the farther you were from the center of power [Madrid]; looked upon with indifference, molested by cupidity, and destroyed

by ignorance.” The decree went on to assure residents in the “kingdoms” (not “colonies”) of the New World that the deputies they elected to the Cortes would hold Americans’ destinies in their hands. This admission of past exploitation and discrimination explicitly recognized equality between Americans and PENINSULARS in language from which there could be no effective retreat.

The Cortes opened on the Isle of León on September 24, 1810, with numerous substitute deputies (*suplentes*) authorized to serve until the duly elected deputies arrived. There were 74 representatives from Spain and 30 from the colonies. The French had been besieging CÁDIZ since February 5.

### RESPONSE TO THE ABDICATIONS: AMERICAS

The creole response in the Americas to events in Spain followed the example of the Spanish juntas. In the absence of the legitimate monarch, sovereignty returned to the people. In practice, this usually meant sovereignty rested in the MUNICIPAL COUNCIL of a region’s leading city. Thus *cabildos* or *ayuntamientos* came to the fore as offering a legitimate solution to the problem of illegitimate government embodied by Joseph I.

Rumors of the events in Spain reached CARACAS on July 5, 1808. Venezuelans received confirmation of the abdications of Charles and Ferdinand 10 days later when representatives of Napoleon arrived at La Guaira, only to be rejected. In the same month, both word of the events and a representative of Napoleon reached Buenos Aires. On August 21, news of Ferdinand VII’s accession reached the city of LA PLATA.

The first responses to news of the unprecedented events in Spain were to pledge allegiance to Ferdinand VII and hostility to the French and Joseph I and to await more information. As more news arrived, however, divergent opinions began to surface. Initially, the discussion focused primarily on two alternatives: recognize and support the government of resistance in Spain, although until the formation of the Junta Central, the juntas of both Seville and Asturias were seeking recognition as the government of resistance; or establish a local or regional junta that would rule in the name of Ferdinand VII until his return, in other words, follow the example of juntas in Spain. Both alternatives held the possibility of greater autonomy within a continuing political relationship with Spain. The idea of total independence from Spain such as some mainland British colonies had secured in 1783 and, more frighteningly, Haiti had achieved more recently, appeared as a third alternative only to a handful of radicals.

During the remainder of 1808 and 1809 an abortive attempt to overthrow Viceroy SANTIAGO LINIERS Y BREMOND in Buenos Aires failed, but successful depositions removed the president of the Audiencia of CHARCAS, the intendant of La Paz, and the president of the Audiencia of QUITO. Military forces sent from Lima and Buenos Aires by the end of 1809 crushed juntas created in La Plata, La Paz, and Quito.

In the meantime, the designated viceroalties and CAPTAINCIES GENERAL were carrying out the order of January 1809 to elect representatives to the Junta Central and provide them with instructions or lists of grievances to take to Spain. Despite complaints that the number of representatives did not provide equal representation and grousing in the presidencies of Charcas and Quito that they did not get their own deputies, indirect elections took place within a complicated system that allowed nearly 100 CITIES and towns with municipal governments to participate. The short life of the Junta Central, however, meant that in some cases the elections were not completed and that other deputies did not arrive in Spain in time to serve.

The participating municipal councils took seriously the charge to provide their representatives with instructions. All affirmed their loyalty to Ferdinand VII, and most placed this within support for monarchy and articulation of their equality within the “Spanish nation.” Some called for reform that would preclude “favorites” by placing limitations on the monarch.

The discussion of events in Spain, elections, and the mandated preparation of instructions for deputies to the Junta Central initiated a political revolution in the kingdoms of Spanish America. The process of clarifying and cataloging grievances brought to the surface and exacerbated differences of opinion between peninsulars and creoles; the former frequently considered the latter’s ideas treasonous. In the absence of the monarch, the idea that sovereignty returned to the people gained currency. The required election of deputies to the CORTES OF CÁDIZ in 1810 and provision of instructions provoked further discussion and hardened opposing views. Increasingly, those who became known as royalists or reactionaries formed one side and insurgents, traitors, or, more generously, patriots, the other.

By the time elections to the Cortes took place, the situation in Spain had gone from bad to worse. In mid-April 1810, news began reaching the Americas that the French had taken Andalusia and the Junta Central had created a five-member Council of Regency and dissolved itself. With little evidence that Spain could free itself of French domination, AUTONOMISTS in several regions of what would become identified as *Ultramar*, or the overseas dominions, quickly pushed for home rule; they would rule until Ferdinand returned to power and preserve their regions from French domination. While elections to the Cortes took place in much of the INDIES, autonomists moved assertively in varied locations.

In Caracas, the captain general and *audiencia* were deposed and a junta created on April 19, 1810. On May 25, 1810, a junta was established in Buenos Aires. On July 16, 1810, the Audiencia of CHILE deposed the captain general, and two months later, a *CABILDO ABIERTO* established a junta. On September 24, the Cortes began to meet on the Isle of León. By the time that the revolt led by MIGUEL HIDALGO Y COSTILLA was under way in New

Spain, only Peru and GUATEMALA among Spain's mainland colonies were firmly under royalist control.

When the Cortes opened, it had 29 substitutes (*suplentes*) and one proprietary deputy representing the Americas; 74 men represented Spain. The allocations demonstrated that the Americas were not equal to Spain, and American deputies complained. A proposal to allocate deputies on the basis of population failed, since it would give the Americas about 60 percent of the deputies. The bright new day promised in the February 1810 call for elections was not dawning.

American deputies immediately forced the Cortes to address the issue of representation, but the result satisfied very few of them. As approved in a resolution of October 15, 1810, *CASTAS* were excluded from the count of citizens used to determine representation. Creoles and NATIVE AMERICANS, in other words, persons with no African ancestry, were to enjoy equal rights with peninsulars. Each time the issue resurfaced, the American deputies who sought full and equal representation in the Cortes lost.

The American deputies were also unsuccessful in obtaining free trade and the return of the JESUITS. The Cortes approved equal opportunity for all positions but did not guarantee that native sons would get at least half of all positions in their *audiencia* districts, as the American representatives wanted. While the Cortes approved an end to ROYAL MONOPOLIES, the provision was not implemented.

Nonetheless, the Cortes of Cádiz and the constitution promulgated on March 19, 1812, and written by American as well as peninsular deputies, did authorize significant changes. Although Americans did not get as much representation as they sought, they were actively involved in the political process and governance of the "Spanish Nation," as the combination of Spain and the overseas kingdoms was now called. The constitution authorized all population centers of 1,000 or more without formal municipal government to establish *ayuntamientos* or *cabildos*; this resulted in 896 new municipal councils in New Spain, many more in other parts of the Americas, and a dramatic increase in political involvement in the affected areas.

The CONSTITUTION OF 1812 gave substantial power to the unicameral Cortes and placed multiple restrictions on the monarch. The judiciary was to be an independent branch of government, and the regional executives would become *jefes políticos*. Viceroys would lose some authority as they became *jefes políticos superiores*. A PROVINCIAL DEPUTATION was created for each province. This new institution would consist of the province's *jefe político* as presiding officer, the intendant, and seven provincially elected deputies.

Among other important Cortes actions that affected the American kingdoms were the authorization of a free press (November 10, 1810), the abolition of Indian TRIBUTE everywhere and the *MITA* in Peru (March 13, 1811),

and the abolition of the INQUISITION (February 22, 1813). Together, the actions of the Cortes and the Constitution of 1812 created a new political baseline that pleased some, angered others, and forced those who wanted additional changes to offer more far-reaching alternatives. Importantly, the Constitution confirmed that Spain was more equal than the Americas.

Buenos Aires had not formally broken with Spain and considered its jurisdiction the entire Viceroyalty of Río de la Plata. Viceroy JOSÉ FERNANDO DE ABASCAL Y SOUSA, however, annexed Charcas to its former home in the Viceroyalty of Peru. Successive governments in Buenos Aires sent armies to reclaim the highland region. A first one, led by Juan José Castelli, crossed the border of Charcas in October and entered Potosí on November 25. By the time royalist forces commanded by creole JOSÉ MANUEL DE GOYENECHÉ Y BARREDA crushed the auxiliary army from Buenos Aires at Guaqui on June 20, 1811, Castelli had alienated the inhabitants of Potosí, La Plata, Oruro, and La Paz. The royalists unsuccessfully invaded the lower provinces of the River Plate viceroyalty, but forces led by MANUEL BELGRANO routed them at Salta on February 20, 1813. Belgrano then entered Upper Peru and took Potosí on May 7, 1813, remaining in control there until November 18, 1813. Following a defeat on October 1, 1813, by JOAQUÍN DE LA PEZUELA, future viceroy of Peru, and a failed attempt to blow up the MINT (Casa de Moneda), Belgrano led his forces down from the Andes. At Sipe Sipe on November 29, 1815, royalists also destroyed a third invading army sent by Buenos Aires.

Venezuela had already gone much further than the Cortes of Cádiz by declaring independence and a republic on July 5, 1811. It was a disastrous experiment, as royalists regained control, sent SIMÓN BOLÍVAR fleeing, and ended the fledgling state in July 1812.

In New Granada, juntas proliferated in 1810. Cali established one on July 3; Pamplona, on July 4; Socorro, on July 10; and BOGOTÁ, on July 21. CARTAGENA DE INDIAS declared independence as a republic on November 11, 1811, but adjacent provinces would not join it. By late 1812, there were two warring independent states, a centralist state of Cundinamarca and the United Provinces of New Granada.

Chile also responded to events in Spain with an autonomist solution. After Governor Francisco Antonio García Carrasco had alienated the SANTIAGO DE CHILE aristocracy through arrests and punishments seen as arbitrary and unnecessary, on July 16, 1810, the *audiencia* in Santiago deposed and replaced him in actions designed to preempt the city council. When word of the deteriorating situation in Spain arrived, pressure from council members led the interim governor to call a *CABILDO ABIERTO* over the *audiencia's* opposition. The *cabildo abierto* promptly established the National Governing Junta on September 18, 1810, which named the interim governor as its president, swore allegiance to Ferdinand VII, and promised to call a national congress. A royalist insurrec-

tion on April 1, 1811, in which the Audiencia of Chile was implicated, clarified that the course the junta was following, for example, declaring Chile open to international trade, had opposition; the insurrection's failure brought about the demise of the *audiencia*.

On July 4, 1811, the National Congress began to meet, but the following month one faction withdrew to Concepción and established its own junta. On November 15, José María Carrera launched a successful *golpe de estado* (coup d'état), assumed power, and dissolved Congress. His opposition was soon in disarray, and Carrera's power was momentarily unchallenged. His actions, however, prompted Viceroy Abascal in Peru to send a small military unit to support royalists and crush what he perceived as an insurgency. Civil war between royalists and autonomists ended in a stalemate, but Abascal repudiated the resulting Treaty of Lircay (May 3, 1814), and a royalist victory at Rancagua (October 1–2, 1814) forced Carrera, BERNARDO O'HIGGINS, and other autonomists to flee across the Andes.

#### INDEPENDENCE IN SPAIN, REACTION IN THE COLONIES

Following indispensable aid from Britain; the military acumen of the duke of Wellington; the help of "*guerrillas*," marking the first use of that term; sometimes valuable participation by Spanish armies; and Napoleon's fiasco in Russia and need to withdraw troops from Spain, the last French troops were leaving Madrid by late May 1813. A month later, Joseph I was back in France. After briefly meeting in Cádiz, the first "regular" Cortes adjourned on November 26 to move to Madrid. The Treaty of Valençay of December 11, 1813, ended the war with the French, recognized Ferdinand VII as king of Spain, ordered the evacuation of the last French troops, and stipulated that the British forces were also to withdraw from Spain. Almost unthinkable in 1810, Spain had won its war of independence, and Ferdinand VII was free.

The monarch reached Spain on March 24, 1814, and slowly traveled southward. Greeted everywhere with wild enthusiasm, he soon realized that popular sentiment and enough military support existed to enable him to take decisive action. He did. On May 4 in Valencia, he declared all actions taken by governments of resistance since he left Spain in May 1808 null and void; thus the Constitution of 1812 and all legislation were abrogated. Moreover, he ordered liberal (that is, pro-constitution) leaders in Madrid arrested on May 10, closed the Cortes the following day, and entered Madrid on May 13, 1814. "Beloved Ferdinand" was back with the institutions and officials of the old regime.

The government's finances, not surprisingly, were in even worse shape than in May 1808. Aside from obvious reasons related to five years of warfare in Spain, the colonies were no longer providing reliable or substantial income through taxes in the Americas or on trade with Spain. Ferdinand's return, furthermore, forced the colo-

nists to decide whether to support Ferdinand or rebellion. The changes American deputies had proposed to the Cortes of Cádiz, and that even in 1814 probably a majority of creoles supported, were no longer on the table.

The situation in the colonies in mid-1814 was as follows. In Venezuela, JOSÉ TOMÁS BOVES drove Bolívar's forces from Caracas on June 15, 1814; the Second Republic, established in August 1813, was history. Troops from Peru had reestablished royal authority in Quito in late 1812 and would do so in Chile in October 1814. New Granada remained divided among groups of autonomists. In the Viceroyalty of Río de la Plata, Charcas was attached to Peru; PARAGUAY had been de facto independent since May 17, 1811; the BANDA ORIENTAL had rejected permanent alliance, as distinct from opportunistic agreements, with Buenos Aires from the time of the May revolution of 1810 and starting on February 26, 1811, had an autonomist movement led by JOSÉ GERVASIO ARTIGAS. War involving royalist soldiers, troops from Buenos Aires, Artigas's supporters, and a Portuguese army from Brazil ended temporarily in February 1815 when Artigas began a contested rule marked by renewed warfare. Buenos Aires had still not declared independence, but its kaleidoscope of governments had behaved as though independent since May 1810. Peru under Viceroy Abascal had remained under Spanish rule. Central America, CUBA, and PUERTO RICO had also remained loyal. Mexico had weathered the Hidalgo revolt, but rebellion led by JOSÉ MARÍA MORELOS Y PAVÓN was still under way in mid-1814; the countryside, moreover, was marked by banditry, guerrilla warfare, and ongoing discontent. Economic conditions throughout the mainland colonies were generally bleak.

Ferdinand thus faced colonies that had experienced absolute monarchy, juntas, independence, republican government, and constitutional monarchy (although without a monarch). They had voted, established numerous constitutional municipal governments, enjoyed unprecedented freedom of speech, and discussed wide-ranging political options. In addition, they had been promised equality as kingdoms in a Spanish nation only to see their hopes dashed. Their political experience included repeated elections for deputies to the Cortes, deputies to provincial deputations, and members of municipal governments.

Within and among the colonies, there was no agreement in 1814 as to the best form of government, and advocates for different types could be found. Ferdinand, in short, could not do anything without alienating one or another group. His decision to restore monarchical absolutism with institutions and personnel as they were in May 1808 unavoidably cost him potential support. Even more, his decision to reimpose Spanish rule by force of arms ultimately drove adherents and uncommitted members of the colonial elites to allow, if not support, a growing number of active citizens who had moved beyond desiring greater autonomy within a Spanish nation to wanting complete independence.



Opposed to federalism or any form of representative government, Ferdinand turned to force. He ordered General PABLO MORILLO to lead an expedition of some 10,500 men to northern South America. The army of reconquest arrived in April 1815 and was in Caracas the following month. After mopping up the remains of the Second Republic in Venezuela, Morillo quickly moved to New Granada, where conditions were messier. He was able to reestablish Spanish rule by October 1816 but never complete control. The growing problem was that force got out of hand; rebel sons of elite families were executed or sentenced to hard labor, and the families suffered confiscation of property. Growing alienation arising from the abuse of force increased the willingness of the elite to countenance an alternative to Spanish rule. Bolívar offered it.

Building up a cavalry in the Llanos of Venezuela with the aid of José Antonio Páez and benefiting from out-of-work British soldiers, officers, and adventurers who found their way into his forces, Bolívar led his army across the Andes into New Granada. Victorious in the Battle of Boyacá near Bogotá on August 7, 1819, he handed New Granada its independence and turned again to his homeland of Venezuela. The CONGRESS OF ANGSTURA on December 17 proclaimed the Republic of Colombia, uniting New Granada and Venezuela. The BATTLE OF CARABOBO clinched the independence of Venezuela on June 24, 1821. With Antonio José de Sucre's victory over the royalists at Pichincha in the Kingdom of Quito on May 24, 1822, northern South America was independent.

Harsh treatment by royalists after their victory in early October 1814 created among Chile's elite the same willingness to countenance independence as had prepared the way for Bolívar's victorious campaign in the north. With a strategic vision that conceived of Chile rather than Charcas as the route to Peruvian independence, which he considered essential for the survival of other independent states in Spanish South America, JOSÉ DE SAN MARTÍN assembled and trained the Army of the Andes at Mendoza, across the Andes from Chile. Meanwhile, the UNITED PROVINCES OF THE RÍO DE LA PLATA declared independence in 1816.

After naming O'Higgins as his lieutenant and incorporating other Chilean exiles into the army, San Martín crossed the Andes, defeated the royalists at the BATTLE OF CHACABUCO, and entered Santiago. A subsequent victory at MAIPÓ on April 5, 1818, guaranteed Chile's independence and opened the way to Peru. The RIEGO REVOLT that began January 1, 1820, near Cádiz, Spain, and the subsequent reestablishment of constitutional monarchy meant, moreover, that the royalists in Peru would receive no reinforcements from Iberia.

Supported by the navy assembled by the soldier of fortune THOMAS, LORD COCHRANE, San Martín landed his expeditionary army at Pisco, Peru, on September 8, 1820. Since Peruvians withheld the joyous response

to anticipated liberty that San Martín had expected, he moved slowly, entering Lima only after the royalists had withdrawn an army into the interior. Under pressure, the Peruvians in Lima declared independence on July 28, 1821. Tired of inaction, Cochrane sailed away disgustingly in September after taking funds from the treasury to pay his sailors. The royalists remained undefeated, with a larger army than that of the invaders.

With Sucre's success at Pichincha, Peru and Charcas alone remained under Spanish rule. Recognizing that he lacked adequate forces or income to conquer them, on July 26, 1822, San Martín met at Guayaquil with Bolívar, who welcomed him to Colombia. The contents of the discussion are unknown, but the monarchist and the republican could not have agreed on the form of government to be established after independence. Regardless, after the meeting, San Martín departed for Lima, resigned his office of "protector" and never returned to Peru.

Recognizing their lukewarm support for independence, Bolívar made the creoles of Lima beg for his assistance, first sending Sucre and an army in May 1823 and then, after the royalists had reoccupied the city for a month, finally arriving himself in September. The army of independent Peru met the royalist army in the Andes at JUNÍN, defeating it on August 6, 1824. Four months later, on December 9, Sucre defeated the remaining royalist army in Peru at AYACUCHO, between Cuzco and Lima. On August 6, 1825, Upper Peru became independent. The capitulation of the starving garrison at CALLAO on January 23, 1826, ended royalist resistance in Peru.

Taken as a whole, the responses to events in Spain that politicized the elites of the mainland empire were initially grounded in the belief that, in the absence of the monarch, sovereignty returned to the people. This provided justification for creating juntas ruling in the name of Ferdinand and, indeed, all subsequent changes of government. Compared to the American Revolution, the conflicts were longer and covered substantially more territory. Armies were small and major battles were few. Gradually elites came to accept, if not actively support, independence and the home rule at its core. The unresolved problems that surfaced immediately were who should rule at home and through what form of government.

See also PÁEZ, JOSÉ ANTONIO (Vol. III); SUCRE, ANTONIO JOSÉ DE (Vol. III).

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**Spanish Succession, War of the** The long-awaited death of the pathetic Spanish Habsburg monarch CHARLES II in 1700 provoked a lengthy war of succession to determine whether a Bourbon or Habsburg would succeed him (see BOURBON DYNASTY; HABSBURGS). The claimants were two. In his final will, Charles II had named a Bourbon, Philip, Duke of Anjou, grandson of the Sun King Louis XIV and Queen Maria Theresa, the daughter of PHILIP IV of Spain. Archduke Charles, son of Holy Roman Emperor Leopold I, was the Habsburg claimant. With the defection of Portugal in the METHUEN TREATY with England in 1703, Philip's support was reduced to France. Supporting Charles was a "Grand Alliance" that included England, the United Provinces of the Netherlands, the Holy Roman emperor, and the duke of Savoy. The nominal issue was determining the ruling house for Spain, but the more pressing concern for the Grand Alliance was the extension of French power implicit in a Bourbon ruling in Madrid. France and England also fought the WAR in North America, where the conflict was known as Queen Anne's War (1702–13).

PHILIP V assumed the throne in 1700 and enjoyed more support in Castile than his rival, despite enemy forces entering Madrid in 1706 and again in 1710. In the kingdom of Aragon, however, supporters of the Habsburg pretender turned the conflict into a civil war. The expenses of war forced Philip and his advisers to employ fiscal devices, for example, the systematic sale of appointments to American *AUDIENCIAS*, which they recognized were antithetical to effective colonial administration. They also allowed French merchants to TRADE directly with Peruvian and Chilean ports. Besides draining SILVER from the empire, this decision permanently crippled woolen textile manufacturing in the *audiencia* district of QUITO.

The TREATY OF UTRECHT in 1713 changed the map of Europe. Philip was recognized as king of Spain but lost any right to succession in France for himself or his descendants; similarly, subsequent French Bourbons were prohibited from succeeding to the Spanish throne. Philip retained Spain and the colonies, but lost the Spanish Netherlands, Gibraltar, Menorca, and Italian possessions. Britain received for 30 years the *ASIENTO*, a contract to provide African slaves to Spain's colonies, and, in a remarkable concession, related privileges that included sending a ship full of merchandise with each fleet to VERACRUZ and PORTOBELLO (see FLEETS/FLEET SYSTEM).

Philip's victory enabled him to end the special privileges (*FUEROS*) enjoyed by Catalonia, Aragon, Valencia,

and Mallorca—the lands of the Crown of Aragon—and to make the concept of Spain a political reality as well as a geographic entity. With the Spanish Netherlands lost, he could concentrate on establishing effective royal authority in Spain and turn more attention to the colonies. The losses in Italy, coupled with his marriage to Elizabeth Farnese in 1714, however, made regaining lands in Italy an important focus of Spanish foreign policy for decades.

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**sports and recreation** Colonials often viewed activities that later generations consider sports as integral to religious and civil celebrations and festivals. Bullfights are an example. The first of what became an annual event in MEXICO CITY for nearly two centuries occurred on August 13, 1529, as part of a celebration marking the feast of San Hipólito, the anniversary of Hernando Cortés's victory over the Aztecs. Bullfights were also held annually on the day of Saint James (Santiago), patron saint of Spain, and, after 1586, to celebrate other occasions such as the birthdays of kings and princes, the accession of a new monarch, and the entry of a new VICEROY. From 1753 on, however, a bullfight season in Mexico City was separated from festivals and became a source of income for promoters and the royal treasury. Bullfighting began in LIMA in 1540, with Francisco Pizarro killing one of the three bulls himself.

Originally, bullfights were held in a town or city's central plaza whose corners had been blocked, as was done in QUITO. In Mexico City, a number of plazas were used prior to the opening of a permanent bullring in 1816. Lima enjoyed a dedicated bullring from 1766, the first in the colonies.

Originating with the Moors and imported from Castile, where even kings participated, a mock combat known as *juego de cañas* pitted teams of mounted contestants, each with a shield and a cane (*caña*), against each other. Spectacularly dressed, titled and other recognized nobles were the jousting in these popular games, which were held in Lima's PLAZA MAYOR.

Cockfighting in Lima may have begun as early as 1585. Its primary purpose was to enable spectators to gamble, and large sums were won and lost. The archbishop of Mexico was so disturbed by the destructive consequences of cockfights that he obtained the right to license them and then refused to allow them. The Crown subsequently compensated him and then, in turn, banned the sport. Despite these efforts, cockfighting and associated gambling continued, as did denunciation of the sport. A friar traveling in Mexico in the 18th century remarked that every village had a cockpit, and few Mexican homes did not raise roosters.

BASQUES introduced a game of handball known simply as *pelota*. It was popular in Mexico City among Basque merchants and their employees and subsequently played in PUEBLA, OAXACA, ZACATECAS, and elsewhere. The game required throwing a hard ball against a wall at the far end of a court, although it was played in public squares as well. While the game involved physical agility, gambling on the outcome was what made it exciting for spectators.

Gambling was the most common leisure activity in the colonies. Taverns were only one of many sites where it occurred. Despite repeated prohibitions, many officials engaged in games of chance, at times hosting gambling parties in their residences. Clerics were also prohibited from participating. Playing cards was an entertainment so popular that the Crown created a monopoly to benefit from the sale of the cards (see MONOPOLIES, ROYAL). It also attempted, undoubtedly without success, to limit daily losses to 10 gold pesos.

See also SPORTS AND RECREATION (Vols. III, IV).

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**subdelegado** The well-documented abuses by *alcaldes mayores* and *corregidores* and the success of the INTENDANT system in Spain after 1749 led to the creation of intendancies in most Spanish colonies (see ALCALDE MAYOR; CORREGIDOR/CORREGIMIENTO). About 40 in number, the intendants had extensive responsibilities in provinces too large to administer without assistants in each subdistrict, or *partido*, into which the intendancy was divided. Consequently, intendants were allowed to place officials known as *subdelegados* in former *corregimientos* and *alcaldías mayores*. Intendants preferred to name their subdelegates, but by the early 1790s, VICEROYS made the appointments from a list of nominees submitted by the intendants.

Throughout the empire, more than 200 subdelegates represented Spanish rule at the local level. Within their subdistricts, they had general administrative oversight, responsibility for tax collection, usually command of the local militia, and authority for implementing orders from their intendant.

Unfortunately for the intendant system, subdelegates received the inadequate remuneration of 3 percent of the TRIBUTE collected in the VICEROYALTY OF RÍO DE LA PLATA and of PERU and 5 percent in NEW SPAIN. They resorted to extralegal measures to increase their incomes, which, in Peru, included forcing NATIVE AMERICANS in their jurisdiction to purchase goods (*REPARTO*). Soon, the former criticisms against *corregidores*' corruption, abusive behavior, and inefficiency were made against subdelegates. If the allegations that some intendants required

bribes from men seeking appointments as subdelegates were true, even more exploitation of the indigenous could be expected.

Only Spaniards (both PENINSULARS and CREOLES) were eligible for appointment as subdelegates. Peninsulars had little interest in serving as poorly paid officials in remote indigenous districts, so creoles, including those native to the district, were named, at least in part, by default. Efficient and honest administration at this level remained an unfulfilled vision.

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**sugar** Christopher Columbus introduced sugarcane plantings from the Canary Islands to HISPANIOLA on his second voyage to the New World in 1493. By 1518, planters on the island exported sugar to Europe, although in very modest amounts. Already, however, they employed African slave labor in its production on PLANTATIONS (see SLAVERY). The availability of the two-roller press in the sugar mills (either water-driven *engenhos*, or *ingenios*, or the smaller, animal-driven *trapiches*) gave New World producers technological equality with producers in Europe and the Atlantic islands.

By the mid-16th century, early settlers had introduced sugarcane on several islands of the CARIBBEAN, although Cuban production was primarily for local consumption well into the 17th century. With his property in Cuernavaca producing sugar by the late 1520s, in 1542, Hernando Cortés agreed to TRADE sugar for slaves with a Genoese trader who warehoused the sugar in VERACRUZ for shipment to Europe. By the early 17th century, sugar production in NEW SPAIN took place in several regions, including the Cuernavaca-Cuatla basin, southern Oaxaca, parts of Michoacán, and in the area of Orizaba, Veracruz, and Atlixco. With the decline of available indigenous laborers, owners turned to African slaves, who were imported in substantial numbers until 1640. Most of the sugar produced was consumed domestically.

By 1550, a small number of planters were producing sugar in coastal PERU, but by the end of the century, WINE production had replaced that of sugar in the south. The first sugar mill on the northern coast of Peru was established in the Chicama Valley by 1558. Starting in the 1570s, landowners in the Saña Valley were producing sugar. Prohibitions against Indian labor, although never uniformly enforced, resulted in the use of African slaves.



This stylized view of a sugar mill documents the hard labor required. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

In the 1530s and 1540s, sugarcane was established as a cash crop in BRAZIL. Introduced from PERNAMBUCO in the north to São Vicente in the south, it was most successful in Pernambuco and the Recôncavo of BAHIA. Planters in both captaincies built plantations that, by about 1580, accounted for some three-quarters of the colony's sugar exports. As a result, Brazilian sugar production was marked by rapid growth into the 1620s; despite some volatility due to WAR and competition from producers in the CARIBBEAN, it experienced overall success into the 1680s, and the addictive sweetener continued to be exported in great quantities.

Between 1570 and 1629, the number of Brazilian sugar mills nearly sextupled from a reported 60 to 346; 230 of the latter number were located in Pernambuco and Bahia. Estimated production for Brazil in 1614 was 700,000 *arrobas* of 32 pounds; an estimate for 1710 was

1,295,700 *arrobas* with the captaincy of RIO DE JANEIRO accounting for nearly as much sugar as Bahia. Although sugar production was depressed during most of the 18th century as a result of high costs, particularly of slaves, and low prices, by the late 1770s, the market was improving. Pernambuco, Bahia, and Rio de Janeiro were the most important production centers, but SÃO PAULO's production was rising by the early 19th century.

Sugar islands in the Caribbean led competition in the 17th and 18th centuries. Barbados's production increased from 6,343 tons in 1712 to 9,025 in 1792; JAMAICA's grew from 4,782 tons in 1703 to 77,800 in 1808; Guadeloupe's rose from 2,106 in 1674 to 8,725 in 1790; CUBA's rose from 10,000 tons in 1774 to 18,571 in 1792; St. Croix's expanded from less than 1,000 tons in 1754 to 15,700 in 1803; Saint Domingue's production rose from 10,500 to 78,696 tons in

1791, the eve of its slave rebellion. The subsequent elimination of Saint Domingue as a major sugar exporter during its revolution opened the market for its competitors, and Brazil and Cuba were among the beneficiaries.

The dependence of sugar planters on slaves was a major determinant of both the ability to produce and the cost of production in a highly capitalized industry. While imported African slave labor was used in producing CACAO, TOBACCO, and other agricultural items and in a variety of other industries, including GOLD MINING in Brazil, the availability and cost of this labor to sugar plantation owners were critical. The average annual importation of slaves was 1,250 for Spanish America and 1,000 for Brazil from 1551 to 1600; this almost tripled for Spanish America (2,925) and sextupled for Brazil (5,600) from 1601 to 1700; the numbers for 1701 to 1810 were 5,786 for Spanish America and 18,914 for Brazil.

Owners also had to invest large amounts in sugar mills. The cost of establishing and maintaining water or animal power and purchasing large cauldrons and presses, among other things, was considerable. It was also necessary to invest in minimal housing, food, and clothing for slaves, as well as a variety of tools. TRANSPORTATION was a further expense. Ownership of a sugar mill enabled plantation owners to earn additional income by processing sugarcane from smaller producers.

Sugar joined SILVER and gold as a defining export from Spanish America and Brazil. Just as early explorers and prospectors sought precious metals, early settlers planted sugarcane in the hope that it would flourish or at least satisfy domestic demand. For some producers, the rewards were substantial; for the laborers, the cost was often even more so.

See also SUGAR (Vols. I, III).

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**Suriname** The central portion of the Province of Guiana, as the entire coastal region between the Orinoco and Amazon Rivers was known in the 16th century, Suriname was long known in English as Dutch Guiana and Surinam. Bounded by FRENCH GUIANA, Guyana, Brazil, and the Atlantic Ocean, it is considered part of the WEST INDIES.

Dutch traders were present on the rivers of Guiana as early as 1598 and built a fort by 1613 on the Corantijn River. The DUTCH WEST INDIA COMPANY received control of the Dutch establishments there as part of its charter in 1621. Beginning in 1645, the colony received Dutch and Sephardic Jewish planters from the failed Dutch effort at conquest and colonization in PERNAMBUCO, BRAZIL. The English captured Suriname in 1650 and held it until the Treaty of Breda in 1667 returned it to Dutch control. Seven years later, the Dutch exchanged their claims to New Netherland for English recognition of their claims to Suriname.

Suriname became a SUGAR colony based on PLANTATIONS using African slave labor. Production in 1684 was about 3 million pounds of sugar; benefiting from the WAR OF THE SPANISH SUCCESSION, production increased to 15 million pounds by 1713, by which date 171 sugar plantations were in Suriname. Planters faced the problem of securing slaves in the numbers they wanted, but between 1740 and 1774 obtained an annual average of 2,900, significantly more than earlier. By the early 19th century only about 2,500 persons, scarcely more than 4 percent of the population, were white.

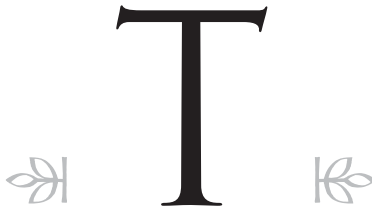
In 1799, the British occupied Suriname. Although returned to the Dutch in 1802, the British reoccupied it in May 1804 and did not return it to Holland until 1816.

Suriname was one of the most important centers of the Jewish population in the Western Hemisphere, and Jews there were planters and slaveholders.

See also SURINAME (Vols. III, IV).

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**taxation** Taxation in colonial Spanish America reflected the fundamental principle of taxation in Old Regime Europe: Commoners paid a much higher percentage of their income in taxes than did nobles. In Spain, the primary division was between *pecheros*—those who paid direct taxation (that is, *TRIBUTE*, or *pecho*)—and nobles, who did not. This distinction translated in the INDIES to Spaniards, who never paid tribute, and NATIVE AMERICANS and others, such as free blacks and *PARDOS*, who did.

Royal officials (*oficiales reales*) designated to collect and disburse income were present from the conquest onward. Tax offices (*cajas reales*) were established wherever and whenever potential income justified them. MEXICO CITY had a *caja* in 1521; VERACRUZ, in 1531; ZACATECAS, in 1544; and GUADALAJARA, in 1559. LIMA and CUZCO had treasury offices (*cajas reales*) in the 1530s.

Excluding labor drafts, categories of taxation included tribute levied on Amerindians as a sign of vassalage to the monarch; taxes on MINING, commerce, sales, office and privilege, the CATHOLIC CHURCH and clerics; and gifts to the Crown, ROYAL MONOPOLIES, and other impositions.

As *ENCOMIENDAS* escheated to the Crown, Amerindian tribute went to the Crown instead of *encomenderos*. Collected by *CACIQUES*, *KURAKAS*, and *principales* (native nobles) in the indigenous villages, the sums were delivered to the Crown's district official (*ALCALDE MAYOR*, *CORREGIDOR*, governor, or *SUBDELEGADO*) responsible for remitting the surplus over expenses to a *caja real*. The amount collected reflected the most current number of tributaries and, thus, rose and fell with significant POPULATION changes.

Particularly in NEW SPAIN, PERU, and NEW GRANADA, taxation on mining was a major source of income to the

Crown. In the mid-16th century, the most common rate was 20 percent (*QUINTO*) of the SILVER or GOLD mined, but most Mexican production paid only 10 percent (*diezmo*) after 1548, a rate that went into effect at POTOSÍ only in 1736. In addition to this basic tax, miners paid other charges, for example, for minting (see *MINTS*).

Import and export duties (*almojarifazgo*) and taxation to pay for armed escorts for the FLEETS to and from the colonies (*avería*) were introduced in the 16th century. A sales tax (*ALCABALA*) charged every time most goods changed hands was imposed in 1591; Amerindians and clergy were exempt unless involved in large-scale commerce, as were some articles, including MAIZE, grain, bread, horses, books, silver, and copper. In 1631, the Crown imposed a tax (*MEDIA ANATA*) of half a year's salary and one-third of additional benefits on all royal appointments to office. Another tax was charged whenever *OFICIOS VENDIBLES Y RENUNCIABLES* changed hands. Income from unfilled bishoprics went to the Crown, as did the sale of indulgences (*bulas de Santa Cruzada*). In times of great financial stress, typically related to WAR, the Crown sought "gifts" to augment the treasury.

A variety of royal monopolies provided revenue. The monopoly that provided MERCURY to miners at a set price was an early creation (1559). Other monopolies included playing cards (1572), stamped paper (1638), gunpowder, bullfighting, cockfighting, salt, *AGUARDIENTE DE CAÑA*, and snow, carried down from the mountains and used for iced drinks. A major source of royal revenue in the latter part of the 18th and early 19th centuries was that gained from the TOBACCO monopoly.

For most of the colonial era, the Crown employed tax farmers to collect taxes. Tax farmers were individuals or a corporate body that made a successful bid to provide

the treasury office with a specified sum of money for a particular tax for a given period of time, for example, 11 years in a 1626 agreement with a farmer of the *cruzada* in New Spain, in return for authorization to collect the tax. The benefits to the Crown were assured receipt of a known amount of money, including an advance on the total, and freedom from the need to hire tax collectors. The potential benefits to the tax farmer included making a guaranteed commission to cover administrative costs, a guaranteed rate of profit, and a group of tax collection agents who could be used for other purposes such as buying cloth and selling merchandise. In the latter half of the 18th century, the Crown reduced its reliance on tax farmers but assumed a larger payroll through employing more officials to collect taxes. Nonetheless, it normally realized higher net income after making this change.

Taxes in BRAZIL weighed heavily on SUGAR production and went by a variety of names, such as tithes (*dízimos*), sales taxes, *avería* (fleet protection tax), *dote da Inglaterra* (dowry of England), and *sustento da infantaria* (infantry support). Gold miners paid the *quinto*, a tax of 20 percent. There were also taxes on slaves, a variety of excises (*subsídios*), a tax on cattle hides (*quinto do couro*), and transit taxes paid at interior customs posts. Like the Spanish Crown, the Portuguese Crown long relied on tax farmers, auctioning off the position every three years.

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**textile industry** See *OBRAJES*.

**theater** Theatrical productions quickly followed Spaniards to the Americas. Friars employed them as a useful means to instruct NATIVE AMERICANS in religious tenets, for the staging gave the message an appearance of universal truth to an illiterate audience consisting of, in most friars' view, perpetual minors. The Amerindians, in turn, drew upon preconquest traditions of dance, mime, and spectacle in adding to the productions. Religious plays were thus acceptable; however, friars tried to prevent native contact with secular productions, “schools where wickedness is taught.” Already in the 1540s, the CATHOLIC CHURCH began to censor the religious productions, a responsibility that the INQUISITION assumed in 1574 and also applied to secular theater.

The Spanish population unquestionably enjoyed theater. Many towns offered enclosed courtyards (*corrales*) such as were used in Spain as venues for productions. Probably using *corrales*, theatrical productions were performed in such modest municipalities as Catamarca in 1596, Córdoba and Tucumán in 1610, Santiago del Estero in 1613, and Mendoza in 1618.

In the major CITIES of Spanish America, the palatial dwellings of the wealthy few also served as sites for private presentations. Indeed, the elaborate entries that new VICEROYS made into their capital cities were, in a sense, theater for the entire populace.

In LIMA, enthusiasm for theatrical performances resulted in a resident company by the end of the 16th century performing contemporary plays. A theater constructed there in 1601 was based on one in MEXICO CITY. Traveling artists who had previously played in Madrid and SEVILLE frequented Lima's stages in the early 17th century. By the middle of the century, however, decline was evident in poorer plays, poorer actors, and decreased attendance. Although the Coliseo playhouse was built in 1662, theater in Lima declined for the remainder of the century and never fully recovered as French and Italian influences marked contemporary plays. The Coliseo fell into disrepair, and the viceregal palace became the venue for the privileged to view both productions written in Europe and some written in Lima, notably by PEDRO PERALTA Y BARNUEVO in the first half of the 18th century.

In Mexico City, the shortage of acting companies before 1600 led to the award of monopolies to companies to perform at specified events. Plays produced for the public were presented in various locations—next to the cathedral, in the cemetery, in churches, and even in carts. Private performances in the viceregal palace entertained favored members of the capital's elite. In addition, Mexico City had *corrales* owned by private individuals; these were located in patios and had few amenities.

The Royal Indian Hospital in Mexico City received authorization to raise money through theatrical performances in the mid-16th century and subsequently enjoyed a monopoly on such performances until 1822; it could offer productions itself or rent the theater to contractors. A playhouse was constructed by the end of the 16th century, remodeled extensively between 1638 and 1640 and again 1665. Fire destroyed this building in 1722, but another was constructed in 1725. The New Coliseum, a more attractive playhouse built of stone in 1752, lasted until 1931. It was located on a site that benefited from the introduction of street lighting in the 1790s.

Viceroyalty in Mexico routinely encouraged the theater, for example, by ensuring that plays would be performed during Corpus Christi. The mid-18th century initiated a period of favor not only by the viceroy but also by the church, although perceived “excesses” on the part of producers and actors could lead to trouble. At the end of

the 18th century, the viceroy CONDE DE REVILLAGIGEDO supported the theater, considering it a medium through which commoners could be educated in the ideas and values of the ENLIGHTENMENT. The viceroy oversaw repairs to the playhouse, reorganization of the repertory company, and acquisition of new props, but the results were not financially successful, in part because the female lead left the company, exacerbating a perennial shortage of good, or at least popular, if underpaid actors.

RIO DE JANEIRO had a small opera house when the Portuguese Court arrived in 1808, but it was clearly inadequate to entertain royalty. A new one was quickly constructed; it opened in 1813.

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**Tierra Firme** The contract Christopher Columbus made with the Crown (*capitulación*) on April 30, 1492, authorized him to seek “Islands and Tierra Firme in the Ocean Sea”; thus, whatever he might find—*islands and mainland*—was approved in advance, provided after 1494, he remained on the Spanish side of the division made with the Portuguese in the Treaty of Tordesillas. Columbus thought he had reached both: The islands became known as the West Indies; the mainland south of the islands as it began to unfold to explorers was soon referred to as “Tierra Firme,” and the formal use of the name designated the lands bounded by the southern coast of the CARIBBEAN. The English translated *Tierra Firme* as the “Spanish Main” and eventually extended the term to include the whole of the Caribbean region, including the sea and the West Indies.

By the middle of the 16th century, successive expeditions of conquest and slaving had ravaged Tierra Firme, whether defined narrowly or broadly. The Spanish-American mainland became the target for French and English corsairs and, in the 17th century, BUCCANEERS.

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**tobacco** Tobacco was indigenous to the Americas. In the 1550s, the first tobacco seeds were carried to Spain and Portugal, where they were planted in palace gardens. Initially considered valuable for its medicinal properties, tobacco received a ringing endorsement from Nicolás Monardes, a physician in SEVILLE whose 1565 book *Joyful News of our Newe Founde Worlde* described it as a remedy for virtually every known ailment. Cured tobacco from CUBA was considered especially healthful, and ship-

pers from Spain and Portugal were soon carrying it to Europe. England proved an eager market, and smoking tobacco using pipes became the rage during the reign of Queen Elizabeth. Africans took to smoking tobacco as well as using snuff, more popular in continental Europe than in England.

In 1606, PHILIP III limited where tobacco could be grown. The approved sites included Cuba, HISPANIOLA, VENEZUELA, and PUERTO RICO. By 1636, Spain had created a monopoly for domestic TRADE (see MONOPOLIES, ROYAL). Between 1717 and 1783, it exported monopolistic control to the colonies. In Cuba and Venezuela, the monopoly focused on cultivation and export of raw leaf tobacco to Spain, where it was turned into cigars, snuff, or cigarettes. In NEW SPAIN, the monopoly controlled the domestic trade, from cultivation to processing to retail sales.

The point of a tobacco monopoly was to extract as much profit from the plant’s sale as possible. The addictive nature of tobacco ensured the continuation of an established market. The monopoly in Spain provided about one-third of domestic tax revenues. In the colonies, it was second only to bullion.

Brazilians also grew tobacco. Sandy soil along the Paraguaçu River in BAHIA became the center of a tobacco industry from the early 17th century. The river port of Cachoeira became important for sending the rolls across the bay to SALVADOR DA BAHIA, from which they were exported. By the early 18th century, production was about 2,400 tons, nearly all of it sent to Lisbon. A market was also developing in West Africa, however, and by 1750 some 3,000 tons were being exported to the Bight of Benin. The Portuguese Crown created a tobacco monopoly that provided it with significant income in the 18th century.

See also TOBACCO (Vols. I, III).

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**Toledo y Figueroa, Francisco de** (b. 1515–d. 1582) *Spanish viceroy of Peru* Born in Oropesa, Spain, Francisco de Toledo y Figueroa was the son of Francisco de Toledo, 3d count of Oropesa, and María de Figueroa. He entered the Order of Alcántara in 1535, spent nearly 20 years serving in the MILITARY throughout Europe for CHARLES I, and was majordomo to PHILIP II when the king named him the fifth VICEROY OF PERU on May 20, 1568.

Toledo sought to establish firm and effective Spanish authority in Peru and to create fiscal surpluses to remit to Madrid. As viceroy (1569–81), he modified, implemented, and created institutions that shaped the



viceroyalty. He reached LIMA at a time when *ENCOMIENDA*, the fundamental institution for labor and TRIBUTE established by Spaniards after conquest, was in decline, the native population was falling, the colonial state was weak, SILVER production at POTOSÍ was failing, and indigenous resistance to Spanish rule continued.

The new viceroy left SANLÚCAR DE BARRAMEDA on March 19, 1569, and reached Lima on November 30. He understood his responsibilities and quickly learned about the interrelated problems that greeted him.

As the king's image and visible representative in Peru, Toledo realized he could achieve more by seeing the land and being seen throughout it than by remaining in the capital. Consequently, as ordered to do before leaving Spain, he undertook an inspection tour accompanied by a sizable retinue that included Juan de Matienzo, Polo de Ondegardo, and, for part of the time, the Jesuit JOSÉ DE ACOSTA, as well as three interpreters. He left Lima on October 22, 1570, and traveled through Huarochirí to Jauja and on to Huamanga (present-day Ayacucho), where he arrived on December 15, 1570. In that province, he visited the MERCURY mines of HUANCVELICA and oversaw the founding of Villa Rica de Oropesa, commonly known as Huancavelica, before moving on to CUZCO, which he reached in mid-February 1571 and where he stayed until October 5, 1572, before continuing to Potosí. He subsequently visited the CITIES OF LA PLATA and La Paz before heading to AREQUIPA, where he arrived in July or August and remained until November 1575, when he left for Lima, arriving on November 20.

Toledo expanded and implemented an ambitious program of indigenous resettlement that may have affected up to 1.5 million NATIVE AMERICANS. His objective was to consolidate scattered small villages into new Spanish-style towns, or *reducciones*. (see *REDUCCIÓN*). The new towns were of varied sizes but located where they would be useful to Spanish economic enterprises for labor assignments and TRIBUTE collection. Groups of towns would have a *KURAKA* and an appointed Spanish *corregidor de indios* (see *CORREGIDOR/CORREGIMIENTO*).

Although two of his predecessors had begun the use of *corregidores de indios*, Toledo institutionalized their office throughout Peru and, in the process, reduced the power of *encomenderos*. The *corregidores* were responsible for administering justice, overseeing relations between Spaniards and Amerindians, collecting from *kurakas* tribute assessed according to an established tariff, and ensuring that *mitayos* from the province went to their assigned destinations, whether Potosí, Huancavelica, *OBRAJES*, or others (see *MITA*).

Noting the increase in SILVER production in NEW SPAIN that accompanied the introduction of the amalgamation process, the viceroy oversaw experimentation in Potosí to modify the process for use at an elevation of more than 13,000 feet (3,962 m) above sea level. Equally important, he arranged for mercury producers at Huancavelica to ship their product to the port of

Chincha and from there to the southern port of Arica, before it was carried more than 300 miles (483 km) to Potosí.

Toledo also arranged with mine owners to build capital-intensive ore-processing mills in return for an ample, inexpensive labor supply. The latter he organized through the infamous *mita*, a labor draft that drew on 16 highland provinces for more than 14,000 unskilled mine and mill workers paid less than market wages for their labor for one year out of every seven. The results of Toledo's creation of mining *mitas* for Potosí and Huancavelica and the introduction of the amalgamation process in Potosí resulted in an astonishing expansion of silver production, until it peaked in 1592.

Among his many actions, Toledo also was responsible for the execution of TUPAC AMARU I in 1572, commissioning Pedro Sarmiento de Gamboa to write a history that argued the Incas were tyrants and the Spaniards had a right to rule and Christianize them. Under Toledo, also an aqueduct to bring water to Lima was completed, and he established a postal system. He died in Escalona, Spain.

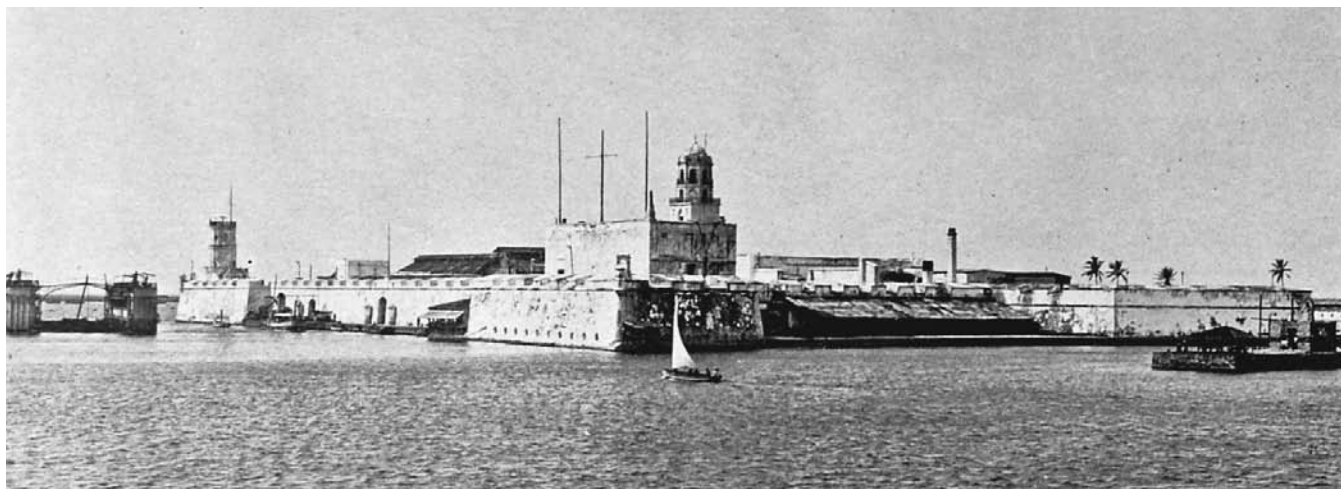
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**trade** The creation of the CASA DE CONTRATACIÓN, or House of Trade, in SEVILLE in 1503 institutionalized the Spanish Crown's desire to place all trade with the INDIES within a monopolistic system. Ideally, this would mean shipment of Spanish goods in Spanish ships manned by Spanish sailors; the return voyage would bring bullion and other desirable products on Spanish ships with Spanish crews. The trading system as developed in the first half of the 16th century placed the Consulado (merchant guild) of Seville in control of wholesale trade with the colonies and gave the Casa de Contratación oversight of the shippers and shipping (see *CONSULADO*). To protect bullion, agricultural products and merchandise, and persons going between Spain and the colonies, the Crown sent ships in convoys and in the 1560s formally implemented the fleet system (see *FLEETS/FLEET SYSTEM*).

Legal trade with the colonies was limited to *consulado* merchants who shipped goods from Seville, SANLÚCAR DE BARRAMEDA, or CÁDIZ to three colonial ports—VERACRUZ, CARTAGENA DE INDIAS, and NOMBRE DE DIOS or, later, PORTOBELLO. From Veracruz, wholesale merchants took goods to warehouses in MEXICO CITY, from which they distributed them. Goods traded at Cartagena were distributed throughout NEW GRANADA. Goods unloaded in Nombre de Dios or Portobello were transported across the isthmus to Panama City and then sent to CALLAO



The presidio of San Juan de Ulúa was built to protect Veracruz. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

for unloading and transport to LIMA and distribution throughout the VICEROYALTY OF PERU.

Initially, Spanish merchants shipped grain and other foodstuffs including olives and olive oil, as well as WINE, metal, tools, glass, books, textiles, and a large variety of other items. Colonists' early dependence on European imports, however, dwindled as locally produced items displaced them. In addition, trade with the PHILIPPINE ISLANDS via the MANILA GALLEONS introduced Oriental silks, ceramics, spices, and other items that competed with European imports.

Overall, textiles were the most important type of merchandise carried by the fleets. Over the 16th century, however, they came from different places. When the century opened, Castile was an important producer of woolen goods. This changed as American bullion flooded into Spain and stimulated higher inflation than in northern Europe. As Spanish prices ceased to be competitive, domestic textile production declined. Increasingly, Spanish merchants served as frontmen for foreign merchants and shipped foreign textiles on the fleets.

By far, the most important colonial export was SILVER from NEW SPAIN and Peru, although GOLD from New Granada led exports from Cartagena. COCHINEAL from GUATEMALA and southern Mexico, INDIGO from Guatemala, CACAO from VENEZUELA and Guatemala, hides from Mexico, emeralds from New Granada, and pearls from Venezuela were also exported, but their combined value in the 16th and 17th centuries probably never reached 30 percent of that of the bullion.

Trade via the fleet system in the 16th and 17th centuries was affected by competition from East Asian goods on the one hand and increased colonial self-sufficiency on the other. Contraband trade that included SMUGGLING within the fleet system itself and trade with FOREIGNERS who landed their ships in American harbors also affected the volume and value of legal trade.

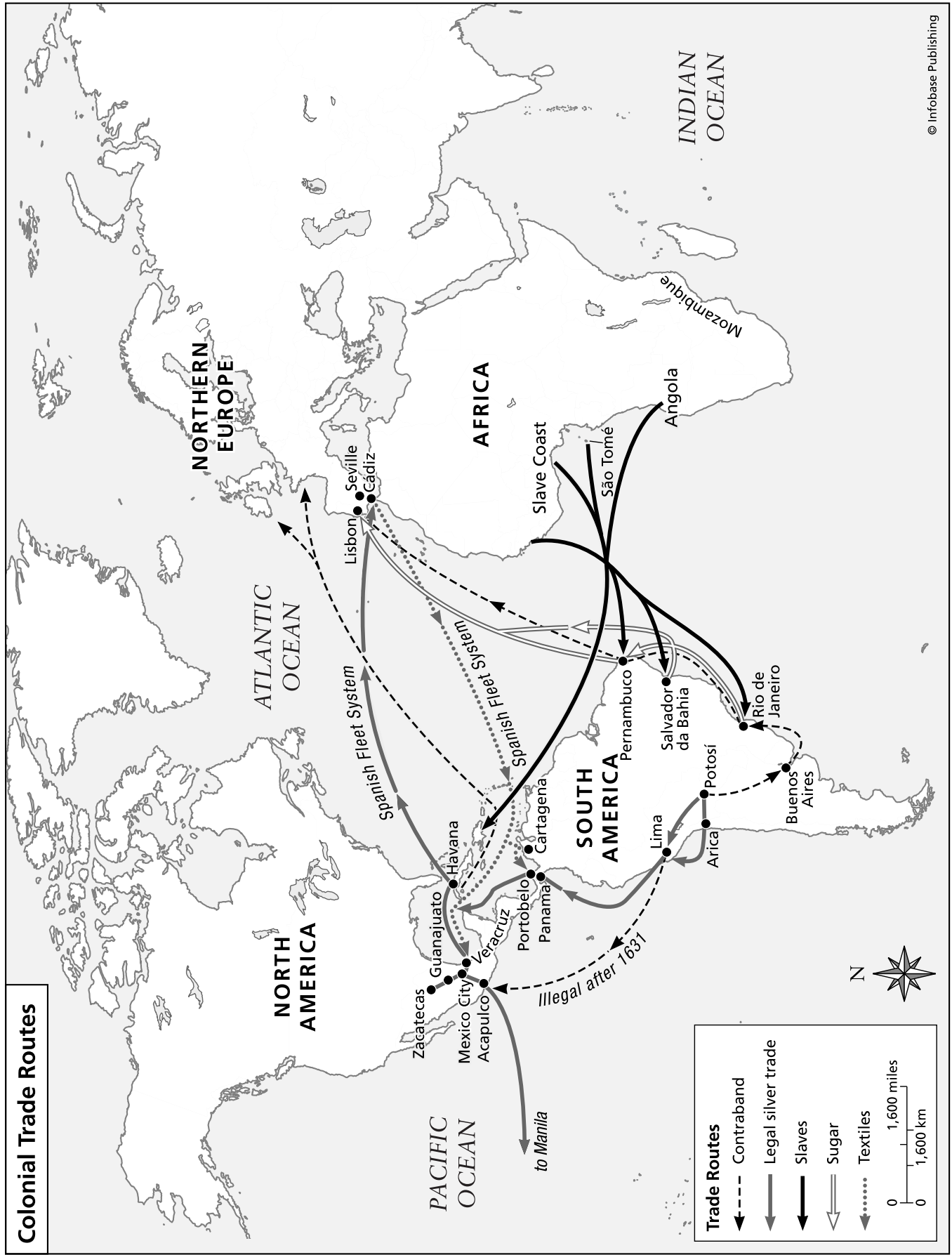
By the end of the 16th century, the amount of silver flowing to East Asia via the Manila galleons exceeded the amount going to Spain via the fleet from New Spain. The Crown had already responded to pressure from the *consulado* merchants of Seville by outlawing intercolonial trade between Peru and New Spain for specified periods of time. In 1631, it ordered an absolute end to the trade. Henceforth, legal trade between New Spain and Peru was an occasional matter, such as sending MERCURY from Peru or a complement to pick up a VICEROY promoted from New Spain to Peru.

As regular sailings by the fleet system faltered from the 1620s and the cost of the tax paid to defend the merchant ships (*avería*) rose, the incentives to smuggle goods increased. Undeclared goods were obviously untaxed. With annual sailings no longer dependable, merchants welcomed merchandise brought by foreigners. Since the illicit merchandise was often similar to products sent via the fleet system, smugglers eliminated the middleman and made prices more attractive.

By the end of the 17th century, the fleet system was a shambles. Sailings were irregular and foreign goods common in American markets. The alliance with France in the WAR OF THE SPANISH SUCCESSION resulted in French merchants trading contraband goods in CHILE and Peru. As a result, local markets were flooded with French textiles, and QUITO's already declining textile production was further damaged.

Voyages around Cape Horn and the reliance on register ships from the 1740s provided more flexibility and responsiveness in trade. The last Spanish fleet to PANAMA sailed in 1737 but made it only to Cartagena; the fleet to Veracruz continued intermittently into the 1770s.

The introduction of *COMERCIO LIBRE* on a limited basis in 1765, its major expansion in 1778, and inclusion of New Spain and Venezuela in 1789, produced a demonstrable and substantial increase in legal trade.



Importantly, exports other than silver enabled formerly peripheral regions to participate in trade with Spain at previously unheard-of levels. Goods of Spanish origin, however, accounted for no more than half of the goods sent from Cádiz and the other ports authorized to trade with the colonies.

The outbreak of war between Spain and Great Britain in 1796 ended normal trading between Spain and the colonies. While bullion was impervious to time in port, other exports had limited lives. The inability to sell products, moreover, adversely affected both borrowers and creditors. Thus, producers and merchants in cochineal, indigo, livestock products, and other nonbullion items clamored for access to markets. The Crown authorized neutral trade on November 18, 1797, in all items except bullion after a British blockade of Cádiz, begun in April, paralyzed colonial trade. Under pressure from the merchants of Cádiz, the Crown reversed the decision on April 18, 1799, but in 1801 sold licenses directly to neutral shippers. During a brief period of peace from 1802 to 1804, it appeared that prewar trading patterns were being resumed, but renewal of war in 1804 again forced the Spanish Crown to allow neutral trade.

Spain had lost control of trade with the colonies, and it would never be restored. Nonetheless, even after securing British assistance in the fight against the French in 1808, the successive governments of resistance in Spain would not grant its former enemy the free trade with the colonies it wanted. Colonial officials, however, recognized that taxing any trade was preferable to no income from trade and thus granted exceptions to official policy. In general, the de facto economic independence of Spain's colonies preceded their political independence.

Monopolizing trade with BRAZIL was always a policy objective of Portugal, but its success varied. Dyewood was the initial focus of trade, but SUGAR soon emerged as the dominant export, with SALVADOR DA BAHIA and Recife in PERNAMBUCO as the key ports; later, RIO DE JANEIRO would join them. Portugal lacked the shipping to handle all of the trade from Brazil, thus it licensed ships from other nations and taxed the cargoes. Dutch shippers were prominent in the 16th century until PHILIP II acquired the throne of Portugal in 1580 and imposed the Spanish concept of monopolistic trade. Indeed, conflict over trade became an important reason for Portugal's rebellion against Spain in 1640. By the time the Dutch, who had seized Recife and Pernambuco in 1630, were expelled in 1654, they were producing sugar in SURINAME, and the English were producing it in Barbados. Brazil's sugar PLANTATIONS were facing unprecedented competition. In 1660, Portugal began using a fleet system, which would survive until 1765; three convoys sometimes as large as 100 vessels sailed from Lisbon to Salvador, Rio de Janeiro, and Recife.

The discovery of gold in MINAS GERAIS in the 1690s sparked a gold rush, astonishing levels of production for more than half a century, and unprecedented income for

the Portuguese Crown. The METHUEN TREATY of 1703 reaffirmed Portugal's trading ties with England under conditions that benefited Portuguese winemakers and English textile manufacturers. While the balance of trade between wine and textiles favored the latter, Brazilian gold made up the difference. By 1750, British merchants dominated the Brazilian trade, a situation that the new minister, the MARQUÊS DE POMBAL, sought to rectify until he lost power in 1777.

Portugal's dependence on Great Britain was never more apparent than when the royal family and some 10,000 other REINÓIS sailed for Rio de Janeiro in 1807 under British escort. Upon arrival, the prince regent opened the ports of Brazil to friendly nations and thus abrogated the historic Portuguese monopoly. Treaties in 1810 gave Great Britain significant commercial rights and advantages, including a maximum tariff of 15 percent on British goods. No longer was Brazilian trade subservient to Portugal, but the disadvantages of the treaties with Britain would become apparent later.

See also TRADE (Vols. I, III, IV).

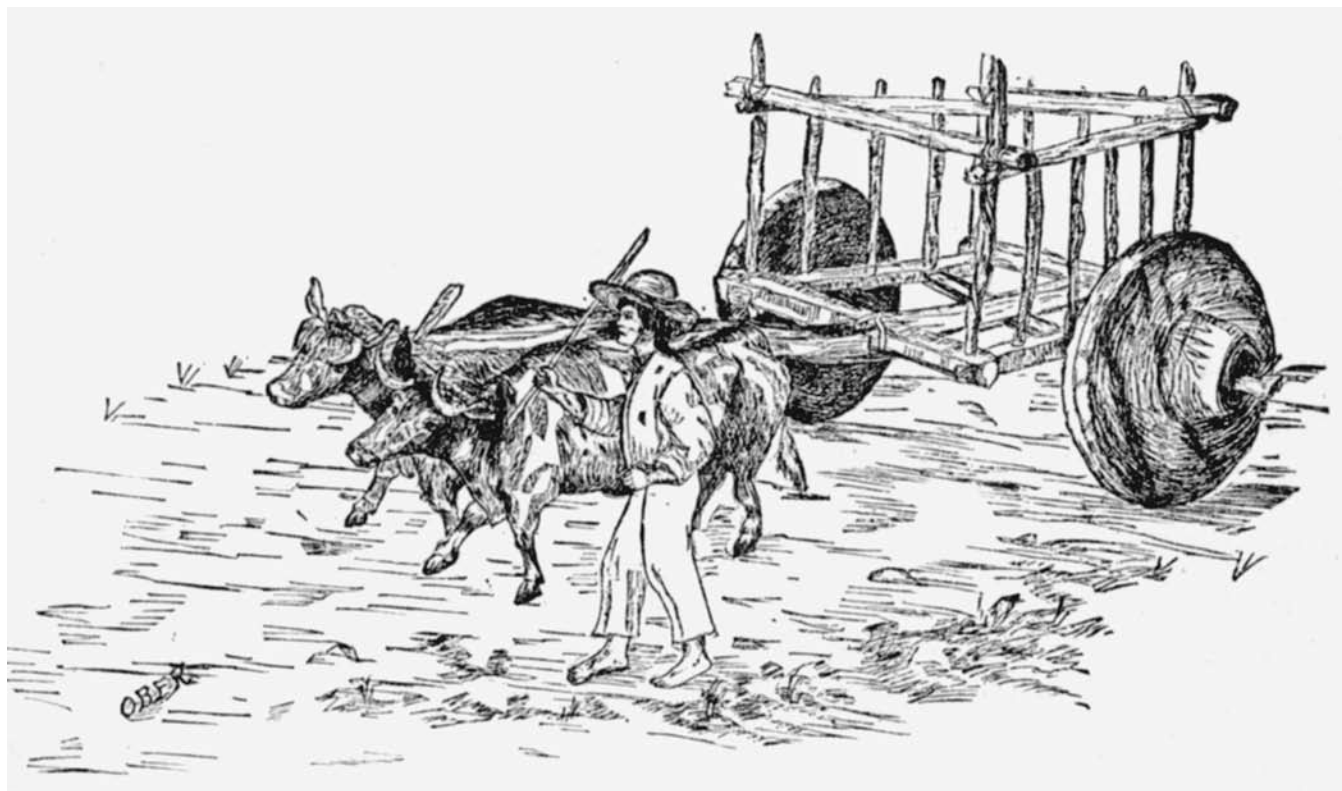
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**transportation** Time, distance, geography, and value as it related to size and weight were key variables addressed by colonial forms of transportation. By the middle of the 16th century, transatlantic sailing was routine. Navigators knew the best routes from Spanish and Portuguese ports and the safest seasons for sailing. Threats from pirates had already led to the use of small convoys by 1526, although the well-organized annual sailings of the fleets began only in 1564–66. Direct sailings from the west coast of Africa by Portuguese slavers were also under way in the 16th century (see SLAVERY). In 1565, regular sailings from ACAPULCO to MANILA began; the trip west took about three months, while the return was usually about six months but could be longer by a month or two. Coasting in the Americas was under way from Christopher Columbus's time onward, and ships built on the Pacific coast were used to transport conquistadores, slaves, animals, and the paraphernalia of conquest and early settlement to PERU. While ships had obvious limitations based on size, their ability to transport people, animals, and goods was unparalleled. For all but a few persons in the Americas, however, travel to and from Europe or the PHILIPPINE ISLANDS was out of the question. Their interest in transportation was the more mundane “from-here-to-there” variety that connected them to CITIES, TOWNS, or MINING camps.

By the 1560s, many of the most important transit routes within colonies were in place. In NEW SPAIN,



Large-wheeled carts were used to transport materials from Mexico City to mines in the north. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

the route from VERACRUZ to MEXICO CITY was well established; trips could be as short as seven days on horseback, but MULE trains required 20 days to a month, and during the rainy season, delays were common. The route to Acapulco was used after regular trade to Manila began. On the central plateau of Mexico, mules could carry loads of 300 pounds (136 kg) about 12 miles (19 km) a day. The cost of transportation substantially increased the price of goods, for example, adding 70 percent to the cost of WINE transported from Veracruz to Mexico City.

Large carts drawn by six oxen were used for moving cargo from BUENOS AIRES to Córdoba and Salta; the trip took a month to the former and another two to three months to the latter. The carts could carry 3,400 pounds (1,545 kg); mules, in contrast, carried 200 to 300 pounds (90–136 kg) depending on the distance traveled.

The most important measurement of distance was the number of days' travel required to get from place to place, although there was often substantial variation depending on the season and weather. Sailing from CÁDIZ to Veracruz required 70 to 179 days, with 91 days the average. Sailing from Cádiz to PANAMA averaged 92 days, but a trip of only 43 days was recorded. Acapulco to CALLAO usually took two to three months between September and February but could require seven to eight months at other times of year; the return voyage, however, could be made in four to six weeks.

From Mexico City it took 15 days to get to ZACATECAS, two months to GUADALAJARA, and three to four months to Parral. LIMA to CUZCO required 22 days, Cuzco to BOGOTÁ took slightly longer, and from Bogotá to CARTAGENA DE INDIAS required three to four weeks. By ship from Cartagena to PORTOBELLO was nine or 10 days, but one could get from Portobelo to Panama City in two days on foot. From Panama's port of Perico to Paita was about a two-week trip. Another 40 to 50 days of travel to reach Callao was good time. In Mexico City and Lima, the elite rode in coaches by the 1620s at the latest.

In travel between Portugal and BRAZIL, it was faster to get from Lisbon to São Luís in MARANHÃO, a trip of about five weeks, than from São Luís to SALVADOR DA BAHIA. Most fleets bound for Salvador or PERNAMBUCO left Lisbon in April and arrived in Recife in about 60 days and Salvador in about 70; fleets from Lisbon to RIO DE JANEIRO usually left between March and May and took about 80 days. The voyage from West African ports to Brazil took about 30 to 50 days.

Roads in Brazil, as in Spanish America, were generally dismal and not worthy of the name. In the late 18th century, Amerindians and African slaves packed goods from Rio de Janeiro to MINAS GERAIS. Most land transportation was accomplished with mules. In the few cities, the elite were carried in decorated sedan chairs that black slaves carried on their shoulders.

See also TRANSPORTATION (Vols. I, III, IV).

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**Tribunal of Accounts** Although treasury offices (*cajas reales*) were established in the Spanish colonies on the heels of conquest, auditing offices (*tribunales de cuentas*) were not established until the early 17th century. In 1605, Tribunals of Accounts were created for LIMA, MEXICO CITY, and BOGOTÁ. An office was created in QUITO in 1776, and another was established in BUENOS AIRES in 1780, several years after the creation of the VICEROYALTY OF RÍO DE LA PLATA.

The charge of the Tribunals of Accounts was to audit all government accounts except for the sales tax (*ALCABALA*), revenues from MERCURY, and TRIBUTE, for which separate provisions had already been made. In addition, the auditors had the responsibility of collecting sums in arrears from debtors, including treasury officers or their bondsmen. This required regular inspection tours of *cajas*. The importance of the treasury office at POTOSÍ was such that an auditor was to visit it every third year.

The Tribunal of Accounts in Lima was to receive annually the accounts of all treasury offices and tax farms in the VICEROYALTY OF PERU and to send the COUNCIL OF THE INDIES a summary of its reviews. There was no appeal beyond it for cases related to the treasuries. By the mid-17th century, it had eight accountants earning between 1,000 and 2,250 *pesos ensayados* (or 12½ *reales*). Nonetheless, backlogs were commonplace.

The Crown's decision to sell appointments to accounting and treasury offices in 1633 resulted in young, inexperienced native sons purchasing them. Between 1633 and 1699, 36 of 44 full-time appointees to Lima's Tribunal of Accounts and treasury offices were purchasers. Eighteen appointments were sold to the Tribunal of Accounts alone between 1700 and 1745. The quality of service by purchasers proved lower than that of pre-1633 appointees.

The ranking employees of the Tribunal of Accounts were subject to review of their actions. Between 1662 and 1685, a review (*VISITA*) of the tribunal in Mexico City resulted in 16 charges, mostly focused on securing required reports from treasury offices and for failing to collect debts. Clearly, the charges had some merit, for one of the accountants bribed an inspector (*visitador*) and was in partnership with some well-known businessmen.

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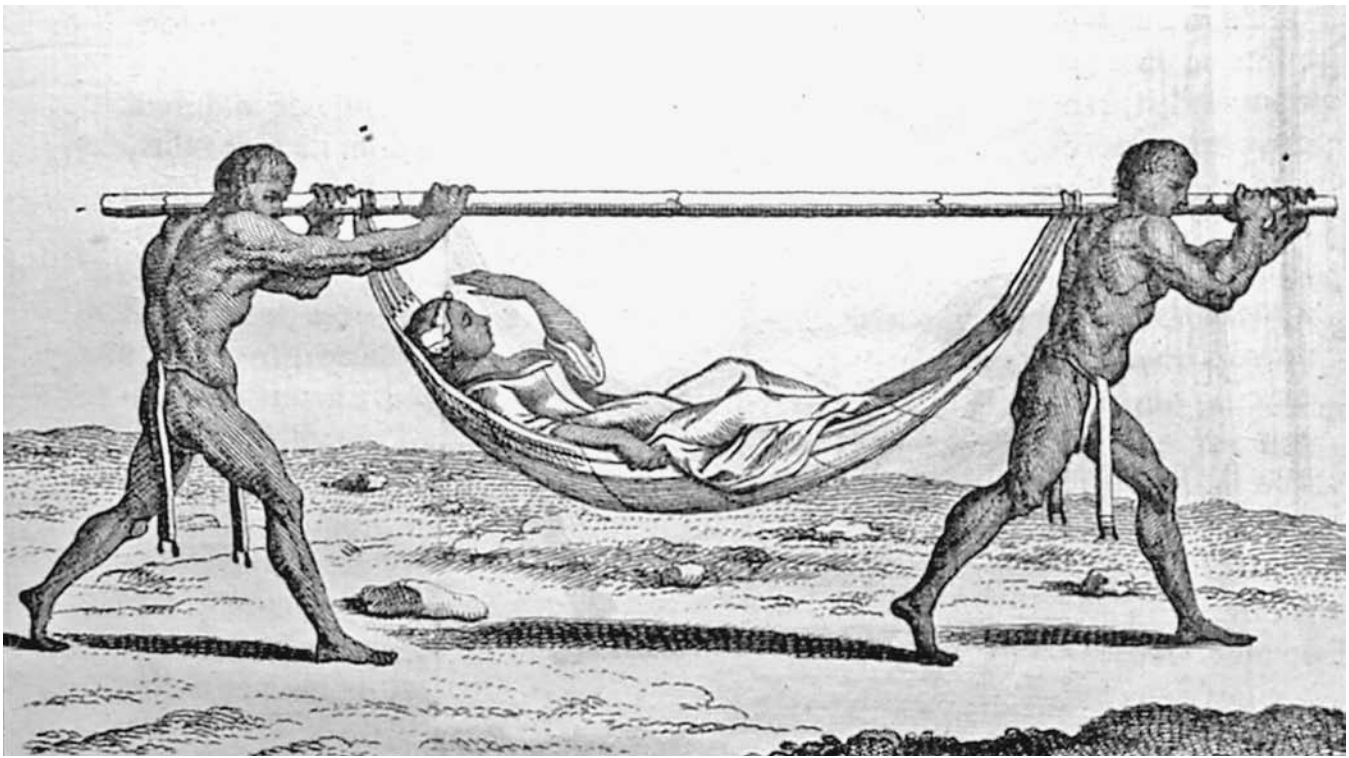
**tribute** Christopher Columbus initiated the Spaniards' assessment of tribute in the INDIES in the mid-1490s. In Central Mexico, tribute in kind, for example, in MAIZE, salt, cloth, or feathers, antedated the arrival of the Spaniards, who, as a consequence, initially relied on this preconquest demand but expanded it to include newly introduced items, for example, chickens and WHEAT. Uncompensated labor, a form of tribute, was also required. Early grants of *ENCOMIENDA* entitled the recipient to both labor and tribute.

By the mid-16th century, tribute was collected from indigenous people who were not chieftains or their eldest sons. In 1572, PHILIP II ordered the children of free or enslaved blacks and Amerindians to pay tribute; thus, free blacks, *MULATOS*, and *ZAMBOs* were liable for payment.

Tribute varied in form and amount in different colonies and could include labor, goods, or cash. Starting in the mid-16th century, goods in kind gave way to cash. Importantly, this direct tax was levied on NATIVE AMERICANS but not on Spaniards. This differentiation was analogous to the distinction in Spain between commoners (*pecheros*), who paid direct taxation, and nobles, who were exempt. Indeed, being subject to tribute ultimately defined *indio* as a separate legal and fiscal category; mestizos, in contrast, were exempt from tribute, although they paid other taxes (see *MESTIZAJE/MESTIZO*).

Full tributaries in the mid-16th-century Valley of Mexico were married adults, heads of families, and persons aged 14 or older. Widows and widowers and bachelors and unmarried WOMEN who did not live with their parents were considered half tributaries and paid half of the amounts charged to full tributaries. Serving members of town councils were exempt from tribute.

Although tribute was defined as a direct tax on individuals paid as a sign of vassalage, in practice, a village chieftain (*KURAKA* or *CACIQUE*) paid an *encomendero* or government official an agreed-upon sum based, theoretically, on the number of tributaries in the village. How the chieftain distributed the tax was left to his discretion; typically, he collected more than the amount due and kept the difference. Converting a tax on individuals into a lump sum for which the village through its chieftain was responsible was recognition that Spaniards (for example, *encomenderos*, *alcaldes mayores* in NEW SPAIN, and *corregidores* in PERU) had to work through an existing indigenous hierarchy (see *ALCALDE MAYOR*; *CORREGIDOR/CORREGIMIENTO*). Allowing the chieftain discretion in its collection, in fact, resembled the way in which villages in Spain turned certain taxes into lump sums through a process known as *encabezamiento*; the MUNICIPAL COUNCIL then determined how to collect the amount. Amerindian governors and town councilors were held personally liable for tribute



Native tribute originally included personal service. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

payments and could be imprisoned and financially ruined if they failed to remit the amounts due.

Until the Crown separated labor and tribute in the New Laws of 1542 and again in 1549, uncompensated labor (*servicios personales*) was a form of tribute common for Native Americans in *encomienda*. It could involve providing agricultural labor, transporting goods, laboring in mines, construction, domestic service, and other types of work.

The amount of tribute paid varied over time and by region, but censuses were used to determine the amount a village owed. In the 1560s, in Coyoacán, New Spain, tributaries were to pay one peso and one-half *fanega* of maize to royal officials in addition to 1.5 or 2 reales for the village; this amount subsequently increased as additional demands were imposed, for example, a half-real to support the construction of the cathedral in Mexico City. In 18th-century Oaxaca, tributaries paid between one and two pesos annually.

In AREQUIPA, Peru, males aged 18 to 50 who lived in their home village paid tribute but enjoyed access to village lands. In the *corregimiento* of Latacunga in the Audiencia of Quito in the early 1670s, the tribute rate varied from 2 to 2.8 pesos. In 18th-century Huarochirí, Peru, a tributary paid between five pesos, four reales and seven pesos.

Censuses and reassessments often lagged POPULATION changes; during a period of demographic decline, this meant that a village's surviving population had a higher assessment, which for some was an incentive to leave the

village even though it meant losing access to its land. Questions of whether remaining community members (*originarios*) in the *reducciones* of Peru were liable for the tribute of those who had left (*FORASTEROS*) and whether the departed were liable for tribute in their home village or their new place of residence were often answered differently, especially when the reassessments did not reflect the current population (see *REDUCCIÓN*).

Tribute became an increasingly important source of income for the Crown as the size of the tributary population increased in the 18th century, in particular. The COUNCIL OF REGENCY abolished tribute on May 26, 1810, and the CORTES OF CÁDIZ issued a decree abolishing it on March 13, 1811. This decision eliminated some 1.2 million pesos annually from royal income in Peru.

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**Túpac Amaru I** (d. 1572) *Inca ruler of Vilcabamba, Peru* Túpac Amaru was the youngest legitimate son of

Manco Cápac Yupanqui (Manco Inca), brother of the Inca Atahualpa captured by Francisco Pizarro and leader of an Andean army that besieged Spaniards in Cuzco during 1535 and 1536. Túpac Amaru was also brother of Titu Cusi, who ruled the neo-Inca state in the city of Vilcabamba, also known as Espíritu Pampa.

Titu Cusi died unexpectedly in 1571 near Vitcos after drinking a beverage given to him by his mestizo secretary. Although the Inca's existing illness adequately explained his death to some observers, some supporters believed he had been poisoned and immediately killed his secretary. They also thought the sole Spaniard present, a priest with medical skills, was involved and took him to Vilcabamba, where adamant opponents of the Spaniards quickly made Túpac Amaru the new Inca. Unlike his brother, who sought to compromise with Catholicism, Túpac Amaru supported prequest religious beliefs and refused to see the Spanish captive, who was then killed. The new Sapa Inca and hardline generals now determined the policy of the neo-Inca state but did not fully appreciate the strength of the new VICEROY, FRANCISCO DE TOLEDO Y FIGUEROA, who did not yet know about Titu Cusi's death.

While in Cuzco, the viceroy received royal approval for the Treaty of Acobamba, which had been made between his predecessor and Titu Cusi. In it, the Sapa Inca had surrendered himself and his lands to PHILIP II. Toledo sent an envoy to the Sapa Inca, unaware that he was now Túpac Amaru. On receiving word that the Incas had murdered the envoy, the viceroy publicly proclaimed WAR on April 14, 1572.

Toledo mobilized a military force of some 250 Spaniards that included *encomenderos* of appropriate age and men hired as substitutes by those *encomenderos* who were not, about 1,500 auxiliaries from the Cuzco region, and 500 Cañari, indigenous allies of the Spaniards from the time of Francisco Pizarro. A punitive expedition under the leadership of Gabriel de Loarte, *OIDOR* of the Audiencia of Lima and a future councilor of the Indies, left Cuzco. Benefiting from treachery by an Inca captain, the Spaniards' force avoided an ambush, but Túpac Amaru and Titu Cusi's son, Quispe Titu, had already left for Vilcabamba. By the time the Spaniards reached Vilcabamba on June 24, 1572, the Sapa Inca, his wife, and his commander in chief had fled. Shortly after, the Spaniards captured the commander in chief, as well as Túpac Amaru and his wife.

The victors took Túpac Amaru to Cuzco and, following three days of indoctrination in Christian beliefs, baptized him. Following a quick and unjust trial conducted by Loarte, the Inca was declared guilty of a variety of offenses, in most of which he had no part. The sentence was death by beheading. Despite pleas from some clerics to pardon him, the sentence was carried out in Cuzco on September 24, 1572. With Túpac Amaru went the neo-Inca state. As part of his campaign to eliminate the Incas once and for all, Toledo had surviving relatives arrested,

tried, and despoiled of their wealth, although Philip II personally reversed their sentences in 1574.

See also INCAS (Vol. I); MANCO INCA (Vol. I).

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**Túpac Amaru II (José Gabriel Condorcanqui)** (b. 1742–d. 1781) *mestizo leader of the largest revolt in colonial Peru* Born in Tinta, PERU, of Amerindian and Spanish ancestry, José Gabriel Condorcanqui was educated at a Jesuit school in Cuzco. Able to speak Spanish and Quechua, the future Túpac Amaru II inherited the position of *KURAKA* (cacique) of Tinta. Married at 16 to Micaela Bastidas Puyucagua, he was prosperous, successful, and knowledgeable about the Inca past. He operated a substantial TRANSPORTATION business, carrying MERCURY and merchandise from LIMA and Cuzco to POTOSÍ by way of La Paz with some 350 MULES he had inherited. As a result, he was well traveled in PERU. He also had land in the province of Carabaya. In 1770, he went to Lima to claim the title of marqués de Oropesa, a title granted to the Inca FAMILY. Unsuccessful, he tried again in 1777 when trying to quash a claim made by Diego Felipe Betancour for his *cacicazgo*. While in Lima, he also petitioned on behalf of himself and other *kurakas* against the abuses of the MITA.

In early November 1780, Condorcanqui and some accomplices ambushed Antonio de Arriaga, *CORREGIDOR* of Canas y Canchis. An abusive and exploitive *corregidor*, who had taken advantage of the *REPARTO* to earn considerable sums, Arriaga received no mercy and was executed in the central plaza of Tungasuca within a week. While occasionally *corregidores* had been executed in Peru in the past and more than 100 uprisings against colonial authority occurred between 1720 and 1790, this execution inaugurated the greatest threat to continued Spanish rule in Peru since the 16th century.

Túpac Amaru, as Condorcanqui was now known, as a descendant of TÚPAC AMARU I, followed up the event by charging the assembled crowd to support him in an effort to secure reforms that would alleviate their harsh social and economic conditions. Then, and subsequently, he articulated his aims. He denounced the *corregidor's* abuses and called for, among other things, the abolition of the *mita* that forced men from Tinta to go to POTOSÍ, *repartos* of merchandise, and the recently increased and more effectively collected *ALCABALA* (sales tax); he also called for the creation of an *AUDIENCIA* in Cuzco.

Túpac Amaru followed the standard practice of exonerating the monarch while condemning his advisers. He repeatedly stated his loyalty to CHARLES III while insisting on the need to end bad government. He sought the support of CREOLES, Amerindians, and mestizos (see *MESTIZAJE/MESTIZO*). His followers, including those to whom he distributed coins taken from Arriaga, were not as concerned



about sparing “good” creoles. Moreover, indigenous people and mestizos were not fully united behind him.

The rebel leader was able to amass arms and ammunition, and his forces defeated a Spanish militia outside Sangarará. His cause benefited from a growing acceptance of him as the new Sapa Inca, an acceptance furthered by his use of traditional Andean redistribution of plundered cloth and *coca* to his followers. Most frightening to the Spanish authorities was the siege of Cuzco, which began at the height of summer on December 28, 1780. However, the defection of numerous indigenous people and the determined pro-Spanish stance by *kuraka* Diego Mateo Pumacahua of Chinchero and his followers resulted in the rebels’ ending the siege on January 10, 1781, and returning to Tinta. Betrayed by an unfaithful friend, Túpac Amaru was captured in April 1781 and brutally executed in the central plaza of Cuzco in May. Diego Cristóbal Túpac Amaru assumed power, but the revolt was on the wane, and the new leader signed a treaty with the viceregal government on November 3 that allowed his forces to return home

without retribution. Remaining rebels agreed to peace on January 27, 1782, bringing what has been called the “Great Rebellion” to an end.

The rebellion was costly, both in terms of human lives and destruction to property, but brought limited change. VICEROY Agustín de Jáuregui decreed an end to the *REPARTIMIENTO* of merchandise in December 1780, although the venerable abuse would sometimes reappear illegally. In 1787, Charles III ordered an *audiencia* to be established in Cuzco.

Considering GARCILASO DE LA VEGA’S work as a stimulus for neo-Inca ideas, the Crown also ordered that his literature be banned from circulation. For the whites of Peru, the fear of social revolution that the rebellion unleashed ultimately served to hinder a movement toward independence for Peru.

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**Ulloa, Antonio de** (b. 1716–d. 1795) *Spanish traveler, scientist, author, and administrator* Born in SEVILLE, Ulloa was the son of Bernardo de Ulloa, an economist best known for coauthoring, with Gerónimo de Uztáriz, *Restablecimiento de las fábricas y comercio español* (1740), a work translated into French and published in 1753. Antonio went to CÁDIZ in 1729 with the intention of enrolling in the naval academy, but the lack of an opening enabled him to sail instead to CARTAGENA DE INDIAS, PORTOBELLO, HAVANA, and SANTO DOMINGO (1730–32) in the Americas. He entered the naval academy in late 1733. Following service off Naples, he returned to Spain and accepted an assignment also given to fellow *guardiamarina* JORGE JUAN Y SANTACILIA to accompany a French scientific expedition to measure an arc of the meridian at the equator.

Juan and Ulloa's assignment took them to PANAMA, the Kingdom of QUITO, and PERU. As a result of their labors, they coauthored the famous *Relación histórica del viaje a la América meridional* (*Voyage to South America*), published in Madrid in 1748. A French edition appeared in Amsterdam and Paris in 1752, and an English translation, in Dublin and London in 1758. They also wrote the equally renowned exposé of conditions in Peru, *Noticias secretas de América* (*Discourse and Political Reflections on the Kingdoms of Peru*). While the former was immediately published, the latter circulated in manuscript until published in London in 1826. Ulloa also published *Noticias americanas* (1772) and *Conversaciones de Ulloa con sus tres hijos en servicio de la marina* (1795).

Ulloa was named governor of HUANCAVELICA on November 4, 1758, and held the post until 1764. In 1765, he was sent to New Orleans as governor of Louisiana, an unfortunate posting as he was driven out of Louisiana in October 1768. In 1777, he commanded the last trea-

sure fleet to VERACRUZ (see FLEETS/FLEET SYSTEM). At his death, he was vice admiral and chief of operations of the Royal Navy.

Ulloa was elected a member of the Royal Society of London and academies in Stockholm and Berlin. In 1767, he married Francisca Ramírez de Laredo, CREOLE daughter of the count of San Xavier of LIMA.

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**Unanue, Hipólito** (b. 1755–d. 1833) *creole physician and author in Peru* The foremost physician of late colonial PERU, Hipólito Unanue secured the chair of anatomy at the UNIVERSITY OF SAN MARCOS in LIMA in 1789. Shortly afterward, he initiated a campaign to reform the study of medicine that bore little fruit for many years. His early fame, however, arose from his many contributions to the *MERCURIO PERUANO* between 1791 and 1794. Only eight of some 55 articles and notes focused on medicine, and about 300 of the 400 pages he wrote dealt with topics ranging from TOBACCO and COCA to indigenous customs and the geography of Peru.

Unanue's best-known publication was *Observations on the Climate of Lima* (1806; revised in 1815). Eighteenth-century writers took climate very seriously, and Unanue

was in their midst. Changes in weather, particularly drops in temperature, he believed, caused nearly all serious diseases. Often warm and humid, Lima, moreover, had given its inhabitants a delicate skin that responded to minute drops in temperature. Backing up his contentions with ample references to contemporary sources and collecting information on weather changes and frequency of disease for six years, he convinced many contemporaries that his argument was valid. Unfortunately, his theory on the climate of Lima and its relationship to disease served to delay rather than advance medical progress.

Although as a young physician he had abhorred systems and advocated reliance upon observation and experience, Unanue in 1806 was willing to accept some systems while rejecting, for example, chemistry. He was suspicious of surgery, rightly considering practitioners to be quacks.

While VICEROY JOSÉ FERNANDO DE ABASCAL Y SOUSA held office, Unanue's career advanced significantly with appointments as first professor of medicine at San Marcos and *protomédico* (see PROTOMEDICATO, ROYAL TRIBUNAL OF). The viceroy also asked him to plan and direct a school of medicine, although Unanue's plan called for far more faculty than could ever be funded. The Medical College of San Fernando opened in 1811, two years before Unanue retired from teaching.

Unanue contributed to *Verdadero peruano*, a government-sponsored periodical that appeared in 1812 to inform Peruvians about government and their rights. He served as minister of finance after JOSÉ DE SAN MARTÍN had led Lima to declare independence in 1821.

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**United Provinces of the Río de la Plata** On July 9, 1816, a congress that had been meeting in San Miguel in the province of Tucumán since late March declared the complete independence and sovereignty of the United Provinces of the Río de la Plata. Even before this declaration, the congress, consisting of 30 deputies from 13 participating provinces of the VICEROYALTY OF RÍO DE LA PLATA, had elected Juan Martín de Pueytrédón supreme director. Thus, it completed the de facto independence that had begun on May 25, 1810, in BUENOS AIRES. CHARCAS was represented but BANDA ORIENTAL, Entre Ríos, Corrientes, and Santa Fe were not. The form of government would be republican, an explicit rejection of MANUEL BELGRANO's proposal for a constitutional monarchy with the ruler a descendant of the Incas.

From the beginning, the United Provinces were disunited. The central issue was whether Buenos Aires would dominate the government or whether it should

be truly federal, with equality among provinces that largely ran their own affairs. When an army from BRAZIL invaded Banda Oriental in 1816 and took MONTEVIDEO in January 1817, the congress moved to Buenos Aires, a move that strengthened the unitarists' argument for a strong central government. In 1819, Congress approved a conservative constitution that was accepted by the provinces of Buenos Aires, Salta, Tucumán, Mendoza, Córdoba, Santiago del Estero, San Luis, La Rioja, and Catamarca, as well as the armies of JOSÉ DE SAN MARTÍN and Belgrano. Importantly, a number of provinces along the Uruguay River did not accept the Constitution of 1819. Indeed, Santa Fe declared independence, creating a republic. The national government used force in an effort to subdue Santa Fe. The action failed and, instead, provoked other provinces to rebel, form an army, and successfully take over the capital following a victory at Cepeda on February 1, 1820. The constitution no longer in effect, Buenos Aires created a provincial government. Federalism had triumphed, although its favorable location and control of the estuary of the RÍO DE LA PLATA gave Buenos Aires primary status among the provinces.

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**universities** At the height of its glory in the early 16th century, the University of Salamanca served as the model for colonial universities in Spanish America. BRAZIL had no colonial university; Brazilian youth seeking a higher education had to go to the University of Coimbra in Portugal.

Spanish colonists quickly clamored for the creation of universities. Formal EDUCATION would enable their sons to follow a career in the CATHOLIC CHURCH or in higher offices of the state. The city council of MEXICO CITY sought a university in the 1530s, and VICEROY Antonio de Mendoza strongly endorsed the idea. LIMA sought a university soon afterward. In 1551, the Crown authorized universities in both cities. The UNIVERSITY OF MEXICO opened its doors in 1553; the UNIVERSITY OF SAN MARCOS in Lima began to function fully in the 1570s. By the late 18th century, some 25 universities had been founded in the Spanish colonies. Major universities—institutions with faculties of arts (philosophy), theology, civil law, canon law, and medicine—numbered 10, while another 15 or so were minor ones that offered work in arts and often theology; JESUITS had eight and DOMINICANS had four minor universities.

Admission to colonial universities was limited to males who were able to understand, write, and, into the 18th century, speak Latin. In practical terms, this meant students were CREOLES and the occasional PENINSULAR, although Amerindians were admissible as well, and despite laws against it, persons of mixed racial backgrounds at

times secured admission. Because Latin was the sole academic requirement, it was not unusual for boys of 14 or 15 to matriculate and receive degrees four years later. Usually, another four years of study were necessary to obtain a professional degree in law or medicine.

The governing body of each university was the *claustró* (cloister), which was composed of all persons with higher academic degrees who had resided in the city for five years or more. The *claustró* elected the rector directly or elected counselors who, in turn, elected the rector. The rector had to hold a doctorate and typically served one or two years without compensation. He exercised jurisdiction over the academic and criminal conduct of the *claustró* and students in accord with the university's constitution. Appeals against the rector's decisions went to the *AUDIENCIA*.

Classes met for about an hour daily, and students enrolled in both a morning class, which began at 7:00 A.M., and an afternoon class, which started at 2:30 P.M. Typically, the professor read in Latin from the course's text for about 30 minutes and then responded to questions. Most undergraduates studied arts (philosophy), which included logic, metaphysics, and physics of Aristotle until the late 18th century. At the conclusion of a four-year course of study, students had to defend orally one or more theses or propositions. Fees for a baccalaureate were nominal. Graduates

who pursued a licentiate degree studied for another three or four years. The doctorate was an expensive formality but required no study beyond the licentiate.

It has been estimated that colonial universities conferred about 150,000 degrees. About 40,000 of them were from the University of Mexico, which enjoyed the sole right to confer degrees within the Audiencia of Mexico. Those who supported founding universities believed that graduates would obtain employment in church and state and, in fact, a substantial number did.

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**University of Mexico** Spaniards fully understood the importance of a university EDUCATION in transmitting culture, as well as in training future professionals. Wanting their children to enjoy educational



Mexico City was justly proud of its university that opened in 1553. (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

opportunities in the colonies commensurate with those in Spain, they sought and encouraged officials to support the creation of UNIVERSITIES in the Americas.

In NEW SPAIN, VICEROY ANTONIO de Mendoza, the MUNICIPAL COUNCIL, and the ecclesiastical authorities petitioned the CROWN to authorize the establishment of a university in MEXICO CITY. Finally, on September 21, 1551, CHARLES I and the queen mother approved the creation of universities in Mexico City and LIMA modeled on the University of Salamanca. The Royal and Pontifical University of Mexico formally opened on January 21, 1553, and classes began on June 5. Viceroy Luis de Velasco attended the initial class of each professor in the seven academic chairs: theology, scripture, canons, arts (logic, metaphysics, physics), laws, decretals, and rhetoric.

The University of Mexico was the only institution of higher learning in New Spain that enjoyed the title of university and conferred degrees until the creation of the University of Guadalajara in 1791. By the end of the colonial period, there were 19 colleges and seminaries in New Spain that prepared students to qualify for them. By independence, the University of Mexico had conferred 39,367 degrees; of this number 37,732 were baccalaureates, and the remainder were the higher degrees of licentiate and doctorate.

The University of Mexico met, at least partially, its original advocates' desire to make available education that would qualify graduates for civil and ecclesiastical positions. At least 61 AUDIENCIA ministers in the Americas studied or received degrees from the University of Mexico.

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**University of San Marcos** CHARLES I authorized the creation of royal UNIVERSITIES in LIMA and MEXICO CITY in 1551. While the one in Mexico City opened in 1553, EDUCATION in Lima remained in a Dominican convent. A papal bull recognized Lima's university in 1571, allowing it to become the Royal and Pontifical University of San Marcos. In the same year, PHILIP II ordered a cloister of secular doctors to be created and suspended the rectorship held by DOMINICANS until that time. In 1576, the following chairs were established: two in Latin grammar, one in native languages, three in philosophy, three in theology, three in law, two in canon law, and two in medicine, although only one was filled. In 1578, San Marcos had reached the point that the UNIVERSITY OF MEXICO had achieved in 1553; it was at last a functioning university.

As the University of Salamanca had been their model, San Marcos and the University of Mexico served as models in the New World. With the five faculties of philosophy, theology, law, canon law, and medicine, both

were "major" universities, as distinct from minor universities with fewer faculties.

Benefiting from the presence of the very successful Jesuit COLEGIO of San Pablo, the Colegio of San Martín, the Conciliar Seminary of Santo Toribio, and the residential Royal Colegio of San Felipe, a *colegio mayor* for post-baccalaureate students, the University of San Marcos was the primary source of university degrees in the VICEROYALTY OF PERU (see COLEGIO/COLEGIO MAYOR). San Martín, created in 1582, was placed under the direction of the JESUITS and offered studies in philosophy and theology. The Seminary of Santo Toribio was established by the archbishop of Lima and future saint TORIBIO ALFONSO DE MOGROVEJO and opened in 1591; the Royal College of San Felipe opened in 1592. Following the expulsion of the Jesuits, VICEROY MANUEL DE AMAT Y JUNYENT combined San Martín and San Felipe into the Convictorio of San Carlos.

Numerous alumni of the University of San Marcos had successful careers in church and state. At least 121 AUDIENCIA ministers named from 1687 to 1821 had studied at or in another way been affiliated with San Marcos.

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**Upper Peru** See CHARCAS.

**Uruguay** See BANDA ORIENTAL.

**Utrecht, Treaty of (1713)** A series of treaties signed at Utrecht in spring 1713 ended the WAR OF THE SPANISH SUCCESSION. The major provisions were that PHILIP V was confirmed on the throne of Spain but renounced for himself and his heirs any claim to the throne of France; Spain gave up to Holy Roman Emperor Charles VI the Spanish Netherlands, the Kingdom of Naples, Sardinia, and much of the Duchy of Milan; to Savoy went Sicily and the remainder of the Duchy of Milan; and Great Britain received Gibraltar and Minorca, a 30-year monopoly to supply 4,800 African slaves annually to the Spanish Empire (the *ASIENTO*), the right to send an annual ship with the fleet to NEW SPAIN and the galleons to PORTOBELLO, and authorization to have factors at a number of ports, including HAVANA, VERACRUZ, CARTAGENA DE INDIAS, PANAMA, La Guaira, and BUENOS AIRES.

Less well known but nonetheless a very important part of the treaty signed with Britain was reaffirmation

of commercial privileges Spain had conceded to England, the Hanseatic League, the Dutch, and the French in treaties between 1648 and 1667. These included exemption from search and seizure and the use of English resident consuls to adjudicate cases involving English merchants. In addition, English warehouses were normally exempt from searches by Spanish officials. This was particularly important to foreign merchants and their representatives. The commercial privileges meant that the British enjoyed legal access to Spanish America and, through it, an unrivaled opportunity for contraband TRADE.

Importantly, the commercial treaty with Britain called for the reestablishment of the fleet system, since it was within the framework of this historic trading system

that the English were to send an annual ship (see FLEETS/FLEET SYSTEM). Two subsequent treaties with Great Britain, in 1715 and 1716, clarified ambiguities, stated that the taxes levied would be at the rates established in 1667, and reaffirmed that the fleets to Portobelo and Veracruz would sail each year. The promised annual sailings never occurred.

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**vecino** *Vecindad*, or the condition of citizenship, was held by *vecinos*, adult European citizens of Spanish and Spanish American municipalities, property owners, and the heads of citizen households; the term did not apply to clerics, Spaniards resident in Amerindian villages, or HACIENDA managers. Thus, *vecinos* made up the base that formed municipalities and were eligible for its elective offices. Everywhere, they quickly were but a small minority of the municipality's residents.

Residence and intent to remain indefinitely were central to *vecindad*. Although individuals might seek *vecino* status from the Spanish municipality, often to gain access to land, non-Spaniards were excluded. Access to land for new *vecinos*, of course, diminished over time, and in CARACAS, for example, the relationship disappeared in the second half of the 17th century. At the same time, individuals who acted like *vecinos* were considered to be such. In LIMA from the 1560s, viceregal grants of *ENCOMIENDA* within Lima's jurisdiction required the recipient to reside in the capital; this was an implicit statement of *vecino* status. As was the case in GUATEMALA, the result was two categories of *vecino*: *vecino encomendero*, or *vecino feudatario*, and simply *vecino*, although other terms might be used. In Trujillo, PERU, *encomenderos* were *vecino feudatarios*; non-*encomenderos* who were citizens with lots and houses were *vecino ciudadanos*; the two categories were separate socioeconomic groups, and a royal decree prior to 1567 ordered that each one should have half of the members on the city council.

When municipalities were established, the Spaniards present had the opportunity to become *vecinos*; each founding *vecino* was entitled to a city lot and some land. Subsequent arrivals could and did petition for citizenship (*vecindad*), although this diminished from the early 17th

century. In some places, the founding *vecinos* might have been restricted to *encomenderos*. In 1554, the initial distinction between merchants and *vecinos* was ended with the royal declaration that any Spaniard who had a fixed residence (*casa poblada*) was a *vecino*.

*Vecino* could refer to non-Spanish residents of neighborhoods, towns, and CITIES, as well as citizen of a Spanish urban center. In 16th-century Santiago de Guatemala, households of the richest families might have 70 or more persons including the *vecino*, his immediate family, relatives, hangers-on (*paniaguados*), servants, and slaves. Demographers of colonial Spanish America often use a multiplier of six with the number of *vecinos* to get an approximate size of the population.

Some 200 Spanish municipalities existed in Spanish America by 1570, each with a complement of *vecinos* that normally but not invariably excluded non-Spaniards; non-Spanish Europeans faced restrictions in becoming *vecinos*. Thus, citizenship gave greater opportunities to Spaniards than to non-Spaniards. It also helped to link the notions of Spaniard and citizen. The creation of the "republics of Indians" tended to emphasize residence and fulfilling a citizen's role rather than descent. As with the Spanish municipalities, increasingly, individuals could choose their place of residence and, through appropriate behavior, become a *vecino*.

Over time, citizenship changed from being a legal category to a condition derived from social reputation and then to a status denied to non-Spaniards. Once land grants were no longer available, citizens in Spanish American municipalities had no real benefits over non-citizens; frequently, the latter were eligible for municipal offices and enjoyed access to communal lands. Place of ongoing residence became identified with citizenship;

there was also a link between nativeness or birth in a municipality and citizenship.

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**Venegas, Francisco Javier de** (b. 1760–d. 1818) *Spanish military officer and viceroy of New Spain* A career MILITARY officer born in Zafra, Badajoz, Spain, who entered the Order of Calatrava in 1792, Francisco Javier de Venegas was a brigadier in 1808. A commanding officer of forces that participated in the great Spanish victory at Bailén in July 1808, he also led an army that suffered defeats at Uclés in January and Almonacid in August 1809. Named VICEROY OF NEW GRANADA by title of May 20, 1810, he never served in the position, for he was appointed to the same post for NEW SPAIN by title of July 10, 1810.

Venegas reached VERACRUZ on August 25, 1810, and MEXICO CITY on September 14, two days before MIGUEL HIDALGO Y COSTILLA'S GRITO DE DOLORES. Sending Brigadier FÉLIX DE CALLEJA DEL REY and other officers against Hidalgo's ill-disciplined and untrained force, the royalist troops won important engagements at Las Cruces on October 30 and Aculco on November 3, 1810. Mexico City was spared an attack, but more than a decade of warfare lay ahead.

Venegas's tenure as viceroy was marked by WAR with insurgents, financial woes, and political conflict with AUTONOMISTS in Mexico City. The CORTES OF CÁDIZ undercut his authority when it reduced his title from viceroy of New Spain to "superior political chief" of the province of Mexico.

The defeat, capture, and execution of Hidalgo were a victory for Venegas and the royalists but did not end the insurgency. Indeed, JOSÉ MARÍA MORELOS Y PAVÓN took it to new heights, while pockets of rebellion continued or reappeared outside of the territory he controlled.

Following the exposure of two plots, in August 1811, Venegas created a Committee of Police and Public Tranquillity that undertook a door-to-door registration of the populace in each of 16 districts. He also imposed a systematic passport program to track persons entering and leaving the capital. Popular antipathy to the actions and the impossibility of keeping track of Amerindians bringing provisions and fuel to Mexico City, however, resulted in lax and ultimately no enforcement. When the CONSTITUTION OF 1812 reached him, Venegas delayed publishing it for more than three weeks. Finally, and against his preference, he promulgated it on September 30, 1812.



Viceroy of New Spain Francisco Javier de Venegas led the royalist response to the Hidalgo revolt in 1810. (Private collection)

The constitutional provision on freedom of the press enabled campaigning before the parish elections of November 29, 1812; the victory of only CREOLE autonomists in Mexico City, however, confirmed his worst fears. Accordingly, Venegas suspended the election and persecuted persons he thought favored the insurgents; these included the creole AUDIENCIA minister Jacobo de Villaurrutia and writer José Joaquín Fernández de Lizardi. While these actions were a setback for the autonomists, the replacement of Venegas by General Calleja on March 4, 1813, resulted in new elections and another victory by the autonomists.

Venegas returned to Spain where in 1816 FERDINAND VII named him marqués de la Reunión de Nueva España. He died as captain general of Galicia.

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**Venezuela** Venezuela consists of four major regions: the Coast, the Coastal Range, the Llanos, and the Segovia Highlands. The Coast includes the ports of Puerto Cabello and La Guaira and produced CACAO and coffee on the eve of independence. The Coastal Range has a more pleasant climate, river valleys, and the city



of CARACAS, and boasted the best agricultural land in the colony (see AGRICULTURE). The Llanos of the interior were the home of Venezuela's cowboys (*LLANEROS*) and a livestock industry that served internal markets. The Segovia Highlands include Coro and Barquisimeto; cacao and SUGAR were grown there, and the region was an outlet for the Llanos's livestock.

Venezuela attracted few Spaniards in the 16th century, although the city of Caracas was founded in 1567. Initially, the Spaniards turned to enslaving NATIVE AMERICANS as a source of income. The conquered indigenous population was divided into *ENCOMIENDAS* that numbered 40 in 1578 but with only about 4,000 tributaries, a third of the original number due to population decline. By the 1580s, the exportation of locally produced WHEAT and flour to CARTAGENA DE INDIAS, where it helped to provision the fleet, produced more profit than did slaving for the planters who lived in Caracas (see FLEETS/FLEET SYSTEM). Success attracted English BUCCANEERS' attention, and in 1595, the town was sacked and burned. The citizens quickly rebuilt and resumed wheat flour production. Flour was even used as a medium of exchange.

A series of years with poor rainfall and bad harvests brought prosperity based on wheat to an end, although the city council of Caracas continued to favor wheat producers and, with the support of the governor, secured a moratorium on planting TOBACCO. By 1620, however, the heyday of wheat production and TRADE was clearly over; cacao production based on native cacao trees, less than 1 percent of exports in 1607, steadily emerged as Venezuela's leading export, with consumers in NEW SPAIN being the primary market. Amerindians in *encomiendas* initially provided labor for the first cacao boom from the late 1620s to mid-century, but growers soon replaced them with African slaves bought from Portuguese traders; black SLAVERY, therefore, emerged as Venezuela's leading form of labor and remained so until at least 1750.

A blight that began in the coastal HACIENDAS in the mid-1630s destroyed more than half of the cacao trees within a decade. An earthquake that destroyed Caracas in 1641 was the second catastrophe. The third was the spectacular collapse of cacao prices, from 20 to 30 pesos a *fanega* in 1647 to five pesos in 1654. This was probably the result of rapidly growing competition from GUAYAQUIL. The devastated market was further hindered by a shortage of circulating SILVER coin and the need for Mexican CREDIT. Finally, it took five years for newly planted cacao trees to become productive.

The cacao trade to New Spain provided the basis for recovery starting in the mid-1670s, and in 1684 Caracas was again thriving, with its planters owning well over 400,000 cacao trees. By that time, many groves had resulted from replanting, and an increasing number were located south and east of Caracas on the banks of the Tuy River. Slave labor had become ever more important and was especially valuable in clearing and planting new fields

during much of the year. By 1720, there were more than 2 million trees in the Caracas Province; the number was more than 5 million in 1744. Over half of the trees were in the region of the Tuy River.

By the early 18th century, society in the Caracas region was hierarchical and heavily based on race, extending from wealthy Spaniards at the top to black slaves at the bottom. Between were immigrants from the Canary Islands, other Spaniards of slight means, and *CASTAS*, including *PARDOS*, an umbrella term that included *MULATOS* and other persons of mixed African ancestry. Amerindians were present but had no certain place in the *sistema de castas* of Venezuela at this point. It was only in 1691 that the crown ended *encomienda* and indigenous labor.

After long neglect, the Spanish Crown in the 1720s perceived Venezuela as a potential source of income and its cacao production as a source of supply for the growing Spanish and European markets. To achieve these goals, in 1728 it created the REAL COMPAÑÍA GUIPÚZCOANA DE CARACAS, a commercial company with monopolistic control over the cacao trade to Spain and the responsibility of ending contraband trade in cacao. Its charter did not alter the longstanding trade with New Spain. Investors anticipated profits from an expansion of cacao production and a reduction in contraband.

Working in concert with BASQUE governors of the province, the company's factors interfered with the Mexico trade and their anti-SMUGGLING efforts affected traditional, albeit illegal, trading channels. The result was a protest in 1749 led by Canary Islander cacao farmers, who marched to Caracas and frightened the governor into fleeing to the nearby fortress at the port of La Guaira. This action converted protest into rebellion. An immediate MILITARY response by troops sent from Spain and HISPANIOLA resulted in the arrest and execution of the leaders, as well as administrative changes that initiated the better-known efforts to strengthen royal authority, income, and defense that the Crown imposed throughout the empire after the loss of HAVANA. Although the disruption of the slave trade in 1739 and the company's heavy-handed policies ended the cacao boom that had begun in the 1670s, the company remained in Venezuela until the Crown terminated its charter in 1784. Twenty years later, the province of Caracas was producing nearly 80 percent of Venezuela's cacao, still its principal export, although responsible for less than half of Venezuela's export earnings. Caracas was also the site for the production of INDIGO and coffee, both growing exports.

In 1776–77, the Crown brought together the six provinces of Maracaibo, Cumaná, Margarita, Trinidad, Guayana, and Caracas into an administrative unit independent from the VICEROYALTY OF NEW GRANADA and the Audiencias of Santo Domingo and Bogotá. Previously called TIERRA FIRME, the new unit was known as the Captaincy General and Intendancy of Venezuela (see CAPTAINCIES GENERAL; INTENDANT). With its port, La Guaira, handling almost all trade with Spain, an *AUDIENCIA* created

in 1786, a merchant guild (*CONSULADO*) established in 1793, a university from 1725, an archbishop from 1803, and a population exceeding 31,000 at the beginning of the 19th century, Caracas was clearly the most important city in Venezuela.

On the eve of the war of independence, Venezuela had a population of 800,000, of which the province of Caracas had about 455,000. Of this number, 46 percent were *castas*; 26 percent were whites; 15 percent were black slaves; and 13 percent were NATIVE AMERICANS. At the top of society was the long-established elite of Caracas that dated back generations. PENINSULARS were no more than 6 or 8 percent of the white population and included perhaps more illegal immigrants from the Canaries than legal immigrants from Spain, the latter averaging maybe 100 annually. Peninsulars were prominent in the upper administrative positions and wholesale trade. Probably, most Spaniards, regardless of place of birth, were poor whites engaged in agricultural production.

Making up almost 60 percent of the free population, *castas* and *pardos* included artisans, day laborers, and militiamen; probably most were engaged in agricultural labor, although few were in debt to their employers. Many had small plots of land; most lived at or slightly above the subsistence level. A majority of black slaves worked on PLANTATIONS and haciendas, but some 8,000 were domestics in Caracas in 1785.

Because of the continuing existence of the Real Compañía Guipúzcoana, Venezuela was not included in the 1778 expansion of *COMERCIO LIBRE*. Spain's involvement in war against Britain the following year, however, resulted in neutral trade, which enabled Venezuelan producers of agricultural staples to get them to market in a timely manner, a consideration far more important in an agricultural colony than one in which silver, which did not deteriorate or spoil, was the primary export. With the end of war with Britain in 1783 and the demise of the Real Compañía Guipúzcoana, Venezuela enjoyed increased production and prosperity until 1796, when Spain and Great Britain again went to war.

Exports plummeted in 1797, and Britain's conquest of Trinidad and then Curaçao in 1800 raised the possibility of an invasion of Cumaná. Neutral trade was a solution for the planters but not one attractive to merchants tied to CÁDIZ. Nonetheless, by 1799, both groups recognized that free trade with foreign colonies in the Antilles was the only way to keep the ECONOMY running, albeit with exports about half of what they had been in 1796. The Spanish Crown's decision to end free trade in 1799, reaffirmed in 1800, caused outrage in Caracas.

Despite peace in 1802, Caracas's trade remained at a low level, in large part because droughts and insects reduced the cacao harvest by more than 50 percent. A renewal of war between Spain and Britain in 1804 again produced depression in Caracas. Neutral trade did not solve the problem, for Britain had taken Curaçao again in 1806, and U.S. merchants were soon under an embargo

prohibiting trade with belligerents. The economic travail had seriously reduced the revenues of the captaincy general as well, and Caracas had a substantial internal debt. Despite the problems, planters and merchants provided resources to defeat FRANCISCO DE MIRANDA and his expeditionaries in 1806.

The French invaded Spain in 1807, and CHARLES IV and FERDINAND VII abdicated in May 1808. The political crisis of 1808 caused by the abdications produced a kaleidoscope of events and reactions in Venezuela that resulted in the formation of a ruling junta on April 19, 1810, that refused to acknowledge the questionable legitimacy of the COUNCIL OF REGENCY in Spain. As events spiraled out of control, the Regency's representative Antonio de Cortabarría reached PUERTO RICO where, on January 21, 1811, he declared Venezuela under blockade. The Venezuelans established the First Republic on July 5, 1811, initiating civil war. Defeated in July 1812, the cause of independence smoldered but did not die.

SIMÓN BOLÍVAR returned to Caracas in triumph on August 6, 1813, and established the Second Republic. On June 15, 1814, royalists under JOSÉ TOMÁS BOVES drove him from Caracas. PABLO MORILLO and an army of reconquest arrived in April 1815 and occupied Caracas and some other key locations, but renewed civil war ended when the patriots finally emerged victorious in the BATTLE OF CARABOBO on June 24, 1821. Venezuela was an autonomous but not fully independent state, for it was linked until 1830 to New Granada and the former *audiencia* district of QUITO in Bolívar's Gran Colombia.

See also GRAN COLOMBIA (Vol. III); VENEZUELA (Vols. I, III, IV).

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**Veracruz (Villa Rica de la Vera Cruz)** In 1519, the expedition led by Hernando Cortés founded the first Spanish municipality at Ulúa, located across the bay from present-day Veracruz. Moved to a coastal location about 35 miles (56 km) north a month later, Villa Rica de la Vera Cruz was situated in lands of the Cempoalans in what became the VICEROYALTY OF NEW SPAIN. Moved south about halfway between the second and original sites in 1525, it was relocated to its fourth and final site opposite San Juan de Ulúa in 1599–1600. In each location, it was the entry port for New Spain. Veracruz was also the name of the province (*alcaldía mayor*), of which the town of Veracruz was the capital.



A picturesque view of the port of Veracruz (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

The importance of the town of Veracruz rested on commerce. Throughout the colonial era, it was the terminus for the FLEETS and single ships from Spain, as well as ships from the CARIBBEAN region. Ideally, the New Spain fleet (*flota*) sailed from CÁDIZ in May or June accompanied by single ships that would carry and pick up goods in the West Indies. The fleet landed at Veracruz, but the inhospitable climate and prevalence of disease resulted in goods being conveyed by MULES to MEXICO CITY. There, wholesale merchants (*comerciantes*) purchased the merchandise, sold some in Mexico City, and distributed the rest through commercial networks extending throughout the viceroyalty.

Veracruz was the terminus for MERCURY from Spain, whether brought on the fleet or by pairs of ships (*azogues*), for the MINING camps. The fleet also brought military supplies for the fort at San Juan de Ulúa, the viceregal guard, the fort at ACAPULCO, and PRESIDIOS in the frontier areas of New Spain. Dispatch ships (*avisos*) arrived in Veracruz with official correspondence and information about the anticipated arrival of the fleet. While TRADE with Spain was paramount, Veracruz was also the port of entry for imports from other colonies, notably CACAO from VENEZUELA.

As the viceroyalty's major port, a variety of exports flowed through Veracruz to Spain. SILVER was the most valuable, but other exports included hides, COCHINEAL,

INDIGO, silk, and other East Asian products that had been carried by mule train from Acapulco via Mexico City. Officials, military personnel, clerics, and private parties passed through Veracruz on their way to Spain. New Spain also sent exports and sometimes subsidies (*situados*) to Caribbean and Gulf ports and Florida. Ideally, the fleet of New Spain met in HAVANA the galleons that had been to CARTAGENA DE INDIAS and NOMBRE DE DIOS or, later, PORTOBELLO to return to Spain as a single fleet.

Fleet sailings became irregular by the 1620s and increasingly so as the century progressed. In 1708, during the WAR OF THE SPANISH SUCCESSION, foreign (French) ships sailed in the fleet to New Spain for the first time. France would never be able to do this again, but a treaty signed at UTRECHT in 1713 awarded Great Britain a monopoly on the slave trade (*ASIENTO*) to the Spanish colonies, as well as the right to send one annual ship carrying 500 tons of cargo with the New Spain fleet and a second ship of the same capacity with the galleons. By 1715, however, Mexican merchants had become so accustomed to buying East Asian goods and illicit merchandise from foreign islands in the Caribbean that their interest in the restoration of regular fleets was minimal. Consequently, when the fleet system was restored, but with the important change that a PORTOBELLO-style fair was to be held at

Jalapa, an inland location more salubrious than Veracruz, Mexican merchants refused to cooperate.

The arrival of the annual British ship, moreover, meant competition for the business of New Spain merchants; with better merchandise and prices, the British flooded the market and Spanish merchants were forced to wait for their rivals' departure to move their goods to Mexico City, a market temporarily overflowing with competitive merchandise. With the exception of the fair of 1729, subsequent efforts to make the fair work largely failed. When the Crown authorized limited *COMERCIO LIBRE* starting in 1765, goods that previously had gone directly to Veracruz increasingly went to ports authorized for "free trade" and then reached New Spain illicitly. Only in 1789 did the fleet system that funneled merchandise through Veracruz come to an end.

Men who went through "seasoning" and survived the threat of disease considered Veracruz a place of opportunity. Successful merchants petitioned for their own *CONSULADO*; the Crown authorized one in 1795. Veracruz survived as the major port of Mexico after independence in 1821.

As New Spain's naval gateway and major port, Veracruz had great strategic importance. More than once, corsairs had assailed it; in 1683, they pillaged it. The British capture of Havana in 1762 underscored the potential of a foreign invasion through Veracruz. The basic approaches to defense were two: either make Veracruz the focal point or garrison troops in the healthier interior towns of Jalapa, Orizaba, Córdoba, and Perote.

Yellow fever was but one danger for the unacclimatized. Fouled water was a breeding ground for diseases with terrifying mortality rates. Of 100 vagabonds sent from PUEBLA to Veracruz to serve in its garrison in 1801, 85 died within a month. WAR against Britain in 1796 heightened the anxiety of royal authorities in Mexico, but a yellow fever epidemic among unclimatized troops increased desertions and underscored the futility of sending men from the highlands to Veracruz. By 1798, the city of Veracruz's population had declined from some 16,000 in 1796 to 6,000 or 8,000. Another effort in 1799 to staff the garrison yielded a similar result; 1,220 deaths and 1,558 desertions resulted from the "horrible cemetery" of Veracruz between then and 1803.

A miserable climate, disease, and distance from the capital of New Spain made the town of Veracruz a place that most Spaniards tried to leave as quickly as possible. In New Spain, the route from Veracruz to Mexico City was well established; trips averaged about a month, but delays during the rainy season were common. The cost of TRANSPORTATION added substantially to the price of goods, for example, 70 percent to the cost of WINE transported to Mexico City.

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**Vértiz y Salcedo, Juan José de** (b. 1719–d. 1798/1799) *creole viceroy of Río de la Plata* Born in Mérida, Yucatán, as a son of the provincial governor, Juan José de Vértiz y Salcedo entered the Order of Santiago in 1760. A career MILITARY officer, he was named governor of BUENOS AIRES in 1771 to replace PEDRO DE CEVALLOS. After Cevallos served as founding VICEROY of the VICEROYALTY OF RÍO DE LA PLATA in 1777–78, Vértiz replaced him until 1784.

Vértiz was viceroy during a time of significant change in Buenos Aires. The INTENDANT system authorized for the viceroyalty in 1782 initially included a superintendent with extensive financial powers that viceroys had traditionally held in other parts of the empire. In the following year, an AUDIENCIA was authorized in the capital, although it was not fully functioning until 1785. The Crown created a host of supporting treasury officials and expanded existing offices. From 35 officials in Buenos Aires in 1778, the number had grown to 126 by 1785.

Vértiz appreciated the need for revenue and in 1779 allowed Portuguese ships with slaves and TOBACCO to enter the harbor at Buenos Aires (see SLAVERY). Despite the general prohibition against foreign traders, the TRADE enabled customs duties to be collected and thus provided needed revenue to the viceregal government.

Vértiz also had to deal with the Túpac Katari revolt in CHARCAS. A rebellion of Aymara speakers, Katari's forces besieged La Paz at length in 1781 before the arrival of royalist forces, including some sent from Buenos Aires, brought an end to the rebellion.

The viceroy made welcome improvements to the city of Buenos Aires, which included cleaning, paving, and lighting major streets. In addition, he established the Colegio of San Carlos, an orphanage, and a hospital (see COLEGIO/COLEGIO MAYOR). Cultural improvements included the creation of the city's first THEATER and the importation of PRINTING PRESSES. Finally, he promoted the founding of the towns of Gualegay, Concepción del Uruguay, and Gualeguaychu between the Paraná and Uruguay Rivers and San Juan Bautista, San José, and other towns in the BANDA ORIENTAL.

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**viceroy/viceroyalty** Faced with the enormous distances, the lengthy time required for TRANSPORTATION, the great size of the INDIES, and the failure of earlier administrative institutions, both the Spanish and Portuguese Crowns employed viceroys as the chief executives of their respective domains. The position had antecedents in Spain, where Ferdinand of Aragon had placed viceroys in his kingdoms because of his absence in Castile. The position literally was that of “vice king,” or the king’s alter ego as his substitute. Consequently, viceroys, especially under the HABSBURGS of Spain, were received regally and lived in splendor, complete with a palace and honor guard. An appointment as viceroy was a great honor; it also afforded substantial opportunity for personal gain.

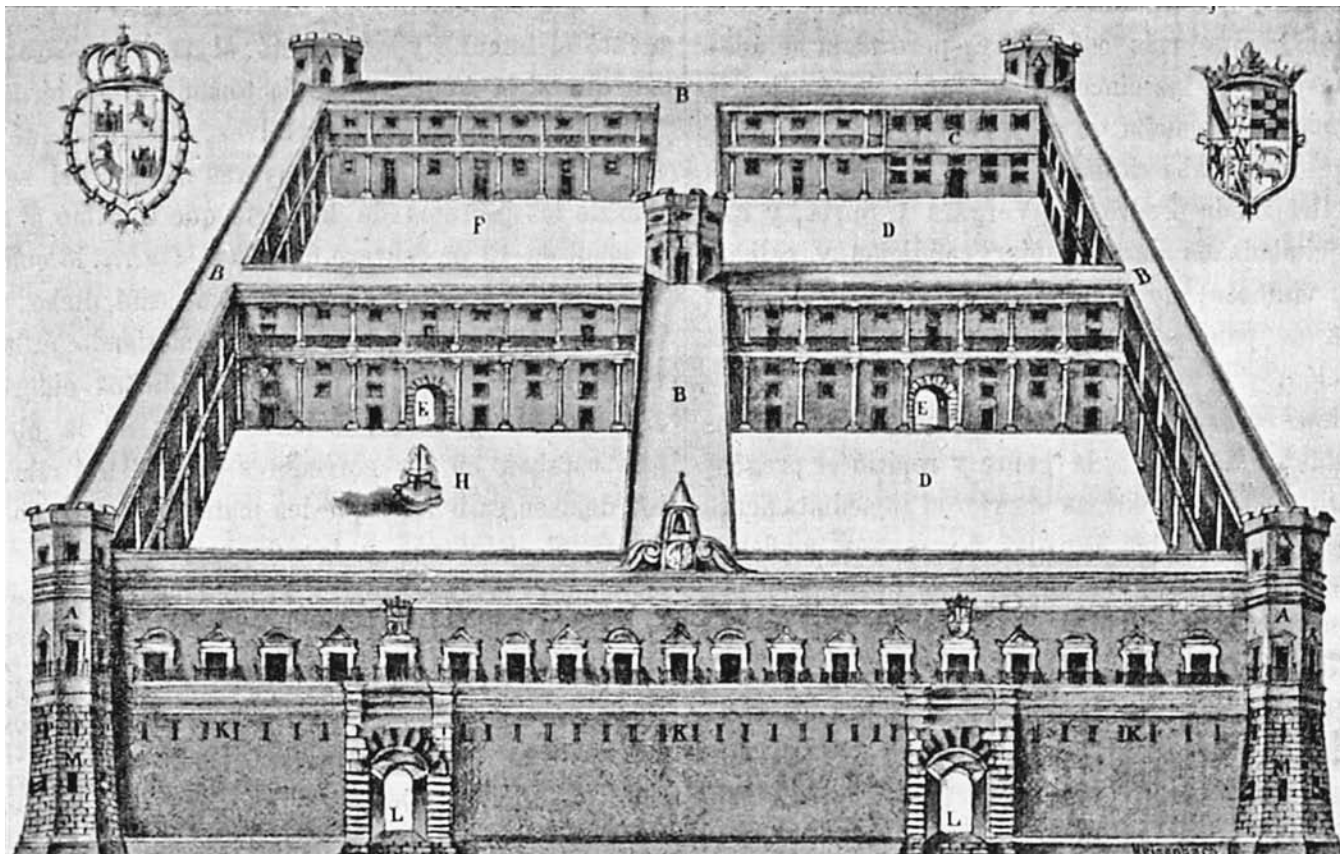
The first viceroy in the Indies was Antonio de Mendoza, who held the position for NEW SPAIN from 1535 to 1550 and established the office on a sound footing. The initial viceroy for PERU was Blasco Núñez Vela who arrived in 1544 determined to put the New Laws of 1542 into effect; he was killed for his efforts, the only serving viceroy to suffer that fate. Not until the fifth viceroy, FRANCISCO DE TOLEDO Y FIGUEROA, was the position secured in Peru. Although the Crown established the VICEROYALTY OF NEW GRANADA in the late 1710s, it required the appointment of Sebastián de Eslava to establish it successfully in a second effort in 1739. The fourth and final viceroyalty in Spanish America was that

of RÍO DE LA PLATA, created in 1777; the first viceroy was PEDRO DE CEVALLOS.

The Portuguese Crown retitled the governor general of BAHIA viceroy for BRAZIL in 1720 and in 1763 moved the office to RIO DE JANEIRO. Viceroys in Brazil, however, never had the authority of their counterparts in Spanish America.

Viceroys in the Spanish colonies had extensive responsibilities that included those under the titles of captain general, president of the *AUDIENCIA* in the capital, and governor. Thus, the early viceroys of New Spain and Peru promoted expeditions of conquest and settlement, distributed *ENCOMIENDAS* and land, supervised the founding of new towns, oversaw the royal patronage (*PATRONATO REAL*), ensured defense and domestic tranquility, and, most important to the Crown, sent revenues to Spain.

While viceroys under the Habsburgs were to appear regal, the Crown placed numerous restrictions on their authority. These included instructions and other directives from the COUNCIL OF THE INDIES, recommendations by their predecessors in office, and prohibitions on specified economic activities and personal ties. Other institutions and individuals, including the *audiencia*, the archbishop, the MUNICIPAL COUNCIL of the capital, and the ranking treasury officials, also served as checks on the viceroys. At any time, the Crown could initiate a *VISITA*,



View of the viceregal palace in Mexico City (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

sending a *visitador*, or inspector, with extensive authority. And always, there was the *RESIDENCIA*, a formal judicial review of the viceroy's tenure in office.

Viceroyalty was a term appointees and could not plan on spending the remainder of their career in office. In contrast, until the late 18th century, *audiencia* ministers in MEXICO CITY and LIMA typically remained at their posts until death or retirement. While they faced restrictions on their local ties, in practice long-serving ministers tended to have a variety of local personal and economic relationships and over time were apt to view issues differently than a viceroy fresh from Spain would. As a result, it behooved viceroys to pay attention to the often more knowledgeable *audiencia* ministers before issuing or enforcing controversial legislation.

An examination of the 44 viceroys of New Spain from 1535 to 1808 reveals some of their characteristics. All but three were PENINSULARS; the CREOLES were a son of an *audiencia* president of QUITO, a son of a general who had held administrative positions in the colonies, and the son of an earlier peninsular viceroy of New Spain. On average, the viceroys served for between five and six years. The 24 Habsburg viceroys were of unquestioned nobility. All but four had titles when appointed; three of the four were scions of major families in Spain; the fourth received a title during an unprecedented second term as viceroy from 1607 to 1611. While many Habsburg viceroys had some MILITARY experience, of the 20 Bourbon viceroys, at least 18 and possibly all 20 had such experience (see BOURBON DYNASTY). In 11 cases, viceroys held titles of nobility prior to their appointments; a twelfth received a title subsequently. A majority of the viceroys named by both the Habsburg and Bourbon monarchs were knights in MILITARY ORDERS. Aside from their generally higher noble background, the Habsburg appointees were younger; six were in their 30s and five in their 40s when named. Of the Bourbon appointees, only one was under 50 when appointed; the unique case was Bernardo de Gálvez, nephew of Minister of the Indies JOSÉ DE GÁLVEZ Y GALLARDO. While all of the Habsburg viceroys were either married or widowers, at least three of the Bourbon viceroys were bachelors.

Starting with Mendoza and ending in 1688 with the count of la Monclova, nine viceroys of New Spain advanced to Peru; the reverse was never true. After 1688, there is no pattern of advancement for the viceroys of New Spain; frequently they died in office. Seven Bourbon viceroys, but only two Habsburg appointees, died while serving.

An appointment as viceroy, especially until the late 1670s, gave the recipient enormous patronage opportunities. Viceroys arrived in New Spain and Peru with substantial entourages that included FAMILY members, servants, and a variety of hangers-on (*paniaguados*). It was routine for the hangers-on to receive appointments, including as provincial administrators, and to marry local women of good family. Maids-in-waiting to the vicereine also found marital

opportunities. Their power gave the viceroys an opportunity for self-enrichment by illegally selling appointments and other favors; the Crown's decision in 1678 to limit viceroys to naming only 12 provincial administrators so that the royal treasury would benefit from selling appointments was a notable reduction of viceregal patronage, although viceroys could still make interim appointments.

Viceroys in Spanish America continued to serve through the wars of independence (see MEXICO, INDEPENDENCE OF; SPANISH SOUTH AMERICA, INDEPENDENCE OF). Along with *audiencia* ministers, they were a favored target for expulsion in the early days of AUTONOMISTS' efforts to achieve self-rule. Extreme royalists proved willing to overthrow viceroys as well, as the case of JOSÉ DE ITURRIGARAY Y ARÓSTEGUI in New Spain demonstrated.

See also VICEROY/VICEROYALTY (Vol. I).

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**Vila Rica do Ouro Prêto** The discovery of GOLD in MINAS GERAIS, BRAZIL, in the mid-1690s led to an unprecedented gold rush. A MULE train leaving RIO DE JANEIRO needed about 15 days to reach Vila Rica de Ouro Prêto (rich town of black gold). Established as a MINING camp in 1698 and one of the most populous mining settlements in the captaincy in 1711, Vila Rica was elevated on July 8 of that year to the status of town, complete with a MUNICIPAL COUNCIL, and became the capital of its own district (*comarca*) in 1714. In 1720, it became the capital of the captaincy of Minas Gerais, confirming its status as an administrative as well as a commercial center. Its early riches brought appellations that included "fabulous city" and "precious pearl of all Brazil."

The colonial town reached its highest population in the 1740s, with about 15,000 inhabitants. Beginning in the early 1750s, mining in the captaincy started to decline, and in the 1760s, the economic downturn became substantial and continued until late in the century. The population had dropped to about 7,000 by the 1790s. The census of 1804 reveals that more than 83 percent of adults of marriageable age (males at 14, females at 12) were single, less than a third of the heads of extended families living together were married, and women headed 45 percent of families. Marriage had become a form of social

differentiation in Vila Rica, with the local elite marrying to the extent that suitable brides were available.

While the inhabitants of Vila Rica—whites, blacks, and mulattoes—were at least technically Christians, the diocesan clergy provided religious instruction and services (see *MULATO*). Unlike in the remainder of colonial Brazil, the religious orders were excluded from the mining zone. Lay brotherhoods (*irmandades*) customarily built their own churches in Minas Gerais, and those in Vila Rica followed this practice.

Twice in its early years, Vila Rica experienced political violence. The WAR OF THE EMBOABAS in 1708–09 brought the defeat of the *paulistas*, and in 1720, the European immigrants who had been successful in the first conflict found themselves defeated in an antitax riot.

Mining wealth available in Vila Rica in the first half of the 18th century enabled the construction of rich churches and elaborate private dwellings for the elite. Architectural forms common to northern Portugal marked the buildings. Now called simply Ouro Prêto, the historic center remains a living museum of colonial architecture.

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**visita** A *visita*, or inspection tour, was always a potential threat to royal officeholders in Spanish America. A general *visita* could encompass an *AUDIENCIA* district or an entire viceroyalty. A visitor general selected by the king conducted it, armed with extensive authority that challenged that of a VICEROY. In specific *visitas*, a visitor named by the viceroy examined a particular official or district. Either kind of *visita* could occur without warning. There were also routine *visitas*, such as those of prisons, that an *audiencia* was to make three times annually and that inspectors were to make of ships used in the INDIES TRADE. Bishops carried out ecclesiastical *visitas*.

By the mid-16th century, the Spanish Crown had already employed a general *visita*, sending Francisco Tello de Sandoval as visitor general to NEW SPAIN on an inspection tour that lasted from 1544 to 1547. The expense and years that general *visitas* consumed meant that the Crown resorted to them only when convinced that serious problems needed special attention. Such problems might involve, for example, a viceroy, president and ministers of an *audiencia*, or treasury officials.

General *visitas* to Mexico included those by Pedro de Moya y Contreras (1583–86); JUAN DE PALAFOX Y MENDOZA (1640–48), continued by Pedro de Gálvez (1650–54); Francisco Garzarón (1716–27), completed by Pedro Domingo de Contreras (1731–34); and JOSÉ DE GÁLVEZ Y GALLARDO (1765–71). General *visitas* to PERU included those by Juan de Cornejo (1664–66) and Francisco Antonio de Manzolo (1664–70), continued by Álvaro de Ibarra until his death in January 1675 and then by *OIDOR* of LIMA Agustín Mauricio Venegas de Villavicencio (1677–80) and *contador mayor* of the TRIBUNAL OF ACCOUNTS Juan de Saiceta y Cucho (1677–83). This lengthy *visita* was at last completed by Lima *oidor* Juan de Peñalosa (1683–ca. 1697). An important *visita* was begun by JOSÉ ANTONIO DE ARECHE Y SORNOZA (1777–81) and completed by Jorge de Escobedo y Alarcón (1781–85). Measures Areche took during the *visita* were among the causes of the TŪPAC AMARU II revolt.

*Visitas* invariably created conflict precisely because the beneficiaries of abuses were under attack. The viceroy Marqués de Montesclaros of New Spain is credited with the summary that general “visitations are comparable to the whirlwinds often seen in the public squares and streets, which serve no purpose save to stir up dust, straw, and other trash, and scatter them about the heads of the people.”

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# W



**war** By the middle of the 16th century, Spain had participated in European conflicts for decades and would continue its frequent and expensive involvement into the early 19th century. Portugal, in contrast, was a minor player in European conflicts and more apt to be at war with Spain than any other European power. Both Iberian countries' colonists, however, intermittently fought NATIVE AMERICANS on the empires' frontiers for generations.

The riches that Spain was receiving from its American colonies by the end of CHARLES I's reign and especially during the reign of PHILIP II attracted the French, English, and Dutch. They concluded that raiding selected locations and even establishing their own colonies in the New World would cut the supply of SILVER to Spain and thus render it incapable of continuing to fight in European wars.

Examples of foreign interlopers on lands the Spanish and Portuguese believed were theirs alone by virtue of papal donation and the Treaty of Tordesillas include the French settlements in Florida in the 1560s and in several locations in BRAZIL beginning in the early 16th century. The most egregious invasion of Brazil came at the hands of the Dutch when they took PERNAMBUCO and held it from 1630 to 1654. The inability of PHILIP IV to expel the Dutch earlier made Spain's dynastic grip on Portugal even more tenuous.

Nonetheless, during the 16th century, raids rather than conquest were the rule. This changed in the early and mid-17th century when Spain's rivals—France, England, and rebellious Dutch provinces—began to seize lightly settled islands in the CARIBBEAN and also to establish colonies on the North American mainland and Guiana. Portugal's successful war of independence against Spain,

which commenced in 1640 and was formally ended by treaty in 1668, had as its major colonial consequence improved English access to the markets of CHARCAS. The



Sir Francis Drake was Spain's enemy in peace and war. (From the collections of the Mercantile Library at the University of Missouri—St. Louis)



places where the English, French, and Dutch settled, however, offered neither the labor pool nor the mineral wealth that Spain had gained in NEW SPAIN and South America. The lands Spain retained in 1700 were far more impressive than those lost to its rivals.

Although the French and British expanded their colonial holdings in the first half of the 18th century, their respective claims rubbed against each other more than with the Spanish. While the British admiral Edward Vernon took PORTOBELLO in 1739, he could not repeat his success at CARTAGENA DE INDIAS. The decisive British victory in the Seven Years' War came more at the expense of the French than the Spanish. Although Spain yielded Florida to Britain in exchange for the return of HAVANA, it received Louisiana from the French. As an ally of France, Spain became involved in the war against Britain by the thirteen colonies and obtained East Florida and a strip of land along the Gulf of Mexico known as West Florida as a result of Britain's defeat. Subsequent arrangements benefiting the newly established United States resulted from European events rather than war in the Americas.

Starting with the establishment of COLÔNIA DO SACRAMENTO, ongoing friction in the "debatable lands" between their colonies led to war between Spain and Portugal on several occasions. The fate of the BANDA ORIENTAL was not permanently resolved until Britain intervened and forced the establishment of an independent Uruguay in 1828.

The wars of the French Revolution extended to Spain's colonies through Britain's naval dominance and blockade of CÁDIZ. The neutral TRADE that Spain adopted, however, confirmed to many, but certainly not all, merchants that trade with Spain was no longer necessary. The French invasion of the Iberian Peninsula that began in 1807 initiated wars of independence in both Portugal and Spain, which ultimately resulted in both Brazil and Spain's mainland colonies in the Americas gaining independence (see BRAZIL, INDEPENDENCE OF; MEXICO, INDEPENDENCE OF; SPANISH SOUTH AMERICA, INDEPENDENCE OF).

**wars of independence** See BRAZIL, INDEPENDENCE OF; MEXICO, INDEPENDENCE OF; SPANISH SOUTH AMERICA, INDEPENDENCE OF.

**weights and measures** The benefits of an agreed-upon system of weights, measures, and coinage were self-evident to consumers in the colonial world. Consumers also agreed that vendors should use accurate weights and measures. The Spanish Crown was always concerned, as were MUNICIPAL COUNCILS, that the weight of bread, meat, and other products was fair and consistent. Indeed, towns often had an inspector who checked the scales in shops to verify their accuracy as a form of consumer protection. In MEXICO CITY in 1559, all persons who owned weights and measures were to have the designated public officials check, adjust, and seal them. The measure was repeated again in 1567 and extended to the whole of NEW SPAIN in 1574. Despite this encouragement, nonstandard measures were never eliminated.

Coinage in the colonies had many names and values that changed over time. At different times, coins were minted of GOLD, SILVER, silver and copper, and copper. By the mid-16th century, some earlier coins, for example, the *maravedí*, had become money of account, or units employed in bookkeeping. Silver taken to the mint in Mexico City in the 16th century was measured in marks valued as 65 reales of eight pesos and one real; by 1700, a mark was valued at 70 reales or eight pesos and six reales (see MINTS). The silver peso of eight reales was known in English as the "piece of eight." With a silver peso worth 272 *maravedís*, the accounting unit of one *maravedí* had a value of less than one-third of a United States penny in late colonial times. Although the Mexico City mint produced some copper coins in the 1540s–60s, the indigenous people considered them worthless, and the mint discontinued them. Beginning in the reign of PHILIP III, the mints in Spain churned out *vellón*, originally copper and silver coinage, but soon only copper. In 1728, the ratio between gold and silver was adjusted. The above

### Spanish Monetary Units

	VALUE IN COIN	METAL IN COIN	VALUE IN MARAVEDÍS
Mark ( <i>marco</i> )	8 pesos, 1–6 reales; or, 65–70 reales	Silver	2,210–2,380 <i>mrvs.</i>
Peso ( <i>peso de ocho</i> )	8 reales	Silver	272 <i>mrvs.</i>
Peso de oro ( <i>peso ensayado</i> )	1.2 ducats	Gold	450 <i>mrvs.</i>
Ducat ( <i>ducado</i> )	11 reales	Unit of account	375 <i>mrvs.</i>
Real ( <i>real de plata</i> )	$\frac{1}{8}$ peso	Silver	34 <i>mrvs.</i>
<i>Real de vellón</i>	$\frac{1}{20}$ peso	Copper	13.6 <i>mrvs.</i>
Escudo ( <i>escudo</i> )	20 reales	Gold	680 <i>mrvs.</i>
Doubloon ( <i>doblón</i> )	2 escudos	Gold	1,360 <i>mrvs.</i>

### Common Spanish Units of Measurement\*

<i>Pie</i> (foot)	11 inches
<i>Vara</i> (yard)	3 <i>pies</i> ; 33 inches, or 0.84 m
<i>Legua</i> (league)	5,000 <i>varas</i> ; 2.6 miles, i.e., the distance a man can walk in an hour
<i>Fanega</i>	1.6 bushels, or 35 liters
<i>Libra</i> (pound)	1 pound, or 0.45 kg
<i>Arroba</i>	25 <i>libras</i>
<i>Quintal</i>	100 <i>libras</i> ; 4 <i>arrobas</i>
<i>Sitio de ganado mayor</i> (land for cattle, horses)	5,000 <i>varas</i> × 5,000 <i>varas</i> ; 4,316 acres, or 1,747 ha.
<i>Sitio de ganado menor</i> (land for sheep, goats)	3,333.3 <i>varas</i> × 3,333.3 <i>varas</i> ; 1,918 acres, or 776 ha.
<i>Caballería</i>	1,104 <i>varas</i> × 552 <i>varas</i> ; 105 acres, or 42.5 ha.

\*There is considerable uncertainty about the precise values of most units of measurement, and there were often regional variations. Commonly used values are indicated in the following table, “Common Spanish Uses of Measurement.”

table provides the most commonly employed units and their value.

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**wheat** Spaniards could not envision civilized life without bread made from wheat. The grain was sown in HISPANIOLA in 1493 and thereafter carried by Spaniards to every settlement where the climate was appropriate. Although Spaniards encouraged and even required Amerindians in Central Mexico to grow wheat as TRIBUTE, the NATIVE AMERICANS showed no inclination to comply and grew only miniscule amounts. As a consequence, Spaniards began setting up their own fields to supervise the cultivation of wheat.

Spanish landowners soon realized that irrigation was often necessary and constructed canals from which to water the fields. Where irrigation was available in the Valley of Mexico, two crops could be raised each year. As MINING camps opened north of MEXICO CITY, recipients of land grants quickly turned to the production of wheat and MAIZE to sell to miners and indigenous people. Wheat, barley, rye, and oats were very successful in the PUEBLA region of NEW SPAIN, to which immigrant Spanish farmers had been recruited. By the 1570s, the Valley of San Pablo annually produced 70,000–80,000 *fanegas* of wheat, an amount equaled by the Valley of

Atlixco. By 1632, some 90 HACIENDAS produced 150,000 *fanegas* of wheat a year. Wheat from Puebla went to Mexico City, Yucatán, CUBA, and, as *bizcocho* (hard, dry wafers) to feed sailors in the Atlantic and Pacific. By the late 18th century, however, the BAJÍO and Michoacán had displaced Puebla in many of its earlier internal markets. Oaxaca, on the other hand, produced wheat only for local consumption.

Wheat did not transplant as successfully in the Andean regions as in New Spain. In the dry coastal strip, irrigation was required for germination. Above 12,000 feet (3,658 m), wheat would not grow. Nonetheless, in numerous valleys between those extremes—for example, QUITO, Cajamarca, Huamanga, CUZCO, and AREQUIPA—wheat grew sufficiently well that it supplied local needs and might even be exported. Both LIMA and POTOSÍ brought in wheat from other regions. After the earthquake of 1687, Lima depended on wheat imported from CHILE. In the Río de la Plata region, wheat production for the local economy was under way by the end of the 16th century, and bread made from locally grown wheat accounted for perhaps half of a daily diet in BUENOS AIRES.

At the end of the 16th century, the finest wheat bread (*pan blanco*) sold in Mexico City cost almost double the price of the coarse bread sold to the poor. At the same time, the cost of bread per pound was about four times that of beef; unlike in Europe, the poor in the New World could eat beef rather than bread and gruel. By 1800, four classes of wheat bread were available in Mexico City. In addition, maize was available for the very poor. Multiple classes of bread were available in POTOSÍ in the late 17th century: *pan blanco* for the well-to-do; *three-fer* for poor Spaniards, Africans, and Amerindians; and a cheap and low-quality bread (*molletes*) for servants and indigenous.

Other than owners of wholesale bakeries (*panaderías*), most Spaniards purchased wheat in the form of bread. In Potosí in 1603, some 28 bakeries turned out 36,000 pounds (16,364 kg) of bread daily. The MUNICIPAL COUNCIL repeatedly sought to ensure that bakers and the owners of neighborhood grocery stores (*PULPERÍAS*) charged a fair price for bread instead of engaging in profiteering, a practice that the complete dependence on imported wheat, including that from the Valleys of Cochabamba and Chuquisaca, facilitated.

While Spaniards favored wheat bread throughout the colonial era; the indigenous population preferred the traditional and less expensive maize and, in the Andes, also potatoes. *CASTAS* ate wheat bread if they were able, for it served as a symbol of taste and status. It was probably more readily available at prices Spaniards could afford in the Americas than in Spain itself.

Wheat was also consumed in BRAZIL but was far less important than in the Spanish colonies. Wealthy families in SALVADOR DA BAHIA ate imported and then locally grown wheat from the mid-16th century onward. A little wheat was grown for local consumption in SÃO PAULO.

Most of the population in Brazil used flour made from the root of the cassava. Settlement in Rio Grande do Sul in the 18th century enabled sufficient wheat production that by the 1790s the grain was being exported to Brazilian ports in the north.

See also **WHEAT** (Vols. I, III).

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**wine** An alcoholic beverage made from grapes, wine was an indispensable component of civilized existence for Iberians. It was essential for religious ritual, consumed daily with meals, and, at times, a medium of exchange.

Christopher Columbus brought wine on his first voyage and cuttings for grape vines on his second voyage to HISPANIOLA, although they did not grow well. With limited amounts of poor-quality local wine, Spanish consumers imported the beverage from Spain throughout the colonial era. Royal efforts to restrict wine production in NEW SPAIN and thus protect Spanish exporters were somewhat successful. Grapes and wine production prospered in PERU, CHILE, Mendoza, Tucumán and elsewhere in the RÍO DE LA PLATA.

Selling wine locally by the late 1540s, within 20 years *encomenderos* and other landowners in the region of AREQUIPA had developed estates known as *heredades*, which were devoted to the commercial production of wine (see *ENCOMIENDA*). These were located in the river valleys, especially that of the Vitor River, which ran from the Andes to the Pacific coast. The second half of the 16th century was generally a period of prosperity for the estate owners, at least until the 1590s. By the 1580s, the region was producing more than 100,000 jugs (*botijas*) of wine annually, with exports going to Cuzco and POTOSÍ as well as LIMA. The decline in indigenous workers as a result of disease, in particular, led to the use of African slaves and increased the cost of production by the 1580s, while overproduction lowered the sale price of wine by 50 percent between the mid-1580s and the mid-1590s (see *SLAVERY*). A devastating earthquake and volcanic eruption in February 1600 reduced wine production by 95 percent in 1601 and the quality to impotability.

By 1630, the Valley of Vitor was producing about 80,000 jugs a year, and production from the Valleys of Moquegua and Sigua added more than another 100,000 jugs annually. Prices declined, however, and by 1650, a jug was worth only one peso, less than a quarter of its value in the mid-1580s. Between 1700 and 1775, production in the southern valleys increased,

but vintners turned to producing brandy, a beverage in high demand from Spaniards in the MINING centers of CHARCAS.

Wine production in Chile was also significant. The climate of central Chile was similar to that of the wine-growing regions of Europe, and friars and settlers soon planted vines of the black grape known as *mónica* and began producing wine. The region around Mendoza, now in Argentina, also produced limited quantities of the beverage. In 1614, the Diocese of Santiago reportedly produced 200,000 jugs of the beverage. Prior to their expulsion in 1767, the JESUITS produced the highest-quality wine in the colony.

The consumers of wine included the colonial elites of every city, but also nonelites. Potosí offered a choice of Spanish and colonial vintages, including a Spanish white wine that sold for 10 pesos a bottle at the end of the 16th century. At about the same time, the city council was upset that the grocery stores (*PULPERÍAS*) in the city were allegedly selling wine to Amerindians, who paid for it with stolen goods. It repeatedly tried to stop sales to indigenous people. In MEXICO CITY in the late 18th century, liquor stores (*viñaterías*) sold limited local vintages and imported wines from Spain to male and female customers, who could consume the beverage on the spot or elsewhere.

Portugal was an important exporter of wine, and as the number of Portuguese in BRAZIL increased, the colony became a valued customer. The colonists had no choice, for they were prohibited by law from producing wine, a restriction that on occasion prevented mass from being said in RIO DE JANEIRO.

See also **ALCOHOL** (Vol. I); **WINE** (Vol. I).

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Jane E. Mangan. *Trading Roles: Gender, Ethnicity, and the Urban Economy in Colonial Potosí* (Durham, N.C.: Duke University Press, 2005).

**women** Females accounted for approximately half of the population in the New World when the Spaniards and Portuguese arrived, and there is no reason to think this figure had changed significantly by the middle of the 16th century. By that time, however, Amerindian females, although predominant numerically, had been joined by a small number of Spanish and Portuguese, mestiza, and African women (see *MESTIZAJE/MESTIZO*; *SLAVERY*).

The cultures of the Americas, Africa, and Iberia held in common some important beliefs about women's roles. The world of work was largely gender specific, with women and men having defined sets of tasks. Women had tasks as difficult and burdensome as those for men

but less valued and rewarded. In general, the societies were patriarchal, and women were required to be both virginal and monogamous, whereas men were not. Finally, women were largely restricted to private rather than public roles.

Prior to 1560, only 2,633 Spanish females have been identified as emigrants from Spain to the Americas; of that number, well over 50 percent were from Andalusia and especially from the province and city of SEVILLE. Another 7,485 have been identified as reaching the colonies between 1560 and 1599; again, the majority were from Andalusia in general, and Seville was particularly well represented. Combined with the heavy emigration of men from the same areas, the result was that Seville had an inordinate influence on the speech, behavioral patterns, values, and attitudes of 16th-century colonists.

The percentage of identified Spanish female emigrants from 1493 to 1599 was 18.4 percent of the total. Not surprisingly, the percentage increased markedly after 1560, as the major conquests had ended and the opportunities for adventurers, as opposed to artisans, professionals, and other FAMILY men, had largely disappeared. From 1560 to 1579, 28.5 percent of emigrants were female; for the following 20 years, the number is 26 percent. With Spanish women in charge of domestic matters, including a primary role in rearing children and instructing domestic servants and slaves, the transfer of the Andalusian variant of domestic culture, in particular, was ensured.

By 1560, the arrival of Spanish women had already meant the routine displacement of Amerindian concubines from the homes of conquistadores and the devaluing of their mestizo children. The increase in the number of Spanish women, however, did not end sexual liaisons by their husbands with NATIVE AMERICANS or, increasingly, women of African descent (see *MULATO*).

CREOLE daughters of elite families had two socially acceptable options when they came of age: entering into marriage or entering a convent. The first convents were established in MEXICO CITY in 1540, in LIMA by the mid-1560s, and in PUEBLA shortly afterward. In BRAZIL, the first convent was created in 1677; before then, women seeking religious seclusion had to go to Portugal. Whether the daughter was going to become a “bride of Christ” or remain in secular society, the family was expected to provide a DOWRY. The relatively small number of women in convents probably peaked in the mid- to late 17th century. By 1810, the total number of women in convents in Brazil and Spanish America combined was about 6,000.

While elite married women might have pleasant lives, complications at childbirth often caused death at a young age. Routinely, moreover, young elite women married older men, in some cases old enough to be their fathers. This was especially true when the husband was a PENINSULAR who married after becoming financially secure. This circumstance often resulted in women inheriting their share of husbands’ assets, receiving the

value of their dowries, and entering the single-most empowering legal state women could achieve in the colonies—widowhood.

Very few women, of course, belonged to an elite. Whether descended from Spaniards, Amerindians, or Africans, most spent their lives engaged in domestic duties and physical labor. For indigenous women in Mexico, preparing food, especially tortillas, required hours of labor every day. Some women in CITIES became small retailers, whether street vendors or working in a stall. In POTOSÍ from the mid-16th to mid-17th centuries especially, a number of indigenous women spent their days making the alcoholic beverage *chicha* to sell.

By the end of the 18th century, women were a majority in most if not all Latin American cities. Race and class largely determined what they did. Elite women of wealth, whether widowed or single, had the greatest range of options. While they neither would nor could work in public, they did invest in property or a variety of businesses, including *OBRAJES* and retail shops and stores.



A lady of Lima, 1819 (From the collections of the Mercantile Library at the University of Missouri–St. Louis)

Several elite women in Lima owned ships that carried WHEAT from CHILE to the capital.

The further down a woman was on the social scale, the more public her occupation tended to be. Weaving was an occupation for many women. Food preparation and retailing were other frequent occupations. The marketplaces in all cities had female vendors selling items that were supposedly available only in *PULPERÍAS*. Domestic labor at home or working for other women for wages was the most common occupation. By 1600, almost exclusively Amerindians, blacks, and *CASTAS* performed such domestic service. Only women were midwives, but slave and indigenous women often worked as wet nurses. Another female occupation was seamstress, for only women sewed clothing for women; men who sewed clothes for men were called tailors and were much better compensated.

Although women were the majority in cities, the reverse was true in the countryside. This was partly the result of mortality resulting from childbirth and partly a consequence of rural girls going to urban centers to make a living. Marriage in rural areas was the rule, for a man alone could not provide the labor needed in an independent household.

See also WOMEN (Vols. I, III, IV).

**Further reading:**

Peter Boyd-Bowman. "Patterns of Spanish Emigration to the Indies until 1600." *Hispanic American Historical Review* 56, no. 4 (November 1976): 580–604.

Susan Migden Socolow. *The Women of Colonial Latin America* (New York: Cambridge University Press, 2000).



**yanacónaje** The social group known as *yana* during Inca rule expanded substantially after the conquest and was known to colonial officials as *yanacóna*. Devoid of ties to ancestral communities and kin groups and exempt from *MITA* service, this servile population quickly included NATIVE AMERICANS who attached themselves to Spaniards, often working for them in exchange for access to a small plot of land. In the years before the amalgamation process was successfully employed at POTOSÍ, *yanacónas* operated the wind ovens or small kilns used in smelting there. Others were artisans and craftsmen.

Although VICEROY FRANCISCO DE TOLEDO Y FIGUEROA identified one group of *yanacónas* as working for Spaniards and exempt from the *mita*, other *yanacónas* were subject to relocation in *reducciones*, TAXATION, and *mita* service (see *REDUCCIÓN*). Those in CITIES were attached to urban parishes. In particularly the provinces affected by a MINING *mita*, *yanacóna* status on a Spanish HACIENDA was a major advantage for Amerindians.

In the early 17th century, an inspection of the farms in the jurisdiction of LA PLATA revealed 920, with nearly 7,000 men from villages affected by the Potosí *mita* lacking ancestors on the properties when Toledo implemented the *reducciones*. As a group, *yanacónas* denied knowing their ancestral villages, claimed they were from cities, and tended to use Spanish last names. One KURAKA stated that the men who left his village “become *yanacónas* by adopting different clothing and last names and claiming to be free of the *mita*.”

By the middle of the 17th century, FORASTEROS, another category of indigenous people who had left their villages and could be found on Spanish estates, mines, cities, and Amerindian villages in which they had no right to

land, outnumbered *yanacónas* in CHARCAS. In the jurisdictions of La Paz and CUZCO in 1646, *forasteros* were more than twice as numerous as *yanacónas*. The important difference between *forasteros* and *yanacónas* was that the former retained ties to their villages of origin and sometimes benefits from them, while *yanacónas* lacked such connections in order to escape *mita* service and often to pay a lower tribute than *originarios*.

In the Cuzco region, *hacendados* in the 18th century relied on *yanacónas* and seasonal wage laborers. Even after independence, Amerindian laborers were referred to informally as *yanacónas*.

See also *YANA* (Vol. I).

#### **Further reading:**

Ann Zulawski. *They Eat from Their Labor: Work and Social Change in Colonial Bolivia* (Pittsburgh: University of Pittsburgh Press, 1995).

**yerba maté** Yerba maté was a tree (*Ilex paraguayensis*) native to PARAGUAY and southern BRAZIL whose leaves were used to make a popular beverage of the same name. Made by steeping hot water with broken or powdered leaves in a SILVER cup (*maté*), “Paraguayan tea” was often drunk through a silver tube.

One of Paraguay’s only cash crops, as well as an early medium of exchange, yerba was exported by the early 17th century, if not before. JESUITS exported it from their MISSIONS by 1680. By the late 17th century, it was Paraguay’s most important export, being sent to provinces throughout the VICEROYALTY OF PERU. Paraguayans harvested natural yerba maté from royal forests rather than developing yerba PLANTATIONS, as Jesuits did.

Following the introduction of *COMERCIO LIBRE* in the VICEROYALTY OF RÍO DE LA PLATA in 1778, the exportation of yerba maté from Paraguay, Corrientes and Misiones in present-day Argentina, and adjoining lands in BRAZIL and the BANDA ORIENTAL expanded rapidly until 1808. Yerba exports from ASUNCIÓN expanded from 26,429 *arrobas* in 1776 to an average of 195,102 *arrobas* annually from 1792 to 1796 and 271,322 *arrobas* per year from 1803 to 1807. In 1808, the export of yerba was the second highest of the colonial era, at 327,150 *arrobas*. Exports plummeted with

the political disruptions at BUENOS AIRES and within the Viceroyalty of Río de la Plata. Only 150,300 *arrobas* in 1812, exports in 1820 were but 42,365 *arrobas* and would fall still further under the rule of José Gaspar de Francia in Paraguay.

**Further reading:**

Thomas Whigham. *The Politics of River Trade: Tradition and Development in the Upper Plata, 1780–1870* (Albuquerque: University of New Mexico Press, 1991).



**Zacatecas** After the discovery of SILVER in 1546, the mines of Zacatecas quickly became NEW SPAIN's premier source of the precious metal. The town of Zacatecas was founded in 1548, the year in which the discovery of three major lodes of silver ore initiated a rush. The Royal Road (Camino Real) was soon begun to connect the mining district to Querétaro and an already established route to MEXICO CITY. Feeder routes quickly linked it to suppliers from Michoacán and GUADALAJARA. Wagon and MULE trains carried food (including WHEAT for Spaniards and MAIZE for Amerindians and mules), equipment, lead, MERCURY, and other supplies. The BAJÍO became the dominant supplier of wheat and maize. Beef and mutton were available from ranches developed near Zacatecas (see RANCHING).

CHICHIMECAS responded to Spanish settlement by turning the northern area into a "land of war" from 1550 to 1590, although ultimately a policy of trading food and clothing for peace prevailed. In 1608, the permanent population of Zacatecas was about 4,500, with Spaniards numbering some 1,500 and indigenous, blacks, and mestizos comprising the balance (see MESTIZAJE/MESTIZO). The Spanish population in 1640 was perhaps 2,000–2,500.

Once established, silver production remained on a plateau from 1560 until the mid-1610s, when it jumped upward and remained at a high level into the mid-1630s, nearly 20 years after San Luis Potosí and just after Parral, with an important silver strike in 1631, went into decline. Zacatecan production suffered a serious depression from 1640 to 1665, in part a consequence of inadequate mercury for processing ore by the patio process, rose again from 1670 to 1690, and then declined once more until 1705. Until at least 1732, the region was producing a quarter of the viceroyalty's silver, but it then went into

a decline as a result of flooding, which exacerbated high production costs.

In 1767, miner José de la Borda convinced Visitor General JOSÉ DE GÁLVEZ Y GALLARDO and the VICEROY Marqués de Croix to give him tax breaks, including lower-priced mercury, that enabled him to open new mines in a lode known as the Veta Grande, build a large refining mill, and drain the mine of Quebradilla. By also cutting wages a third, he was able to mine and process ore at a lower cost. Importantly, Borda's achievement attracted other investors who were successful miners elsewhere in New Spain and merchants who withdrew capital from TRADE. The result of this investment coupled with the Crown's reduction in the price of mercury by 75 percent between 1767 and 1776, a reduction in the price of blasting powder, and flexible TAXATION applied to miners in Zacatecas was a resurgence of silver production. By 1803, Zacatecas ranked behind only GUANAJUATO and perhaps Catorce in silver production in New Spain. The depredations associated with the MIGUEL HIDALGO Y CASTILLA's revolt, however, ended its high level of productivity.

**Further reading:**

- P. J. Bakewell. *Silver Mining and Society in Colonial Mexico, Zacatecas 1546–1700* (New York: Cambridge University Press, 1971).
- D. A. Brading. "Mexican Silver-Mining in the Eighteenth Century: The Revival of Zacatecas." *Hispanic American Historical Review* 50, no. 4 (November 1970): 665–681.

**zambo** In colonial Spanish America, *zambo* usually referred to the offspring of a NATIVE AMERICAN and a



black, although by 1600 it was rarely used in Mexico, where a variety of terms including *MULATO* or *mulato pardo* (dark mulatto) were employed. In Peru, the term *sambo* was used for the offspring of a black man and a *mulata*, while the offspring of an Amerindian and a black person was termed a *chino*. *Zambos* thus fit into the broader mixed racial category of *CASTAS* or, in some regions, for example, Río de la Plata, *PARDOS*. In this broader context, the existence of some African heritage, not the extent, made it important.

The mother's status as free or slave determined that of her *zambo* child. Most *zambos* were, in fact, born to Native American women and thus free; one consequence was repeated royal orders prohibiting blacks from living in indigenous villages beginning in 1563. Free *zambos*, however, were required to pay *TRIBUTE*. Viceroy Martín Enríquez wrote in 1574 that "Negroes prefer to marry Indian women rather than Negresses, so that their children will be born free." At about the same time, the viceroy of *NEW SPAIN* was concerned about *zambos* causing unrest and potentially rebellion among the indigenous

communities in which they were raised, although there was no *zambo*-led Afro-Indian rebellion in the history of the viceroyalty. By 1650, the population of *zambos* and mulattoes in Mexico exceeded 100,000. The Crown was also concerned about unskilled *zambos*' contribution to the *ECONOMY* and about blacks abusing Amerindians in *PERU*, but the persons of African descent were fewer and less threatening there.

The second-class status of *zambos* and other *castas* was reaffirmed in the *CONSTITUTION OF 1812*. After considerable debate, that document vested automatic citizenship in Spaniards and Amerindians resident in Spain and the Americas, but not in persons from Africa or reputed to be Africans and their descendants.

#### **Further reading:**

- Frederick P. Bowser. *The African Slave in Colonial Peru, 1524–1650* (Stanford, Calif.: Stanford University Press, 1974).  
 Edgar F. Love. "Legal Restrictions on Afro-Indian Relations in Colonial Mexico." *Journal of Negro History* 55, no. 2 (April 1970): 131–139.

# APPENDIX

## PRIMARY SOURCE DOCUMENTS

The majority of the translated primary sources that follow are laws—royal *cédulas* and royal orders—issued by a Spanish monarch, who routinely refers to himself as both “I” and “we,” or the minister of the Indies in Spain. Intended to resolve a specific problem in a particular geographical location, they were also applied elsewhere. In several cases the documents are recommendations (*consultas*) by the Council of the Indies regarding specific issues. As a group, these sources provide a view of colonial administration and society from Spain, although their content often includes a brief summary of the problem being addressed as presented by an official or cleric in the Americas. Another type of official document is the *relación de méritos y servicios*, or résumé prepared by officials in Spain from documentation submitted by an aspirant planning to apply for a government or clerical position. The résumé of Peruvian José Baquíjano y Carrillo de Córdoba is one of literally thousands available in Spanish archives. These official documents are arranged below by topic.

Unlike the *cédulas*, *consultas*, orders, and résumés, all of which are official documents from Spanish archives, the letters related to medical care are private correspondence in a private collection. Finally, two of the last three documents were written by travelers. Thus, they are descriptions and observations from outsiders rather than materials produced by persons born and raised in the colonies. The declaration of independence adopted in Caracas in 1811 is an early example of declarations adopted by 1826 throughout Spain’s mainland empire.

### Nepotism, Local Ties, and Appointments to Office

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#### Royal Cédula: That Relatives of the Presidents, Oidores and Fiscales of the Audiencias May Not Be Appointed to Corregimientos and Other Offices, September 5, 1555

*Spanish monarchs relied on government officials to provide justice and administrative oversight in the colonies. The lengthy time required for letters to travel from Spain to New Spain or Peru and then for a response to travel back meant that effective control of officials was difficult. Soon after conquest, one step the Crown took to restrict the powerful members of colonial audiencias was to prohibit them from naming relatives (nepotism) to other positions. In this way, it tried to reduce the ministers’ conflicts of interest.*



*Valladolid, September 5, 1555.*

The King. We are informed of the difficulties that result from our Viceroy and *Audiencias* of the Indies, islands and *Tierra Firme* of the Ocean Sea, giving *corregimientos* and other judicial positions to fathers-in-law, brothers, sons, sons-in-law, and brothers-in-law of the presidents, *oidores* and *fiscales* of those *Audiencias*. We are aware of the problems that these relationships create for when the presidents or *oidores* hear the appeals of the cases and the *fiscales* are involved, the injured parties may have reason to complain and fear that they will not receive justice. To avoid these problems, our Council of Indies has seen and discussed this issue and recommended that I issue this Royal *Cédula*. By it we prohibit and expressly forbid that from now on, in no part of the Indies, can any of the sons, brothers, fathers-in-law, sons-in-law, nor brothers-in-law of any president, *oidor*, or *fiscal* of any of our *Audiencias* in the Indies, be appointed to any of the *corregimientos* or other judicial offices of our Indies. If any

is appointed, he will be removed from the post, not be allowed to serve it any longer, and will pay a fine of one thousand gold *pesos* to our *cámara* and treasury. We order our viceroys, presidents, and *oidores* of our Royal Audiencias to observe and comply with this *cédula* and all that it contains. Do not alter its intention and neither authorize nor consent to any alterations.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 332–333 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: That No Viceroy, President, Oidor, Alcalde del Crimen, Fiscal, nor Any of Their Sons or Daughters May Marry in Their Districts, February 10, 1575

*Restricting marriage between royal officeholders and local women was of particular importance because marriage could immediately and explicitly link an official to a local elite faction and compromise the administration of justice. Examples of this occurred within a few years after audiencias were established. Thus, the Crown tried to bar high-ranking officials from marrying locally, although the general prohibition was later weakened by royal willingness to provide dispensations for a price.*



Madrid, February 10, 1575.

The King [Philip II]. Because of *visitas* and *residencias* and other reports that have been sent and through experience, we have seen some problems as a result of marriages contracted by our Viceroys, presidents and *oidores*, *alcaldes del crimen* and *fiscales* of our *Audiencias* of the Indies, islands and Tierra Firme of the Ocean Sea, and their sons and daughters. It is desirable for good administration of justice that they be free of relatives and kin in their districts so that they can do their job, consider and resolve matters with complete integrity, and prevent any need or excuse for appeals and other recourses that would preclude their hearing cases. Our Royal Council of the Indies has seen and discussed this issue. In order to avoid these difficulties and so that our subjects and vassals may receive justice without offense, we have agreed to send this *cédula*, by which we prohibit and expressly forbid that from now on, until a new order is issued, or without our particular license, our viceroys, presidents, and *oidores*, *alcaldes del crimen*, and *fiscales* of our *Audiencias* may not marry in their districts while they are serving. The same applies to their sons and daughters while these officials are serving. The punishment for not complying with this order is removal from office, and we will name another person to hold it. To ensure fulfillment of this *cédula*, we order that it be read in each and every one of our *Audiencias* with the president and *oidores*, *alcaldes* and *fiscales* in attendance; our scribe of the *cámara* and government will witness the event.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 486–487 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: That the Royal Officials Cannot Make Contracts for Marriage nor Marry in Their Districts, November 15, 1592

*As the date of this document testifies, the problem of royal officials creating local ties did not go away. Moreover, it affected every type of royal official. Notice that the *cédula* was to be distributed in the cities where audiencia ministers, governors, provincial officials, and treasury officials were located. Nonetheless, the problem persisted. Despite the king's declaration that he would not grant licenses, the Crown soon yielded and, for a fee, allowed officials to marry locally. Only in the latter half of the 18th century was an effective policy implemented. For audiencia ministers, the Crown typically followed the grant of a license to marry locally with a transfer to another location.*



Viana, November 15, 1592.

The King. In regards to the different *cédulas* [dated February 10, 1575, and February 26, 1582] that prohibit the persons named from marrying without my license. I understand that in the hope they had that I would give my permission, some have discussed marriage and made secret arrangements to marry. I will not give these licenses, and the persons risk danger to their honor and property. These ministers then try to excuse themselves with my refusal to grant the license. My Royal Council of Indies has discussed this issue and recommended to me that this must stop. Accordingly I declare that it is my will that in these cases, where any of my ministers or officials or any other person included in the prohibitions, contracts or arranges to marry, by word or promise or writing or with the hope that I will give them the license so that they can marry in their districts where they have appointments, will be deprived of their offices as though they had truly married. Moreover, they cannot obtain other employment of any type in the Indies. So that it will be public and known by all, I order that this *cédula* be published and circulated in all of the cities where my *Audiencias*, governors, *corregidores*, *alcaldes mayores* and treasury officials reside.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 626 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Advice of the Council of the Indies Regarding the Problems That Result from Selling Offices in the Indies, and Especially the Posts of Justice and Government, November 9, 1693

*Desperate for money, the Spanish Crown began to sell appointments to treasury positions in 1633, to provincial administrative positions in 1678, and systematically to audiencia*

positions in late 1687. The Council of the Indies did not hesitate to point out to the king and his immediate advisers, in suitably respectful language, the detrimental implications the sales had for the provision of justice and honest administration. Penury triumphed, however, and the Crown continued to sell appointments until the mid-18th century.

One must distinguish between the sale of appointments and the sale of local positions, for example, of alderman, ensbrined in 1606. The latter were pieces of property that could be resold or passed to heirs. The former were for the lifetime of the purchaser. As a result, they were particularly attractive to young, inexperienced men who anticipated a lifetime of employment at public expense as the guaranteed profit on their investment. The sale of appointments of corregidor and alcalde mayor had a different dynamic. Since they were for a term of three to five years, the purchaser had a brief period to benefit, and his objective was to make enough to pay the purchase price, usually borrowed from a merchant, to cover the expenses of his time in office, and build savings for the future. It is no surprise that these term appointees forced large quantities of merchandise on the Amerindians in their districts through reparto.

The consequences of the Crown selling audiencia appointments until 1750 were young appointees, an unprecedented number of native sons, and long tenures in office. In some cases, purchasers served for many decades. The corruption decried by Jorge Juan and Antonio de Ulloa was directly related, in their view, to the sales.



Madrid, November 9, 1693.

It is not the intention of the Council, Lord, to limit Your Majesty. Rather, we [members of the Council of the Indies] want to console him with just and relevant resources for the many problems and weaknesses that this Monarchy is suffering. . . .

We also do not want to omit nor ignore that offices have been sold in different times, and we concur that circumstances can make them licit. These are the cases that produce a morally impossible difficulty, if not in the realm of speculation, at least in practice. This makes it indispensable that simultaneously the properties of the Royal Patrimony are encumbered; royal income is legally distributed; there is verifiable extreme [financial] necessity without judicial appeal; a meritorious purchaser is available; and the price of the sale is low. The absence of any of these related conditions makes the sale of office illegal.

The Council only mentions these interrelated conditions if Your Majesty is going to administer justice and not regarding his general obligations in the Catholic dominions of these Kingdoms where the weight, application, and censure of these requisites is lacking. . . . Now the Council must represent that neither can it ignore the fundamental points made above as elemental principles nor what experience has shown concerning the sale of offices.

The Council has letters from Viceroys, Presidents, *Audiencias* and cities that provide evidence of the absolute ruin of those Kingdoms resulting from similar sales.

In the Archives, there are many complaints, offenses, and injustices that, because of sales, have suffered the vassals of the New World that has contributed so many riches to the Crown.

There are also complaints from the inhabitants that are faithful, dedicated, and tribute paying vassals whose merits and services make them legitimately deserving of these posts. Yet they suffer from governance by less worthy subjects that only pass through and work to recover their investments by excessive usury.

We also have knowledge of the greatest damages that those kingdoms suffer because of sales. Every day the Faith is propagated, but it establishes no roots because there is no administration of justice.

We also find evidence that, because the distances are so great and the sailings of the fleets and galleons are so seldom, it is morally impossible to resolve the problems and provide relief to those that are suffering without hope of a solution. For this reason, though with different distances, His Majesty Don Felipe II sent an order to Italy prohibiting similar sales.

We also have notices of problems without solution when posts filled by viceregal appointment are not approved [by the Council of the Indies]. The Viceroys do not have the rewards that can be distributed among the worthy and to those that have the first claim to them. When the Viceroys abuse this, it affects the persons selected and the punishment of transgressors when the Council can prove the excesses.

We also find the worthy justifiably provoked when they are assured preference [in appointments] by divine, pontifical, and human laws, and when they witness the irregularities that corrupt virtues. This reduces the motivation of the subjects, reduces the number of students in the Universities, and causes desertion from the militia.

We also know from experience that the combination of selling governorships and extending the time of the residencias means that when irregularities are found, the evidence has disappeared, and the interested parties have already died.

We also find in the reliable registry that not only are governorships, posts in navigation, and judicial positions sold, but also the promise of the posts to second and third buyers, a practice of successions that impedes new sales. This practice is of no worthwhile benefit for if the buyers die before taking office, the Royal Treasury of His Majesty returns the payment, often with substantial interest.

We also find justified resentment, documented by experiences and foreseen in repeated decrees by His Majesty, and so many Kings, of the harm caused by promised rights of succession to positions (*futuras*) where foul play cuts short the life course of men, and where in the Indies the owners of futures and their successors easily conspire, not only to gain [benefits] through violence but to destroy to the roots what in a brief time they obtained through envy of he that cultivated it.

We also found that the deception with which the posts are sold through repeated delays, makes it difficult for anyone to

want to purchase them. This is done to lower or remove the price. The price remains in name only other than the agreed to gratuity and interests. This does not help resolve the present financial demands. . . .

The Council could extend and discuss this longer. The Council supposes that His Majesty is very well aware of these and other more important reports. It is with inconsolable pain that we find no remedies in this institution. We desire the fulfillment of our obligations, the security of the Royal conscience and we believe that, even more that his life and succession, they being so important to his vassals and Kingdoms, the King should firmly guarantee the administration of justice and abolition of the sale of positions. The Council believes that the great necessities will not be remedied if there is no fair distribution of rewards when this and justice are two attributions that constitute and canonize Kings.

If, nonetheless His Majesty in his catholic zeal and vigilance, recognized by the Council in its service in all that is under its authority, and in the desire for the greatest success, finds it necessary to use these sales, we beg that he take into account the combination of qualities that will make them more acceptable, exempting completely from sale positions of strictly judicial administration and the military governorships on the coasts of the Indies, as their principal keys to survival. If they are lost, there will be no hope of recovering them. For the rest, those that would obtain the positions should be the most worthy. The payment should be the fair price that makes them less prohibitive, and from there, the legitimate execution. With a narrow line, we can arrive at a fair medium, correcting the pernicious consequences as much as possible. In this manner, this Monarchy will find a better form of divine justice than the current repeated and melancholy constitution. His Majesty will achieve the happy fruit of its imitation, as the Council promises His Majesty, to whom, with great reverence and respect, we humbly sought to make a seriously considered response, and who will resolve that which is to his best service.

Resolution of the King [Charles II]: It has always been my desire to end those sales, but the extensive public needs, they have been not only accepted, but obligatory to avoid greater difficulties, and thus the Council will have to understand it, and I will continue to deliberate ending these negotiations when it is possible.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 1: 1691–1779, 34–39 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

**Résumé of the Merits, and Services of Doctor  
don Josef Baquijano y Carrillo de Córdova,  
Lawyer of the Royal Audiencia of Lima,  
November 20, 1773**

*Men who aspired to royal appointments or other favors employed a document similar to a résumé that combined information about their education, employment, and family.*

*Unlike today's self-prepared compilations, the résumés of aspirants in the late colonial era were assembled by royal officials employed by the Council of the Indies and its smaller patronage committee, Cámara of the Indies, on the basis of notarized copies of official documents. These included baptismal records, genealogical materials, and university transcripts. What is strikingly absent in the résumé below is any mention that the subject's father had become one of Lima's wealthiest merchants prior to his death in 1759.*

*The document is a translation of the official résumé of a celebrated creole from Lima, Peru, Josef Baquijano y Carrillo de Córdova, compiled for use during his first trip to Spain in pursuit of an audiencia appointment. It illustrates the speed with which very bright students who mastered Latin at a young age could complete university degrees. More important, it demonstrates the importance of family background and the services of ancestors in bolstering the case for an aspirant to office. In 1773, Baquijano had few personal accomplishments to relate, but he could track his deceased father and paternal ancestors to Vizcaya, Spain, where noble status was widespread, and, on his maternal side, to conquistadores of Peru as well as to a grandfather who held for many years an important position as regent of the Tribunal of Accounts in Lima.*

*Baquijano was unsuccessful in securing the appointment he sought on this trip to Spain. After returning to Lima, teaching at the University of San Marcos, and writing for the Mercurio peruano, in the 1790s, he went to Spain again to pursue preferment and ultimately was named an alcalde del crimen of the Audiencia of Lima in 1797. Already evident in 1773, but much more so starting in 1776, the Crown's policy of favoring peninsulars for American positions and severely limiting the appointment of men to their home district made Baquijano's success in 1797 particularly notable.*



He is, as can be verified, a native of that Capital [Lima], twenty-two years old, completed on March 13 of this year, and the legitimate son of Don Juan Bautista Baquijano and Doña María Ignacia Carrillo de Córdova, Count and Countess of Vistaflorida, both from families of notorious distinction and quality.

On April 22, 1762, he entered the Royal *Seminario Colegio de Santo Toribio* in the capital city of Lima with a paid scholarship. He studied law with singular application and benefit, as seen in his regular examinations of the four Books of *Instituta*, which he passed unanimously in the various literary acts that he completed and from which he advanced as a graduate student in the faculty [of law] on April 15, 1765.

He graduated with a baccalaureate degree in canon law from the Real University of San Marcos on February 18, 1765; on April 29th of the same year, he received the degrees of *Licenciado* and Doctor after completing the public

and secret examinations, as established by the [University's] Constitutions.

After the requisite apprenticeship with a practicing attorney, by the Royal *Audiencia* of Lima approved him to practice law on December 5, 1769. On the ninth of January and seventeenth of March of the current year 1773, he was named a legal advisor to the Tribunal of the *Consulado* and the City Council of that Capital, respectively.

On March 24, 29, and 31, and April 4, [1773], the above-mentioned City Council of Lima, the Cathedral Chapter of the Metropolitan Cathedral [in Lima] and its current prelate, and the Reverend Bishop of Cuzco, currently a resident there, have informed His Majesty of the legitimacy of this interested party [Baquijano], the notorious distinction of his family, his outstanding scholastic achievements, and his desire to distinguish himself in his literary career, for which he has come to these kingdoms [Spain]. The Cathedral Chapter added that because of the moderation, judgement, and conduct with which he distinguished himself among his fellow students, he was selected as one of the teachers of the school and then as President of the Law Conferences there. The City Council notes that, in addition to his family's distinction on both sides, on the maternal side he is descended from Conquistadors of Peru, and the grandson of Don Augustín Carrillo de Córdova, who was Regent of the Royal Tribunal of Accounts [in Lima], serving for a period of more than thirty years with zeal, honesty, and commitment to Royal Service.

From the testimony of twelve witnesses, received at the request of the widow Countess of Vistaflorida, Doña María Ignacia Carrillo de Córdova y Garcés, before the Count of Casa-Tagle, magistrate of the City of Lima, in the month of December, 1771, and other attached documents, it is known that the mentioned Doctor Don Josef Xavier Baquijano is her legitimate son, and of Don Juan Bautista Baquijano, Count of Vistaflorida, who was the legitimate son of Don Martín and Doña Clara de Baquijano, natives and property owners (*vecinos*) of the Parish of Yurreta in the Merindad de Durango in the Señorío de Vizcaya, both noble and descendants of noble cavaliers.

That on the maternal line, Don Xavier is also noble and distinguished, and the legitimate grandson of Don Augustín Carrillo de Córdova, who served more than thirty years in the employment of Regent of the Royal Tribunal of Accounts in Lima, and of Doña Rosa Garcés.

He is also the legitimate great-grandson of General Don Fernando Carrillo de Córdova y Doña Ursola [sic] de Agüero y Añasco. The above-mentioned Doña Rosa was the legitimate daughter of Don Antonio Garcés y Mansilla and Doña Ana Luperguer [sic] Irarrázabal.

He is the great-great-grandson of Captain Fernando Carrillo de Córdova, Alderman, and perpetual General Representative (*Procurador*) of the City of Lima, and Doña Isabel de Quesada y Sotomayor.

He is the great-great-great-grandson of General Hernán Carrillo de Córdova and Doña Leonor de Carvajal, both natives of the City of Córdoba in these kingdoms, who moved to Peru.

Hernán Carrillo, Lieutenant of the Captain General of Sea and Land, who as such commanded the Royal Navy in various encounters with the enemies and pirates that infested the seas. In recognition of this, on December 4, 1601, His Majesty, Don Felipe, issued an order to Don Luis de Velasco [sic], Viceroy of Peru at the time, that in attention to his [Hernán's] singular services he be provided with employment in the Royal Service that corresponded to his merit and abilities and in which he could serve with honor and benefit.

The above-mentioned Doña Ursola Agüero y Añasco, great-grandmother of Don Josef Xavier Baquijano, was the legitimate daughter of the Field Marshal Don Luis de Agüero y Padilla and Doña Jacoba de Añasco y Córdova.

The above-mentioned Don Luis, third grandfather for this line of the same Don Josef Xavier Baquijano, was the legitimate son of Don Josef de Agüero and Doña Marcela de Padilla.

This same Don Josef was the legitimate son of Don Diego de Agüero and Doña Beatriz Brabo de Lagunas.

This Don Diego was the legitimate son of Don Diego de Agüero the elder and Doña Luisa de Garay.

This Don Diego the elder, native of the Merindad of Trasmiera, in the mountains of Burgos, was one of the first famous Conquistadors in the Kingdom of Peru, and a legitimate son of Garcia de Agüero, also a native of the mountains [of Burgos].

The above-mentioned Doña Ana Lisperguer Itarrázabal, great-grandmother along these lines, of Don Josef Xavier, was the legitimate daughter of Don Juan Rodolfo Lisperguer and Doña Catalina Andía Itarrázabal.

The above-mentioned Don Antonio Garcés de Mansilla, maternal great-grandfather of Don Josef Xavier, was native of the *Señorío* of Molina, legitimate son of Don Juan Garcés de Mansilla and Doña Isabel de Tavira.

This Don Juan was also the legitimate son of Miguel Garcés de Mansilla and Doña María Lazaro, and Doña María Lazaro was the legitimate daughter of Don Juan Tavira and Doña Isabel de Logroño. All of the above proves that Don Joseph Xavier Baquijano, is a noble cavalier on the paternal and maternal side, a descendent of one of the first Conquistadores of Peru, and that his ancestors have served honorable employments corresponding to his notorious quality.

There were various accompanying documents exhibited by the interested party (which were returned) and the recommendations that remain in this Secretariat for Peru of the Supreme Council and Cámara of the Indies, and which I certify, as Secretary of His Majesty and *Oficial Mayor* of the same. Madrid, November 20th 1773.

[signed]

Francisco Eduardo Paniagua

Source: Translated by author from *Relación de los Méritos, y Servicios . . . Baquijano*, 1773. Archivo General de Indias (Seville, Spain), Charcas 501.

### Royal Order: That American Spaniards Be Proposed for Civil and Ecclesiastic Employments of Spain and Reserving One-Third of the Prebends in America for Them, February 21, 1776

*American Spaniards (españoles americanos), as this royal order refers to creoles, were very successful in securing audiencia positions during the era in which the Crown sold appointments and also were effective in obtaining positions in the cathedrals of the Americas. This remarkable document informed the Cámara of Castile that it was to recommend creoles of “proven virtue and literature” for positions in the cathedrals and tribunals of Spain. Similarly, it informed the Cámara of the Indies that it was to propose Americans for the positions in the colonies, reserving one-third of the cathedral chapters for them.*



*El Pardo, February 21, 1776.*

With the Catholic and pious care that the King devotes to maintaining the splendor of the divine cult in the cathedral churches of his dominions of America, and to providing ever better government and administration of justice to his vassals by the secular tribunals, he has deigned to resolve, with the goal of also strengthening the union of those kingdoms with these and rewarding equally the suitability, merit and services of the American Spaniards, that the Cámara of Castile propose those Americans of proven virtue and learning [*literatura*] for ecclesiastic prebends and *togada* positions in the churches and tribunals of Spain, including in this order those that are now serving these positions in the Indies. The Minister of the Indies [*via reservada*] is to see that the Cámara of the Indies is informed of this and the Minister of Grace and Justice is to do the same for the Cámara of Castile for the same two objectives, with the express declaration that the third part of canonries and prebends of those cathedrals are always reserved for the Spaniards of the Indies [creoles].

*Source:* Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 1: 1691–1779, 405–406 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

### Royal Cédula: That the American and European Vassals Are Equal, January 2, 1778

*The municipal council of Mexico City complained about what it considered an unfair proportion of the cathedral chapter positions guaranteed to Americans. In a heated response, Minister of the Indies José de Gálvez informed the council that it should show gratitude rather than complain, especially since the reservation of one-third did not restrict Americans from holding more.*

*For the American audiencias, appointments made in 1776–77 were ominous, as 31 of 34 new men named were peninsulars. Between 1778 and 1808, peninsulars were 70 percent of the new men appointed. Available figures are not as precise for the cathedral chapters of Lima and Mexico City, but between 1700 and 1799, about 85 percent of Lima’s chapter was made up of creoles. The comparable figure for Mexico City was about 70 percent. While the response by Mexico City’s municipal council seems rather prickly in light of these numbers, it clearly reveals the importance of offices to Americans and their unhappiness at the possibility of losing the gains of an earlier time.*



*Madrid, January 2, 1778.*

Josef de Gálvez to the City Council, Justice and Regiment of the city of Mexico. I have informed the King of Your Honor’s representation of last 24th of July, in which you complain about His Majesty’s order of February 21st, 1776, that reserved one third of the canonries and prebends of America for American Spaniards, and also about an order of September 17th of the same year, that instructed [the Cámara of the Indies] to propose European Spaniards for the vacant position of dean of that Metropolitan see and to follow the same practice for the dignitaries of the rest of the churches of the Indies. Immediately His Majesty perceived the lack of exactness with which Your Honor refers to the two Royal Orders and that either you do not understand or you pretend to misunderstand the spirit of the motive and the finality of the Orders, it being absolutely clear that they were motivated by His Majesty’s religious zeal and paternal love for his American vassals and his desire for their well-being and happiness. In the first [Order], His Majesty expressed that to maintain in the Cathedrals of the Indies the splendor of the divine cult and in the secular tribunals the greatest exactness in the administration of justice, and with the goal of strengthening the union of the kingdoms [of Spain and the Indies] and giving equal reward to the merits and services of his vassals, it was his intention that the Cámara of Castile propose Americans for prebends and *togada* appointments in the churches and tribunals of Spain and that the Cámara of the Indies do the same for the churches and tribunals of those realms, with the stipulation that in those, the third part of the canonries and predendaries was reserved for Spaniards from the Indies, an expression that clearly explains that in all of the churches in America, a third part of the prebendaries should be from the Indies; this does not preclude many more, as there have always been and there always will be.

On the second hand, His Majesty ordered that for the position of dean in that Metropolitan see, vacant at the time, to recommend European Spaniards and that it do the same for the dignitaries of the other Cathedrals of America. He did not order Americans excluded, indeed they were recommended for that dignitary and for others; most recently both Americans and Europeans were recommended for archdeacon of the same Metropolitan see, and His Majesty has selected the American don Luis de Torres Tuñón.

Thus it is manifest that His Majesty, through the two cited orders, opened the doors to the churches and to the tribunals of Spain to his vassals of Indies, manifesting his paternal desires that these and the vassals from Europe be equal. It is well known that, after the two Royal Orders, [the Cámara of the Indies] is recommending and [His Majesty] is appointing Americans to these dignitaries. Finally given the small number of Europeans in the Cathedral of Mexico and in the other Cathedrals of both Americas, there is no rational or fair reason for your complaints and even less for the grievances it contains. His Majesty has ordered me to inform Your Honor of this, advising you that the care and attentions with which His generosity seeks the well-being, happiness, and the security of his beloved vassals, the Americans, rightly demands from the Municipality of Mexico appreciation [*justicia*] in place of unfounded complaints, and recognition that love and gratitude have always been His most glorious nature and character.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 1: 1691–1779, 434–435 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

## Two Republics

### Royal Cédula: Ordering That Spaniards, Mulattoes, Blacks, and Mestizos Should Not Live in the Indian Towns, February 18, 1587

The Spanish Crown recognized, as did the friars, that from the earliest days of contact, Spaniards abused Native Americans by excessive demands for labor and tribute. Already in 1512, the Laws of Burgos restricted what Spaniards could require and tried to impose humane limitations on labor and tribute. The New Laws of 1542 were an even more celebrated effort to curb Spanish exploitation. By this time, the concept of separate “republics” for Indians and Spaniards had emerged, as friars, in particular, believed that Spaniards were providing examples of morally reprehensible behavior to the indigenous people.

The idea of two republics rested on the retention of native villages and the creation of Spanish municipalities; each would be home to its respective, racially defined population. In 1533, Charles I had ordered that Amerindians be kept separate from “Spaniards, mestizos, and Indian vagabonds.” The concept of two republics enshrined segregation, but it is important to recognize that the majority of Amerindians fully endorsed the idea of keeping others out of their communities.



Madrid, February 18, 1587.

The King [Philip II]. To the President and *oidores* of my Royal Audiencia in the city of Santiago in the province of Guatemala. I have been informed that, despite my orders that Spaniards, mulattos, blacks, and mestizos should not live in Indian towns, to avoid the evil treatment that they receive, I have learned that you, my President, have given licenses for some Spaniards to live among the Indians. In particular, you have given permission for them to live in the towns of Icalcos and Naolingó. You should have restrained yourself in granting these permissions and taken more care not to contradict my orders. I have determined that it [segregation] is for the good of the Indians, which is why you should fulfill my orders. You should not go against the customs of the provinces and you should not approve Spaniards to live in the towns of Icalcos and Naolingó. You should gather the Spaniards in the village of Trinidad or other towns for Spaniards. Do not allow the Spaniards, mulattos, blacks nor mestizos to live in the Indian towns, because this is my will.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 572–573 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: About the Punctual Observance of the Orders That Have Been Issued Regarding the Relief and Proper Treatment of the Indians, September 19, 1675

Spaniards continued to abuse Amerindians despite repeated royal orders outlining proper treatment of the indigenous. The predictable result was still more orders referring to earlier restrictions and charging officials to enforce them. Nearly a century after Buenos Aires was permanently established, the Crown responded to specific examples of mistreatment with a reiteration that officials should follow proper judicial procedures dealing with the Amerindians.



Madrid, September 19, 1675.

The Queen Regent [Mariana of Austria; mother of Charles II]. Many different and repeated *cédulas* have been issued to the Viceroy, Presidents and Governors, Archbishops and Bishops of the Metropolitan Churches and Cathedrals of the West Indies, regarding the conversion of the infidel Indians and conservation of those that have been already reduced to our Holy Catholic Faith, their proper treatment, relief, and education. However, I have learned, from a letter from the Governor and Captain General of the provinces of Río de la Plata, dated October 20, 1674, that after he arrived at his post, he witnessed the poor treatment that the domestic Indians and those in *encomienda* receive in those provinces. They are hung, tied to tree trunks, sometimes by their feet, other times by



their hands. Some of them receive this treatment as a response for requesting their payment for personal services. When they request payment, they are brutally whipped. They are treated more cruelly than if they were slaves. This is seen in the complaints that have been made in various cases. In one case, the [Indian] *alcalde* of a religious brotherhood was punished, without the common practice of informing the Governors and justices so that they could protect him. Since the officials were not informed, there was no blamable omission on their part. And this occurred in one of the provinces where the Indians are best protected. For reasons given, for the correction of these problems and fulfilling the orders that have been given, we published a proclamation ordering that no *vecino*, of any quality, be allowed to whip any Indian, nor consent that any Indian be whipped, nor cut their hair, nor allow that any Indian be punished. If they must be corrected, they must attend the courts and be heard and be treated properly according to other orders given previously. Since this has been seen by the Royal Council of the Indies, with what has been said on this topic and what has been requested of the *fiscal*, I have determined to approve the *bando* that was published by the Governor, in addition to instructions given here. Therefore, I order that the Viceroy, Presidents, Governors, and all other magistrates in all the West Indies, the Archbishops and Bishops of the Metropolitan Churches and Cathedrals, review the older and recent *cédulas*, for the conservation, relief and good treatment of Indians, and for the way that the Indians should be treated and assisted. Pay particular attention to the punctual execution of the *cédulas*. Do not allow nor give the opportunity for not fulfilling this order. Those that transgress this order will have charges listed in their *residencia*, for the unscrupulous behavior of tolerating abuses. More than anything, I order this for your own conscience and the service of God, Our Savior, and my principal desire is the prompt observance of the orders that I have given.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 2, Book 2: 1659–1690, 621–622 (Madrid: Consejo Superior de Investigaciones Científicas, 1958).

### Royal Cédula: To the Viceroy of New Spain, Ordering That He Take Care That the Indians Not Live Outside of Their Neighborhoods, April 2, 1676

*The concept of “two republics” was clearly visible in indigenous villages from which non-Indians, other than children of Amerindian mothers, were excluded as a matter of policy. The use of segregation also extended into “Spanish” cities where Amerindians were to reside in separate districts or barrios. As the following document illustrates, part of the reason for segregation was to enable clerics to impart Christian doctrine more efficiently.*



*Madrid, April 2, 1676.*

The King [Charles II]. To the Very Reverend in Christ, Father Don Fray Payo de Ribera, Archbishop of the Metropolitan Church of the City of Mexico, my Viceroy, Governor and interim Captain General of New Spain. My Council of the Indies has received the news that in that city, the Indians lack religious doctrine and education. Many do not know the precise prayers for their salvation and some barely know how to make the sign of the cross. This has been observed by zealous persons who have informed us. We have sent priests to teach the doctrine and we know that the fault is partly theirs. But under your administration, as we know, the priests give the excuse that Indians leave their neighborhoods to live in the city among the Spaniards. When the Indians are in the city, they cannot be found, nor well administered. The previous government of that kingdom received my *cédula*, but the priests have not been able to make them return to live in their neighborhoods, despite my orders. Having been considered by the Council of the Indies and knowing how important it is to resolve this, once again, I order that you comply with the *cédulas* that I have issued on this matter. Do not permit the Indians to live outside of their neighborhoods, because of the harm that results when they cannot attend the training in religious doctrine and spiritual education. I also order that you verify that the parish clergy in charge of teaching the doctrine, fulfill this obligation. Carelessness in this obligation causes serious problems of conscience.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 2, Book 2: 1659–1690, 629 (Madrid: Consejo Superior de Investigaciones Científicas, 1958).

### Royal Cédula: That the Indians of the City of Mexico Live in the Designated Neighborhoods, April 10, 1699

*The difficulty of segregating Amerindians from the rest of the population was clearly visible in Mexico City. Amerindians persisted in living in the city’s center, in part because they resided as servants in Spaniards’ homes. This document of 1699 refers to an earlier effort to move the indigenous people out of the Spaniards’ residential area into their own neighborhoods or in their villages outside of the capital. It exemplifies the Crown’s habitual reference to earlier directives and the absence of their ongoing enforcement.*



*Madrid, April 10, 1699.*

The King. To Don Josef Sarmiento de Valladares, my Viceroy, Governor, and Captain General of the Provinces of New Spain and President of my Royal Audiencia of Mexico. In a letter dated October 31, 1697, you sent a report where it is clear that you recommend that it would be useful for the Indians that live in the center of that city, in the houses of Spaniards, to live in

their neighborhoods in the places that have been designated for them. In these places, they should build shelters to live in. In this way, they would not live hidden in the houses of Spaniards and avoid paying the Royal Tribute. They would have their own parishes and know their own priests and would be taught the doctrine and instruction of our Holy Faith. For this reason, you were obliged to publish a proclamation of May 20, 1697, that the Indians that have their dwellings outside of that city should live there. They would be enumerated in the parish and fulfill their Christian obligations. Even though your predecessor complied with this order, subsequently the practice has weakened, and it has been necessary to repeat the *bando* and to insist that it be enforced. The Royal Council of the Indies has seen your letter and testimony and heard the *fiscal*. We have decided to thank you for what you have achieved, charging you with special care in fulfilling and observing the *bando* that you published, so that its implementation is not lessened. This is my will.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 1: 1691–1779, 74 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

**Royal Cédula: To the Governor of  
Cumaná, Ordering Him That the Laws  
Cited Here State That Indians Should  
Reside in the Indian Towns,  
May 25, 1752**

*The policy that Amerindians should reside in their own towns was empire-wide. Spanish settlement in the province of Cumaná, located in the eastern portion of modern-day Venezuela, began with a Franciscan mission in 1520. The order established more missions subsequently but faced the common problem that Spanish landowners saw their indigenous populations as sources of labor. In this specific case, cacao growers around Caracas recruited Amerindians from the missions, a process that harmed the royal treasury, local hacendados, and the missions. This royal cédula from 1752 is a reminder that the Crown persisted in supporting separate indigenous villages even after more than two centuries of miscegenation.*



*Aranjuez, May 25, 1752.*

The King [Ferdinand VI]. To the Governor and Capitan General of the province of Cumaná. My Council of the Indies has learned that there is a growing number of Indians that are distracted from the conversions and missions of Piritus, Palenques, Cumanagotos, Caribes and others of that same province under the supervision of the religious of the Order of San Francisco because they go to work on the cacao haciendas on the coast and province of Caracas. This causes serious harm to the Indians and many offenses to God. It also harms my Royal Treasury, because in addition to paying tribute, they are

needed by subjects to cultivate their lands and haciendas. It is also harmful for the missionaries. The converted Indians are in the same condition as those that are in the wild. Even worse, this goes against everything that has been ordered through repeated Royal resolutions that the Indians should live in their towns of residence. Those that are married and have children should not wander from their towns, as has been stated in various *Laws of the Indies*, especially number 18 of title 3, book 6. Number 19 prohibits governors and courts from giving licenses to Indians to live outside of their communities, with serious penalties. In cases such as that of orphaned Indians, only law 12, title 1 of the same book allows changing residency. This does not apply to Indians in *reducciones* established by my Royal Orders. Since it is my intention to avoid these damages, I order you to enforce these laws and take the necessary action for their most exact observance. Your efforts should protect the Indians and gather the dispersed Indians in your districts. You should assure that they receive fair treatment and protect them from extortion and abuse. You should be aware of law 12, title 1, book 6, and enforce it. These orders also are going to the governor and bishop of Caracas, to be fulfilled by all. This is my will.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 1: 1691–1779, 263–264 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

**Consulta of the Council of the Indies  
Regarding the Reasons That the Governor  
and Intendant of Nicaragua Had for Not  
Exacting the Tribute Established for the  
Mulattoes and Free Blacks,  
September 10, 1788**

*Although the intendant system established between the 1760s and 1780s had the major objective of increasing the collection of revenue, the following document illustrates that intendants, as well as earlier officials for more than two centuries, employed the approach, although not the words, of “obedezco pero no cumplo” to avoid implementing directives whose enforcement would provoke serious problems. In this case, the intendant of Nicaragua responds to the hatred of mulattoes and free blacks toward paying tribute by informing the Council of the Indies why it would be better not to collect it. The response from authorities in Spain demonstrates flexibility in administration even after the reforms of Charles III.*



*Madrid, September 10, 1788.*

Señor. By order of Your Majesty [Charles III], on May 29 of this year, Don Antonio Valdés sent the report of Don Juan de Ayssa, Intendant Governor of the province of Nicaragua to the Council so that it could provide its comments to Your Majesty. This report, dated January 20, contained the reasons

for not implementing the practice of extracting tribute from the mulattos and free blacks as ordered by article 137 of the Royal Ordinance of Intendants of New Spain.

The above-named Governor, having prudently and carefully considered what is contained in the article, explored how the mulattos and blacks would respond. He determined that they would not placidly accept the imposition of annual tribute.

This contribution is conceptually just and extremely moderate, given the industry, investment, and assistance that the contributors enjoy. It is not a new tax, but as old as its constituents in America. Although the lack of observance of the laws does not reduce their rights and force, trying to reestablish it can give the impression that it is new.

This consideration, supported by the practical knowledge that he has acquired, persuades him that it is not convenient to enforce this point vigorously. The very large number of mulattos in the province in proportion to the rest of the population, their particular character, relationships and ideas, the limited forces and support the Government has to sustain and enforce its measures, and the proximity to the Caribs [an indigenous people], would facilitate unpunishable efforts at resistance. At the least it would favor the abandonment of the country whose profits are the result of the industry and application of the population.

To this one must add that the mulattos detest the designation “tribute” more than the payment itself. They are falsely persuaded that their class is superior to that of the Indians, whom they judge as inferior by virtue of being tributaries. The mulattos are deeply offended at the appearance of equality with the Indians.

Nevertheless, one might achieve the objective simply by changing the name of the tax and not altering its substance. It is certain that sometimes common opinion, ignorance, and preoccupation undermine some efforts, but without the repugnance that other means produce. Not using the word tribute will produce more willing acceptance, particularly if Your Majesty deigns to express as a sign of his beneficence the appreciation that his beloved vassals deserve, in gratitude for their application, industry, obedience, and effective services.

To this end [the Governor] has been working to bring together in villages the many individuals of that class that live dispersed and those that wander in the vast landscapes of the provinces. He is persuaded that this policy would succeed in convincing them of the advantages of sociable living, strengthening at the same time the spirit of patriotism that a solitary existence weakens and making them accustomed to order, public administration, and subordination.

Meanwhile, he has abstained from forcing any changes, limiting himself to informing the Junta Superior of Guatemala of the inconveniences, so that they can adopt the necessary measures to be implemented in the interim until Your Majesty gives new orders. This report is born of the goal of achieving public tranquility and well-executed policy.

The Council has considered the report and the accompanying comments by the *Contaduría General* and the Fiscal.

The Junta Superior of Guatemala should send its recommendation to the Council and also to the Governor of Nicaragua.

Your Majesty will resolve this according to your Royal pleasure.

Resolution of the King: As it is presented and in gratitude to the Governor and Intendent of Nicaragua for the care with which this matter has been managed. The King charges him to continue with the same prudence and collect as much as possible without irritating those vassals [the mulattoes].

Report of the *Contaduría General*, dated August 7, 1788.

The reasons that the Governor uses to support the suspension of the article mentioned above demonstrates good judgment and careful meditation of an issue that by its delicate nature warrants full consideration. [The Contador] recognizes and acknowledges the fairness of the contribution and does not doubt that it will produce the desired result. All of these reflections emphasize the importance of the name and form in which the aforesaid tax must be established. This must be done in such a way that it is neither rejected nor produces fatal consequences. It must be guided by local knowledge, that will provide a strong foundation and thus favor success. It would be best to follow these recommendations. The service of the King will be complete, without the risk that results from damaging the public.

The *Contador General* sees the benefit of the Governor’s suggestions. The report embraces a political topic that is vital to governing, particularly in such distant lands, and has given him a very favorable view of the solid instruction and prudent behavior of the Governor.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 2: 1780–1807, 28–30 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

## Blacks

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### Royal Cédula: That No Black in the Province of Peru Can Carry Arms, January 18, 1552

*The importation of black slaves directly from Africa was well established by the 1550s. Their presence added a third racial group to colonial society and ensured that the distinction between slaves and freedmen would persist long after the end of Amerindian slavery. Although a few blacks participated in the conquests, the Crown, its officials in the colonies, and Spaniards, whether or not they owned slaves, feared the threat that armed slaves posed. In addition, already by 1552, the*

*practice of blacks abusing Amerindians was apparent. The Crown's response was to prohibit blacks from carrying arms, a restriction never fully implemented.*



Toro, January 18, 1552.

The Prince [future Philip II]. To the President and *oidores* of the Royal Audiencia of the provinces of Peru. We have been informed that it is not desirable that in the provinces of that Audiencia, any black carry a sword, knife, or dagger. Because they have carried these arms freely up to now, there have been deaths of Indians and other disadvantages. I have been asked to put an end to this problem, should I choose to do so. The Council of the Indies has discussed this and agreed to recommend that I send this *Cédula* to you; I concurred. I order that you read the *cédula*, and enforce and expressly prohibit any black in any of the provinces of that Audiencia from carrying a sword, knife, or dagger. You should impose harsh punishments for infractions and publish this disposition so that everyone will be aware of it and no one can pretend to be ignorant of it.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 299–300 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal *Cédula*: That the Indians Should Not Be Injured by Blacks, May 10, 1554

*To enforce the prohibition against blacks carrying arms and to police the crimes of blacks against Amerindians, the Crown approved the creation of constables. Issued in the mid-16th century, this prohibition, like much other legislation, was designed to protect the Amerindians from abuse.*



Valladolid, May 10, 1554.

The Prince [future Philip II]. To the President and *oidores* of the Royal Audiencia of the provinces of Peru. We have been informed that there are many blacks in the City of the Kings and that they cause great harm to the Indians. They steal from them in the fields and in their houses. The same problem is prevalent in the rest of the towns of that land. Although many corrections have been suggested, none have been implemented. To solve this problem, you should appoint one or two constables for each Indian town. They should be generous in their support of the Indians and defend them in each town and the roads. They should have the authority to capture the blacks and bring them to justice. The constables can be paid from the fines or with a small salary from the His Majesty's coffers. All of this should be done so that the Indians are protected from the blacks.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 321 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal *Cédula*: That All Blacks (Men and Women), Mulattoes and Free Mulattoes in the Indies Should Pay Tribute to His Majesty, April 27, 1574

*Since a female slave's legal condition determined that her children would be slaves, regardless of the father's legal status, there were mulatto, zambo, and black slaves. Over time, the number of free blacks increased as a consequence of manumission, the purchase of freedom, and the birth of children to free black women. Perceiving the free blacks and their offspring as a potential source of revenue, the Crown determined in 1574 that they should pay tribute as the Amerindians did. The justification for this decision was the benefits they received by virtue of their freedom and status as vassals of the monarch.*



Madrid, April 27, 1574.

The King [Philip II]. We have been informed that many of the black slaves (both male and female), mulattos and mulattas taken to the Indies and those that were born there and live there, have been able to save and buy freedom with the riches present in the Indies. They have many sources of income and riches. Thus for many just causes, and particularly because they live in our lands and enjoy peace and justice and have moved from being slaves to being free, they should now pay tribute in the same manner as the Indians that are native to the lands and always paid considerable tribute to their lords. This should be one silver *marco* each per year. This has been discussed and agreed upon by our Council of the Indies and accordingly we have decided to send this letter. Therefore, we order our Viceroy, Presidents, and *oidores* of our Royal Audiencias of the Indies, islands and *tierra firme* of the Ocean sea and our governors, each in his district and jurisdiction, to distribute upon receipt of this order the amount of tribute that you think appropriate to all of the blacks, male and female, and the free mulattos and mulattas that are and will be in those parts so that they can serve us through personal service, working their land, and other commercial activities each year. After assigning the tribute, the officials should make a list of the amounts that can be collected as royal income in each district. With the present *cédula*, we order you to do this and comply. The sums collected should be placed in the three-keyed chest, noting the amounts, in the same way that is always done. This is the order that we give to our Viceroy, audiencias, governors, and other magistrates. All assistance should be provided for the collection of these funds.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 482–483 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

## Mestizos

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### Royal Cédula: About Gathering and Educating the Abandoned Children of Spaniards and Mestizos, February 13, 1554

*Few Iberian women arrived in the colonies during the years of conquest and early settlement. Consequently, Spaniards and Portuguese had indigenous women as concubines; their offspring were mestizos and mamelucos.*

*While the first generation of mestizo children reared by their Spanish fathers were considered Spaniards, especially if their parents had married, most mestizos were of illegitimate birth and abandoned by their fathers. By the 1530s, their number was sufficient to attract royal attention and continued to grow. The Crown's initial response revealed its recognition that many mestizos lacked a fixed residence or employment. These "vagabonds," particularly male and female orphans, needed shelter and education or training in useful skills.*



*Valladolid, February 13, 1554.*

The Prince [future Philip II]. To the President and *oidores* of the Royal *Audiencia* of the provinces of Peru. We have been informed that in your region there are many orphaned children, sons and daughters of deceased Spaniards, that are abandoned, committing idolatry and other crimes and sins, fornication and adultery, robberies and murders. The orphans' property is in the hands of administrators that rob them. To end these abuses, it has been ruled that you should gather into towns these sons and daughters of Spaniards. The orphans should be separated from the bad lives that they lead, and their properties should be administered in such a way that they benefit from the income. The income from their own properties should provide them with food and shelter. They should be put in schools, one for boys and one for girls, where they will be taught the Christian faith and way of life. If there are not enough good and virtuous people to educate these children, they can be put under the care of the religious orders. To pay for this, you should assign someone to administer the expenses.

Requested to address this issue, the Council of the Indies of His Majesty recommended that I send this *cédula* and I agreed to do so. You should inform us of the progress, including the number of sons and daughters of Spaniards and mestizos that are in this condition and how many you care for.

You should appoint tutors that will take care of them and their properties. The boys should be taught an occupation and the girls should learn good habits. If necessary for the boys, you should start a school; for the girls, you should start a home, where each of them can live off of the income of their own property. Those that do not have property should be supported

by donations. If any of the mestizo boys or girls requests a license to travel to Spain, it should be granted.

*Source: Richard Konetzke, ed. Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810, Vol. 1: 1493–1592, 320–321 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).*

### Royal Cédula: About the Mestizos in Guatemala, October 3, 1555

*By the 1550s, the number of mestizos in Guatemala was large enough to attract royal attention. Recognizing that many were abandoned ("without help"), the Crown used experience, or at least aspirations, in Mexico as a model. It turned to education as a way to make mestizos self-sufficient. Thus, boys were to be trained in a trade, and girls were to learn household activities, sewing, and "good habits." For them, marriage was the longer-term goal.*



*Valladolid, October 3, 1555.*

The King [Charles I]. To Doctor Quesada, President of our Royal *Audiencia* de los Confines. You have informed us that there is a large and growing number of mestizos and mestizas without help and recommended that we order how to remedy this. The boys should be taught a trade. We order that you start a home or school where they can be educated and supervised. After they learn a trade, they can be obliged to work. For the girls, you should found a house where they can be taught to work and sew and learn good habits. When they reach the proper age, each can be married according to her rank. As you know, this is the system that is used in Mexico City. In Santiago, you should introduce the same practice. You will keep us informed of the progress and any further actions we should order.

*Source: Richard Konetzke, ed. Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810, Vol. 1: 1493–1592, 333–334 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).*

### Royal Cédula: About the Facilities for Training Male Mestizos to Be Priests and for Admitting the Female Mestizos in the Monasteries of Nuns, August 31, 1588

*Many of the earliest mestizos were the sons and daughters of Spanish conquerors and first settlers and Amerindian women. The growing number of Spanish women in the colonies, however, enabled the Spanish fathers of illegitimate mestizo children to take Spanish wives. Understandably, the wives were much more concerned with the education, oppor-*

tunities, and inheritance of their own children than of their illegitimate half siblings. Some fathers took an interest in all of their children, and their mestizo sons gained an education. As employment, the church offered a potential solution for some, although the question of their ordination as clergy bedeviled policymakers for many years. Mestizas sought admission to convents, and their eligibility and status within convents were other questions to be answered, although the city fathers of Cuzco in 1551 had supported the establishment of the Convent of Santa Clara for the orphaned mestiza daughters of the conquistadores.



San Lorenzo, August 31, 1588.

The King [Philip II]. To the Reverend in Christ, archbishop of the metropolitan church of the City of the Kings of the provinces of Peru and the Reverend Bishops in Christ of the cathedral churches of the cities of Cuzco, la Plata, San Francisco de Quito and Tucumán of those provinces, each in its district.

Pedro Rengifo, who says that he is the natural [illegitimate] son of Captain Francisco Rengifo, *vecino* of the City of la Paz of those provinces, for himself and in the name of all of the children of Spaniards and Indians of the provinces, called mestizos, has informed me that they are children of principal persons that served in the discovery, pacification, and settlement of those provinces and in the recovery of the provinces when some people rebelled against my service. Some of them, on their mothers' side, are descendents of the Lords that possessed these provinces, *caciques*, and other principal Indians. They have continued to serve me in every way, following the example of their fathers. They are all poor because the property of their parents was left to legitimate children and the wives of their fathers. As descendents of persons of quality, few or none of them have learned trades and many have studied with the intention of converting the Indians. Many of the mestizos were at the point of being ordained and were ready to receive their orders, but in fulfillment of my *cédulas* of December 2, 1578, in response to a claim that the mestizos were not yet prepared, their ordination was withheld in order to investigate whether this was true. I asked you to look into this carefully and not to ordain mestizos until the answer was clear. The *cédulas* were interpreted and extended to the mestizas that were allowed to be lay but not regular nuns. Carrying out these *cédulas* also led to damaging the teaching and conversion of the Indians, because the mestizos know their language. Those that were ordained and will be virtuous and set good examples should be favored. Considering this, in the City of Kings, in 1582, the Provincial Council determined that these *cédulas* should not be fulfilled. Based on information that was presented and reviewed, my Council of the Indies agreed that I should suspend the *cédulas*. In the session of Provincial Council, it was decided that the mestizas that are regular nuns should be admitted as such. The Council agreed that I should order

by this *cédula* approving the ordination of mestizos as priests if they have the qualities and aptitude necessary. This should take place only after an investigation has shown that their lives and customs are appropriate and they are well taught and capable of serving. Regardless of the constitutions of the nunneries, mestiza women may be admitted in full regular status without hindrance provided their life and customs are appropriate.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 595–596 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: To the Governor of Yucatán about Not Giving the Position of Notary to Mestizos, June 14, 1599

By the late 16th century, a growing number of mestizo men were literate and employed in some cases as notaries, or escribanos. Other than specific cases approved by the Crown, however, the policy enunciated in 1599 succinctly prohibited mestizos from being named notaries. The reference to the persons eligible for these positions clearly meant persons of legitimate birth and full Spanish descent.



Barcelona, June 14, 1599.

The King [Philip III]. To my Governor of the province of Yucatán. We have been informed that on some occasions you employ mestizos as notaries [*escribanos*]. This is prohibited for it causes damages and vexations to those that have businesses. In the future, you may not use them. We order that any employment that you have should not be given to mestizos, nor should you consent that they be selected or serve in the case of vacancies of other notaries. You should employ the persons that are loyal, meet legal requirements, and comply with all of the laws of my kingdoms. Those that are prohibited should be removed, because this is what is best for good administration. It is my will that this not be applied to those that are authorized by *cédulas de arbitrios*.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 2, Book 1: 1593–1659, 61 (Madrid: Consejo Superior de Investigaciones Científicas, 1958).

### Royal Cédula: Soliciting Information about Mestizos Who Hold Public Offices, September 9, 1600

Correctly suspecting that mestizos held positions as aldermen, provincial administrators, and notaries, in 1600, the Crown asked the viceroy of Peru to investigate and submit a report

on their number and whether royal laws, such as the one above from 1599, were being broadcast and observed. The royal interest in whether mestizos in such positions had been appropriately trained or whether there were problems resulting from their service suggests some openness to their employment in positions originally held by Spaniards.



Madrid, September 9th, 1600.

The King [Philip III]. To my Viceroy, President and *oidores* of my Royal *Audiencia* of the City of Kings in the provinces of Peru. I understand that in these provinces are some mestizos employed as district officials [in *corregimientos*, *alcaldías mayores*], aldermen [in *regimientos*], scribes and notaries [in *escribanías*] and other positions of this type. I want to be better informed about this and whether the mestizos that are employed in these occupations have the appropriate training and who provided it. I also want to be informed whether it is generally ordered that mestizos should not have this type of employment and if this is honored or ignored and what difficulties have resulted, are occurring, and will continue to occur. I order you to investigate this in detail and to send me a report with your opinion.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 2, Book 1: 1493–1592, 64–65. (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

## Mulattoes

### Royal Ordinance: That No Black or Mulatto Have Indians at his Service, June 14, 1589

*Mulattoes, typically the offspring of a Spanish man and an enslaved or free black woman, rather than the reverse, were one of many categories in the hierarchically organized society based on race and culture under the sistema de castas. Often lumped together with blacks, mulattoes were subject to discriminatory legislation based on race and legitimacy. Their inclusion as tributaries by the 1570s was one indication of this. Prohibitions on having Amerindians work for them and against carrying weapons were two other signs of their status. Complaints that mulattoes lived in an unacceptable manner persisted throughout the colonial era.*

*The size of the mulatto population was directly related to the number of African slaves brought to a specific area. Venezuela had numerous blacks and mulattoes, but Brazil had far more.*



San Lorenzo, June 14, 1589.

The King [Philip II]. To my Viceroy of the Provinces of Peru. In the name of the *Ciudad de la Plata* of the province of *Charcas* of that land, I have been asked to confirm the orders given by Don Francisco de Toledo, who was my Viceroy of those provinces, that no black nor mulato may have in his service either *yanacunas* or any other Indians. This has been reviewed by the members of my Council of the Indies and I have agreed. Therefore, I order that you enforce what Viceroy Don Francisco de Toledo ordered concerning this issue.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 600 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: To the Governor of Venezuela, That He Maintain the Cédula Regarding Taxation of Free Blacks and Mulattoes, September 21, 1592

*Free blacks and mulattoes objected to paying tribute like Amerindians. As this document indicates, the requirement that they do so in Venezuela needed repetition. This did not, however, meet the vecinos' request that they be subject to encomienda.*



Burgos, September 21, 1592.

The King [Philip II]. To my Governor in the province of Venezuela. On the part of the *vecinos* and inhabitants of the cities of this province, I have been informed that there are many mulattos, children of Indian women [and black males], that pretend to enjoy the liberty that belongs to their mothers. They move about freely, causing damages, committing crimes and excesses that would end if they were corrected and subjected to the service of their *encomenderos* just as their mothers are. The *vecinos* request that I order that these mulattos go into the same service as their mothers. This has been reviewed by my Royal Council of the Indies, and the order has already been given for those parts regarding the tribute of the black men and women and free mulatto men and women. Therefore, there is and will be a *cédula* in the following tone [dated April 27, 1574; see page 344]: I order you that you read, comply, and fulfill all that is contained and declared as if it were directed at you, without making any changes in it.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 623–624 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

**Royal Cédula: That the Mulattoes and Persons of Mixed Indian and Black Parentage Be Raised with Good Habits and That They Be Occupied in Useful Tasks and Jobs, August 16, 1601**

*Concern about the increasing number of mulattoes and zambos living as vagabonds and without schools or jobs that would eliminate their alleged laziness preoccupied Spanish authorities in the late 16th and early 17th centuries. In this case, the king asks the viceroy of Peru to investigate these problems and to find a solution for them.*



*San Lorenzo, August 16, 1601.*

The King [Philip III]. To the Marquis of Montesclaros, my relative and Viceroy, Governor and Captain General of the provinces Peru. Pedro de Ludeña, my *corregidor* of the Villa of Potosí, has written to me about the many mulattos, mestizos, and persons of mixed Indian and black parentage (*zambos* or *zambaigos*) in that region. They cause serious problems, not only because of their growing numbers, but also because the Spaniards do not employ them, nor are there any provincial schools, studies, or jobs that can occupy the youths. They live like vagabonds during the period in which they should be learning good habits. They turn to vices and laziness, and any effort to correct them just makes them move to another place to continue the same bad habits. What is needed is a universal solution. Although the Count of Monterrey knew of this problem and was determined to resolve it, nothing has been put into effect after his death. Since it is necessary that you investigate and understand this problem, I order that you do so. After you have looked into this matter with due consideration, you should provide the necessary general solution to reduce the problems. You will find a way for these people to learn and live with good habits, and you should insure that they are productively occupied and employed, since laziness is the cause of damage to society and hinders good habits. You will keep me informed of all that you do and order.

*Source: Richard Konetzke, ed. Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810, Vol. 2, Book 1: 1593–1659, 134–135 (Madrid: Consejo Superior de Investigaciones Científicas, 1958).*

**Royal Cédula: To the Viceroy of New Spain. That You Remedy the Problems That Result from the Free Blacks and Mulattoes Who Are in the Land, October 17, 1607**

*After challenging the viceroy of Peru to solve the problem posed by unschooled and unemployed mulattoes and zambos, Philip III turned to New Spain. There, similar issues were present,*

*plus the additional one that “their women dress with great excess.” Disapproval of “their women” dressing in a manner above their station became an ongoing issue. Sumptuary legislation in Spain indicates that some Spaniards, and in particular the conde-duque de Olivares who advised Philip IV for many years, considered expenditure on fancy clothing there was excessive as well.*



*San Lorenzo, October 17, 1607.*

The King. To Don Luis de Velasco, my Viceroy, Governor, and Captain General of the provinces of New Spain. I [Philip III] have been informed that in New Spain there are many free blacks and mulattos and mestizos that sustain themselves through trickery and bartering expensive goods. Most of them are free, and their women dress with great excess. The problems caused by these people and their way of life should be resolved. You should be aware of the problem and find the solution that you consider to be the most convenient.

*Source: Richard Konetzke, ed. Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810, Vol. 2, Book 1: 1593–1659, 135 (Madrid: Consejo Superior de Investigaciones Científicas, 1958).*

## Castas

**Royal Cédula: That No Mulatto, Mestizo, or Man Who Is Not of Legitimate Birth, Can Have Indians or Hold Royal or Public Employment, February 27, 1549**

*Colonial society was based on legislatively identified racial categories, each with defined rights, privileges, and responsibilities. The ultimate source for racial identification in this sistema de castas was a priest’s entry in a parish record book for baptisms and marriages. Without a record of baptism, a person of mixed ancestry in an area of Spanish settlement was presumed to be illegitimate, a reasonable assumption in the 16th century when Spaniards considered the terms mestizo and illegitimate to be synonymous. The distinction between legitimate and illegitimate was crucial to Spaniards. Once blacks were present in substantial numbers, a person of illegitimate birth born to a non-Spanish woman was presumed to have some African ancestry.*

*By the middle of the 16th century, the number of mulattoes, mestizos, and persons born out of wedlock was sufficiently large that the Spanish Crown often aggregated them in legislation. This cédula of 1549 identifies mulattoes and mestizos*



*in a prohibition against holding office or benefiting from Amerindian labor.*

*In the early 19th century, the Council of the Indies still distinguished between the legitimate mestizo, eligible for all offices in church and state, and the castas. It was willing, however, to concede eligibility to persons of African descent (morenos and pardos) and legitimate birth provided their four immediate generations of ancestors were also of legitimate birth, a problematic stipulation.*



Valladolid, February 27, 1549.

The King [Charles I]. To the President and *oidores* of our Royal *Audiencia* of the New Kingdom of Granada. Alonso Téllez and Pedro de Colmenares, in the name of that province, have informed me that, although it is well known that laws and pragmatics of our realms order that no mulatto, mestizo, nor man of illegitimate birth can have Indians, nor royal nor public office without a special license. They request that we send these laws to you so that that you can comply with them. We remind you that mulattos, mestizos and illegitimate persons cannot have Indians through *repartimiento* or any other manner; nor can they hold royal appointments. This was seen by our Council of Indies, and it was agreed that we should issue this *cédula*, so that you can know these laws and pragmatics, comply with them, and enforce them without exceptions.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 256 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: That Indians, Mestizos and Mulattoes Can neither Have nor Carry Weapons, December 10, 1566

*The idea that the lower orders of colonial society would own or carry weapons was anathema to authorities in Spain, and as early as 1535, they prohibited it. Nonetheless, officials in the Americas found it necessary on occasion to arm them for defense. In 1615, the viceroy of Peru organized colored militia companies as part of his effort to meet a threat by the Dutch. The following document is just one example of royal concern over arming Amerindians, mestizos, and mulattoes.*



Madrid, December 10, 1566.

The King [Philip II]. To *Licenciado* Castro of our Council of the Indies and president of our Royal *Audiencia* residing in the City of Kings in the provinces of Peru. We have been informed that although we have ordered that Indians and mes-

tizos and mulattos in these parts are prohibited from having or carrying arms, the Marquis of Cañete and Count of Nieva, previous viceroys of those lands, and other persons that have governed there have given permission to some Indians and mestizos and mulattos to have and carry arms. They should not have done this for it is against what we have ordered. It also causes other problems. To end this practice, it has been discussed in our Council of the Indies and decided that we should send this *cédula* to you. I have agreed with this recommendation so that you can be informed and know that Indians and mestizos and mulattos have some arms. You must remove these weapons or have them removed and procure that in the future, they do not have nor carry arms in any manner. Regarding those that have been given license by our viceroys or governors, you should take the arms and sell them. The proceeds of the sale will be given to the Indians or persons from whom the arms were taken, and the other arms will be placed in storage for protection and use when necessary. You will inform us when this has been done.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 410 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

### Royal Cédula: That Blacks, Mulattoes, and Mestizos Should Not Live with Indians, November 25, 1578

*As the sistema de castas became more complex, the Crown expanded the list of racial categories forbidden to live among the Amerindian population. This document from 1578 disparages the behavior of mulattoes, blacks, and mestizos and blames them for teaching the Amerindians “bad habits, laziness and vices.”*



Madrid, November 25, 1578.

The King [Philip II]. To our Viceroy and president of our *Audiencia* that resides in Mexico City of New Spain. We have been informed that it is very undesirable for the good of the Indians of those provinces that they be in the company of mulattos, mestizos, and blacks because the latter not only take advantage of the Indians but also teach them bad habits, laziness and vices. This will impede the salvation of the Indians' souls, because no good can come from the company of mulattos, blacks and mestizos; they are universally inclined to poor behavior. I order that you take great care to prohibit this and, in the future, enforce that they not be in the company of Indians. You should order that all of the tribunals of the districts of this *Audiencia* be very careful to maintain this separation, punishing all that are found in the company of Indians, or in the Indian villages. You will procure to enforce and comply with the contents of this *cédula*, and inform us of the way that you do so.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 1: 1493–1592, 513 (Madrid: Consejo Superior de Investigaciones Científicas, 1953).

**Royal Cédula: That the Viceroy of Peru Address Whether It Would Be Convenient to Gather the Mulattoes, Blacks, and Zambaigos in Towns, April 10, 1609**

*All racial combinations other than a mestizo born of married Spanish and Amerindian parents formed the castas. Royal efforts to prevent non-Indians from residing with Amerindians reflected the desire for two “republics.” While the restriction against mestizos, mulattoes, and blacks was intended to protect the Amerindians, the royal cédula of 1609 reveals the ongoing uncertainty about what to do with these groups, repeatedly described in derogatory language.*



Madrid, April 10, 1609.

The King [Philip III]. To the Marquis of Montesclaros, my Viceroy, Governor and Captain General of the provinces of Peru. I have been informed that it would be advisable to gather the large number of mulattos, free blacks, mestizos, and *zambaigos* that are found in those provinces and in the provinces of Charcas. If brought together in Spanish towns, they could pay their tribute and personal service at the mountain of Potosí as is done by the Indians, who are freer. I want to see what you think about this and whether it would be convenient to relocate the mulattos, *zambaigos*, and free blacks and mestizos. I want to know if it could be done easily and in what manner, in which towns they could be relocated, what tribute could be imposed, and if they could be distributed to labor in the mines of Potosí. I also want to know what problems or benefits could arise from this, as I have ordered you to report by another *cédula*. Inform me if another order is advisable to address and eliminate the problems that one can fear as a result of the growth, bad customs, and inclinations of these people. I order that, having paid close attention, you send me a report regarding this. You should also send a list with the number of free blacks, mulattos, *zambaigos*, and mestizos that are found in this district, listing each group separately.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 2, Book 1: 1593–1659, 148 (Madrid: Consejo Superior de Investigaciones Científicas, 1958).

**“Unequal” Marriages and Gracias al Sacar**

**Pragmatic Sanction to Avoid the Abuse of Contracting Unequal Marriages, March 23, 1776 (Excerpts)**

*The importance of matrimony for a stable, well-ordered polity contained in the Crown’s legislation on castas and their component groups came to the fore in this Pragmatic Sanction. The document outlined the responsibility of children under the age of 25 to secure paternal consent, or that of other specified persons in the father’s absence, to their marriage or face disinheritance. The law applied to all children, from those of the highest titled nobility to those of the lowest commoners. Children older than 25 years also had to seek parental counsel but could marry without parental approval. Jurisdiction over marriage moved from ecclesiastical to civil courts. The purpose of the Pragmatic Sanction was to enable parents to stop “unequal” marriages, for example, those between nobles and commoners.*

*When Charles III extended the Pragmatic Sanction to the Indies in 1778, he specifically excluded from its application mulattoes, blacks, and castas other than militia officers and a few other special cases. This meant, for example, that Spanish parents could prevent a marriage of a son or daughter to a casta solely because of his or her ancestors or lack of legitimate birth.*



*El Pardo. March 23, 1776.*

Don Carlos, by the Grace of God, King of Castile, etc. Know that as part of my Royal Authority to prevent through healthy measures the disorders that are introduced over time, establishing sanctions to punish infractions, accommodating the circumstances of each case and qualities of the persons, laws should be vigorously observed. The abuse of children of families contracting unequal marriages, without waiting for the advice and consent of their parents or guardians, has become frequent, with grave injury and offense to God. This results in the disruption of the good order of the State and continuous discord and damages to the families against the intention and pious intention of the Church, that, even though it does not annul such marriages, has always detested them and prohibited them as opposite to the honor, respect and obedience that children owe their parents in such a serious and important matter. . . .

1. For these reasons, and for the organized observance of the laws of this Kingdom going back as far as the laws of the *Fuero Juzgo* [a seventh-century compilation], that consider the marriages of sons and daughters of good families, I order that from now on, in agreement with these laws, the sons and daughters that are under 25 years of age must obtain their father’s advice and permission. In the absence of the father, they must obtain their mother’s consent. In the absence of both parents, the sons and daughters must obtain consent of the paternal or maternal grandparents, respectively. If there

- are no grandparents, they must have the consent of the two closest relatives, who must be of legal age and not interested parties in the marriage. If there are no relatives that meet these criteria, then the tutors or guardians can give permission. It is understood that relatives, tutors or guardians should exercise this right with the approval of a royal judge. If the royal judge is not in a position to exercise this authority, then the authority rests in the nearest *corregidor* or *alcalde mayor*.
2. That this obligation applies to all classes, from the highest classes in the State, without exception, to the most common classes of the towns. All of them, without exception, owe the indispensable and natural obligation of parental respect. Parents hold this right by natural obligation and because of the serious implications in the selection of the most appropriate person. This selection cannot be left to a person that is not of legal age, without the intervening parental deliberation and consent, based on an understanding of the consequences. Parents have the right to put a timely end to potentially damaging results both for the family and society.
  3. If a marriage is celebrated without the proper advice and consent, by this simple fact, those that contract this marriage and the children and descendants that result from this marriage will lose all civil privileges, including the right to a dowry and the right to obligatory inheritance from parents and grandparents, whose respect and obedience were offended by not honoring this Pragmatic. Disinheritance, under these conditions, is fair. Those who are disobedient and ungrateful cannot demand justice, nor protest the will of their parents or grandparents. Parents and grandparents have the right freely to dispose of their properties, without more obligation than basic sustenance.
  4. I also declare persons that disobey this Pragmatic will be deprived of their income and the right to inherit the entails, religious foundations, and other perpetual family rights that would belong or be inherited by them. This will apply until all other legitimate heirs to the entail are deceased. Only then may the disobeying party inherit.
  5. If the person that marries without permission is the last of the line of descendants, the transversal descendants will inherit, in the order of birthrights. Those that prohibit a marriage and their descendants cannot inherit the rights as a result of denying permission, except in the case of last resort and exhausting the transversal options. This does not remove the basic right to sustenance by persons that break the prohibition to marry without permission.
  6. Persons that are over 25 years of age fulfill the obligation by requesting paternal consent for marriage. Based on other laws, no delay is allowed at this age. But if the son or daughter marries without requesting parental consent, the same penalties will apply regarding both normal inheritance rights and entails.
  7. It is my intention and will that the disposition of the Pragmatic shall preserve all rights and authority of the

parents regarding the intervention and marriage of their children. The parents should use their authority to guide their children for the benefit of the children and the State. It is important to warn against the potential for abuse and excesses on the part of parents and relatives in the arbitrary use of this right. Children have freedom to choose their vocation. Should this be marriage, parents cannot force sons and daughters to marry against their will. There have been numerous cases where parents and relatives have denied permission to be married honorably to a person that the son or daughter selects, with the intention of forcing them for reasons of temporal benefits to marry against their will to a person that they find repugnant. Parents must respect the fundamental intention of the holy sacrament of marriage.

8. Considering the very serious temporal and spiritual damages that are caused to the civil and Christian republic as a result of prohibiting fair and honest marriages or from celebrating marriages without the due liberty and mutual affection of the parties, I declare and order that parents, grandparents, relatives, tutors and guardians, should give their consent if there is no just and rational cause to deny it, such as serious offense to the family honor or if it were harmful for the State.
9. This is the procedure to protest the irrational refusal of the parents, grandparents, relatives, tutors, or guardians [to allow a marriage]. Persons under 25 years of age and those over 25, should submit their case to the ordinary royal magistrate that must review and resolve the case within eight days, and by appeal to the Council, Chancellery, or *Audiencia* of the respective region, which must review and resolve the case within 30 days. The declaration cannot be appealed, so that reasonable and just marriages cannot be delayed.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 1: 1691–1779, 406–409 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

### **Royal Cédula: Inserting the New List of Fees for the Payment of Services Indicated in the *Gracias al Sacar*, August 3, 1801 (Excerpts)**

*The right of the Spanish monarch to grant dispensations to the law was unquestioned. Originally issued in 1795, a revised price list (arancel) of specific dispensations published on August 3, 1801, again systematized them, providing for a precise payment for a particular dispensation, provided the Cámara of the Indies approved it. Charles IV promised that revenues received would be applied to the interest and amortization of royal bills issued to finance Spain's involvement in European wars.*

*The price list covered many items, ranging from approval to establish an entail (mayorazgo) to dispensations from the age required to serve in a particular position. Of particular*

*interest to contemporaries were legitimation of birth and the purchase of “whiteness” through buying a dispensation from being a pardo, or person with some African ancestry. While some elites felt threatened by a potential invasion of their ranks by “inferiors,” the number of identified dispensations actually granted to pardos was small.*



Madrid, August 3, 1801.

The King. Because in my Royal Pragmatic Sanction of August 30th of last year I identified the total income going to the Cámara as one of the sources to be applied to the payment of interest for the *vales reales* and the loans made, especially from mortgages, to the *Caja de Amortización*, the proceeds from *gracias al sacar* issued by my Cámaras of Castile and the Indies are included. By a Royal Order issued the same day, I asked the Cámara of the Indies to recommend as soon as possible the fees that would provide the greatest increases in income. In complying with this royal request, the Cámara of the Indies by recommendation of June 1 of this year proposed a list of fees that I consider just and in accord with my sovereign intentions. Consequently, I have approved the following:

First Chapter: For permission to establish *mayorazgos*, the payment will be twenty thousand *reales vellón*.

2. For the confirmation of *mayorazgos*, twenty thousand.
3. For the age supplement of notaries, lawyers, doctors, surgeons, pharmacists and others of this class, for each year that they are lacking, they will pay one thousand two hundred.
4. For the age supplement to be *regidor* of any capital city of a province, for each year that they are lacking to reach the age of eighteen, a payment of four thousand five hundred.
5. For the age supplement to be *regidor* of any city that is not the capital of a province, for each year that they are lacking to reach the age of eighteen, a payment of one thousand five hundred.
6. In the towns and villages of Spaniards, seven hundred and fifty. . .
16. For the exemptions from royal or seigneurial jurisdiction for the villages or hamlets that become towns, for each *vecino*, the payment of six hundred and fifty. . .
26. For a license to serve as employees of the Royal Treasury (Real Hacienda) in the capital city of a province, even if the person is a retail merchant, the payment will be nine thousand.
27. In the cities that are not capitals of a province, six thousand.
28. In a town or hamlet of Spaniards, two thousand eight hundred.
29. For the license to serve as *regidor* and notary at the same time, in towns and hamlets of Spaniards, if it is one with a large population, two thousand eight hundred.
30. In the small towns and hamlets, the payment will be one thousand five hundred.

31. For the license for a *regidor*, and those that succeed him, to elect and be elected as *alcaldes* in the year that it is their turn by luck, as long as they do not have more than one vote, if it is in a capital city of a province, the payment will be four thousand five hundred.
32. In those cities that are not capitals, two thousand eight hundred.
33. In the towns and hamlets of Spaniards, one thousand eight hundred. . .
43. For the license of a cleric who is also a lawyer, so that, despite his category of priest, he can practice in matters that are purely civil, he should pay two thousand eight hundred.
44. For the license to transfer the properties of *mayorazgos* in all classes of *mayorazgos*, there is a payment of five thousand five hundred.
45. For the favor of enjoying an entail when one does not reside where the founder specified, a payment of six thousand. . .
47. For the child of unknown parents to serve in positions of notary, a supplement of six thousand.
48. For the legitimation of a child (son or daughter) to inherit and enjoy the privilege of legitimacy, when both parents are single, the payment is five thousand five hundred.
49. For the extraordinary legitimations to inherit and enjoy the nobility of fathers that are members of the military orders and married, or the children of clerics, the payment is thirty three thousand for all of them.
50. For the legitimation of the same class as the above, for children born of unmarried mothers and fathers that are married, the fee is twenty five thousand eight hundred.
51. For each of the privileges of nobility (*hidalguía*), the payment is one hundred and seven thousand.
52. For the declaration of nobility (*hidalguía*) and nobility of blood, the payment should be in proportion to the justification that is presented and according to the linkage to the true rights, with payments of sixty, eighty and one hundred thousand.
53. For the favor of a title of Castile for a subject that resides in the Indies, if the person is lacking any or all of the criteria established by law, the Cámara will establish the quota that must be paid, based on the dispensations needed.
54. And in regard to the provision of the same Cámara from the year 1785 that orders that titles of Castile issued to persons in the Indies, will not express the monetary payment made by the recipients, both secretariats should observe this resolution, but without prejudice to what the Cámara might indicate when appropriate, as foreseen, and always when there are no very relevant reasons that should exempt the recipients from all or part of the payment, in which case His Majesty must make the determination.
55. For the licenses that are given to foreigners to go to the Indies, the payment will be the amount that the Cámara determines, based on the consideration of the conditions and circumstances of the license.

56. For the same license for residents of the Indies, the payment will be eight thousand two hundred.
57. For letters of naturalization for the Indies when the interested party is not lacking any of the requirements established by law, the payment will be eight thousand two hundred.
58. And when the person is lacking any or all of the indicated qualities and these qualities must be dispensed, the Cámara will regulate the amount that must be added to the established payment.
59. For the license to *encomenderos* so that they can reside in these Kingdoms, the payment will be one thousand four hundred. . . .
63. For the concession of the use of the distinction *Don*, one thousand four hundred. . . .
69. For the dispensation of the quality of *pardo*, a payment of seven hundred should be made.
70. For the dispensation of the quality of *quinterón*, the payment is one thousand one hundred.

Source: Richard Konetzke, ed. *Colección de documentos para la historia de la formación social de Hispanoamérica, 1493–1810*, Vol. 3, Book 2: 1780–1807, 778–783 (Madrid: Consejo Superior de Investigaciones Científicas, 1962).

## Medical Matters

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### Letter from Ciriaco Sepúlveda to Dr. Narciso Esparragosa Concerning the Illness That Both Doctors Were Treating, ca. 1800

*Historians of colonial Latin America find personal letters far less frequently than official correspondence. The selections that follow are personal letters between Dr. Narciso Esparragosa and friends, relatives, and patients. The greetings and signatures therefore have a more familiar tone; the writers are revealed as real people faced with medical problems that often had no certain cure.*

*Dr. Esparragosa was the protomédico of the Kingdom of Guatemala and its foremost surgeon in the early 19th century. His accomplishments bought him the position of surgeon of the royal bedchamber and the right to wear a gold-embroidered uniform. Sepúlveda was Esparragosa's student and friend. He left Guatemala City to practice medicine in other parts of Central America.*



Dear Dr. Don Narciso,

My dear friend, I am very sorry to hear about your poor health. I hope that you are soon recovered from the fever. I am at your service, in whatever you may need.

Around three o'clock I saw the answer that you sent, in which you write to don Francisco Andonay. You are right to be surprised that he did not tell you about the condition of your *comadre* [probably godmother], but don Francisco did not tell me that he had consulted you about his sister. If he had told me, I would have informed you and asked your advice. Her present condition is that she is still ill. The illness began on Thursday, at 7 o'clock at night. She began feeling cold and then the fever started. The fever continued through Thursday and Friday, and on Friday night, at about nine o'clock, she started having pains in her side, near her ribs. On Saturday morning, at about six o'clock, the pain subsided. Then she felt a sharp pain on her right side and had great difficulty breathing and pain in her blood. I immediately ordered that she be bled and I observed that the blood was in an inflamed state. I also ordered ammonia salts, water with willow, and cutting on her legs and feet. The next day, the pain in her side returned. I repeated the blood-letting and the blood did not look inflamed at all. The pain continued, though it was not as sharp. But on the fifth day, I noticed that she had very little phlegm and a dry cough. I applied the laxative for the pain, which did not stop. On the sixth day, I applied another, which did not raise a blister. It healed and began to ooze on the second day. On the second day of the blood-letting, I started to give her the indicated powders in simple vinegar. Today she is very weak, and a cinnamon-yellow color. The fever goes up at night and lasts until about two o'clock in the morning. Together with the first powders that you sent, at ten o'clock on day five, I gave her Escorscionera water [a kind of tea] and palm water. Her tongue is thickly coated. I have a list of the dark symptoms. I continue to give her the antipruritic [medicine], giving two at ten o'clock on day five, and ten o'clock at night.

This is all that I have to report to you. I hope that you recover your health. Your servant, who kisses your hands,

*[signed] Ciriaco Sepúlveda*

Source: Documentos Privados del Dr. Esparragosa. Private Archive. St. Louis, Missouri. Document no. 81, undated.

### Letter from Ciriaco Sepúlveda to Dr. Narciso Esparragosa Discussing the Illness of Esparragosa's *Comadre*, ca. 1800

*This letter from one physician to another illustrates what practicing physicians in Guatemala around 1800 considered important medical symptoms.*



Señor Doctor, Don Narciso Esparragosa,

My sir, right now it is around seven o'clock at night. I am writing this letter to you to inform you of the condition of your *comadre*.

The method that you applied, with the antipruritic powders has given the result of moving the phlegm. It is white and very thick. The pain has reduced. The treatment with the laxative is working, but only in small amounts. I observe a kind of noise

in her throat, like when a cold is congested in the chest. There is little phlegm, but the fever is constant. The fever reduces around ten o'clock. She continues like this until about eight or nine at night, when the fever goes up again. She does not speak clearly and I can observe that she has a blister on her tongue. Her tongue is very dry, with a black film that extends from the back to about half of the tongue. She has slight delirium, which has gone on for about three days. She has been constipated for about three days and up to today, her abdomen has not moved. I ordered that she should be given the treatments that you sent. The result was that she successfully sweated from the waist to the head. This is all that I have to report at this time.

I hope that you have recovered from the fevers and you order whatever you consider necessary.  
Your servant, who kisses your hand,

*[signed] Ciriaco Sepúlveda*

Source: Documentos Privados del Dr. Esparragosa. Private Archive. Document no. 85, undated.

### Letter from Gertrudiz Zavala to Dr. Narciso Esparragosa, ca. 1800

*In this letter, a patient complains that she is ill and in a bad mood.*



Señor Don Narciso Esparragosa,

My dear Señor, who has my greatest appreciation. I have never stopped having the confidence in putting my care in your hands, and you have never failed to carefully manage the reestablishment of my health. I cannot find any cause for the displeasure that has caused me to be in a very bad mood, which was caused by the practical joke that was played yesterday. I feel infinite displeasure that you felt compelled to joke. I do not have the health to support this problem.

I kiss your hands,

*[signed] Gertrudis Zavala*

Source: Documentos Privados del Dr. Esparragosa. Private Archive. Document no. 86, undated.

### Letter from Dr. Narciso Esparragosa to Mariano Herrarte, ca. 1800

*Dr. Esparragosa writes about contagion in furniture and clothing.*



Señor Don Mariano Herrarte,

My dear Señor, of my greatest appreciation. To remove all of the traces of contagion in the furniture and clothing of the persons who had direct contact with the President, Don

Mariano Toledo during his illness, especially during the last months of the illness.

I believe that all of the clothing should be boiled with lye and smoked with sulphur. You should do the same with the furniture that allows this type of procedure. The bed should be burned. If you need to reuse the bed, after washing it carefully and smoking it, it can be sent to the hospital. The books do not need to be treated, because the priest did not touch any of the books during all the time he was sick. The few that were in his room when he died, should be smoked.

The room where he died should also be smoked, the bricks should be washed and the walls should be white-washed. There is nothing else that can be done regarding the furniture that was used by the father in the last months of his illness to reduce the residue of contagion.

I remain at your service, with the greatest affection. You servant and master. I kiss your hands.

*[signed Esparragosa]*

Source: Documentos Privados del Dr. Esparragosa. Private Archive. Document no. 88, undated.

### Letter from Antonio González to Dr. Narciso Esparragosa, August 13, 1808

*Royal officials had to obtain permission to leave their positions for personal reasons. In this letter from Antonio González, Dr. Narciso Esparragosa is informed that his request to spend time in a warmer climate has been approved.*



In attention to the serious and notorious illness have been suffering, I grant you the license that you request to move to warmer place to convalesce. You may be in this warmer place until next November. You may also suspend your work in the Royal Hospital. Your obligations will be covered by the Second Surgeon, Don José Tomás Cáceres and Doctor Don Mariano Larabe, who will attend the patients daily and continue with his obligations with the medical school.

Everything that His Majesty proposes will be communicated to the Brotherhood Charity and you are informed so that you can use this permission when it is convenient.

God Protect His Majesty. Royal Palace, August 13, 1808.

*[signed] Antonio Gonzalez*

Source: Documentos Privados del Dr. Esparragosa. Private Archive. Document no. 98, August 13, 1808.

### Medical report by Dr. Narciso Esparragosa, December 29, 1814

*This document provides an official report by Dr. Narciso Esparragosa on wounds sustained by one Antonio Trujillo.*



### The *Protomédico*

It is true that Antonio Trujillo has lost the use of his right arm, as the result of a wound to his shoulder. The wound is on the front of his shoulder and there is another on the joint of his elbow. These wounds, with very notable scars, damaged some of his nerves, veins, and tendons that are necessary for movement and nutrition. This extremity has less than half of the normal volume, compared to the other, and it also lacks the necessary movement and force.

In regards to everything else, Trujillo is a strong and robust man. This is reported to you in fulfillment of medical requirements.

New Guatemala, December 29, 1814.

*Source:* Documentos Privados del Dr. Esparragosa. Private Archive. Document no. 102, December 29, 1811.

## Letter from José María Jáuregui to Dr. Narciso Esparragosa, April 9, 1815

*A friend, José María Jáuregui, provides family news as well as a request for Dr. Narciso Esparragosa to comment on medical treatment prescribed by an English doctor.*



Señor Doctor Don Narciso Esparragosa  
San Salvador, April 9, 1815.

My dear friend and Señor:

This letter has two objectives. The first is to introduce my new daughter to you. As you have heard, this gift from God was presented to me by Doña Juana Josefa Cobar, the wife of my son Manuel José. She is a truly a gift from God, born without being delivered by me, guarding human prudence. His Majesty ordered the marriage, which makes it bitter for me. But I have the intimate satisfaction of seeing the principles, means, and, ultimately, that everything has ended with honor and in fulfillment of God's plan. Blessed be it.

Due to our friendship, I was waiting to share this with you. But it is not late to honor you by sharing the good news.

The second, unavoidable objective of this letter is to bother you. I am counting on your good-will in tolerating me. You well know that María Manuela has suffered an irritation in the liver. She has spleen problems, is subject to fluxes, and is excessive in all ways. She suffers from periods of diarrhea, and a weak and profound pulse. Once again, she is suffering from irregular menstruation, which tends to stop, then start again. It lasts much more than normal, but with small amounts and irregular color.

She improves with the freshest water that is available. She improves and is happy with this, but the disorder tends to repeat the next month. I doubt that, at her 43 years, these changes mean the end of menstruation.

While we have been in this state, the English doctor, Don Juan Marcos Imeri, has come here. He has the following cure for María Manuela:

Three days of cold baths.

A laxative called *Angélica* in cold water, while she is fasting.

The next day, on the morning and afternoon, a thimbleful of *citric acid* dissolved in cold water and the same amount of *Alkali* also dissolved in the same water. Both solutions should be taken immediately. When she finished both jars of remedies that the doctor left, she should take another laxative called *Angélica*. Starting the next day, she should take twenty-five drops of *Jesuita* in water.

When she finished the jar of drops, another of the same laxatives. The next day, she should start the other jar of drops, and end with the same laxative. He says that this cure is superior for treating liver ailments, problems with the spleen, and other illnesses that come from viscous humors.

My Manuel José also has liver problems and possible problems in the blood, which make his gums bleed.

For this, Doctor Imeri has dictated the following method:

Three days of cold baths and fluids. Then a laxative *Angélica*. Starting the next day, while fasting, twenty five drops of *Marendants Antiscorbutic<sup>a</sup>* in a small amount of water of Escorcionera.<sup>b</sup> At ten o'clock on the next day, a small packet of *Oxygenata Muriat Potasb<sup>c</sup>* diluted in the same water. At night, two *Keyser pills<sup>d</sup>* with water. He should take a laxative every eight days and on the days that he does not take a laxative, he should take a cold bath. At the end of this, he should rinse his gums with the water that the doctor left in a small jar. I do not know what the water is.

The same occurs with another water that he has prescribed for soaking some threads, which should be repeatedly placed on my Petronita on a fistula that she has in the gap where a molar has broken. The English doctor says that it will not heal until the molar is taken out. He says that this water will make the tooth fall out. But he warns that she should not swallow the saliva, even if it is not dangerous.

I would like to hear your opinion about all of these remedies, in particular for the two primary patients. I will tell you that I try to guess about the remedies because the doctor does not explain them to me. I see that I am familiar with some of

<sup>a</sup> Antiscorbutic was a treatment used to prevent and cure the disease scurvy. It was usually heavily concentrated with Vitamin C.

<sup>b</sup> Escorcionera is a plant with roots that were either used as a balm for wounds, sores, rheumatism, or arthritis, or mixed with tea for diabetes, gastrointestinal disorders, and liver ailments.

<sup>c</sup> Muriatic acid, also known as hydrochloric acid, would be mixed with salt of potassium, intended to cleanse the stomach by inducing vomiting.

<sup>d</sup> Keyser's Pills, or Keyser Pills, invented by French military contractor Jean Keyser, were made of mercury mixed with vinegar to treat rheumatism, asthma, apoplexy (an outdated term that refers to hemorrhages), palsy, excess swelling, sciatica, eye diseases, and gout.

them. But for those that I do not understand and the English doctor has not explained, I ask that you tell me whether these remedies should be applied. I ask you this because you were the one who cured Manuel José four years ago with quinine when he had a mortal attack of worms. After the treatment, he suffered a terrible rash on his face. Ever since, he has had a weak stomach and headaches, including on his wedding day. With the answer to my pestering questions, you know that Manuela is with me and that this is your house. We await your valued orders, and we desire that you enjoy complete health. We reiterate our affection.

I kiss your hands,

[signed] José Mariano Jáuregui

P.S.

My brother Don Pedro and my sister María Gertrudis have not written in many days, even to answer our letters. If you know anything about them, or anything about the house of my uncle Don Pablo, or about my brothers and children who are in Dueñas, I would appreciate it if you could let me know.

Source: Documentos Privados del Dr. Esparragosa. Private Archive. Document no. 105, April 9, 1815.

## Outsiders' Perspective

### On Cartagena de Indias, Jorge Juan and Antonio de Ulloa, *A Voyage to South America*, 1758 (Excerpts)

*In the mid-1730s, Jorge Juan and Antonio de Ulloa reached South America as part of a scientific expedition. They subsequently published A Voyage to South America in 1748 in Spanish (the first English translation appearing a decade later), a description of the places they visited and the people they encountered. The following selection, from an 1807 edition translated by John Adams, describes Cartagena de Indias—which for almost two centuries was a stop for the galleons that arrived from Spain laden with merchandise and returned there with gold from New Granada and silver from Peru—and the city's inhabitants.*

*The peninsular observers noted at once the sistema de castas and described it at some length. They also commented on various social customs of the inhabitants, including drinking and smoking, and their dances.*



The city and suburbs are well laid out, the streets being straight, broad, uniform, and well paved. The houses are built of stone, except a few of brick; but consist chiefly of only one

story above the ground-floor; the apartments well contrived. All the houses have balconies and lattices of wood, as more durable in this climate than iron, the latter being soon corroded and destroyed by the moisture and acrimonious quality of the nitrous air; from whence, and the smoky colour of the walls, the outside of the buildings makes but an indifferent appearance.

The churches and convents of this city are the cathedral, that of the Trinity in the suburbs, built by bishop Don Gregory de Molleda, who also in 1734 founded a chapel of ease dedicated to St. Toribio. The orders which have convents at Cartagena are those of St. Francis, in the suburbs, St. Dominic, St. Agustin, La Merced, also the Jacobines, and Recollets; a college of Jesuits and an hospital of San Juan de Dios. The nunneries are those of St. Clara and St. Teresa. All the churches and convents are of a proper architecture, and sufficiently capacious; but there appears something of poverty in the ornaments, some of them wanting what even decency requires. The communities, particularly that of St. Francis, are pretty numerous, and consist of Europeans, white Creoles, and native Indians.

Cartagena, together with its suburbs, is equal to a city of the third rank in Europe. It is well peopled, though most of its inhabitants are descended from the Indian tribes. It is not the most opulent in this country, for, besides the pillages it has suffered, no mines are worked here; so that most of the money seen in it is sent from Santa Fe and Quito, to pay the salaries of the governor and other civil and military officers, and the wages of the garrison; and even this makes no long stay here. It is not however unfrequent to find persons who have acquired handsome fortunes by commerce, whose houses are splendidly furnished, and who live in every respect agreeable to their wealth. The governor resides in the city, which till 1739 was independent of the military government. In civil affairs, an appeal lies to the audience of Santa Fe; and a viceroy of Santa Fe being that year created, under the title of viceroy of New Granada, the government of Cartagena became subject to him also in military affairs. The first who filled this viceroyalty was lieutenant-general Don Sebastian de Eslava; who defended Cartagena against the powerful invasion of the English in 1741.

Cartagena has also a bishop, whose spiritual jurisdiction is of the same extent as the military and civil government. The ecclesiastical chapter is composed of the bishop and prebends. There is also a court of inquisition, whose power reaches to the three provinces of Isla Espanola (where it was first settled), Terra Firma, and Santa Fe.

Besides these tribunals, the police and administration of justice in the city is under a secular magistracy, consisting of regidores, from whom every year are chosen two alcaldes, who are generally persons of the highest esteem and distinction. There is also an office of revenue, under an accountant and treasurer: here all taxes and monies belonging to the king are received; and the proper issues directed. A person of the law, with the title of auditor de la gente de Guerra, determines processes. . . .



#### CHAP. IV. OF THE INHABITANTS OF CARTHAGENA.

The inhabitants may be divided into different casts [sic] or tribes, who derive their origin from a coalition of Whites, Negroes, and Indians. Of each of these we shall treat particularly.

The Whites may be divided into two classes, the Europeans, and Creoles, or Whites born in the country. The formerly are commonly called Chapetones, but are not numerous; most of them either return into Spain after acquiring a competent fortune, or remove up into inland provinces in order to increase it. Those who are settled at Carthagena, carry on the whole trade of that place, and live in opulence; whilst the other inhabitants are indigent, and reduced to have recourse to mean and hard labour for subsistence. The families of the White Creoles compose the landed interest; some of them have large estates, and are highly respected, because their ancestors came into the country invested with honourable posts, bringing their families with them when they settled here. Some of these families, in order to keep up their original dignity, have either married their children to their equals in the country, or sent them as officers on board the galleons; but others have greatly declined. Besides these, there are other Whites, in mean circumstances, who either owe their origin to Indian families, or at least to an intermarriage with them, so that there is some mixture in their blood; but when this is not discoverable by their colour, the conceit of being Whites alleviates the pressure of every other calamity.

Among the other tribes which are derived from an intermarriage of the Whites with the Negroes, the first are the Mulattos. Next to these the Tercerones, produced from a White and a Mulatto, with some approximation to the former, but no so near as to obliterate their origin. After these follow the Quarterones, proceeding from a White and a Terceron. The last are the Quinterones, who owe their origin to a White and Quarteron. This is the last gradation, there being no visible difference between them and the Whites, either in colour or features; nay, they are often fairer than the Spaniards. The children of a White and Quarteron are also called Spaniards, and consider themselves as free from all taint of the Negro race. Every person is so jealous of the order of their tribe or cast, that if, through inadvertence, you call them by a degree lower than what they actually are, they are highly offended, never suffering themselves to be deprived of so valuable a gift of fortune.

Before they attain the class of the Quinterones, there are several intervening circumstances which throw them back; for between the Mulatto and the Negro there is an intermediate race, which they call Sambos, owing their origin to a mixture between one of these with an Indian, or among themselves. They are also distinguished according to the casts their fathers were of. Betwixt the Tercerones and the Mulattos, the Quarterones and the Tercerones, &c. are those called Tente en el Ayre, suspended in the air, because they neither advance nor recede. Children, whose parents are a Quarteron or Quinteron, and a Mulatto or Terceron, are Salto atras, retrogrades, because, instead of advancing towards being Whites, they have gone backwards toward the Negro race. The Children between a Negro and Quarteron are called Sambos de Negro, de Mulatto, de Terceron, &c.

These are the most known and common tribes or Castas; there are indeed several others proceeding from their intermarriages; but, being so various, even they themselves cannot easily distinguish them; and these are the only people one sees in the city, the estancias<sup>1</sup>, and the villages; for if any Whites, especially women, are met with, it is only accidental; these generally residing in their houses; at least, if they are of any rank or character.

These casts, from the Mulattos, all affect the Spanish dress, but wear very slight stuffs on account of the heat of the climate. These are the mechanics of the city; the Whites, whether Creoles or Chapitones, [sic] disdaining such a mean occupation, follow nothing below merchandise. But it being impossible for all to succeed, great numbers not being able to procure sufficient credit, they become poor and miserable from their aversion to those trades they follow in Europe; and, instead of the riches which they flattered themselves with possessing in the Indies, they experience the most complicated wretchedness.

The class of Negroes is not the least numerous, and is divided into two parts; the free and the slaves. These are again subdivided into Creoles and Bozares [sic], part of which are employed in the cultivation of the haciendas<sup>2</sup> [sic], or estancias. Those in the city are obliged to perform the most laborious services, and pay out of their wages a certain quota to their masters, subsisting themselves on the small remainder. The violence of the heat not permitting them to wear any clothes, their only covering is a small piece of cotton stuff about their waist; the female slaves go in the same manner. Some of these live at the estancias, being married to the slaves who work there; whose those in the city sell in the markets all kinds of eatables, and dry fruits, sweetmeats, cakes made of the maize, and cassava, and several other things about the streets. Those who have children sucking at their breast, which is the case of the generality, carry them on their shoulders, in order to have their arms at liberty; and when the infants are hungry, they give them the breast either under the arm or over the shoulder, without taking them from their backs. This will perhaps appear incredible; but their breasts, being left to grow without any pressure on them, often hang down to their very waist, and are not therefore difficult to turn over their shoulders for the convenience of the infant.

The dress of the Whites, both men and women, differs very little from that worn in Spain. The persons in grand employments wear the same habits as in Europe; but with this difference, that all their clothes are very light, the waistcoats and breeches being of fine Bretagne linen, and the coat of some other thin stuff. Wigs are not much worn here; and during our stay, the governor and two or three of the chief officers only appeared in them. Neckcloths are also uncommon, the neck of the shirt being adorned with large gold buttons, and these generally suffered to hang loose. On their heads they wear a cap of very fine and white

<sup>1</sup> Estancia properly signifies a mansion, or place where one stops to rest; but at Carthagena it implies a country-house, which, by reason of the great number of slaves belonging to it, often equals a considerable village.

<sup>2</sup> Hazienda in this place signifies a country-house, with the lands belonging to it.

linen. Others go entirely bareheaded, having their hair cut from the nape of the neck.<sup>3</sup> Fans are very commonly worn by men, and made of a very thin kind of palm in the form of a crescent, having a stick of the same wood in the middle. Those who are not of the White class, or of any eminent family, wear a cloak and a hat flapped; though some Mulattos and Negroes dress like the Spaniards and great men of the country.

The Spanish women wear a kind of petticoat, which they call pollera, made of a thin silke [sic], without any lining; and on their body, a very thin white waistcoat; but even this is only worn in what they call winter, it being insupportable in summer. They however always lace in such a manner as to conceal their breasts. When they go abroad, they wear a mantelet; and on the days of precept, they go to mass at three in the morning, in order to discharge that duty, and return before the violent heat of the day, which begins with the dawn. . . .

Both sexes are possessed of a great deal of wit and penetration, and also of a genius proper to excel in all kinds of mechanic arts. This is particularly conspicuous in those who apply themselves to literature, and who, at a tender age, shew [sic] a judgment and perspicacity, which, in other climates, is attained only by a long series of years and the greatest application. This happy disposition and perspicacity continues till they are between twenty and thirty years of age, after which they generally decline as fast as they rose; and frequently, before they arrive at that age, when they should begin to read the advantage of their studies, a natural indolence checks their farther progress, and they forsake the sciences, leaving the surprising effects of their capacity imperfect.

The principal cause of the short duration of such promising beginnings, and of the indolent turn so often seen in these bright geniuses, is doubtless the want of proper objects for exercising their faculties, and the small hopes of being preferred to any post answerable to the pains they have taken. For as there is in this country neither army nor navy, and the civil employments very few, it is not at all surprising that the despair of making their fortunes, by this method, should dampen their ardour for excelling in the sciences, and plunge them into idleness, the sure forerunner of vice; where they lose the use of their reason, and stifle those good principles which fired them when young and under proper subjection. The same is evident in the mechanic arts, in which they demonstrate a surprising skill in a very little time; but soon leave these also imperfect, without attempting to improve on the methods of their masters. Nothing indeed is more surprising than the early advances of the mind in this country, children of two or three years of age conversing with a regularity and seriousness that is rarely seen in Europe at six or seven; and at an age when they can scarce see the light, are acquainted with all the depths of wickedness.

The genius of the Americans being more forward than that of the Europeans, many have been willing to believe that it also sooner decays; and that at sixty years, or before, they have

outlived that solid judgment and penetration, so general among us at that time of life; and it has been said that their genius decays, while that of the Europeans is hastening to its maturity and perfection. But this is a vulgar prejudice, confuted by numberless instances, and particularly by the celebrated father Fr. Benito Feyjoo. . . .

The use of brandy is so common, that the most regular and sober persons never omit drinking a glass of it every morning about eleven o'clock; alleging that this spirit strengthens the stomach, weakened by copious and constant perspiration, and sharpens the appetite. Hazer las onze, to take a whet at eleven, that is, to drink a glass of brandy, is the common invitation. This custom, not esteemed pernicious by these people, when used with moderation, has degenerated into vice; many being so fond of it, that, during the whole day, they do nothing but hazer las onze. Persons of distinction use Spanish brandy; but the lower class and Negroes very contentedly take up with that of the country, extracted from the juice of the sugar cane, and thence called Agoa ardente de canna, [*aguardiente*] or cane brandy, of which sort the consumption is much the greatest.

Chocolate, here known only by the name of cacao, is so common, that there is not a Negro slave but constantly allows himself a regale of it after breakfast; and the Negro women sell it ready made about the streets, at the rate of a quarter of a real (about five farthings sterling) for a dish. This is however so far from being all cacao, that the principal ingredient is maize; but that used by the better sort is neat, and worked as in Spain. This they constantly repeat an hour after dinner, but never use it fasting, or without eating something with it. . . .

The passion for smoking is no less universal, prevailing among persons of all ranks in both sexes. The ladies and other white women smoke in their houses, a decency not observed either by the women of the other casts, nor by the men in general, who regard neither time nor place. The manner of using it is, by slender rolls composed of the leaves of that plant; and the women have a particular manner of inhaling the smoke. They put the lighted part of the roll into their mouths, and there continue it a long time without its being quenched, or the fire incommoding them. A compliment paid to those for whom they profess an intimacy and esteem, is, to light their tobacco for them, and to hand them round to those who visit them. To refuse the offer would be a mark of rudeness not easily digested; and accordingly they are very cautious of paying this compliment to any but those whom they previously know to be used to tobacco. This custom the ladies learn in their childhood from their nurses, who are Negro slaves; it is so common among persons of rank, that those who come from Europe easily join in it, if they intend to make any considerable stay in the country.

One of the most favourite amusements of the natives here, is a ball, or Fandango. These are the distinguished rejoicing on festivals and remarkable days. But while the galleons, guarda costas, or other Spanish ships are here, they are most common, and at the same time conducted with the least order; the crews of the ships forcing themselves into their ballrooms. These diversions, in houses of distinction, are conducted in a very regular manner; they open with Spanish dances, and are suc-

<sup>3</sup> Here, and in most parts of South America, they have their hair cut so short, that a stranger would think every man had a wig, but did not wear it on account of the heat. —A.

ceeded by those of the country, which are not without spirit and gracefulness. These are accompanied with singing, and the parties rarely break up before daylight.

The Fandangos, or balls, of the populace, consist principally in drinking brandy and wine, intermixed with indecent and scandalous motions and gestures; and these continual rounds of drinking soon give rise to quarrels, which often bring on misfortunes. When strangers of rank visit the city, they are generally at the expense of these balls; as the entrance is free, and no want of liquor, they need give themselves no concern about the want of company.

*Source:* George Juan and Antonio de Ulloa. *A Voyage to South America: Describing at Large the Spanish Cities, Towns, Provinces, &c.*, Vol. 1, translated by John Adams, 23–25, 29–40, passim (London: John Stockdale, 1807).

### **“Preliminary Remarks” on Venezuela’s Declaration of Independence, *Interesting Official Documents*, 1812 (Excerpts)**

*In 1812, a volume of documents published in English and Spanish appeared in London. Intended to enlist British support for Venezuelan independence, it provided lengthy unsigned “Preliminary Remarks” as an introduction to Venezuela’s Declaration of Independence of July 5, 1811, a manifesto outlining Venezuela’s reasons for declaring independence, the federal constitution of December 21, 1811, and other materials.*

*The opening remarks justified Venezuelan independence as an appropriate response to oppression and the denial of justified requests for redress. Employing terms such as corrupt, unreasonable restrictions, arbitrary acts, wanton ignorance, and a systematic plan of debasement, the author portrays the Venezuelan response as a reasonable last resort.*

*The Act of Independence presents the formal Venezuelan case for breaking with Spain. It pays attention to the political crisis caused by the abdications of Charles IV and Ferdinand VII and the French invasion of Spain. The interpretation of the abdications, however, condemns the Bourbons for acquiescing and “abandoning the country of Spain.” The act also criticizes the governments of resistance in Spain. Notable is the use of language reminiscent of the earlier American and French Revolutions.*



#### **PRELIMINARY REMARKS**

No period of the history of nations, like the present, has been marked by events, so great and interesting. . . . Revolutions, both signal and unexpected, have taken place, reform has been the watch-word. . . . In Europe, whole nations have been seen to struggle for redress of grievances, even those who have been longest accustomed to clank the galling chains of Despotism, have pondered on their long forgotten rights, and have felt

that they were yet men. Whilst such was the sense of feeling in Europe, and similar was the sigh that re-echoed to the most distant poles, could it be expected that Spanish America, those regions so long trampled upon, and enslaved, where a reform was in short the most wanting, would alone stand still, and bear with her former hardships; that she would calmly behold, whilst the governments of Spain, were busied in meliorating their own condition, that she was yet debarred from all relief, her claims unheard, and that she was even left in a more degraded state, than under the corrupt administration of the late ministers of Charles IV. As was natural, these vast and interesting settlements equally felt the electric shock, for political, like human bodies, seem naturally destined to rise [sic] from irrational to rational life; and confident of the justice of their demands, they asked redress, but it was denied. . . .

The first and most material question that occurs in treating the subject, is, whether or not, the Spanish Settlements at the time of the entry of the French into Spain, and of the dissolution of the Monarchy, from their situation, required redress and a reform of government; and next, whether they asked it, and were denied. Too much is already known to the European public, and the degraded state of the colonies has been the too frequent theme of our own writers, as well as those of the French, to make it necessary here to give any picture of the state of these said colonies, or of the manner in which they were governed; suffice it to say, that the people were oppressed by the crown, and by monopolies; the commonalty and peasantry groaned under burdensome and unreasonable restrictions, destructive of all enterprise; the laws did not inflict punishment on the guilty, nor afford protection to the innocent; arbitrary acts were common; the natives were debarred<sup>4</sup> from a fair participation in offices of trust and emolument; a system of government prevailed, disgraceful to the Statute books of Spain and the Indies, opposed to the common rights of mankind, and hostile to the dictates of truth and reason;<sup>5</sup> the Americans in short, could be considered in no other state than in that of feudal vassalage to Spain. Who is there unapprised of those chasms which existed in the branches of industry, occasioned by wanton ignorance, by which great masses of labour were suspended; who is there that has not beheld a system of monopoly, generated by a false principle of preference to few, but hostile to productive labour, and destructive to the basis of

<sup>4</sup> As a proof how little the Spanish Americans shared in the offices of distinction in their own country, we add the following statement of persons who have been in command there, since its settlement.

	EUROPEANS	AMERICANS
Arzobispo y Obispos	702	278
Virreyes	166	4
Capitanes Generales y Gobernadores	588	14
[Totals]	1,456	296

Vide *El Censor Extraordinario*, Cadiz, Jan. 26, 1810.

<sup>5</sup> The Viceroy held in their own hands, the Executive, Legislative, and Military Powers.

society; a systematic plan of debasement extending even to the prohibition of the necessary schools;<sup>6</sup> these are all facts which the most unblushing advocates for arbitrary power cannot deny, nor can they ever be palliated by the ingenious and specious pieces written in Cadiz to prove the utility and advantages of dependence and monopoly.

That repeated efforts were made for a reform of government, and to obtain the right of legislating locally for themselves in their own concerns, is proved, not only by the applications of the respective American municipalities and Juntas, but also by the Journals of the Cortes and their Debates. The claims of the Americans, were defined and laid before the Spanish Government, in eleven propositions on the 16th November, 1810, they were repeated on the 31st December, and again on the 1st of August, 1811 in the well known *Representacion de la Deputacion Americana á las Cortes de España*, but were never attended to. A torpor seemed to have succeeded to distress, and to the violent convulsions of a calamitous revolution, which appeared to render the government deaf to the just cries and appeals of a well deserving moiety of the nation; there was wanting a healing and cementing principle of benevolence, nor is there up to the present day, a proper measure of redress or of conciliation, on record.

Had the early governments of Spain, possessed talents, and disinterested views and virtues, suited to their power, in the first stages of the revolution, such was the enthusiastic spirit which pervaded the breast of every American, that they might have had them united as brothers, and besides have conferred upon them the most important blessings, such as humanity dictated, such as prudence and policy urged, and such as their own rights entitled them to. Unfortunately for both nations, and still more so for the common cause, the long neglected claims of the Americans remained unheard; in the eye of reason and justice that period had arrived, in which both continents were to be placed on an equal footing; yet no redress or reform was offered, every avenue to a fair restoration was closed, and there appears to have been a decided opposition to every revival of light, and to every restitution of happiness and equality. Mutual distrust and animosity gradually were engendered, an inextinguishable spirit of resentment at length flamed, and there appeared nothing left in the governments of Spain, of those enlightened principles which are always directed to the general, and not particular interests; an apathy followed, joined to a systematic exclusion from those diffused enjoyments which belonged to the whole, and not to the detached portions of the nation. The claims of the Americans tended to remove extensive, inveterate, and galling ills; this besides a right, became a measure of national policy, and when first agitated, if the welfare of the people had been really the object of the rulers in Spain, by merely following the dictates of an enlarged

philanthropy, we repeat, that they might have associated their American brethren [sic], by which they would have given force to those parts, they have now disjointed.

It is not in our power to enter into the different stages of open hostility, mutual aggression, and growing enmity, that have since been followed up; they are better seen from the official declarations of those sections, which have been driven to the extreme of separation; and perhaps no collection of documents is more explanatory thereof, than the following. Venezuela has been the first to break entirely the fetters which bound her to the mother country, and after three years expended in vain efforts of redress, and after bearing with every degradation and indignity that could be heaped upon her, she has asserted that undoubted right, which every people has, to interpose and to adopt such measures, as are most conducive to their own internal welfare, and the most effective to repel foreign attack.

That imperious causes have compelled her to this step, to this last alternative, is seen by the manifesto she addresses to the impartial world, and that the exertions of the representatives of the people are directed to the well-being of their constituents, is also evinced, by the constitution, framed for the administration of law, as well as from the results of their other solemn deliberations. It is indeed, an era, new to the inhabitants of Venezuela, to see their rights defined, and their liberties secured; it is a period novel and extraordinary, to behold their rulers and judges become answerable to them alone for their conduct; but through the transition from the abject state in which they lately drooped, to the dignified one in which they now stand, is great, it will nevertheless be found, that the natives of Spanish America, are generally as well prepared to share and enjoy the blessings at which they have aimed, as those of the nation, which seeks to prolong its sway over them; and the documents composing this volume, will be found as well constructed, as well argued, and in every sense as sound, as any of the boasted measures of the Cortes, and they exceed them in liberality and philanthropy. To every mind, pure and unprejudiced, the occurrences of Venezuela, will appear as the fair and honest result of a wish on the part of the people to insure to themselves the greatest security and happiness; nor can any opposite allegations of national policy, for a longer dependence, without redress, be urged, that will bear the test of candour and of reason, unless it can be proved, that a country becomes more interesting by being debased, than when rendered free and prosperous. . . .

. . . the ideas which circulated in the Settlements of the hopeless state of Spain, at the time the French entered Andalusia; to which was added the dread of falling into the hands of the same usurpers, were the chief causes of the Americans resolving no longer to trust to the administration of their European governors, conceiving their own affairs more secure when confided to their own assemblies or Juntas, whom they created after the manner of the Province of Spain. That they had cause to suspect the whole of the viceroys and governors, has been proved by posterior events; they all proclaimed the doctrine, that America ought to share the same fate as the Peninsula, and that when the one was conquered, the other was

<sup>6</sup> It is a fact that notwithstanding the remonstrances of the municipality, the university, and all the representative bodies, in Caracas, it was not allowed to teach mathematics, to have a printing-press, a school for the tuition of navigation, or the study of jus publicum; and that in Merida, one of the provinces of Venezuela, a university was not tolerated. In Buenos Ayres, and in other parts, similar restrictions existed.

to submit; in short, the commanders abroad were prepared for this alternative, they had been previously chosen by the Prince of Peace, and were ready to be moulded to the views on which he had acted. Was it therefore natural, was it reasonable, after their own dear-bought experience, for these distant colonies to have confidence in such chiefs; was it prudent to leave themselves to the mercy of men, who had no other interest in the country, than to prolong the continuation of their command, which had been secured to them by the French, and their Spanish partisans. . . .

That a people, capable of addressing to the world such sentiments, as are contained in the documents comprising this volume, and that after emerging from the dark reign of feudal vassalage, they will ever again descend from the summit of felicity and dignity to which they have attained, to the wretchedness and dishonour attendant on despotic government, appears the wild chimera of political visionaries. . . .

#### ACT OF INDEPENDENCE

*IN THE NAME OF THE ALL-POWERFUL GOD,*

We the Representatives of the United Provinces of Caracas, Cumana, Varinas, Margarita, Barcelona, Merida, and Truxillo, forming the American Confederation of Venezuela, in the South Continent, in Congress assembled, considering the full and absolute possession of our Rights, which we recovered justly and legally from the 19th of April, 1810, in consequence of the occurrences in Bayona, and the occupation of the Spanish Throne by conquest, and the succession of a new Dynasty, constituted without our consent: are desirous, before we make use of those Rights, of which we have been deprived by force for more than three ages, but now restored to us by the political order of human events, to make known to the world the reasons which have emanated from these same occurrences, and which authorize us in the free use we are now about to make of our own Sovereignty.

We do not wish, nevertheless, to begin by alledging [sic] the rights inherent in every conquered country, to recover its state of property and independence; we generously forget the long series of ills, injuries, and privations, which the sad right of conquest has indistinctly caused, to all the descendants of the Discoverers, Conquerors, and Settlers of these Countries, plunged into a worse state by the very same cause that ought to have favoured them; and, drawing a veil over the 300 years of Spanish dominion in America, we will now only present to view the authentic and well-known facts, which ought to have wrested from one world, the right over the other, by the invasion, disorder, and conquest, that have already dissolved the Spanish Nation.

This disorder has increased the ills of America, by rendering void its claims and remonstrances, enabling the Governors of Spain to insult and oppress this part of the Nation, thus leaving it without the succour and guarantee of the Laws.

It is contrary to order, impossible to the Government of Spain, and fatal to the welfare of America, that the latter, possessed of a range of country infinitely more extensive, and a population incomparably more numerous, should depend and be subject to a Peninsular Corner of the European Continent.

The Cessions and Abdications at Bayona, the Revolutions of the Escorial and Aranjuez, and the Orders of the Royal Substitute, the Duke of Berg, sent to America, suffice to give virtue to the rights, which till then the Americans had sacrificed to the unity and integrity of the Spanish Nation.

Venezuela was the first to acknowledge, and generously to preserve, this integrity; not to abandon the cause of its brothers, as long as the same retained the least hope of salvation.

America was called into a new existence, since she could, and ought, to take upon herself the charge of her own fate and preservation; as Spain might acknowledge, or not, the rights of a King, who had preferred his own existence to the dignity of the Nation over which he governed.

All the Bourbons concurred to the invalid stipulations of Bayona, abandoning the country of Spain, against the will of the People;—they violated, disdained, and trampled on the sacred duty they had contracted with the Spaniards of both Worlds, when with their blood and treasure they had placed them on the Throne, in despite of the House of Austria. By such a conduct, they were left disqualified and incapable of governing a Free People, whom they delivered up like a flock of Slaves.

The intrusive Governments that arrogated to themselves the National Representation, took advantage of the dispositions which the good faith, distance, oppression, and ignorance, created in the Americans, against the new Dynasty that had entered Spain by means of force; and contrary to their principles, they sustained amongst us the illusion in favour of Ferdinand, in order to devour and harass us with impunity: at most, they promised to us liberty, equality, and fraternity, conveyed in pompous discourses and studied phrases, for the purpose of covering the snare laid by a cunning, useless, and degrading Representation.

As soon as they were dissolved, and had substituted amongst themselves the various forms of the Government of Spain; and as soon as the imperious law of necessity had dictated to Venezuela the urgency of preserving itself, in order to guard and maintain the rights of her King, and to offer an asylum to her European brethren against the ills that threatened them; their former conduct was divulged: they varied their principles, and gave the appellations of insurrection, perfidy, and ingratitude, to the same acts that had served as models for the Governments of Spain; because then was closed to them the gate to the monopoly of administration, which they meant to perpetuate under the name of an imaginary King.

Notwithstanding our protests, our moderation, generosity, and the inviolability of our principles, contrary to the wishes of our brethren in Europe, we were declared in a state of rebellion; we were blockaded; war was declared against us; agents were sent amongst us, to excite us one against the other, endeavouring to take away our credit with the other Nations of Europe, by imploring their assistance to oppress us.

Without taking the least notion of our reasons, without presenting them to the impartial judgment of the world, and without any other judges than our own enemies, we were condemned to a mournful incommunication with our brethren; and, to add contempt to calumny, empowered agents are named

for us, against our own express will, that in their Cortes they may arbitrarily dispose of our interests, under the influence and force of our enemies.

In order to crush and suppress the effects of our Representation, when they were obliged to grant it to us, we were submitted to a paltry and diminutive scale; and the form of election was subjected to the passive voice of the Municipal Bodies, degraded by the despotism of the Governors: which amounted to an insult to our plain dealing and good faith, more than a consideration of our incontestable political importance.

Always deaf to the cries of justice on our part, the Governments of Spain have endeavoured to discredit all our efforts, by declaring as criminal, and stamping with infamy, and rewarding with the scaffold and confiscation, every attempt, which at different periods some Americans have made, for the felicity of their country: as was that which lately our own security dictated to us, that we might not be driven into a state of disorder which we foresaw, and hurried to that horrid fate which we are about to remove for ever from us. By means of such atrocious policy, they have succeeded in making our brethren insensible to our misfortunes; in arming them against us; in erasing from their bosoms the sweet impressions of friendship, of consanguinity; and converting into enemies a part of our own great family.

At a time that we, faithful to our promises, were sacrificing our security and civil dignity, not to abandon the rights which we generously preserved to Ferdinand of Bourbon, we have seen that, to the relations of force which bound him to the Emperor of the French, he has added the ties of blood and friendship; in consequence of which, even the Governments of Spain have already declared their resolution only to acknowledge him conditionally.<sup>7</sup>

In this mournful alternative we have remained three years, in a state of political indecision and ambiguity, so fatal and dangerous, that this alone would suffice to authorize the resolution, which the faith of our promises, and the bonds of fraternity had caused us to defer, till necessity has obliged us to go beyond what we at first proposed, impelled by the hostile and unnatural conduct of the Governments of Spain, which have disburdened us of our conditional oath, by which circumstance, we are called to the august representation we now exercise.

But we, who glory in grounding our proceedings on better principles, and not wishing to establish our felicity on the misfortunes of our fellow-beings, do consider and declare as friends, companions of our fate, and participators of our felicity, those who, united to us by the ties of blood, language, and religion, have suffered the same evils in the anterior order of things, provided they acknowledge our *absolute independence* of the same, and of any other foreign power whatever; that they aid us to sustain it with their lives, fortune, and sentiments; declaring and acknowledging them (as well as to every other nation,) in war enemies, and in peace friends, brothers [sic], and co-patriots.

In consequence of all these solid, public, and incontestable reasons of policy, which so powerfully urge the necessity of recovering our natural dignity, restored to us by the order of events; and in compliance with the imprescriptible rights enjoyed by nations, to destroy every pact, agreement, or association, which does not answer the purposes for which governments were established; we believe that we cannot, nor ought not, to preserve the bonds which hitherto kept us united to the Government of Spain; and that, like all the other nations of the world, we are free, and authorized not to depend on any other authority than our own, and to take amongst the powers of the earth the place of equality which the Supreme Being and Nature assign to us, and to which we are called by the succession of human events, and urged by our own good and utility.

Notwithstanding we are aware of the difficulties that attend, and the obligations imposed upon us, by the rank we are about to take in the political order of the world; as well as the powerful influence of forms and habitudes, to which unfortunately we have been accustomed: we at the same time know, that the shameful submission to them, when we can throw them off, would be still more ignominious for us, and more fatal to our posterity, than our long and painful slavery; and that it now becomes an indispensable duty to provide for our own preservation, security, and felicity, by essentially varying all the forms of our former constitution.

In consequence whereof, considering, by the reasons thus alledged [sic], that we have satisfied the respect which we owe to the opinions of the human race, and the dignity of other nations, in the number of whom we are about to enter, and on whose communication and friendship we rely: We, the Representatives of the United Provinces of Venezuela, calling on the **SUPREME BEING** to witness the justice of our proceedings and the rectitude of our intentions, do implore his divine and celestial help; and ratifying, at the moment in which we are born to the dignity which his Providence restores to us, the desire we have of living and dying free, and of believing and defending the holy Catholic and Apostolic Religion of Jesus Christ. We, therefore, in the name and by the will and authority which we hold from the virtuous People of Venezuela, **DO** declare solemnly to the world, that its united Provinces are, and ought to be, from this day, by act and right, Free, Sovereign, and Independent States; and that they are absolved from every submission and dependence on the Throne of Spain, or on those who do, or may call themselves its Agents and Representatives; and that a free and independent State, thus constituted, has full power to take that form of Government which may be conformable to the general will of the People, to declare war, make peace, form alliances, regulate treaties of commerce, limits, and navigation; and to do and transact every act, in like manner as other free and independent States. And that this, our solemn Declaration, may be held valid, firm, and durable, we hereby mutually bind each Province to the other, and pledge our lives, fortunes, and the sacred tie of our national honour. Done in the Federal Palace of Caracas; signed by our own hands, sealed with the great Provisional Seal of the Confederation, and

<sup>7</sup> He was at one time supposed to be married to a relation of Buonaparte.

countersigned by the Secretary of Congress, this 5th day of July, 1811, the first of our Independence. [signatures follow]

Source: *Interesting Official Documents Relating to the United Provinces of Venezuela*, iii–xxiii, 3–19 (London: Longman & Co., 1812).

**On the Independence of Peru,  
William B. Stevenson, *A Historica  
and Descriptive Narrative of Twenty Years'  
Residence in South America, 1825* (Excerpts)**

*William Bennet Stevenson described himself as the former private secretary to the president and captain general of Quito, a naval officer, and private secretary of Thomas, Lord Cochrane. An eyewitness to events in Peru, he published a three-volume account of his travels in 1825.*

*Stevenson clearly considered Peruvian independence desirable (“redeemed from foreign despotism”) but noted that it was the support of other independent governments that effected it. The importance of José de San Martín is obvious. The author’s description of the proclamation of Peruvian independence on July 28, 1821, gives no indication that many Peruvians signed the declaration under duress. The initial tenuousness accompanying independence is evident in the final paragraphs of the selection.*



The population of Peru has been estimated at 1,300,000. This population is similar to other parts of America, formerly Spanish, consisting of Creoles, European Spaniards, Indians, Negroes, and the various mixed races. The European Spaniards have nearly disappeared, in consequence of the revolution. The Creoles constitute the enlightened portion of the community, and are the most efficient and patriotic supporters of liberty and independence. The people of colour comprising the Indians and all the casts have been much devoted to the revolution. The Indians, heretofore a much degraded class, have generally filled the ranks of the armies, and made excellent soldiers. The Negroes and Mulattos are most numerous on the coast of the Pacific, and the Indians, Mestizos, and Cholos, in the interior. The latter class are derived from Mestizos and Indians. These degraded classes possess great muscular power, and are remarkable for the quickness of their perception, and their faculty for imitation. They make ingenious artisans and mechanics, excel in painting and sculpture; many of their performances in these arts are said not to be inferior to those of the Italian masters. Some of these classes have been even leaders in the revolution. Many mulattos on the coast possess property, and make pretensions to learning, particularly to medicine, as they are not permitted to enter into the professions of law or divinity; they afford many expert quacks. Before the revolution, they obtained letters patent of the king, conferring on them the *dignity and title* of “Don,” of which they were extremely vain. . . .

[T]he gallant general San Martin, perceiving that the independence of Chili would be much exposed, while the royalists were able to command the wealth and resources of Peru, conceived the noble project of liberating that country also. He, accordingly, with the aid of the governments of Chili and Buenos Ayres, made immediate preparations to fit out an expedition against that country. A naval armament was provided with all possible hast, and lord Cochrane, arriving in Chili, in November, 1818, was immediately appointed to the command. Many English and American officers and seamen flocked to his standard, and by great exertions a formidable squadron was equipped, and sailed in 1819. This squadron visited the coast of Peru, and continued to harass the enemy by capturing their ships, and blockading their ports, until the army was ready, which was not, however, until August, 1820. The expedition was reported ready for sailing on the 15th, and on the 18th the troops were embarked on Valparaiso. Their appearance and discipline were worthy of any country, and their numbers amounted to 4900; 15,000 stand of arms, with a proportionate quantity of ammunition and clothing, were shipped for the purpose of organizing a corps of Peruvians, who, it was expected, would flock to the revolutionary standard as soon as the expedition landed. General San Martin was appointed commander in chief of the liberating army of Peru. The fleet under lord Cochrane consisted of the flag ship of fifty guns, one of sixty guns, another of forty, and four smaller vessels; the transports were twenty in number.<sup>8</sup>

Before the expedition sailed, the following bulletin was published:

An expedition, equipped by means of great sacrifices, is at length ready to proceed, and the army of Chili, united to that of the Andes, is now called upon to redeem the land in which slavery has long existed, and from whence the latest efforts have been made to oppress the whole continent. Happy be this day on which the record of the movements and the actions of the expedition commences. The object of this enterprise is to decide whether or not the time is arrived, when the influence of South America upon the rest of the world, shall be commensurate with its extent, its riches, and its’ situation.

The expedition sailed from the port of Valparaiso in Chili on the 20th of August, 1820, and reached Pisco, which is situated about 100 miles south of Lima, on the 7th of September, and by the 11th the whole army was disembarked. The Spanish troops stationed in the neighbourhood had previously retired to Lima, where the viceroy resolved to collect his whole army. The liberating army at first encountered no resistance, and on the 26th of September an armistice for eight days was concluded, at the request of the viceroy, and commissioners from both parties held a conference. On the 4th of October, the armistice terminated without any successful result to the negotiation, which had been

<sup>8</sup> Journal of B. Hall.

attempted, and on the 26th the expedition moved northward to Ancon. Lord Cochrane, with part of the squadron, anchored in the outer roads of Callao, the sea port of Lima. The inner harbour is extensively and strongly fortified, and is called the castle of Callao. Under the protection of the batteries, lay three Spanish armed vessels of war, a forty gun frigate, and two sloops of war, guarded by fourteen gun boats. On the night of the 5th of November, lord Cochrane, with 240 volunteers in fourteen boats, attempted the daring enterprise of cutting out the Spanish frigate, and succeeded in the most gallant manner, with the loss of only 41 killed and wounded. The Spanish loss was 120 men. This success annihilated the Spanish naval power on the Pacific.

The joy occasioned by this splendid naval exploit was increased by col. Arenales, who had been sent from Pisco with 1000 men, with orders to proceed by a circuitous route around Lima, until he rejoined the army. On his march, he attacked and defeated a detachment of the royal army sent from Lima to oppose him; and at the same time took the commanding officer prisoner. Many districts declared in favour of the liberating army, and the revolutionary cause become so popular, that on the 3d of December a whole regiment of the royalists, with their colonel at their head, deserted from the Spanish service, and joined the liberating army.

After a short stay at Ancon, San Martin proceeded to Huara, a strong position near the port of Huacho, about 75 miles north of Lima. Here the army remained for six months, engaged in recruiting; in disseminating the spirit of independence, and cutting off the resources of the royalists in Lima. After another unavailing armistice, the liberating army began to advance towards the capital on the 5th of July, 1821, when the viceroy, alarmed for its security, issued a proclamation, announcing his intention of abandoning the city, and pointing out Callao as a asylum for those who felt insecure in the capital. This was a signal for an immediate flight; the consternation was excessive throughout the city; the road to Callao was crowded with fugitives, carrying their most valuable effects. The women were seen flying in all directions towards the convents, and the narrow streets were literally chocked up with loaded wagons, mules, and mounted horsemen; the confusion continuing all night, and until day-break. The viceroy marched out with his troops, not leaving a single sentinel over the power magazine, having previously nominated the marquis Montemire as governor of the city, who immediately called a meeting of the inhabitants, and the cabildo, or town council, which resolved to invite San Martin to enter the capital. The answer of San Martin was full of magnanimity, and immediately inspired the greatest confidence among the inhabitants. He told them that he did not desire to enter the capital as a conqueror, but as their liberator; adding as proof of his sincerity, that the governor might command a portion of his troops, for the security of the persons and property of the inhabitants. The people who deserted the city, now returned to their dwellings, and order was restored; and San Martin, who a few days before was considered an enemy, was now hailed as a benefactor. On the 12th of July, he made his entry into the capital, without ostentation or ceremony, and in a manner worthy of a republican general. He was accompanied by a single aid-

de-camp only, and was received with the greatest enthusiasm by most of the inhabitants. All classes were anxious to behold the man who had performed such distinguished services for their country; he was kind, courteous, and affable to all. The females caught the enthusiasm of the men, and vied with each other in paying their respects to their liberator. To every one he had something kind and appropriate to say, occasioning an agreeable surprise to the person he addressed. San Martin now commenced the difficult task of reforming the abuses of the colonial government, and published an address to the Peruvians, containing sound and judicious sentiments, which justly entitles it to preservation.<sup>9</sup>

On the 28th of July, 1821, the independence of Peru was solemnly proclaimed. The troops were drawn up in the great square, in the centre of which was erected a lofty stage, from which San Martin, accompanied by the governor and some of the principal inhabitants, displayed for the first time the independent flag proclaiming that Peru was *free* and *independent*, by the general will of the people, and the justice of her cause: Then waving the flag, San Martin exclaimed *Vive La Patria! Vive La Libertad! Vive La Independencia!* which was reiterated by the multitude in the square, while the bells rung a joyous peal, and cannon were discharged amidst the universal acclamations of the people. On the 3d of August, San Martin took upon himself the title of protector of Peru, and issued a proclamation.

This proclamation concluded by declaring that the supreme political authority and military command were united in him, under the title of protector, and that Juan Garcia del Rial was named secretary of state, and by specifying the other appointments under his new government. He also addressed a proclamation to the Spaniards, bearing date the 4th of August, in which he says, that he has respected their persons and property agreeably to his promise, but notwithstanding which, they murmur in secret, and maliciously propagate suspicious of his intentions. He assures those who remain peaceable, who swear to the independence of the country, and respect the new government, of being protected in their persons and estates; he offers to such as do not confide in his word, the privilege of passports, within a given time, to leave the country with all their effects, and declares that those who remain and profess to submit to the government, but are plotting against it, shall feel the full rigour of the law, and be deprived of their possessions. . . .

Peru is entirely emancipated from the dominion of Spain. It declared its independence in 1821, after it was liberated by San Martin, and organized a government. This government, however, maintained its authority but a short time after San Martin left Peru, and the Spaniards re-established their authority over the country, which continued until the arrival of the liberating army, under the magnanimous Bolivar, in 1824.

After the great victory of Ayacucho, which annihilated the Spanish army, and liberated the whole of Peru, Bolivar, who had been appointed dictator, convened a congress, and resigned into their hands his authority. This congress, which was installed on the 10th of February, 1825, conferred on the

<sup>9</sup> Journal of captain Basil Hall.



liberator the supreme political and military power, until the constitutional congress should be installed, in the year 1826. The government, therefore, in Peru, is not yet actually established; its powers are exercised by the Liberator as president and dictator; it is expected that a congress will be convened, a constitution framed, and a republican government organized and put into operation during the year 1823. The Peruvian

territories are the last of the Spanish American dominions redeemed from foreign despotism, and this has been effected by the other independent governments.

*Source:* W. B. Stevenson. *A Historical and Descriptive Narrative of Twenty Years' Residence in South America*, Vol. 2, 133–144 (London: Hurst, Robinson & Co., 1825).

## ❖ GLOSSARY ❖

- afrancesados** Spanish supporters of Joseph I
- alcalde de la hermandad** rural constable
- alcalde del primer voto** chairman of a municipal council
- alcalde ordinario** magistrate of first instance in municipalities
- alcaldía mayor** district administered by a provincial official known as an *alcalde mayor*
- alférez mayor** municipal standard-bearer
- alguacil mayor** sheriff or chief constable
- almojarifazgo** import and export duties
- alternativa** formal rotation between Spaniards and creoles in the offices of some religious orders in the Spanish Empire and between Portuguese and *brasileiros* in the Franciscan order in Brazil
- anata entera** tax of one year's salary on royal officeholders
- apiri** ore carrier at mines in Peru
- Armada del Sur** South Sea Fleet based in Callao, Peru
- arras** groom's gift to the bride
- arroba** weight of 25 pounds, or 11.34 kilograms
- asentista** investor in an *asiento*
- avería** tax to pay for defense of the fleets sailing to and from the Americas
- aviador** merchant creditor to miners and officeholders
- aviso** dispatch ship carrying official correspondence and information about the anticipated arrival of a fleet
- ayllu** Andean kin group descended from a common ancestor and with access to land
- ayuntamiento** municipal council; also known as a *cabildo*
- bajón** bassoon
- bamba** popular dance considered "indecent" by some
- bandeirante** participant in a slaving expedition (*bandeira*) against Amerindians in Brazil; *bandeirantes* often set out from São Paulo
- barrio** neighborhood or district in a municipality
- batab** Maya term for leader of an indigenous community; equivalent to cacique and *kuraka*
- bizcocho** hard, dry wafers eaten by sailors at sea
- botija** earthenware jug; often used as a measure for wine
- bozal** slave born in and brought into the Americas directly from Africa
- brasileiro** Portuguese born in Brazil; equivalent to *criollo* in Spanish America
- brigadier de la armada** naval rank between *jefe de escuadra* and *capitán de navío*
- búcaro de Indias** a type of earthenware
- bula de Santa Cruzada** an indulgence that provided income to the Spanish Crown
- caballerizo mayor** master of the horse; a high-ranking official in a royal household
- caballero** knight or horseman
- cabildo** municipal council; also known as an *ayuntamiento*
- cabildo eclesiástico** cathedral chapter
- cachaça** sugar brandy produced in Brazil
- cacicazgo** rights and properties of a cacique
- caja de comunidad** municipal treasury in colonial Native American villages
- caja real** royal treasury office
- Cámara of the Indies** a small group within the Council of the Indies that recommended candidates for positions in the colonies; analogous to the Cámara of Castile
- Camino Real** the royal highway or road
- capa y espada** literally "cape and sword"; the phrase distinguishes nonlawyers from *letrados*
- capitação** head tax on slaves in Brazil
- capitán de fragata** commanding officer of a frigate
- capitán de navío** naval officer between brigadier and capitán de fragata
- capitán de reales guardias españolas** captain of the royal Spanish guard
- capitão do mato** professional hunter of runaway slaves
- capitão mor** governor
- capitulación** contract between the Crown and an explorer or leader of an expedition
- casa de fundición** royal smeltery
- casa de moneda** mint
- Casa de Suplicação** High Court of Appeals in Lisbon

**casa poblada** fixed residence in a municipality

**casa real** staff of a royal household

**catastro** single tax on income proposed by the marqués de la Ensenada

**cédula** a royal decree issued by a council over the monarch's signature

**certámenes** poetic contests

**chanfre** precenter

**chapetón** derogatory term for a peninsular; poor, boorish greenhorn

**chicha** alcoholic beverage made from corn in Peru; corn beer

**chino** in Peru, offspring of an Amerindian and an African; in New Spain, an enslaved Filipino

**chirimía** flute

**chorillo** shop producing coarse fabric

**chuchumbe** popular dance considered indecent by some

**chuño** freeze-dried potatoes in Charcas

**cimarrón** fugitive slave

**claustro** governing body of a colonial university

**coa** digging stick

**cobija** a type of poncha worn by *llaneros*

**coboclos** offspring of white and indigenous parents in Brazil; synonymous with *mestiços* and *mamelucos*

**colegial** a student in a secondary school (*colegio*) in the Spanish colonies and Brazil

**coliseo** playhouse

**comandante del navío** naval commander

**comandante general de marina** high-ranking naval officer

**comarca** district or province in Brazil

**comendador** knight of a military order with an income derived from an *encomienda* in Iberia

**comerciante** wholesale merchant

**comissário volante** itinerant trader in Brazil

**compadrazgo** godparentage

**composición** fee charged to regularize a land title and certain legal infractions

**conciencia de sí** sense of local pride and awareness

**confraria** religious brotherhood in Brazil; synonymous with *irmandade*

**consolidación** an effort by the Spanish Crown in the early 19th century to appropriate the funds of pious foundations and chantries

**convictorio** residential *colegio* for secondary students

**corral** enclosed courtyard where theatrical productions were presented

**criollo** a creole; term applied to a Spaniard born in the New World and, less frequently, to an African slave born in the New World

**cuerpo de blandengues** cavalry unit in Banda Oriental

**cura** priest

**cura doctrinero** priest in an indigenous parish

**degredado** criminal sent into penal exile

**depositario general** public trustee

**derecho indiano** Spanish colonial law

**derrama** a per-capita tax; in Guatemala a version of the *reparto*

**desagüe** drainage project in the Valley of Mexico

**desembargador** judge on a *relação* in the Portuguese world; counterpart to an *oidor* on Spanish courts

**diezmo** a tithe or 10 percent tax for the church paid on specified agricultural products

**divorcio** permanent separation of a married couple but with no right of remarriage while both spouses lived

**dizimo** tithe in Brazil; equivalent to *diezmo* in Spanish America

**doctrina de indios** an Amerindian parish

**domiciliario** peninsular cleric who remained in the Americas

**don, doña** lord, lady; terms recognizing nobility

**dote da Inglaterra** English dowry; annual tax levied on each municipal council in Brazil

**ejido** common land held by a Native American village in New Spain

**encabezamiento** lump sum that a municipality paid for taxes originally levied on a per capita basis

**encomienda mitaya** form of *encomienda* used in Paraguay

**encomienda originaria** form of *encomienda* used in Paraguay

**enconchado** oil painting with mother-of-pearl

**entradas** quasi-military expeditions sent to enslave Native Americans in Brazil

**escribano** a notary

**español americano** American Spaniard; creole

**español europeo** peninsular Spaniard

**estancia de labor** plowland

**estancia de labor y ganados** fields and livestock

**estancia de pan llevar** wheatland

**estanciero** owner of land (*estancia*) used for ranching

**europeo** in the Spanish colonies, a person born in Spain

**europeu** in Brazil, a person born in Portugal

**Euskera** Basque language

**exaltado** radical

**familiar** agent of the Inquisition

**farinha de mandioca** flour made from the cassava (manioc)

**fazendeiro** owner of land used for ranching (*fazenda*) in Brazil

**fianza** performance bond required of some officeholders

**fidalgos** low-level gentry; the lowest rank of nobility in the Portuguese world

**fiel ejecutor** inspector of weights and measures

**fijo** regular army units

**filho da terra** term used in Brazil for locally born Portuguese; analogous to creole in Spanish America

**flota** fleet; fleet sent from Spain to New Spain

**gachupín** derogatory term for a peninsular; arrogant newcomer

**ganado mayor** cattle

**ganado menor** sheep and goats

- gobierno municipal** municipal matters
- golpe de estado** coup d'état
- gracia y justicia** “grace and justice”; portfolio of a ministry of the same name created in early 18th-century Spain
- grand blanc** great plantation owner on Saint Domingue
- guardia marina/guardiamarina** midshipman
- guayaquileño** person from Guayaquil, Ecuador
- guayra** Andean wind oven used in processing silver ore prior to the introduction of the amalgamation process
- guesito** popular dance considered “indecent” by some
- hábito** knighthood
- hacendado** owner of a landed estate (hacienda), often of considerable size
- hacienda de minas** reduction works for processing silver ore
- heredades** estates in the Arequipa, Peru, region devoted to commercial production of wine
- hidalgo** untitled noble; the lowest level of nobility in Spain; *fidalgo* in Portugal
- huacas** traditional Andean gods
- huasos** Chilean cowboys
- indios de faltriquera** “Indians in the pocket”; the cash that mine owners received in lieu of *mitayo* labor
- irmandade** religious brotherhood in Brazil; synonym for *cofraria*
- ius commune** Roman legal tradition of civil and canon law
- jefe de escuadra** naval rank between lieutenant general and brigadier
- jefe político** political chief; administrative title employed in the Spanish Constitution of 1812
- jefe político superior** superior political chief; reduced title given to viceroys in the Spanish Constitution of 1812
- juego de cañas** mock combat with teams of mounted contestants armed with a cane and a shield
- juez** judge
- juez de repartimiento/juez repartidor** official that distributed *repartimiento* labor
- juez hacedor** cleric who oversaw the collection and disbursement of tithes
- juiz de fora** royal judge in Brazil
- junta de fazenda** treasury board in Brazil; created in 1760s
- Juzgado de Indias** court for commercial matters related to the Spanish colonies; subordinate to the Casa de Contratación
- ladino** casta or Hispanized Native American in Guatemala
- latifundio** large landed estate
- lengua general** term applied to written version of Quechua
- limeño** person born in Lima, Peru
- limpeça da sangue** purity of blood or unsullied ancestry; Portuguese equivalent of *limpieza de sangre*
- lingua geral** term applied to a common form of the Tupí-Guaraní language
- Llanos** tropical plains of Venezuela
- Lonja/Casa Lonja** merchant exchange in Seville, Spain
- lugar** here, hamlet
- maestro de capilla** music director
- magistral** copper or iron pyrite; employed in amalgamation process
- maravedí** Spanish unit of account of very small value
- masa** dough made of corn for tortillas
- mate** silver cup used for drinking *yerba maté*
- medio-rationero** lowest-level member of a cathedral chapter
- mercedes** grants made by the king or his representative of land, office, labor, or other items
- mesta** stockmen's association
- mestiço** offspring of white and indigenous parents in Brazil; also known as *mameluco* and *coboco*; same as mestizo in Spanish America
- milpa** native field in New Spain typically used for growing maize
- minga** non-*mitayo* wage-earning indigenous miner in Charcas
- ministro togado** councilor of the Indies and other councils who was a *letrado*
- mitayo** Amerindian subject to the rotational forced labor draft of South America known as the *mita*
- mocambo** fugitive slave community in Brazil; synonymous with *quilombo*
- molino** mill; stamping mill in mining
- molletes** low-quality bread in Potosí
- monica** black grape planted in Chile for wine production
- montañés** person from the Province of Santander, Spain
- moreno** person with both parents of African ancestry
- morgado** entailed estate in Portuguese world; comparable to *mayorazgo* in Spanish world
- Morisco** christianized Muslim
- municipio** town in Brazil
- norte chico** part of Atacama and Aconcagua provinces and province of Coquimbo in Chile
- novohispano** person born and reared in New Spain
- obrador** small shop used for weaving
- obraje de añil** dyeworks for indigo
- oficial real** one of the royal treasury employees designated to collect and disburse income in Spanish America
- originario** Native American with rights and responsibilities in village of birth
- ouvidor** judge on a *relação* in Brazil
- paisano** countryman, usually from the same small region or municipality
- palenque** a fortified hamlet of runaway slaves in Spanish America; equivalent to *quilombo* in Brazil
- palmarista** resident of Palmares, a fugitive slave community Brazil
- panadería** bakery
- pan blanca** finest wheat bread

**paniaguado** hanger-on; part of an entourage  
**pañó azul** blue woolen cloth produced in Quito  
**parlamento** meeting between Spanish authority and Araucanian leaders in Chile  
**partido** subdistrict of an intendency  
**patio process** amalgamation process that employed mercury to separate silver from ore  
**paulista** a person from São Paulo; frontiersman and Indian slaver  
**pechero** person in Spain required to pay ahead tax or tribute known as the *pecho*; commoner  
**pella** amalgam of silver and mercury  
**pelota** a game of handball  
**pena infame** degrading judicial sentences from which nobles were exempt  
**pés de chumbo** leaden feet; derogatory term for a person born in Portugal  
**peso** weight; gold or silver coin of specified value  
**petit blanc** artisan, working class, or small land-owning white on Saint Domingue  
**picota** pillar of justice placed in a central plaza  
**pieza de Indias** standard unit applied to slaves  
**piña** conical form in which silver and mercury amalgam was placed for heating  
**porteño** person from Buenos Aires  
**praça** plaza in Portuguese world  
**principal** Native American noble  
**procurador general** municipal attorney; synonym is *síndico*  
**pruebas** genealogical proofs of nobility and *limpieza de sangre*  
**quinto de couro** tax on cattle hides in Brazil  
**raconero** low-ranking member of a cathedral chapter  
**radicado** man tied to his district of employment by length of service and local financial or family relationships  
**Ratio studiorum** classical curriculum taught by Jesuits  
**real** one-eighth of a silver peso if a silver *real*; one-twentieth of a peso if copper  
**real acuerdo** a meeting of an executive with his *audiencia* in an advisory or cabinet capacity; the viceroy-in-council  
**real caja** royal treasury office  
**Real Erário** Royal Treasury in Portuguese world after reorganization in the 1760s  
**receptor de penas** collector of fines  
**relator** an officer of a court responsible for preparing a brief for the case at hand  
**renta** an annuity  
**república de españoles** Spaniards as a whole  
**república de indios** Native Americans as a whole  
**rey intruso** “intrusive king”; applied to Joseph I, whom Napoleon forced on Spain  
**saladero** salted beef processing plant in the Río de la Plata region  
**sambo** alternate spelling of *zambo*  
**san benito/sanbenito** penitential garb worn by persons found guilty by the Inquisition

**sarao** soirée  
**segundón** younger son of a Spanish grandee or titled noble  
**senado de câmara** municipal council in Brazil  
**senhor** Portuguese equivalent to *señor* in Spanish; mister  
**servicio personal** term used in Yucatán for draft labor  
**sesmaria** land grant in Brazil usually of one league square; about 17 square miles, or 43.5 square kilometers  
**sirvinacuy** trial marriage in Andean Peru  
**situado** a financial subsidy sent from the royal treasuries of Lima and Mexico City to outlying parts of the Spanish Empire  
**subsídio** excise tax in Brazil  
**sumiller de corps** grand chamberlain at the royal court  
**suplente** substitute deputy, especially at the Cortes of Cádiz  
**tambo** supply station maintained along major roads in Peru; *tambos* predated the arrival of the Spaniards  
**tamemes/tlamemes** indigenous porters  
**telar suelto** individual loom used in weaving  
**temporalidades** revenue-producing properties of the Jesuits that the Spanish Crown sold or assigned after expelling the Society.  
**teniente** lieutenant; associate or substitute for a provincial administrator  
**teniente y asesor** lieutenant and legal adviser; commonly an assistant to an intendant  
**three-fer** bread for the poor in Potosí  
**torta** mixture of silver ore, salt, and mercury that was spread on a patio as part of refining process  
**trajín** mule or llama train  
**trapiche** animal-powered sugar mill; small shop used for weaving  
**traza** checkerboard layout of surveyed and measured streets and lots in a municipality  
**ultramar/provincias de ultramar** overseas; Spain’s colonies or overseas domains  
**vales reales** large-denomination, interest-bearing paper bills  
**valido** royal favorite  
**vaqueiro** cowboy in Brazil  
**vecindad** the condition of citizenship held by *vecinos*  
**vecino ciudadano** non-*encomendero* who was a citizen with a lot and house in a municipality  
**vecino encomendero/vecino feudatorio** *encomendero* who was a citizen in a municipality  
**veinti-cuatro** an alderman of some cities in the Spanish world; synonym of *regidor*  
**vellón** copper coinage  
**vía reservada** minister of the Indies and other ministers that reported directly to the monarch  
**viñatería** liquor store in Mexico  
**visitador** official inspector appointed by the Crown  
**yungas** low-altitude tropical lands on the eastern side of the Andes

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ENCYCLOPEDIA OF  
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 **Facts On File**  
*An imprint of Infobase Publishing*

**Encyclopedia of Latin America**  
**Volume III: Search for National Identity**

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For information contact:

Facts On File, Inc.  
An imprint of Infobase Publishing  
132 West 31st Street  
New York NY 10001

**Library of Congress Cataloging-in-Publication Data**  
Encyclopedia of Latin America / Thomas M. Leonard, general editor.

p. cm.

Includes bibliographical references and index.

ISBN 978-0-8160-7359-7

I. Latin America—History—Encyclopedias. I. Leonard, Thomas M., 1937–  
II. Francis, J. Michael (John Michael) III. Burkholder, Mark A., 1943– IV. Rankin, Monica.

F1406.E5155 2010

980'.01303—dc22

2009014594

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Text design by Lina Farinella  
Composition by Hermitage Publishing Services  
Cover printed by Sheridan Books, Ann Arbor, MI  
Book printed and bound by Sheridan Books, Ann Arbor, MI  
Date printed: May 2010  
Illustrations by Patricia Meschino  
Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

This book is printed on acid-free paper.

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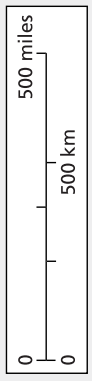
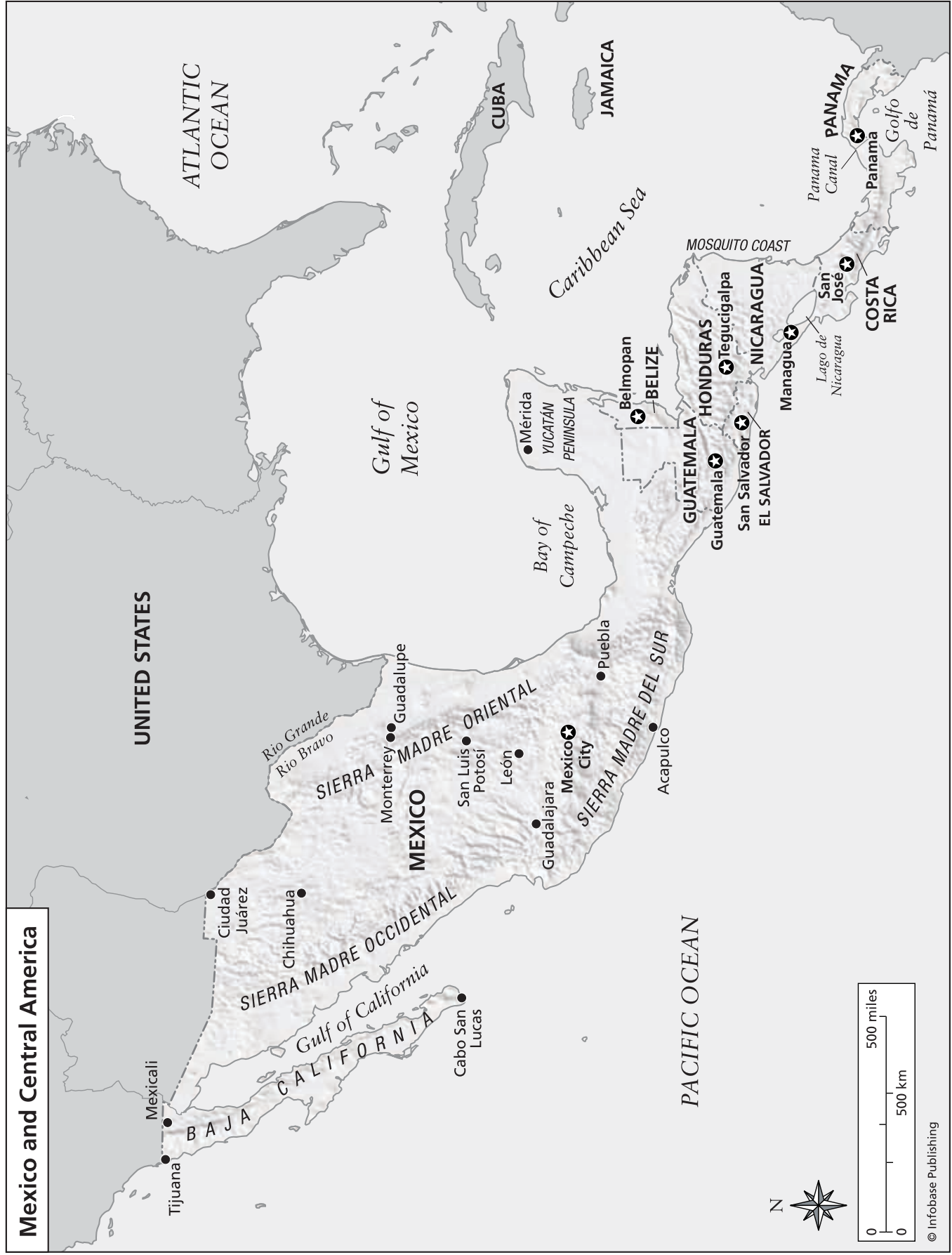
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# Mexico and Central America



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# The Caribbean



Gulf of Mexico

Florida (U.S.)

Grand Bahama

Great Abaco

Eleuthera

Cat Island

Long Island

Acklins Island

Great Inagua Island

Guantánamo

Windward Passage

Port-au-Prince

Santo Domingo

Kingston

Santiago de Cuba

Holguín

Camagüey

Isla de la Juventud

Havana

Cayman Islands (UK)

Turks and Caicos Islands (UK)

ANTILLES

ANTIGUA and BARBUDA

St. John's

Guadeloupe (FRANCE)

LESSER ANTILLES

Virgin Islands (U.S./UK)

Basseterre

ST. KITTS and NEVIS

San Juan

Puerto Rico (U.S.)

DOMINICAN REPUBLIC

DOMINICA

Roseau

Martinique (FRANCE)

ANTILLES

ST. LUCIA

Castries

ST. VINCENT and THE GRENADINES

Kingstown

BRBADOS

Bridgetown

GRENADA

St. George's

Port-of-Spain

TRINIDAD and TOBAGO

Aruba

(THE NETHERLANDS)

Netherlands Antilles

Bonaire

Curaçao

COLOMBIA

PANAMA

VENEZUELA

Caribbean Sea

ATLANTIC OCEAN

NICARAGUA

0 150 miles

0 150 km

N

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South America



## ❁ PREFACE TO THE SET ❁

How does one define Latin America? Geographically, Latin America stretches from the Rio Grande River on the U.S.-Mexican border and Cuba, bordering the Caribbean Sea and the Atlantic Ocean, to Tierra del Fuego at the southern tip of South America. The area is two and one-half times the size of the United States. Brazil alone is slightly larger than the continental United States. Within this vast geographic region there is enormous human and physical variety.

In historical terms, Latin America includes those parts of the Americas that at one time were linked to the Spanish, Portuguese, and French Empires and whose people speak a Romance language (a language derived from Latin, such as Spanish, Portuguese, French, and the derivative Creole). When Napoleon III popularized the term *Latin America* in the 1860s, he implied a cultural relationship between France and those countries of the Western Hemisphere where these language traditions existed: Mexico, most of Central and South America, Cuba, the Dominican Republic, Puerto Rico, Haiti, Martinique, Guadeloupe, and French Guiana. A literal interpretation of Napoleon III's definition would also include portions of the Southwest United States, Florida, and Louisiana; Quebec in Canada; and the islands of St. Pierre and Miquelon off of Newfoundland's coast. English is the first language of most Caribbean islands, and Papiamentu, a form of Creole, is predominant in the Netherlands Antilles and Aruba. Amerindian dialects remain the primary languages in parts of Mexico, Guatemala, Ecuador, Peru, and Bolivia.

The mixture of languages illustrates the diversity of race and culture across Latin America. The Amerindians, or Native Americans, dominated the pre-Columbian time period. In the 21st century, their descendants are still prevalent in Mexico, Guatemala, Ecuador, Peru, Bolivia, and the upper reaches of the Amazon River in the Andes Mountains. Latin America was colonized primarily by the Spanish and to a lesser degree by the Portuguese, first and foremost in Brazil. British, French, and Dutch interlopers followed, and in the 20th century,

the United States had a profound impact across the region. For economic reasons, slavery was practiced most notably in Brazil, along the Ecuadoran coast, and in the Caribbean Islands. Each of these ethnic groups—and the descendants of interracial relationships—produced its own culture with unique religious traditions, family life, dress styles, food, art, music, and architecture. With accelerated globalization throughout the 20th century, Western ideas and culture have had a significant impact upon Latin America.

Geography and climatic conditions also play a major role in the development of societies, their cultures, and economies. Latin America is no exception. For example, the Andes Mountains that traverse the west coast of South America served as the centerpiece of the Inca Empire in the pre-Columbian period, the source of gems and ores during the Spanish colonial period, and the ores and petroleum essential for modern-day industries. The Andes westward slopes and coastal plains provided agricultural products since the earliest of times. The rolling plains, or pampas, of north-central Argentina, southern Brazil, and Uruguay coupled with a Mediterranean-type climate turned those areas into highly productive cattle and grain centers. In contrast, the Amazon rain forest in Brazil, while still home to undiscovered Native American groups, offered little economic advantage until the 20th century, when the logging industry and land clearing for agricultural expansion cut deep into the rain forest's expanse. The tropical climate of the Caribbean and the coastal areas of Central America offered fertile ground for sugar, tobacco, and tropical fruits.

People, geography, language and culture, and economic pursuits transformed Latin America into one of the world's most diverse regions. Yet, the 41 countries and foreign dependencies that make up Latin America share four distinguishable historical time periods: the pre-Columbian period, followed by nearly three centuries of colonial rule; the struggle for national identity during the 19th century; and the quest for modernity since 1900.

The *Encyclopedia of Latin America* takes a chronological approach to the examination of the Latin American experience. Divided into four volumes, each devoted to one of the four time periods that define Latin American history, this unique reference work contrasts sharply with traditional encyclopedias. It provides students and general readers the opportunity to examine the complexity and vastness of the region's development and culture within a given time period and to compare the time periods.

Volume I, *Amerindians through Foreign Colonization*, focuses on the pre-Columbian period from the earliest Native American societies through the arrival of the Spanish conquistadores. Scholars continue to debate the number of Native Americans, or "Indians" as Christopher Columbus labeled them, who resided in the Americas when Columbus first reached the region in 1492. Estimates range from a low of 10 million to a high of slightly more than 100 million. While most scholars agree that the earliest waves of migrants came to the Americas across the Bering Straits land bridge as early as 40,000 years ago, there is continued debate over both the dates of settlement and descent of the earliest settlers. More recent scholarship in Chile and Brazil place the earliest New World migrants to 33,000 B.C.E. and suggest them to be of South Asian and Pacific Islander—rather than Eurasian—descent.

By the time of the European arrival on Latin America's mainland in the early 1500s, three highly organized Native American societies existed: Aztec, Maya, and Inca. Mexico's central valley was home to the rigidly stratified Aztec society, which by the time of the conquest reached southward and eastward to the Caribbean coast. The Aztecs had earned a reputation for their military prowess, for the brutal exploitation of the peoples brought into the empire, and for ceremonial city building, evidenced by its capital, Tenochtitlán, the site of contemporary Mexico City. From Peru's Cuzco Valley, the Inca Empire in South America stretched 3,000 miles (4,287 km) through the Andes mountain chain and inland to the east from Ecuador, in the north, to Chile, in the south. Through a tightly controlled bureaucracy, the Incas exercised control of the conquered communities. The Maya civilization began approximately in 1000 B.C.E. and, through a system of independent city-states, extended from Mexico's Yucatán Peninsula through Guatemala. For reasons not yet fully understood, Classic Maya civilization began its political collapse around 900 C.E., but Mayan society and culture remained intact. Aside from the three major groups, many other Native American societies existed throughout Latin America, such as the Arawaks and Tainos in the Caribbean and the Mapuche and the Guaraní in Argentina, Paraguay, and Chile.

Marked differences separated groups within the larger society and each group from the other. For example, even today, the Mexican government reports nearly 200 different linguistic groups; Guatemala, 26 different Mayan dialects; and an estimated 10 million Native Americans speak some form of the Quechua language in the high

Andes along South America's Pacific coast. Elaborate ceremonies that included human sacrifice characterized the Aztec, Inca, and Maya religions. Agriculture was the primary economic pursuit of all Native American groups, while hunting and fishing were pursued by some groups. Textiles and metalwork usually contained designs peculiar to each indigenous group.

Volume II, *From Colonies to Independent Nations*, focuses on the Spanish colonial period, from the early 16th century through the early 19th century. At the beginning of this time period, the Spanish explored the South and North American continents, laying out an empire in the name of the king and queen of Spain and the Roman Catholic Church. Despite the vastness of the empire, which stretched from Tierra del Fuego at the southern tip of South America to the far reaches of the northwest Pacific Coast, eastward to the Mississippi River and into the Floridas, the Spanish attention focused on the areas of modern-day Mexico and Peru. Both were home to significant Native American societies and rich in mineral wealth, particularly gold and silver. The colonies existed for the benefit of Spain, and the application of mercantilist economic policies led to the exploitation of natural resources, regulation of manufacturing and agriculture, and control of international trade, all of which contributed to a pattern of large land holdings and abuse of labor. In effect, the system drained the colonies of its specie and other wealth and negated economic development and the emergence of a significant entrepreneurial class in the colonies. The Spanish imposed their political and cultural systems on the colonies, including the Native Americans. A highly centralized governmental structure provided little opportunity for political participation by the Spanish colonial residents, except in matters at the local level. The colonial laws and rules were made in Spain and enforced in the New World by officials appointed by the Crown. During the colonial period, the Catholic Church became an entity unto itself. It administered education, hospitals, social services, and its own court system. It tithed its followers and charged fees for religious services. Because the church was exempt from taxes to the Spanish Crown, it emerged as a colonial banker and a benefactor of the Spanish colonial system. The church, therefore, was not anxious to see the system change.

In theory, the Brazilian colonial experience paralleled the Spanish model, but in application, the Brazilian model was much different. The states established on Brazil's Atlantic coast were administered like personal fiefdoms by the king of Portugal's appointed authorities. Because the colony lacked natural resources for mass exploitation and a Native American population to convert to Catholicism, Portugal gave little attention to its New World colony.

Latecomers to the New World, the British, French, and Dutch colonization schemes were confined to the Caribbean region. As with the Spanish and Portuguese,

each island fell victim to the political system of the mother country. Over time, the local governments of the British became more representative of the resident population. The economic focus on sugar production caused the importation of slave labor from Africa.

New World discontent in the mid-17th century led to reforms in the Spanish colonial system, but it took European events in the early 19th century to bring about Latin America's independence by 1826. Only Cuba and Puerto Rico remained under Spanish rule, and the British, French, and Dutch maintained control over their Caribbean island positions. Brazil received its independence on September 7, 1822, but continued to be governed by a member of the royal Portuguese family until November 15, 1889.

The legacies of colonial rule became evident immediately following independence. The establishment of governmental institutions and the place of each nation in the growing global economy that characterized 19th-century Latin America are the subject of volume III, *The Search for National Identity*. In addressing these issues, political and religious leaders, intellectuals, and foreigners who came to Latin America were confronted by the legacies of Spanish colonial rule.

The New World's Spanish descendants, the creoles, replaced the Spanish peninsulars at the apex of the rigid social structure and sought to keep political power confined to themselves. Only conflicting ideologies separated the elite. One group, the Conservatives, remained tied to the Spanish tradition of a highly centralized government, a privileged Catholic Church, and a hesitancy to reach out to the world. In contrast, the Liberals argued in favor of a greater decentralization of political power, the curtailment of church privileges, and greater participation in world affairs, particularly trade. Liberals and Conservatives, however, did not want to share political power or wealth with the laboring classes, made up of mestizos, Native Americans, or blacks. The dispute over the authority of central governments played out in different ways. In Argentina and Chile, for example, Conservatives Juan Manuel de Rosas and Diego Portales produced constitutions entrenching the Spanish traditions. In Central America, it signified the disintegration of the United Provinces by 1839 and the establishment of Conservative-led governments. The contestants for Mexican political power took to the battlefield, and the struggle produced 41 presidents from 1822 through 1848.

The Latin American world began to change in the 1860s with the emergence of Liberal leaders. It increasingly contributed raw materials to industrialized Europe. The heads of state welcomed foreign investment for the harvesting and processing of primary products and for constructing the supportive infrastructure. And, while the Liberals struck against church privileges, as in Chile during the 1880s, they still retained political power and continued to discriminate against the working classes.

Brazil and the colonized Caribbean Islands fell within the same purview as Spanish America. Although Brazil peacefully achieved independence in 1822, it continued its monarchical form of government until 1889. During that same time period, Brazil participated in the world economy through the exportation of sugar, followed by rubber and coffee. Meanwhile, the Caribbean Islands from Cuba southward to Trinidad and Tobago continued to be administered as part of European colonial empires. Administrators from Spain, Great Britain, France, and the Netherlands arrived to govern the island and to oversee the exportation of primary products, usually sugar, tobacco, and tropical fruits.

Latin America's participation in the global economy accelerated in the 20th century, but the new era also brought new players in the region's economic and political arena—the United States and Latin America's lower socioeconomic groups. These concepts form the basis for the entries in volume IV, *The Age of Globalization*.

The U.S. entry into Latin American affairs was prompted by the Cuban struggle for independence from 1895 to 1898 and the U.S. determination to construct a trans-isthmian canal. The U.S. three-month participation in the Cuban-Spanish War in 1898 and its role in securing Panama's independence in 1903 also confirmed long-standing assumptions regarding the backwardness of Latin American societies, owing to the legacies of the Spanish colonial system. More obvious was the need to secure the Panama Canal from foreign interlopers. U.S. policymakers combined the two issues—political and financial irresponsibility and canal security—to justify U.S. intervention throughout the circum-Caribbean region well into the 1920s. U.S. private investment followed the government's interventions and together led to the charge of “Yankee imperialism.”

The entrance or attempted entrance into the national political arena by the middle and lower socioeconomic groups remained an internal affair until after World War II, when they were considered to be part of an international communist movement and again brought the United States into Latin America's internal affairs. Argentina and Chile provide early 20th-century examples of the middle sector entering the political arena while the governments continued to suppress labor. The results of the Mexican Revolution (1911–17) provided the first example of a Latin American social revolution addressing the needs of the lower socioeconomic class at the expense of the elite. In the 1920s and 1930s, small Communist or communist-like political parties or groups emerged in several countries, including Costa Rica, Chile, Brazil, and Peru. While of concern at the time, the presence of communism took on greater importance with the emergence of the cold war in 1945, when the “generation of rising expectations” fused with the Communists in their call for a complete overhaul of the socioeconomic and political structures rooted in Spanish colonialism. In the ambience of the cold war, however, the 1954 presidential

election of Jacobo Arbenz in Guatemala, Fidel Castro's actions in Cuba in 1959 and 1960, the 1963–65 political crisis in the Dominican Republic, the administration of Chilean president Salvador Allende from 1970 to 1973, and the Central American wars during the 1980s were intertwined into the greater context: struggles of freedom against international communism based in Moscow. To "save" these countries from communism, the United States intervened but in so doing restored and propped the old order. The struggle against communism also resulted in a generation of military governments across South America.

Beginning in the 1980s, democratic governments replaced military regimes across Latin America, and each

of the countries experienced the growth of new political parties, mostly left of center. The new democratic governments also accepted and implemented the neoliberal, or free-market, economic model in vogue at the time. By the mid-1990s, many of the free-market reforms were in place, and Latin America's macroeconomic picture had vastly improved. Still, the promised benefits failed to reach the working classes: Half of all Latin Americans remained poverty stricken. In response to their personal crisis, beginning in 1998 with the election of Hugo Chávez as president of Venezuela, the Latin American people started placing so-called leftists in their presidential palaces. Latin America may be at the precipice of another change.

# ❖ HOW TO USE THIS ENCYCLOPEDIA ❖

The *Encyclopedia of Latin America* explores broad historical developments within the context of four time periods that together make up the complete Latin American historical experience. For example, the student or general reader can learn about a given country, when it was a “location” during the pre-Columbian period (volume I), a part of the Spanish colonial empire (volume II), a new nation struggling for its identity (volume III), or in its search for modernity (volume IV). The same can be done with political ideas and practices, economic pursuits, intellectual ideas, and culture patterns, to mention just a few of the themes that are explored across the four volumes. To locate topics in each of the four volumes, the reader should utilize the list of entries in the front matter of each volume. Words set in SMALL CAPITAL LETTERS in the body of a text indicate that an entry on this topic can be found in the same volume. At the conclusion of each entry are cross-references to related entries in other volumes in the set. For further help with locating information, the reader should turn to the comprehensive set index that appears at the end of volume IV.

Within each volume, the entries focus on the time period at hand. Each volume begins with an introduction providing a historical overview of the time period, followed by a chronology. A glossary of terms can be found in the back matter of the book. Each entry is followed by a list of the most salient works on the subject, providing the reader the opportunity to further examine the subject. The suggested readings at the end of each entry are augmented by the select bibliography appended to each volume, which offers a listing of the most important works for the time period. The further readings for each entry and selected readings for the volume together form a comprehensive list of Latin America’s most important historical literature.

Each volume also includes a collection of documents and excerpts to illustrate the major themes of the time period under consideration. Offering eyewitness accounts of significant historical events and personages, they perhaps will encourage the user to further explore historical documentation.

# ❖ ACKNOWLEDGMENTS ❖ FOR THIS VOLUME

I wish to acknowledge the support and patience of the editorial staff of Facts On File whose assistance has been invaluable in the preparation and production of this volume. I thank series editor Thomas M. Leonard as well as the editors of the other volumes of this series for their assistance and cooperation throughout this project. I am particularly thankful to Peter Henderson, Kimberly Greenough-Hodges, and Robert Jordan for their contributions to the entries on Ecuador, Haiti, and Puerto

Rico. I would also like to recognize the support staff at the University of Texas at Dallas McDermott Library, who helped to procure reference materials necessary for the writing of this volume as well as primary source documents found in the appendix.

As always, I am grateful to my husband, Brian, and daughter, Kyla, for their support and understanding as I engaged in extensive research and writing for this project.

# ❧ INTRODUCTION ❧ TO THIS VOLUME

This volume covers the national period in Latin American history, from the time immediately following the wars for independence (the 1820s) to the turn of the century. That era was one of major transition in much of the region. In the early decades of the 19th century, the mainland Spanish colonies fought bloody and protracted wars in order to break away from European imperial control. The shift from colony to independent nation was accompanied by debates over governing and economic systems and social order. Those conflicts often produced instability as regional leaders vied for power, national borders shifted, and foreign powers intervened. Nation building was neither an easy nor a peaceful process. The entries in this volume describe the precarious and volatile evolution of many of the new nations. While common themes were evident, individual nations, regions, and peoples often developed in very different ways. This volume also details the nuances and individuality that defines the different Latin American cultures.

The shift away from colonialism began as early as the 1790s when a black and mulatto revolt in the French Caribbean colony of Saint Domingue eventually culminated in the creation of the new sovereign nation of Haiti. That successful movement to end colonial rule combined with Enlightenment ideas about governing and with growing discontent over the injustices of European imperial policies. Important members of the creole elite in the Latin American colonies began to push for reform, while others considered the possibility of self-rule. That nascent interest in independence intensified in the early years of the 19th century after French emperor Napoléon Bonaparte set out to expand his empire across Europe and beyond. In 1807, the French army invaded the Iberian Peninsula, and by the following year, both Portugal and Spain were occupied by the French. As the Spaniards resisted the French incursion, they formed various local juntas to govern in their monarch's absence. Similar self-governing committees formed in the colo-

nies, and these later became the foundation for independence movements throughout Spanish America.

The independence era lasted from approximately 1808 until the 1820s in the mainland Latin American colonies, but the nature of the movements varied greatly. Areas such as Mexico and Peru that were long-standing seats of royal authority witnessed the emergence of strong loyalist groups that opposed the efforts of liberal independence leaders to break completely from Spain. Mexico and Peru were also home to large indigenous populations, and many creole elite worried that challenging the traditional power structures would lead to mass uprisings they would not be able to control. As a result, independence leaders met with considerable resistance in those countries, which achieved independence more gradually and somewhat reluctantly. Other, more peripheral regions of the colonies were not traditional seats of royal authority and lacked large indigenous populations. In Chile, Argentina, and elsewhere, the wars for independence were no less violent, but independence movements generally faced less organized loyalist opposition and, thus, were able to break away from Spain more quickly. The Portuguese colony of Brazil had a unique independence experience as the Portuguese Crown and 10,000 officials fled Napoléon's invasion and relocated at Rio de Janeiro in 1807. The Portuguese Crown operated from the Americas until 1822, when the king returned to Lisbon and his son Pedro, left behind in Brazil, later declared that country's independence. In the Caribbean, only Haiti and the Dominican Republic achieved independence in the early 19th century. Elites in other Spanish colonies in the Caribbean (Cuba and Puerto Rico) initially rejected the idea of independence, largely because they feared revolt among their sizable slave populations. The British, French, and Dutch also held small colonies with slave-based economies in the Caribbean and northern South America. Much of the 19th-century history of those areas was defined by trade,



abolition, and immigration, and many remained under European control until well into the 20th century.

In the areas that achieved independence in the first decades of the 19th century, the shift from colony to sovereign nation was rarely smooth. More than a decade of warfare left the former Spanish colonies in disarray. Vital economic sectors such as mining and agriculture were damaged and struggled to recover. Furthermore, new governments had to deal with the social and political systems left over from the colonial era. Slavery and other forms of coerced labor continued to exist, and the new leaders in most nations spent several decades debating abolition and other labor reforms. Although African slavery was eventually abolished in the former mainland Spanish colonies by the 1850s, repressive and exploitative indigenous labor policies continued throughout the century. Cuba and Puerto Rico—which remained under Spanish control—and the former Portuguese colony of Brazil retained a slave-based labor force in their plantation economies until the latter half of the 19th century.

One of the most significant consequences of independence was the removal of the monarch as the legitimate authority. Leaders in new nations attempted to fill the power vacuum by writing constitutions and experimenting with liberal and democratic political institutions. Liberal leaders of the independence generation drafted new governing documents in Argentina in 1819, Mexico in 1824, and Chile in 1828. Other nations followed with constitutions of their own in subsequent decades, and many of those early documents were modeled after the U.S. Constitution and the liberal Spanish Constitution of 1812. Constitutional experiments also required national leaders to consider the complex system of caste and social class in the context of citizenship and political rights. A firmly entrenched system of social inequality remained and many Latin Americans—including women, the poor, the indigenous, and former slaves—were not incorporated into the political process until well into the 20th century. Moreover, despite attempts to establish democracy, the political systems in newly independent nations remained shaky. Most countries went through multiple constitutions over the course of the 19th century. Political elites competed for power, and those conflicts frequently turned violent. New leaders who took power by force often abrogated the constitution and governing systems established by their predecessors in favor of a political infrastructure better suited to their own immediate needs.

Instability and political strife allowed for the emergence of autocratic yet charismatic leaders known as *caudillos* throughout Latin America. Caudillos were generally military men who had participated in the wars for independence. They often built up a loyal following and relied on those supporters to take power by force. Caudillos ruled with a heavy-handed authoritarianism but also exhibited personal characteristics that their

supporters found likable and even charming. Caudillos emerged in nearly all of the former Spanish colonies starting as early as the 1820s, and political rule under *caudillismo* lasted for several decades. Caudillos' use of tyranny and personal favors complicated early efforts at establishing lasting democratic institutions. Indeed, many caudillos found it more expedient to circumvent the constitution and dissolve legislative bodies than to rule under the restrictions of a formal democratic process. Many did, however, provide a much-needed sense of stability in nations that were struggling to find their way after more than a decade of violent revolution. Although most nations began to move away from caudillo rule by the 1850s, remnants of *caudillismo* were evident in Latin American politics throughout the 19th century.

Spain proved reluctant to relinquish control over its former colonies, and a real fear remained in Latin America that the once-powerful European nation would try to recolonize the areas that had just won independence. Indeed, the Spanish did make an attempt to retake Mexico in 1828. That effort was successfully thwarted by a young and disorganized Mexican military. Spain was more successful in later decades when it established an empire in the Dominican Republic from 1860 to 1865. Similar threats came from other European powers. The French made several incursions into Mexico and Central America. In an era known as the French intervention, Napoléon III occupied Mexico from 1862 to 1867. He installed a European emperor in an attempt to build an empire in the Americas. The United States also became a concern for leaders in the new Latin American nations. The U.S. threat took some by surprise because the North American independence experience had been a model for many Latin Americans, and U.S. leaders had issued the Monroe Doctrine in 1823 vowing to safeguard the independence of Latin American nations. Nevertheless, by the 1830s, U.S. expansionist interests had set their sights on Latin American nations in the throes of instability. The expansionist cause in the United States—also known as Manifest Destiny—played a role in the Texas revolution in 1836 and the subsequent U.S.-Mexican War from 1846 to 1848. Mexico was forced to cede nearly half its national territory to the United States at the conclusion of that war. U.S. interests in Central America led a number of filibustering expeditions in the 1850s. William Walker even briefly installed himself as president of Nicaragua during that time. In the last half of the 19th century, U.S. interests shifted to the Caribbean, much of which was still under European imperial control. The threat of foreign invasion, territorial loss, and/or recolonization exacerbated the internal political conflicts that already existed in Latin America and frustrated leaders' attempts to bring peace and stability to their nations.

Equally challenging to national stability were the frequent armed conflicts between neighboring Latin American nations. Many early conflicts were over territory, trade,



and access to resources. Brazil and Argentina fought the Cisplatine War between 1825 and 1828 over the Banda Oriental, or Cisplatine Province. The resolution of that conflict was mediated by the British, who established the independent republic of Uruguay as a buffer zone between the two nations. In 1828, Peru fought a war with the Confederation of Gran Colombia over boundary disputes that were rooted in colonial administrative divisions. Chile, Peru, and Bolivia went to war after Bolivian caudillo Andrés Santa Cruz attempted to form the Peru-Bolivia Confederation. In the Caribbean, Haiti invaded neighboring Santo Domingo and occupied the eastern portion of the island of Hispaniola for 22 years. Dominicans finally ousted Haitian forces in 1844 after more than a decade of organized armed opposition. In the 1860s, the War of the Triple Alliance was fought between Paraguay on one side and Argentina, Brazil, and Uruguay on the other. Chile battled against Peru and Bolivia in the War of the Pacific from 1879 to 1884. The numerous intraregional wars resulted in shifting borders or even the formation of entirely new nations, as in the case of Uruguay in the 1820s and Panama in the early 20th century. Nineteenth-century wars also helped shape the balance of power in the region with nations such as Chile and Brazil emerging as formidable military and economic powers, while Bolivia and Paraguay saw their dominance decline.

Nevertheless, the most serious threat to national stability in Latin American nations came from internal power struggles. In the early 19th century, ideological conflicts formed in many of the former Spanish colonies as the liberal and conservative political factions competed for power and sought to influence the direction of national development. Conservatives generally wanted to retain the power structures and social traditions that had defined the colonial era. Liberals, on the other hand, aimed to divest the new nations of the colonial practices they considered were thwarting modernization and progress. The liberals eventually won the struggle. Many early liberal leaders had helped lead independence movements, and their influence is evident in many of the first Latin American constitutions. In later decades, liberal leaders were often intellectuals, many of whom denounced the tyranny and corruption of *caudillismo*. Venezuelan literary figure Andrés Bello was a contemporary of Simón Bolívar during the independence era and later held a number of government posts in Chile. Prominent Argentina liberal leader Domingo F. Sarmiento was renowned for his literary works, in which he denounced the rule of Juan Manuel de Rosas. Mexican writer José María Luis Mora spoke out against the arbitrary rule of Antonio López de Santa Anna. His writings helped motivate other liberals to oust the dictator in the 1850s.

Latin American liberals introduced policies intended to reform the old ways. One of their most notable targets was the Catholic Church, which had become the most powerful institution in Latin America by the end

of the colonial period. Reformers moved to secularize society by placing some former church functions—such as welfare, medical care, charity, and recording of vital statistics—under state auspices. Liberals also targeted the church's vast real estate holdings in a series of land reforms intended to facilitate the creation of a viable sector of small farmers. Supporters of the church and other conservatives railed against such reforms. Convinced that disturbing the long-standing social order would lead to chaos, conservatives objected when liberal leaders attempted to curtail the traditional system of social privilege and legal protections, or *fueros*, enjoyed by members of the church and the military. Hostilities between liberals and conservatives contributed to decades of violence and instability in many Latin American nations. Opposing sides fought formal civil wars in Mexico, Colombia, and Chile, while other nations saw near-constant power changes as a result of violent coups and overthrows of governments.

Although reformers encountered numerous challenges and resistance to change, Latin American society underwent dramatic transitions in the 19th century. Liberal policies gradually secularized society, and new nations eventually became stronger and more viable. Economic reforms were among the most notable changes. In contrast to the closed mercantilist system of the colonies period, in the 19th century, economic policies were influenced by laissez-faire theories and the notion of comparative advantage. More open trade paved the way for impressive economic growth in the last half of the 19th century. Healthy and more viable economies brought much-needed stability to the region. Laissez-faire policies and product specialization also had drawbacks, however, as many nations turned to producing only one or two primary products for export. Soon Latin American economies had become export-oriented monocultures whose financial well-being was increasingly tied to the volatile global market. The difficulties that accompanied various short-term economic downturns were early indications that wholesale economic liberalism would be problematic. The full extent of these economic weaknesses did not become evident until well into the 20th century.

In the last half of the 19th century, cultural and social transformations often accompanied economic changes. Permanent borders took root and national governments secured power. These developments helped shape notions of national identity. In many nations, the infighting between liberals and conservatives subsided, and powerful liberal oligarchies made up of political elite who also had a direct stake in the economy emerged. Those leaders often used their nations' newfound wealth to shape concepts of nationalism at home and perceptions of their nations abroad. Leaders in Mexico, Argentina, Peru, and elsewhere became concerned with promoting order, progress, and modernity. Latin American elite were frequently influenced by Auguste Comte's

theories of positivism. In Mexico, Porfirio Díaz converted public spaces into displays of national greatness, with monuments and grandiose government buildings. Argentine leaders showcased Buenos Aires as the “Paris of South America,” as European artistic styles and architectural designs became popular. Indeed, most nations attempted to display their progress and modernity by emulating European culture. Positivist policies facilitated the construction of transportation and communications infrastructure. In conjunction with European and U.S. investors, Latin American leaders oversaw the construction of thousands of miles of railroad tracks, highways, and telegraph wires. They also invested in port improvements and military modernization to facilitate foreign trade and safeguard national prosperity. In Brazil, the

introduction of positivist doctrine had even more dramatic effects, since economic modernization helped advance the abolitionist cause. The former Portuguese colony became the last American nation to abolish slavery, in 1888. Positivist influence also played a part in the overthrow of Brazil’s monarchy one year later and the formation of the Old Republic.

By the end of the 19th century, new nations had emerged in areas that had for centuries been under European colonial rule. The political, social, cultural, and economic processes that defined this era of nation building were firmly in place by the turn of the century, and many of those 19th-century systems continued to influence Latin American development in the 20th century.

# TIME LINE

## (NINETEENTH CENTURY)

### 1791

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- Haitian Revolution begins after a weeklong slave revolt on the island colony.

### 1795

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- Spanish cede control of Santo Domingo to the French in the Peace of Basel.

### 1804

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- Haitian declaration of independence

### 1806

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- Francisco de Miranda leads a failed attempt to incite an independence movement along the Venezuelan coast.
- First British invasion of Buenos Aires, Argentina
- Rivalry between Henri Christophe and Alexandre Pétion divides Haiti politically between north and south.

### 1807

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- British abolish the transatlantic slave trade.
- Napoléon Bonaparte begins invasion of the Iberian Peninsula, setting off resistance movements in Spain, Portugal, and the American colonies.
- Portuguese Court relocates to Brazil.
- Second British invasion of Buenos Aires, Argentina

### 1808

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- Charles IV and Ferdinand VII abdicate the Spanish throne. Napoléon installs his brother as Joseph I of Spain.

### 1809

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- French cede Santo Domingo back to the Spanish after successful independence movement in Haiti.

### 1810

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- Miguel Hidalgo y Costilla issues the Grito de Dolores, marking the beginning of Mexico's independence movement.

### 1811

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- Declaration of independence in Venezuela
- Declaration of independence in Asunción, Paraguay

### 1812

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- Caracas earthquake disrupts Venezuelan independence movement.

### 1814

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- Ferdinand VII is restored to the throne in Spain and abrogates the liberal Constitution of 1812.
- Dutch cede control of Guyana to the British.

### 1815

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- Brazil becomes a kingdom on equal status with Portugal.
- Simón Bolívar writes the *Jamaica Letter*, in which he outlines his vision of an independent and united America.
- Haitian leader Alexandre Pétion provides sanctuary to South American independence leader Simón Bolívar.

## 1816

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- The first Argentine congress is formed and declares independence.
- Publication of Mexico's first novel, *The Itching (or Mangy) Parrot*, by José Joaquín Fernández de Lizardi.

## 1817

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- Brazilian forces invade the Banda Oriental.
- Treaty between Spain and Great Britain abolishes the legal transatlantic slave trade, although a nonsanctioned slave trade continues.

## 1818

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- Battle of Maipó secures Chilean independence.

## 1819

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- Simón Bolívar convenes the Congress of Angostura and forms Gran Colombia.

## 1820

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- Riego Revolt in Spain forces Ferdinand VII to agree not to send Spanish military reinforcements to the Americas and to reinstate the Constitution of 1812.

## 1821

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- John VI returns to Portugal, leaving his son Pedro I to rule Brazil.
- Brazilian regent John annexes the Banda Oriental and re-names it the Cisplatine Province.
- Victory at the Battle of Carabobo secures the independence of Venezuela.
- University of Buenos Aires is founded in Argentina.
- Haiti is reunited under Jean-Pierre Boyer.
- Treaty of Three Guarantees ensures Mexican independence under a monarchy. Agustín de Iturbide is named Emperor Agustín I.

## 1822

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- Pedro I declares Brazil's independence with the Grito de Ipiranga.

## 1822

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- Haitian leader Jean-Pierre Boyer invades neighboring Dominican Republic, initiating 22-year Haitian occupation.

## 1823

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- Agustín de Iturbide is forced to abdicate the throne of Mexico, marking the end of the Mexican Empire.
- U.S. president James Monroe issues the Monroe Doctrine, which articulates a protective policy toward the newly independent nations of Latin America.
- Present-day Guatemala, Nicaragua, Honduras, Costa Rica, and El Salvador form the United Provinces of Central America after the collapse of the Mexican Empire.

## 1824

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- Victory in the Battle of Ayacucho secures the independence of Peru.
- Mexican republic is established under a constitution.

## 1825

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- Creation of the Republic of Bolivia
- Thirty-three Immortals rebel against Brazilian forces in the Banda Oriental, beginning the Cisplatine War.
- Indemnity agreement with France secures recognition of Haitian independence in exchange for large debt obligation.

## 1826

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- Promulgation of the Bolivarian Constitution
- Rebellion led by José Antonio Páez erupts in Gran Colombia.
- Code Rural imposes forced labor system in Haiti.

## 1828

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- Treaty of Montevideo ends the Cisplatine War and creates the Republic of Uruguay.

## 1829

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- Juan Manuel de Rosas comes to power in Argentina.
- Antonio López de Santa Anna repels an attempted invasion by the Spanish in Mexico.

## 1830

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- Dissolution of Gran Colombia

## 1831

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- Pedro I abdicates the throne in Brazil in favor of his five-year-old son, Pedro II. Beginning of the Regency period in Brazilian government.

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**1832**

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- The War on Cabanos begins in Pernambuco, Brazil.

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**1833**

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- Slavery Abolition Act gradually ends slavery in most British colonies.
- Antonio López de Santa Anna is elected president of Mexico for the first time.

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**1834**

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- Assassination of Juan Facundo Quiroga in Argentina

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**1835**

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- Onset of the War of the Farrapos in Brazil
- Siete Leyes dissolves state governments in Mexico, setting off conflicts in the Yucatán and Texas.

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**1836**

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- Formation of Peru-Bolivia Confederation
- Chile-Peru War of 1836
- Texas secedes from Mexico and begins the Texas revolution.

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**1837**

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- Livingston Codes go into effect in Guatemala, introducing a wide range of legal reforms.

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**1838**

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- La Trinitaria opposition movement forms in Santo Domingo against Haitian forces.
- First railroad opens in Cuba between Havana and Güines.
- French blockade of Buenos Aires, Argentina
- Mexican forces fight the French in the Pastry War.
- Costa Rica, Honduras, and Nicaragua withdraw from the United Provinces of Central America, leading to its eventual demise.

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**1838–51**

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- Guerra Grande civil war in Uruguay

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**1839**

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- Dissolution of Peru-Bolivia Confederation

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**1839–41**

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- War of the Supremes among competing caudillos in present-day Colombia

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**1840**

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- Pedro II crowned, beginning Second Empire in Brazil

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**1841**

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- John Lloyd Stephens publishes his famous *Incidents of Travel in Central America, Chiapas and Yucatán*, which chronicles his travels and his tours of Maya archaeological sites.

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**1843**

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- University of Chile opens.
- Ecuador promulgates conservative constitution known as the “Charter of Slavery.”

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**1843–79**

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- Guano age in Peru

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**1844**

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- Abolitionist plot known as the Ladder Conspiracy in Cuba is brutally put down by Spanish authorities.
- Dominican opposition leaders finally oust Haitian forces, ending the Haitian occupation.

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**1845**

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- Publication of Argentine Domingo F. Sarmiento’s *Facundo*, based on the life of regional caudillo Juan Facundo Quiroga

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**1846**

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- Onset of the U.S.-Mexican War

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**1847**

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- Onset of the Caste War of the Yucatán in Mexico
- U.S. occupation of Mexico City

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**1848**

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- Slavery abolished in French colonies
- The Treaty of Guadalupe Hidalgo ends the U.S.-Mexican War and forces Mexico to cede its northern territory to the United States.

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**1849**

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- Onset of era of liberal reform in Colombia
- Hise Treaty grants the Accessory Transit Company exclusive rights to construct a canal, railroad, and roads across Nicaragua.

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**1850**

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- End of slave trade to Brazil
- Clayton-Bulwer Treaty forbids Britain and the United States from seeking new territorial possessions throughout Central America.

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**1851**

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- First rail line opens in Peru between Lima and Callao.

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**1852**

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- Overthrow of Argentine dictator Juan Manuel de Rosas

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**1853**

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- Liberal constitution promulgated in Colombia
- Mexico sells the Mesilla Valley territory to the United States in the Gadsden Purchase.

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**1854**

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- First rail line in Brazil opens between Rio de Janeiro and Petrópolis.
- Slavery abolished in Peru
- Island of Vieques permanently annexed by Puerto Rico
- Revolution of Ayutla in Mexico removes Antonio López de Santa Anna from office for a final time and sets the stage for an era of liberal reform.
- In a conflict with the British, U.S. warships destroy Greytown along the Nicaraguan coast.

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**1855**

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- Chilean Civil Code goes into effect.
- Filibuster William Walker makes his initial attempt to capture and rule Central America.

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**1857**

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- Brazilian José de Alencar publishes the novel *O Guarani*.
- Mexican leaders promulgate a liberal constitution.

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**1858–61**

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- War of Reform in Mexico

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**1858–63**

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- Federal War in Venezuela

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**1860**

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- Chilean government initiates strategy to populate and develop the Araucania.
- Gabriel García Moreno rises to power in Ecuador.
- U.S. filibuster William Walker executed by Honduran military
- In the Treaty of Managua, the British cede claims to the Mosquito Coast to Nicaragua.

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**1861**

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- Spain reannexes Dominican Republic.

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**1862**

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- French forces invade Mexico, beginning the French intervention
- Mexican forces win a surprising victory against the French in the Battle of Puebla.

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**1863**

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- Colombia promulgates a second liberal constitution.
- Onset of the War of Restoration in the Dominican Republic to oust Spanish forces
- Slavery abolished in Dutch colonies

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**1864**

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- Pope Pius IX issues the Syllabus of Errors condemning liberal ideas considered contrary to Catholic doctrine.
- Austrian archduke Maximilian and his wife, Carlotta, supported by the French military, arrive in Mexico to claim the throne.

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**1864–70**

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- War of the Triple Alliance fought by the forces of Argentina, Brazil, and Uruguay against Paraguay

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**1865**

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- Spanish ships blockade the Chilean port city of Valparaíso.
- Junta de Información formed in Spain to address demands for reform in Puerto Rico and Cuba
- Era of the Second Republic begins in the Dominican Republic at the end of the Spanish annexation.



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## 1866

- Treaty of Mejillones between Bolivia and Chile transfers territory in the Atacama Desert to Chile.

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## 1867

- Treaty of Ayacucho between Bolivia and Brazil grants the Acre Province to Bolivia.
- Blue Revolution in Venezuela
- French forces are defeated by the Mexican army, and Maximilian is executed.
- National University opens in Bogotá, Colombia.

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## 1868

- Grito de Yara begins the Ten Years' War in Cuba.
- Grito de Lares launches an armed insurrection against Spanish royal presence in Puerto Rico.

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## 1869

- Domingo Sarmiento conducts Argentina's first national census.
- First bicycles imported into Mexico

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## 1870

- April Revolution in Venezuela
- Moret Law frees many slaves in remaining Spanish colonies.
- Mexico passes national Civil Codes.

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## 1871

- Law of the Free Womb passed by the Brazilian government in an attempt to gradually phase out slavery

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## 1872

- Initial publication of Argentine José Hernández's poem *El gaucho Martín Fierro*

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## 1873

- First rail line opens in Mexico between Mexico City and Veracruz.

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## 1874

- Treaty of Amity, Commerce, and Navigation between Haiti and the Dominican Republic fully recognizes Dominican independence.

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## 1876

- First refrigerated shipment of beef leaves Buenos Aires, Argentina.
- Porfirio Díaz comes to power in Mexico, beginning the Porfiriato.

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## 1878

- Treaty of Zanjón ends the Ten Years' War in Cuba.

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## 1878–79

- Conquest of the Desert initiative to subdue the indigenous of the *Pampas* in Argentina

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## 1878–1900

- Regeneration period of conservative reform in Colombia

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## 1879

- Onset of the War of the Pacific between Chile, Bolivia, and Peru

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## 1880

- Brazilian Anti-Slavery Society founded by Joaquim Nabuco

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## 1881

- Chilean forces begin occupation of Lima in the War of the Pacific.

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## 1884

- Bolivia cedes the Antofagasta Province to Chile in the Treaty of Valparaiso.
- Treaty of Ancón ends the War of the Pacific.

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## 1885

- Chile passes national Civil Codes.
- Uruguay passes national Civil Codes.

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## 1886

- Abolition of slavery in Cuba

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## 1887

- Positivist-inspired Clube Militar founded in Brazil
- Rafael Núñez signs concordat in alliance with Catholic Church in Colombia.

**1888**

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- Golden Law frees all slaves in Brazil.
- Argentina passes national Civil Codes.

**1889**

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- Revolution of 1889 ends monarchical rule in Brazil and ushers in the era of the Old Republic.

**1890**

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- Brazilian novelist Aluísio Azevedo publishes *The Slum*.
- *La Democracia* newspaper founded by Puerto Rican Autonomist Party
- U.S. businessman Minor Keith completes the first railroad across Costa Rica.

**1891**

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- Financial crash in Brazil as a result of fiscal policies of the Encilhamento
- Chilean civil war
- Pope Leo XIII issues the Rerum Novarum, which introduces the notion of social Christianity.

**1892**

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- Legalist Revolution in Venezuela
- José Martí forms the Cuban Revolutionary Party.

**1894**

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- After centuries of isolation, settlements along the Mosquito Coast are absorbed by the Nicaraguan government.

**1895**

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- Liberal Revolution of 1895 in Ecuador
- Onset of Cuban movement for independence
- Coronation of the Virgin of Guadalupe in Mexico

**1896**

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- Joaquim Machado de Assis founds the Brazilian Academy of Letters.

**1897**

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- War of Canudos destroys the religious community led by Antônio Conselheiro in Bahia, Brazil.
- Political autonomy granted to Puerto Rico

**1898**

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- Explosion of USS *Maine* brings United States into War of 1898 for Cuban independence.

**1899**

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- Federal Revolution in Bolivia
- Onset of the War of the Thousand Days in Colombia
- Restorative Liberal Revolution in Venezuela
- Peruvian novelist Clorinda Matto de Turner publishes *Torn from the Nest*.
- Minor Keith and Andrew W. Preston join forces to create the United Fruit Company, which eventually becomes the largest banana producer in Central America.

**1900**

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- Uruguayan José Enrique Rodó publishes the essay “Ariel.”

**1901**

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- Bolivian Syndicate is formed.

**1903**

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- Bolivia cedes the Acre Province to Brazil in the Treaty of Petrópolis.
- Panama secedes from Colombia.



✿ ENTRIES A TO Z ✿





**Accessory Transit Company** The Accessory Transit Company was founded in 1847 by U.S. shipping and railroad businessman Cornelius Vanderbilt (b. 1794–d. 1877). The company transported people and goods across the Central American isthmus via the San Juan River, which borders NICARAGUA and COSTA RICA. From the San Juan River, travelers traversed Lake Nicaragua and then followed a carriage road to the Pacific coast port at Rivas.

United States interest in the Central American isthmus as a transit route between the Atlantic and Pacific Oceans began in the mid-1840s (see TRANSISTHMIAN INTERESTS). While PANAMA already provided a transisthmian transit route, the flood of passengers, particularly during the 1849 California gold rush, prompted entrepreneurs to look for another, faster, and more economical route. Vanderbilt focused on Nicaragua, which offered both time and cost savings over Panama. When U.S. diplomat Ephraim G. Squier traveled to Nicaragua in June 1849, he obtained a contract from the government for Vanderbilt to pursue the transisthmian connection. Vanderbilt directed the construction of the sea-land route from its start in 1849 to its completion in July 1851. The company transported 2,000 people across Nicaragua for the remainder of 1851, and another 10,000 took advantage of its bimonthly service during 1852. However, U.S. interests soon clashed with those of the British at Greytown, the route's eastern terminus located at the mouth of the San Juan River on Nicaragua's Caribbean coast. Tensions erupted into violence in December 1851 over payment of harbor fees by Vanderbilt's ships to the British authorities at Greytown. Leaders in Washington and London momentarily settled the controversy, which became known as the Prometheus Affair, but violence

erupted again in 1854. This time, a U.S. Navy warship leveled British-owned Greytown (see GREYTOWN AFFAIR).

The struggle between liberals and conservatives that dominated Central American politics during the 19th century had an impact on the Accessory Transit Company. After the Nicaraguan liberals lost on the battlefield in 1855, they asked Tennessee native WILLIAM WALKER to come to their assistance. Walker had already made a name for himself leading filibuster expeditions into northern Mexico. Nicaraguan liberals hoped he would lend military backing to their cause. When he arrived in 1856, Walker took advantage of an internal company dispute between Vanderbilt and Cornelius Garrison and Charles Morgan. Walker struck a deal with the latter two, which in November 1856 resulted in the cancellation of the 1849 concession on the grounds that the company had failed to pay appropriate royalties to the Nicaraguan government. Walker then reissued the contract to Morgan and Garrison. An angered Vanderbilt immediately diverted ships from his Atlantic and Pacific Steamship Company from New York and San Francisco to Panama, where the transisthmian PANAMA RAILROAD opened in 1855. This move effectively closed down the Accessory Transit Company and ended Vanderbilt's plan for a transisthmian canal utilizing the San Juan River. Vanderbilt went further still. He purchased arms for the Costa Rican army when it invaded Nicaragua in March 1856. Although Walker's vision of a Central America under his control was short lived, Vanderbilt's vision of a transit route between the Atlantic and Pacific Oceans remained until 1903 when the United States chose Panama for the location of a transisthmian canal.

**Further reading:**

Craig Dozier. *Nicaragua's Mosquito Shore: The Years of British and American Presence* (Tuscaloosa: University of Alabama Press, 1985).

Gerstle Mack. *Land Divided: History of the Panama Canal and Other Isthmian Canal Projects* (New York: Knopf, 1944).

**Acre Province** Acre Province was an Amazonian region on the border between BRAZIL and BOLIVIA in the 19th century. It became the subject of a boundary dispute between the two nations toward the end of that century.

The Acre Province fell within a remote area of the Amazon jungle that was considered Spanish territory during the colonial period. After independence, the new nations of Bolivia and Brazil competed for claim to the territory. In the 1867 Treaty of Ayacucho, Bolivian president MARIANO MELGAREJO secured Bolivian title to the region in exchange for ceding a larger Amazonian territory to Brazil. Boundary disputes continued, however, and these conflicts grew urgent during the Amazonian rubber boom beginning in the 1880s. Acre provided a large supply of quality rubber trees, and investors and laborers looking to profit from the region's resources arrived from Brazil. The province quickly attracted the attention of numerous other foreign investors, and the Bolivian government grew concerned over maintaining control of the lucrative region. President Manuel Pando (b. 1899–d. 1904) encouraged Bolivians to settle there but was unable to offer much protection against rival Brazilian interests. In 1901, the Bolivian government invited U.S. investors to form the BOLIVIAN SYNDICATE in an attempt to assert Bolivian authority in the region.

The Bolivian government had also been increasing customs rates for rubber transported from Acre to Brazil. In 1902, resentful Brazilians rebelled and declared independence from Bolivia. Separated from the province by rough terrain and hundreds of miles, the Bolivian government was unable to subdue the revolt. The Treaty of Petrópolis ceded the Acre Province to Brazil in November 1903.

The surrender of the Acre Province was one of a long line of territorial losses suffered by Bolivia in the final decade of the 19th century.

**Further reading:**

René de la Pedraja Tomán. *Wars of Latin America, 1899–1941* (Jefferson, N.C.: McFarland & Co., 2006).

**agriculture** Agriculture has long been the largest sector in the economies of most Latin American countries (see ECONOMY). It is also an important part of rural culture and identity in many regions. Historically, Latin American agriculture has been devoted to the production of foodstuffs, although some regional markets have specialized in nonfood products, such as COTTON and

henequen. Agricultural production has ranged from small-scale subsistence production to larger scale commodity-oriented agribusiness.

Pre-Columbian agriculture was generally organized in communally operated systems in Mexico and in South America. In Mexico, these agrarian communities were known as *EJIDOS*, and subordinate tribes within the Aztec Empire often provided a portion of their agricultural output to Tenochtitlán as tribute. The main agricultural product in Mesoamerica prior to the 16th century was MAIZE, or corn. Aztec and Maya cultures revered maize and incorporated it into their daily religious practices. In South America, the Incas developed a sophisticated system of domestic agriculture to feed a large population stretched across an enormous empire. The Incas cultivated a variety of fruits and vegetables; additionally, Spanish settlers noted the widespread chewing of COCA leaves for energy. *Ejid*os and other communal agrarian systems continued to form the organizational structure of rural indigenous villages after the Spanish conquest.

The Spanish introduced large landed estates to Latin America. The Crown rewarded early conquistadores with *encomiendas* and gave them control over the NATIVE AMERICANS living on these large estates. HACIENDAS eventually replaced *encomiendas* as large, self-sufficient rural properties throughout the Spanish colonies. The Spanish introduced a number of European crops to the Americas in the early years of the colonial period. Notably, Europeans preferred WHEAT over corn and attempted to cultivate the grain for use in bread and communion hosts. Plantations specializing in the cultivation of export-oriented commodity products such as SUGAR, COFFEE, and TOBACCO emerged in BRAZIL, the Caribbean, and in coastal regions of the Spanish mainland. The frontier regions of the Southern Cone became home to large *ESTANCIAS*, or ranches, dedicated to farming and raising European livestock.

The economies of the colonies in Spanish and Portuguese America were based on the export of raw materials such as agricultural goods and mining products to the mother countries. This economic system, known as mercantilism, kept the colonies' economies tightly controlled and essentially isolated from those of the rest of the world. After achieving independence in the early 19th century, Latin American nations opened their economies to less restrictive global TRADE under the basic theories of an economic system known as LAISSEZ-FAIRE. Even though the wars of independence had disrupted much of the agricultural output in the Americas, some areas saw a recovery in agriculture and looked forward to trade opportunities with Europe. The British were the first to take advantage of the free trade system, and nations such as ARGENTINA, URUGUAY, and Brazil began exporting large amounts of agricultural products to western Europe. Under the laissez-faire model, Latin American countries structured their economies according to the principle of COMPARATIVE ADVANTAGE. The



Agriculture historically was the largest sector in Latin American economies. This photo taken in the late decades of the 19th century shows two peasants standing in a sugarcane field. (*Library of Congress*)

theory states that countries should export products they produce comparatively well and import those they produce less efficiently. Latin American nations had a comparative advantage in agricultural production, thus agrarian output became the basis for much of the region's trade in the 19th century.

Many new Latin American governments reevaluated the nature of land ownership carried over from the colonial period. In the decades after independence, the CATHOLIC CHURCH was the largest land owner throughout Latin America. Furthermore, indigenous villages in the Andes and in MEXICO still operated under a system of communal control of agriculture. Liberal leaders viewed these systems as traditional and backward and began to consider laws that would modernize the agrarian sector. Inspired by the republican ideas of Thomas Jefferson in the United States, Latin American liberals were convinced that owning private property would make members of the population into responsible citizens. A series of liberal laws in COLOMBIA and Mexico, for example, stipulated that institutions and communities such as the church and indigenous villages could not own land. Liberals envisioned selling off those lands to individual families to create a nation of small farmers. Instead, many rural elite who often already owned large properties increased their landholdings in a process called *LATIFUNDIO*. Rural peasants became peons on large

haciendas, and the system of family-sized farms that liberals had hoped for did not emerge. The land policies created serious conflict between liberal leaders and conservative interests, particularly as the wealth and privilege of the Catholic Church came under attack. Mexico and Colombia both experienced violent civil wars as a result, with the liberal and conservative political factions battling to determine the economic and social structure of the new nations.

In the late decades of the 19th century, many Latin America governments saw a period of relative political stability and seeming economic growth. Liberal oligarchies consolidated power in most countries, and those leaders imposed policies designed to bring modernization and progress to their nations. The production of agricultural commodity products for export that had long been a foundation of Latin American economies accelerated, but government leaders also worked to encourage modernization of the agrarian sector. In South American countries such as Brazil and Argentina, the national elite further consolidated control of large landholdings. A coffee oligarchy became extremely powerful in Brazil, while the Argentine rural sector grew as a result of the expansion of cattle and sheep ranching and the cultivation of wheat. Other nations implemented policies to attract foreign investors into the most important economic sectors. In Mexico, Central America, and the Caribbean,



U.S. investors purchased large quantities of arable land. By the turn of the century, foreign elite controlled a considerable portion of the agricultural production in MEXICO, COSTA RICA, NICARAGUA, and the DOMINICAN REPUBLIC. U.S. investors also became a prominent force in Cuba's sugar industry, and those interests helped to pull the United States into the WAR OF 1898 to secure Cuban independence.

The trends of *latifundio* and the emergence of agribusiness in late 19th-century Latin America brought the appearance of economic growth through an increase in exports. But the concentration of land in the hands of a few elite did not modernize the economies. Income disparity between the rich and poor grew as many landowners became increasingly wealthy, while rural peasants sank further into poverty. The comparative advantage economic model also meant that Latin American economies relied on the export of volatile commodity products, and so were vulnerable to fluctuations in the market. Export-oriented agriculture was in place throughout most of Latin America until the onset of the Great Depression in 1929.

See also AGRICULTURE (Vols. I, II, IV); FOOD (Vol. I).

#### Further reading:

Arnold Bauer. *The Church and Spanish-American Agrarian Structure: 1765–1865* (Berkeley: University of California Press, 1971).

Evelyn Huber and Frank Safford. *Agrarian Structure and Political Power: Landlord and Peasant in the Making of Latin America* (Pittsburgh, Pa.: University of Pittsburgh Press, 1995).

**Alamán, Lucas** (b. 1792–d. 1853) *Mexican statesman and conservative intellectual* Lucas Alamán was a conservative intellectual, historian, and political leader in MEXICO. He grew to prominence in the years following independence and served in several administrations as minister of foreign relations and minister of the interior.

Alamán was born on October 18, 1792, in the MINING town of Guanajuato to a Spanish noble family. He was highly educated in both the arts and sciences and traveled extensively as a young man. He was at home in Guanajuato in 1810 when Miguel Hidalgo y Costilla's independence rebellion destroyed the Alhóndiga and massacred many of the town's Spanish elite. Although he advocated modest reform, following the bloodshed Alamán worked with conservative allies to return to the monarchical order that had existed under the colonial system. He served as a delegate to the Cortes of Cádiz and worked in government positions to bolster TRADE, revamp mining, and restore financial strength in the years after independence. He was known for attempting to defend Mexico against encroachments by the United States.

Alamán aimed to ensure the well-being of the nation as a whole and played the role of public servant across

political lines. He founded the National General Archive and the Museum of Natural History and Antiquities. Yet, he continually pushed to preserve what he called the traditions of the Old World and advocated a reformed version of monarchical rule for Mexico. He helped organize and found Mexico's CONSERVATIVE PARTY and supported the administrations of Anastasio Bustamante (1830–32, 1837–41) and ANTONIO LÓPEZ DE SANTA ANNA (1833–55, intermittently) as they opposed liberal attempts at reform in the 1830s. He wrote for several prominent newspapers and eventually published *Disertaciones sobre la historia de la República Mejicana* (Dissertations on the history of the Mexican Republic) and the five-volume *Historia de Méjico* (History of Mexico), two fundamental works of Mexican history that also articulated his conservative politics. Alamán served with the cadre of conservative leaders who brought Santa Anna back to power in 1853. He died in MEXICO CITY on June 2 of that same year.

See also MEXICO, INDEPENDENCE OF (Vol. II).

#### Further reading:

Luis Martín. "Lucas Alamán Pioneer of Mexican Historiography: An Interpretive Essay." *The Americas* 32, no. 2 (October 1975): 239–256.

**Alberdi, Juan Bautista** (b. 1810–d. 1884) *Argentine writer and political activist* Juan Bautista Alberdi was an Argentine intellectual whose writings challenged the dictatorship of JUAN MANUEL DE ROSAS. He was the leader of the Generation of '37 and later influenced the writing of the CONSTITUTION OF 1853.

Alberdi was born on August 29, 1810, in San Miguel de Tucumán. In 1824, he relocated to BUENOS AIRES to study the arts, and in 1831, he enrolled at the UNIVERSITY OF BUENOS AIRES to study law. There, he experienced firsthand the repression of the Rosas dictatorship against the intellectual community. Alberdi joined various literary salons that met in secret to escape and challenge the tyranny of ARGENTINA'S CAUDILLO rule. It was at this time that he began collaborating with ESTEBAN ECHEVERRÍA. The two writers founded the Asociación de la Joven Generación Argentina, which became known as the "Generation of '37" (see LITERATURE). The group dedicated itself to publishing intellectual indictments of the Rosas regime specifically and caudillo rule in general.

As members of Alberdi's group became more vocal in their criticism of Rosas, they attracted the attention of the dictator's MAZORCA force. Facing recriminations, Alberdi left Buenos Aires for exile in Montevideo in 1838. He later relocated to CHILE and worked closely with DOMINGO F. SARMIENTO. Alberdi continued to use his writings to challenge the Rosas regime throughout the 1840s. After JUSTO JOSÉ DE URQUIZA's victory over the caudillo, Alberdi wrote one of his most important works outlining his political vision for Argentina's future. He won Urquiza's favor, and his political philosophy strongly

influenced the writing of Argentina's Constitution of 1853.

Alberdi served the Argentine government as a diplomat in Europe throughout much of the 1850s. He fell out of favor, however, with the government of BARTOLOMÉ MITRE in 1861. His situation worsened when he spoke out against the Paraguayan War in 1872. Alberdi left Argentina in 1881. He died in France on June 19, 1884.

#### Further reading:

William H. Katra. *The Argentine Generation of 1837: Echeverría, Alberdi, Sarmiento, Mitre* (Madison, N.J.: Fairleigh Dickinson University Press, 1996).

**Alencar, José de** (b. 1829–d. 1877) *Brazilian journalist and literary figure* The Brazilian writer José de Alencar is best known for his novel *O Guarani* (*The Guarani*), published in 1857. The book provided a rich portrayal of the Tupí-Guaraní indigenous group and set a standard of nationalist LITERATURE. Alencar is considered one of the leading figures of 19th-century Brazilian and Latin American ROMANTICISM.

Alencar was born on May 1, 1829, in Mecejana in the present-day northeastern state of Ceara. His father was a senator in the new EMPIRE OF BRAZIL. As a young man, Alencar was educated in law but began an early career in journalism, publishing works in the style of 19th-century romanticism. *O Guarani* was the first in a trilogy of books that are considered the core of Indianist literature in BRAZIL. The novel began as a series of installments in a newspaper owned by Alencar. These depicted the Brazilian indigenous of the 17th century as strong and majestic but often conformed to elite Brazilians' stereotypes of the supposed "noble savage." Alencar followed *O Guarani* with *Iracema* and *Ubirajara*, which further portrayed the valiant and robust Amerindian. Alencar's novels also described a mutually beneficial union between Europeans and NATIVE AMERICANS as a foundation for a strong and unique sense of Brazilian identity. *O Guarani* was later made into an opera by Brazilian composer Carlos Gomes. It stressed the same themes as Alencar's novel and received critical acclaim in both Brazil and Europe.

Many of Alencar's works supported the abolitionist movement that was gaining speed in the late 19th century (see SLAVERY, ABOLITION IN BRAZIL OF). He was one of the first intellectuals and literary figures to produce specifically abolitionist writings. During that time he also began his political career, serving in the Brazilian legislature and eventually as a minister in the government of Emperor PEDRO II. Alencar died in RIO DE JANEIRO on December 12, 1877.

See also GUARANÍ (Vols. I, II).

#### Further reading:

José de Alencar. *Iracema: A Novel* (New York: Oxford University Press, 2000).

———. *Senhora: Profile of a Woman* (Austin: University of Texas Press, 1994).

**Altamirano, Ignacio** (b. 1834–d. 1893) *Mexican writer and liberal politician* Ignacio Altamirano was a writer, novelist, and liberal political leader in MEXICO in the late 19th century. He is best known for his LITERATURE, which provides a portrait of contemporary Mexican society and offers a strong statement of nationalism for a country that had experienced decades of divisiveness and turmoil.

Altamirano was born in Tixtla, Guerrero, on November 13, 1834, to full-blooded Amerindian parents. At a young age, he exhibited a natural gift for learning and received scholarships to study at the Toluca Literary Institute (Instituto Literaria de Toluca). He later studied law in MEXICO CITY but suspended his intellectual pursuits twice to participate on the side of the liberals in the REVOLUTION OF AYUTLA in 1854 and the WAR OF REFORM in 1857. Altamirano finally received his law degree in 1859 and began serving as a congressional deputy. He took up arms one last time against the FRENCH INTERVENTION in 1863 and, after helping BENITO JUÁREZ oust Maximilian, devoted himself to public service. While continuing his political career, he produced numerous literary works and trained young writers. His novel *Clemencia*, published in 1869, is considered the first modern Mexican novel. *El zarco* (roughly translated as "The blue-eyed bandit") was published in 1901 after his death but recounts life in the 1860s. *El zarco* is praised for inverting many of the stereotypical racial hierarchies of the 19th century. Indeed, in the novel, the honest and industrious mestizo and indigenous characters are the heroes, while the lighter-skinned, blue-eyed character resorts to crime and banditry and eventually perishes.

Altamirano died on February 13, 1893, in San Remo, Italy, while on a diplomatic mission for the Porfirian government.

#### Further reading:

Ignacio Manuel Altamirano. *El zarco, the Blue-Eyed Bandit: Episodes of Mexican Life between 1861–1863* (Santa Fe, N.Mex.: Lumen Books, 2007).

Chris N. Nacci. *Ignacio Manuel Altamirano* (New York: Twayne Publishers, 1970).

**Ancón, Treaty of** (1884) The Treaty of Ancón was reached between PERU and CHILE to end the WAR OF THE PACIFIC (1879–84). Acting Peruvian president Miguel Iglesias (1883–85) signed the treaty on October 20, 1883, but MILITARY commander and future president ANDRÉS AVELINO CÁCERES refused to recognize the treaty until the following year. The Treaty of Ancón ceded a portion of Peru's southern territory to Chile and further exacerbated political infighting among military and political leaders in Peru.

The War of the Pacific originated as a border dispute between Chile and BOLIVIA over the nitrate-rich Atacama Desert. Peru was pulled into the conflict because of a mutual defense agreement reached years earlier between the Peruvian and Bolivian governments. The Chilean army quickly dominated its two adversaries and invaded Peru in 1879. Negotiations to end the violence and the Chilean occupation stalled as Peru's leadership fragmented under the pressure of the war. A confusing series of power shifts occurred as several individuals claimed the presidency. Finally, Iglesias emerged in 1883 to negotiate the Treaty of Ancón.

The treaty required Peru to cede its nitrate-rich Tarapacá region in the south to Chile in exchange for the withdrawal of the Chilean army from Peruvian soil. In addition, the disputed regions of Tacna and Arica would remain under Chilean control for a period of 10 years, after which the local population would vote to determine which country would rule them. Iglesias signed the treaty in the fall of 1883, but Cáceres continued his offensive against the Chilean military and refused to recognize the legitimacy of the document until July 1884. After the Chilean army withdrew, a civil war raged between Iglesias and Cáceres for control of Peru, further destabilizing the war-weary nation. Cáceres eventually formed an alliance with the recently formed CIVILISTA PARTY and was elected president in 1886.

#### Further reading:

William F. Sater. *Andean Tragedy: Fighting the War of the Pacific, 1879–1884* (Lincoln: University of Nebraska Press, 2007).

**Arce, Manuel José** (b. 1786–d. 1847) *Salvadoran politician and first president of the United Provinces of Central America* Born into a Salvadoran creole family, Manuel José Arce studied medicine in GUATEMALA before returning home in 1807 to manage his father's estate. A year later, he married Felipa de Aranzamendi y Aguiar.

After Napoléon I placed his brother on the Spanish throne in 1808, Arce became attracted to the early independence movements. He joined military insurrections against the Spanish Crown in 1811 and in 1814. Arce was sentenced to four years in prison for his participation in the second uprising, but the incarceration did not break his spirit. When the Spanish Empire began to crumble in 1821, he led a small military command in an unsuccessful effort to thwart EL SALVADOR's forced incorporation into the newly created Mexican Empire. At this time, Arce was, in fact, a leading spokesman for El Salvador's annexation to the United States. Arce served as the first elected president of the UNITED PROVINCES OF CENTRAL AMERICA following its establishment in 1824. His administration, however, faced growing regional unrest and a civil war from 1827 to 1829. Although Arce had initially won the loyalty of liberals, he quickly lost their support after

forming alliances with church leaders and other conservative interests. Honduran liberal FRANCISCO MORAZÁN eventually ousted Arce, who fled into exile in Mexico. Arce made four subsequent unsuccessful attempts to regain the Salvadoran presidency in 1832, 1842, 1844, and 1845. Frustrated, he abandoned politics and shortly after completing his memoirs, died in San Salvador in 1847. One hundred years after his death, the Salvadoran National Assembly recognized Arce by changing the name of the city of El Chilamatal to Ciudad Arce.

#### Further reading:

Philip Flemion. "States Rights and Partisan Politics: Manuel José Arce and the Struggle for Central American Union." *Hispanic American Historical Review* 53, no. 4 (1973): 600–618.

**architecture** Architecture was used in the early 19th century in Latin America as a visual representation of the new nations' break with the colonial past. Colonial architecture had been dominated by Spanish styles and designs; the Spanish architectural presence remained after independence in structures such as churches, government buildings, and private dwellings. Artists and government leaders understood that visual representations of the nation would be an important part of nation-state formation in the postindependence era, and many therefore rejected the baroque style as representative of Spanish and Portuguese culture. The baroque style was characterized by bold structures with tall spacious interiors, often topped by an extravagant dome or other dramatic statement. Liberal intellectuals, in particular, associated baroque artistic styles with the CATHOLIC CHURCH, thus the liberal agenda to secularize society often targeted baroque architecture as well.

Postindependence architecture quickly turned to neoclassical styles that were characterized by stark colors, straight lines, and squared structures with smaller, more subtle ornamentation. Neoclassical designs were inspired by ancient Greek and Roman designs. Neoclassical buildings often featured large balconies and rows of decorative balusters. Other features included dramatic arches and fluted columns with small yet lavish embellishments. Some late colonial churches in Latin America already showed signs of neoclassicism. The Palacio de la Moneda in SANTIAGO DE CHILE and the Palacio de Minería in MEXICO CITY are two government structures that were started in the late 18th century and reflect the neoclassical architectural style. In some areas, European architects led projects to renovate colonial buildings in a more neoclassical style in the first half of the 19th century.

Neoclassical architecture emerged as a rejection of European colonial styles in the decades immediately following independence. Eventually, that rejection of the Old World gave way as political leaders and cultural intellectuals attempted to promote modernization by

emulating European styles in the last half of the 19th century. Architectural styles were transformed as designers modeled their projects after the great architectural structures of Europe. By the late 19th century, however, Spain was no longer the dominant European cultural leader. Now, French styles began to emerge in Latin American architecture.

Relative political stability and economic expansion allowed many Latin American governments to finance projects to beautify and modernize public spaces, particularly in large urban areas. PORFIRIO DÍAZ's regime devoted substantial government resources to the construction of public buildings and other projects in an attempt to model Mexico City and other urban areas after Paris and other European cities. Similar developments took place in other Latin American capitals, including BUENOS AIRES, CARACAS, and Santiago. Buenos Aires architecture imitated French styles to such an extent that local residents and foreign travelers alike often referred to the city as the "Paris of South America." Many foreign travelers were impressed by the seemingly rapid modernization of Latin American cities displayed through architectural design. Others criticized the supposed cultural renovation of Latin American cities as a facade, as large, expensive, ornate structures were built while much of the population remained in poverty.

See also ARCHITECTURE (Vols. I, II, IV).

### Further reading:

Leslie Bethell. *A Cultural History of Latin America: Literature, Music, and the Visual Arts in the Nineteenth and Twentieth Centuries* (Cambridge: Cambridge University Press, 1998).

Leopoldo Castedo. *A History of Latin American Art and Architecture from Pre-Columbian Times to Present* (New York: Praeger, 1969).

**Argentina** Argentina is located on the southern tip of South America. Argentina and neighboring CHILE, URUGUAY, and PARAGUAY make up an area known as the Southern Cone. Argentina is a large country with varied topography and climate, ranging from the flat and fertile plains of the PAMPAS to the cool and dry southern region of Patagonia. The capital city of BUENOS AIRES is located on the eastern shore at the mouth of the Río de la Plata, making the city an ideal stopping point for import and export TRADE through river transport. The role of the capital city in regulating the transport of goods to and from the interior caused numerous conflicts throughout much of the 19th century.

### THE COLONIAL ERA AND INDEPENDENCE

For most of the colonial period, Argentina was administratively a part of the Viceroyalty of Peru. Because it offered little in the way of precious metals and was located a considerable distance from the viceregal capital at LIMA, the Spanish Crown paid relatively little atten-

tion to the region. But by the 18th century, new measures implemented by the Bourbon monarchs in Spain propelled the region into a more prominent role in the empire. Major changes in administrative, economic, and military policies—collectively known as the Bourbon Reforms—opened the port of Buenos Aires to trade and expanded the Spanish presence in the Southern Cone. Tensions mounted between settlers in the Spanish colonies and Portuguese settlers in neighboring BRAZIL. Concern over potential foreign incursions into Spanish territory brought about an administrative realignment. In 1776, the Spanish Crown officially separated Argentina and the surrounding region from the Viceroyalty of Peru. This separation created a new Viceroyalty of Río de la Plata, which included present-day Argentina along with BOLIVIA, Paraguay, and Uruguay.

Buenos Aires became the capital of the new viceroyalty, and in the latter decades of the 18th century, the city became a major urban center as its population boomed and trade increased. The importance of the Río de la Plata quickly grew, and the Spanish Crown responded by devoting more resources and attention to the area. Many native residents were accustomed to relative autonomy on the periphery of the Spanish Empire and resented the new supervision and security measures imposed by the Bourbon monarchs. Many members of the local creole elite, in particular, resisted what they perceived as unnecessary interference by the Crown in their daily affairs.

Argentines' independent attitudes were strengthened in 1806 when British forces attacked and occupied Buenos Aires. The Spanish MILITARY proved incapable of defending the city. The viceroy fled to the interior, leaving the newly established viceregal capital to fend for itself. Buenos Aires residents organized a resistance force themselves and drove the British from the city. Those same residents repelled a second attempted British invasion the following year. Buenos Aires citizens, who already had a strong sense of autonomy, now saw themselves as even more capable of managing their own affairs and distanced themselves further from the Spanish Crown. The local elite ousted the Spanish viceroy, replacing him with Santiago de Liniers y Bremond, who had led the defense of the city against the British. Under Liniers, the Buenos Aires *cabildo* and other local officials wielded more power and worked to limit Spanish authority over the region's politics and trade.

After Napoléon's invasion of the Iberian Peninsula in 1808, the elite in Buenos Aires became divided over how best to respond to the challenge to Spanish authority. As in other colonies, groups of loyalists emerged and resolved to maintain closer ties with the Spanish Crown. In Buenos Aires, these loyalists were quickly subdued by more liberal-minded advocates in the ruling *cabildo*. A new viceroy was appointed in 1809, only to be dismissed by a *cabildo abierto* of local elite in 1810.

At the same time, local leaders faced challenges from outside Buenos Aires. Regions on the periphery of the

viceroyalty sought to move away from the control of leaders in the capital city. Upper Peru (Charcas), already separated from the rest of the viceroyalty by geography, broke away from Buenos Aires early on. A similar attempt in Paraguay resulted in the occupation of the province by the Portuguese. Local leaders in several regions of the interior attempted to exert their autonomy from Buenos Aires. As *porteño* leaders worked to maintain their authority, a power struggle emerged between Buenos Aires and the provinces that would dominate much of the region's 19th-century politics.

### UNITARIOS AND FEDERALES

As leaders in the Southern Cone tried to secure their independence and keep the region together, a series of governments unfolded. A triumvirate of leaders emerged in 1810 with plans to convene a governing congress. Those plans fell apart when the triumvirate was overthrown and a series of supreme dictators took over power of the former viceroyalty. A second triumvirate formed in 1812 and provided a government presence for a little more than a year. While local leaders struggled to provide a basic government structure, they also engaged in a series of military campaigns against royalist forces in an effort to secure independence. In the ensuing chaos, José Gervasio Artigas (1764–1850) led a series of revolts in the eastern province surrounding Montevideo. The region that would become the independent nation of Uruguay eventually broke away, only to be invaded in 1817 by the Portuguese from BRAZIL.

By 1816, hostilities had begun to subside; the Second Revolutionary Congress formally declared independence, calling the region the United Provinces of the Río de la Plata. The congress also began drafting a governing document that eventually took shape as the CONSTITUTION OF 1819. Conflict over regional autonomy began to surface immediately as leaders in Buenos Aires attempted to impose restrictive trade measures, requiring that nearly all imports and exports pass through the port city. As the exclusive port of entry, this gave *porteños* enormous influence over trade policy. Additionally, the customs house in Buenos Aires was the sole collector of tariff revenues, effectively giving the city control over national income. Provincial leaders argued that tariff income benefited Buenos Aires almost exclusively at the expense of the interior regions. The new constitution resulted in numerous provinces rising in revolt almost immediately.

Political tensions quickly mounted between *UNITARIOS* and *FEDERALES*. *Unitarios* were generally liberal-minded intellectuals from Buenos Aires who wanted a strong central government based in the port city. They advocated relatively free and open foreign trade but often supported measures that limited interior trade. *Federales*, or federalists, often came from the provinces and so considered their well-being to be tied to the economic and trade activities of the interior. *Federales* rejected the *unitario* preference for a strong, central government. They

also advocated restrictions on foreign trade to protect the economic interests of the interior. When hostilities erupted in 1819, *federales* initially took over Buenos Aires and nullified the new constitution. Nevertheless, federalist dominance was short lived, as infighting began to develop among provincial CAUDILLOS, or strongmen.

In the 1820s, *unitario* Martín Rodríguez (b. 1771–d. 1845) served as governor of Buenos Aires. Former member of the first ruling triumvirate BERNARDINO RIVADAVIA was his main adviser and led most of the *unitario* initiatives. These included instituting open trade with the British and other European powers and controlling interior trade by blockading river transport. Rivadavia built a close relationship with merchants and government representatives in Great Britain. After 1824, British investors and businessmen received special trade advantages in their dealings with Buenos Aires, while the economies of the interior provinces suffered. Eventually, Rivadavia secured large loans from British banks and other investors for infrastructure projects that never moved beyond the planning stage. Most of the money was misspent or lost to corruption and graft.

Rivadavia was an advocate of the economic and social philosophy of LIBERALISM that was becoming popular throughout much of Latin America in the 19th century. He led the initiative to establish the government-backed UNIVERSITY OF BUENOS AIRES. In later years, that institution played a major role in educational reforms initiated by President DOMINGO F. SARMIENTO. Rivadavia also introduced controversial rural initiatives, such as an antivagrancy decree and a measure to regulate ownership of rural land.

The *unitario* era did not last for long, as the Rivadavia government also oversaw a foreign-policy fiasco with neighboring Brazil. In 1821, Brazilian forces invaded the BANDA ORIENTAL—or the eastern bank of the Río de la Plata—and renamed the territory the Cisplatine Province. The region makes up the southern portion of present-day Uruguay. At the time, it was part of the United Provinces of the Río de la Plata but had rebelled against the Buenos Aires government. When “easterners” under the leadership of JUAN ANTONIO LAVALLEJA revolted against Brazilian forces in 1825, Rivadavia supported the insurgency in the hope of reexerting control over the recalcitrant province. Brazil responded by declaring war on the Rivadavia government, and the CISPLATINE WAR began.

Rivadavia expected a brief war and an easy victory, but the reality surprised him. Argentine ground forces, working with local guerrilla fighters under Lavalleja, won several important victories, but Brazil's powerful navy tried to gain the upper hand by blockading the port of Buenos Aires. The Brazilian naval presence severely disrupted trade, and customs revenues declined significantly. Federalist opposition in the interior seized the opportunity to denounce Rivadavia and challenge his government. Financing a costly war and unable to replenish

the national treasury, Rivadavia defaulted on the foreign loans he had secured only a short time earlier. Faced with increasing instability and dissent among the provincial elite, Rivadavia stepped down as president in 1827.

### THE ROSAS DICTATORSHIP

Rivadavia's absence brought a period of intense conflict throughout the United Provinces as powerful regional caudillos and *unitario* intellectuals vied for power. By 1829, the power struggle had resulted in the rise of JUAN MANUEL DE ROSAS, who dominated regional politics for the next two decades. The Rosas administration renamed the young nation the Confederación Argentina (Argentine Confederation) to reflect his self-proclaimed loyalty to the federalist ideology. Even though for most of his tenure Rosas served as governor only of the Buenos Aires Province, political leadership in such a prominent region gave him extraordinary influence. Between 1829 and 1852, Rosas emerged as the most powerful caudillo in Argentina and the de facto dictator of the entire nation.

Rosas's rule was characterized by tyranny and violence. *Unitario* intellectuals railed at his antidemocratic tendencies, and many spoke out vehemently against his administration. Rosas responded by censoring the press and harassing his political enemies. *Unitarios* were arrested, and many were executed. Would-be political opponents fled into exile, and vibrant communities of anti-Rosas *unitarios* began to emerge in neighboring Uruguay, Brazil, and Chile. Outspoken critics of the Rosas regime, such as Sarmiento, BARTOLOMÉ MITRE, JUAN BAUTISTA ALBERDI, and ESTEBAN ECHEVERRÍA formed literary groups whose purpose was to produce anti-Rosas propaganda.

After serving an initial three-year term as governor of Buenos Aires, Rosas temporarily abandoned his political office in 1832 and pursued a campaign to bring the NATIVE AMERICANS of the Pampas under government control. During that interlude, hostilities between *unitarios* and *federales* in Buenos Aires escalated to a new level of urgency. Rosas's wife and other supporters established the force known as LA MAZORCA, which became a type of special security detail dedicated to terrorizing and silencing the *unitario* opposition. Additionally, some influential caudillos began to consider writing a new national constitution. One of those leaders, JUAN FACUNDO QUIROGA, was assassinated in 1835. While some suspected Rosas of ordering the hit on his former ally, the influential caudillo used Quiroga's death as a pretext to return to power. Rosas served uninterrupted as governor of Buenos Aires until 1852, ruling as a virtual dictator of the entire nation. Sarmiento later wrote a critical biography of Quiroga's life while in exile in Chile. *Facundo, or Life in the Argentine Republic in the Days of the Tyrants (Facundo: Civilización y barbarie en las pampas argentinas)* was published in 1845 and is considered a literary masterpiece (see LITERATURE). It can be interpreted as a denunciation of the Rosas regime and caudillo rule in general in Argentina.

Although Rosas had built his power on an alliance with federalist caudillos from the interior, as dictator, his policies increasingly reflected a preference for centralist policies that favored the economic interests of Buenos Aires. Ranchers and *SALADEROS* (salted meat processors) benefited from the trade policies he implemented (Rosas himself had built a personal fortune as a *saladero*). Nevertheless, discontent began to mount among once-loyal federalist leaders. As dissent grew, anti-Rosas forces abroad used the opportunity to launch an offensive against the dictator. With support from Uruguay and Brazil, JUSTO JOSÉ DE URQUIZA formed an alliance of exiled Argentines, and his forces overthrew Rosas in 1852.

### CONSTITUTION OF 1853

Urquiza became the interim national leader and immediately convened a Constitutional Congress charged with drafting a new governing document. The congress began meeting in the late months of 1852, but underlying tensions between Buenos Aires and the interior rose to the surface yet again. Mitre, Urquiza's one-time ally in the overthrow of Rosas, broke with the national leader over the proposed constitution and the role Buenos Aires would play in the post-Rosas era. Delegates from Buenos Aires boycotted the Constitutional Convention entirely and moved to separate the province from the rest of the country. When the CONSTITUTION OF 1853 was finally completed, it reflected the strong influence of political writer Alberdi. The document was immediately ratified by all provinces except Buenos Aires. Mitre and other leaders from the port city ran Buenos Aires as an independent province for the next six years.

Between 1854 and 1860, Urquiza tried to reunite Buenos Aires and the interior provinces both through negotiations and by force. Unable to retake the city militarily, he and other leaders in the interior agreed to several amendments to the constitution to address the concerns of *porteño* leaders. The revised document was finally approved by Buenos Aires in 1860. It is still the foundation of Argentina's constitutional system today.

With the country tenuously reunited, Argentina experienced an era of growth in the last half of the 19th century. Mitre, who had led the Buenos Aires secessionist efforts in the 1850s, became president of the republic in 1862. The liberal Buenos Aires native immediately began pushing through measures intended to expand the nation's ECONOMY, but the underlying contention between the port city and the interior continued. Although political infighting subsided to some extent after 1860, Mitre still faced several revolts by local leaders of interior provinces. In 1863, Vicente Peñalosa rebelled in La Rioja to challenge Buenos Aires's dominance in the reunification. Two years later, Felipe Varela rose in revolt in that same province in defiance of national trade policies. The rebellions were relatively small and isolated, with both Peñalosa and Varela failing to attract support

from neighboring provinces. Nevertheless, instability in the interior continued to threaten the well-being of the entire nation, and the government in Buenos Aires increasingly intervened in interior politics in an effort to head off local revolts.

### WAR OF THE TRIPLE ALLIANCE

Internal stability became particularly important after 1865, when Argentina found itself pulled into the protracted and destructive **WAR OF THE TRIPLE ALLIANCE**. The war resulted from tensions over regional hegemony between Argentina, Brazil, Uruguay, and Paraguay that dated back to the independence era. By the 1860s, a complex system of local alliances had developed around the two warring Uruguayan political parties. Paraguayan dictator **FRANCISCO SOLANO LÓPEZ** formed an alliance with the Uruguayan **BLANCO PARTY**, while Brazil and Argentina backed the **COLORADO PARTY**. Brazilian forces invaded Uruguay in 1864 in an attempt to install a Colorado government. Paraguay's Solano López responded by declaring war on Brazil and invading the northeastern Argentine province of Corrientes in order to attack Brazil. Mitre feared that Solano López might enlist the support of federalist leaders in the Argentine provinces and upset the delicate balance of internal control he had been striving to achieve. The Argentine leader immediately signed the Pact of the Triple Alliance with Brazil and the Uruguayan Colorado government declaring war against Paraguay.

Mitre, who had an extensive military career, was named commander of the allied forces. With the financial backing of the British government, the Triple Alliance mobilized for war. Despite the fact that Uruguay's, Brazil's, and Argentina's combined armed forces amounted to only a fraction of Paraguay's mammoth military force, Mitre and other leaders expected a quick victory. Instead, the conflict lasted for five years and became the most costly and destructive war that any of the belligerents endured in the 19th century. Within a year, the Triple Alliance had decimated at least half of Solano López's powerful army and had wiped out the Paraguayan navy. The allies also cut off Paraguay's access to the coast, which led to a devastating shortage of vital supplies for Solano López's ever-weakening military. The situation in Paraguay reached crisis levels over the next several years, with both sides committing atrocities. As alliance forces pillaged occupied areas of Paraguay, Solano López took his own vengeance on those within his country who had failed him in some way. Because of the dictator's delusions and paranoia, the war continued for several years after Paraguayan forces had been effectively defeated.

As the war dragged on, it became increasingly unpopular in Argentina. Nevertheless, Mitre was able to use the conflict to modernize the nation's military and to strengthen the central government's position against regional caudillos. Furthermore, although the war was costly for the Argentine government, it did boost many

sectors of the economy, as ranchers and other merchants profited from the demand for wartime supplies.

The War of the Triple Alliance finally ended in 1870 when Solano López was killed in battle. By that time, the federalist conflict in the interior had largely been quelled and Sarmiento had been elected president of Argentina. Sarmiento had served as governor of San Juan during Mitre's presidency and had transformed the province through a series of liberal reforms in education and economic development. As president, Sarmiento applied his liberal ideals on a national scale. He oversaw a vast expansion in the nation's educational system and worked to attract British investment in an effort to improve **TRANSPORTATION** and communications infrastructure (see **EDUCATION**). Operating under the philosophy of Alberdi that "to govern is to populate," Sarmiento conducted Argentina's first census in 1869. He then actively encouraged European immigration under the assumption that attracting a skilled workforce would develop and strengthen the national economy more quickly (see **MIGRATION**).

When Sarmiento's presidential term came to an end in 1874, Mitre once again ran for election, but the opposition organized under a new political party, the **Partido Autonomista Nacional** (National Autonomist Party), or **PAN**. The **PAN** candidate, Nicolás Avellaneda (b. 1837–d. 1885), easily defeated Mitre. Avellaneda was from Tucumán, and the selection of a second national leader from the provinces revealed that the hegemony of Buenos Aires in national politics was beginning to decline. Avellaneda continued many of the economic expansion policies initiated by his predecessor. He also oversaw the **CONQUEST OF THE DESERT**, or the military campaign led by future president **JULIO ARGENTINO ROCA** to subdue the Amerindians on the Argentine Pampas and in the frontier region of Patagonia. Although Roca's expedition slaughtered thousands of indigenous people, it was popular among Argentines because it opened up large territories for settlement. Roca used his popularity to win the presidency in 1880.

### THE GENERATION OF '80

The election of Roca in 1880 marked the beginning of an era of major transformation in Argentina. Roca's opponent, Buenos Aires governor Carlos Tejedor (b. 1817–d. 1903), attempted to incite a revolt to prevent the military leader from taking office. Roca easily put down the rebellion and federalized Buenos Aires to diminish the port city's influence in national politics. Roca then proceeded to solidify the political cooperation between his **PAN** administration and provincial governors. That political cooperation defined the era of rule by the **LIBERAL OLIGARCHY** in late 19th-century Argentina. A few powerful and wealthy individuals dominated national and regional politics, and generally, those privileged few came from Roca's **PAN** party. The **PAN** won most political contests after 1880, often as a result of federal government interference.

With political stability increasing—albeit by force—Roca and his supporters tailored economic policy to fall in line with their vision for Argentina's future. Largely influenced by the philosophy of POSITIVISM, which was prevalent throughout most of Latin American in the late 19th century, Roca emphasized Argentina's potential for progress. As a result, Argentina entered an era often referred to as the "Golden Age," defined by relative political stability, population growth, and economic progress between 1880 and 1910. Positivist leaders saw agricultural production for export as the nation's greatest economic strength and throughout the latter decades of the century pushed through measures to encourage investment and growth primarily in that sector. European investors provided capital to expand railroad lines and to improve ocean and river transport. Commercial AGRICULTURE took off as cattle ranching and sheep grazing continued to dominate economic production and farmers focused on the cultivation of grains and other goods. The close economic relationship between Argentina and Great Britain strengthened after 1880 as Argentine agriculturalists exported raw materials that went into British industrial production. In exchange, manufacturers in Britain provided finished industrial goods for the Argentine market.

Roca and his successor, Miguel Juárez Celman (b. 1844–d. 1909), solidified PAN control over the political scene by using government wealth to maintain support among provincial leaders. Much of the expansion in the national treasury was fueled by increased tariff revenues. Government borrowing also contributed to expanding coffers, which allowed leaders to finance costly developmental projects. Unwise spending and irresponsible borrowing, however, combined with poor fiscal policies as the government abandoned the GOLD standard and flooded the market with national currency. By 1889, the Argentine government was facing a financial crisis as investment money from Great Britain dried up. The short-term economic crisis motivated political opposition of the PAN to form the Unión Cívica (Civic Union) and to revolt against the government. The Revolution of '90 was thwarted by an agreement between Roca and Mitre, in which Roca agreed to support his political rival for president in 1892 in exchange for a return to political stability. By 1892, however, Roca had reneged on the pact with Mitre. Roca supported two PAN leaders in the 1890s and eventually won his own second term as president in 1898.

As the 19th century drew to a close, the liberal oligarchy created by Roca still dominated Argentina's political and economic systems. The nation seemed to have achieved great progress over the final decades of the century, but underlying problems lingered. Social and economic inequalities created under the liberal oligarchs would need to be addressed in the 20th century.

See also ARGENTINA (Vols. I, IV); PERU, VICEROYALTY OF (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); UNITED PROVINCES OF RÍO DE LA PLATA (Vol. II).

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### Argentine–Brazil War See CISPLATINE WAR.

**"Ariel"** "Ariel" is an essay written by Uruguayan literary figure José Enrique Rodó (b. 1871–d. 1917) and published in 1900. It is considered a major contribution to the tradition of MODERNISM in Latin American LITERATURE. "Ariel" critiques the materialistic and utilitarian culture of the United States and celebrates the spiritual and artistic nature of Latin American culture.

Rodó was a philosopher and educator who dedicated his career to studying politics and society in URUGUAY. He worked as a university professor in Montevideo and on two occasions served in the national legislature. "Ariel" is considered to be his defining work and one of the most articulate expressions of his philosophy of human society. Characters in the essay appear to be inspired by those in William Shakespeare's *The Tempest*. Ariel represents the idealistic and aesthetic culture of Latin America and the true markers of civilization. Caliban represents the trend in U.S. culture to embrace progress and utilitarianism. In the essay, the teacher Próspero gives a lecture to his students in which he denounces the loss of spirituality and high culture in the face of materialism. Rodó structures his critique in a similar manner to Argentine writer and political leader DOMINGO F. SARMIENTO by pitting civilization against barbarism. But unlike Sarmiento, who lauded the civilizing democratic traditions of the United States, Rodó considered the U.S. fascination with material wealth to be a veiled form of barbarism.

"Ariel" was published on the heels of the U.S. victory in the WAR OF 1898. Rodó used the work as an appeal for a Latin American identity that would challenge the hegemony of the United States. The essay was well received by critics throughout Latin America.

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**art** A general term used to describe many forms of creative expression, including MUSIC, LITERATURE, and drama, the term also specifically refers to visual arts such as painting, sculpture, ARCHITECTURE, and photography. Artistic expressions in 19th-century Latin America made a transition from the European-dominated styles and themes that had defined the colonial period to more local and nationalistic forms that eventually dominated in the 20th century. Art became a way for Latin Americans to express their national identity.

Many Latin American artists during the colonial period produced works inspired by the Renaissance, baroque, and neoclassical styles that prevailed in Europe. Some local and native subjects appeared in colonial art, setting it apart from the predominant European styles, but for the most part, Latin American artists followed the general stylistic trends of European artists. The cultural emancipation of Latin America brought about by the wars of independence in the early 19th century allowed for a gradual shift away from European inspiration. One reason for the slow shift away from European artistic hegemony was that in the decades immediately following independence, European artists flocked to Latin America to seek inspiration for the emerging artistic style of ROMANTICISM. Spain and Portugal had kept the American colonies relatively isolated from the rest of Europe, and the postindependence opening of Latin America gave European artists access to the colorful landscapes and natural beauty the region had to offer. The beauty of natural Latin American scenery worked well within romanticism's emphasis on imagination and passion. Yet, the presence of European artists in Latin America and local artists' propensity for traveling to Europe for training meant that much of the artwork produced in the first half of the 19th century was heavily influenced by European impressions of the Latin American experience.

Romanticism's influence on Latin American art in the early 19th century is also evident in the nationalistic and heroic themes that appeared in painting, sculpture, and other visual expressions. Some of the most famous paintings of this period are the official portraits of national leaders such as ARGENTINA'S JUAN MANUEL DE ROSAS and MEXICO'S ANTONIO LÓPEZ DE SANTA ANNA. The Brazilian artist Manuel de Araújo Porto-alegre (b. 1806–d. 1879) produced portraits of BRAZIL'S leaders, and one of his most famous works depicts the coronation of PEDRO II. Although the themes portrayed in these works were both nationalistic and patriotic, the style and inspiration for them came largely from European artists in the Americas or through the training Latin American artists received in Paris and Rome.

In the final decades of the 19th century, Latin American artists began incorporating the natural scenery more fully into their works. The Argentine PAMPAS, the Brazilian Amazon, and other rural landscapes became the setting of a number of paintings. Mexican painter José

María Velasco (b. 1840–d. 1912) took inspiration from the natural setting of the Valley of Mexico in his late-century works. Historic events had been portrayed in early 19th-century artwork, but in later decades, artists began focusing greater attention on epic battles and the heroic events that had shaped the new nations in the colonial period and in the early years after independence. Those changes paved the way for a major shift toward popular art in Latin America in the 20th century.

See also ART (Vols. I, II, IV).

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**Aruba** See CARIBBEAN, DUTCH.

**Aycinena Piñol, Juan José de** (b. 1792–d. 1865) *leading Guatemalan conservative spokesman in Central America* Born into a wealthy landowning family in Antigua, GUATEMALA, Juan José de Aycinena Piñol earned a doctorate degree from the University of San Carlos in Guatemala City and in 1817 entered the priesthood. He supported Central American independence from Spain in 1821 and its annexation to the Mexican Empire through 1823. In 1829, the liberals gained control of the UNITED PROVINCES OF CENTRAL AMERICA, which consisted of Guatemala along with other present-day Central American nations. Liberals worked hard to separate CENTRAL AMERICA from the Mexican Empire, while Aycinena advocated a more conservative political strategy for the region. Because of those ideological differences, Aycinena and most of his family spent a good deal of time during the 1830s in the United States. Impressed by the U.S. road and canal building boom at the time, Aycinena envisioned a transisthmian canal as a vehicle to Central American prosperity. At that time, however, there was no interest for such a project among the Central American leadership. Also while in the United States, Aycinena authored nine books characterized by a common theme: the call for a constitutional monarchy and a secular church in Central America. When he returned to Guatemala in 1837, Aycinena used his newspaper, *El Observador*, to advocate the breakup of the United Provinces of Central America.

Aycinena became the most influential adviser to President RAFAEL CARRERA, holding positions that included minister of justice, minister of foreign affairs, and minister of ecclesiastical affairs. For a time, Aycinena was rector of the University of San Carlos.

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**Azevedo, Aluísio** See *SLUM, THE*.

# B

**Báez, Buenaventura** (b. 1810–d. 1882) *caudillo and president of the Dominican Republic* Buenaventura Báez was a CAUDILLO in the DOMINICAN REPUBLIC who rose to prominence following the Dominican declaration of

independence and the end of the HAITIAN OCCUPATION OF SANTO DOMINGO. Báez advocated annexation of the Dominican Republic by the United States and alternated power for several decades with his political rival PEDRO SANTANA.

Báez was born to a wealthy family in SANTO DOMINGO in 1810. He studied in the United States and Europe, and in 1843, he participated in the Dominican revolt against HAITI. Báez became president of the newly independent nation in 1849, following the rule of the caudillo Santana. For nearly two decades, the two caudillos remained bitter rivals and constantly challenged each other for power. Throughout Báez's five presidential administrations (1849–53, 1856–58, 1865–66, 1868–73, 1876–78), he continually attempted to secure foreign protection for his nation by negotiating with Spain, France, and the United States. Despite his support of annexation, when the Spanish attempted to reacquire the Dominican Republic in 1861, Báez supporters opposed the move and helped lead revolts against the Spanish and against Santana in the WAR OF RESTORATION. Báez, who had been exiled in Europe, returned to rule in 1865 after the Spanish were forced to abandon the island. Upon returning to the Dominican Republic, however, Báez found a nation bitterly divided by regional rivalries. He made one final unsuccessful attempt to negotiate annexation by the United States before being forced from office for good in 1878. Báez fled into exile, where he died in 1882.

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An 1854 portrait of Buenaventura Báez, caudillo and president of the Dominican Republic various times between 1849 and 1878 (*Library of Congress*)

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**Bahamas** See CARIBBEAN, BRITISH.

**Balmaceda, José Manuel** (b. 1840–d. 1891) *president of Chile* José Manuel Balmaceda was a liberal politician who served as president of CHILE from 1886 to 1891. During his presidency, he aggressively pursued a variety of liberal reforms to transform the nation's economic and social systems and attempted to curb the growing power of the legislature. His clash with Congress eventually led to the CHILEAN CIVIL WAR and to his overthrow.

Balmaceda was born in SANTIAGO DE CHILE on July 19, 1840. Through his early education, he was swayed by liberal political thought and in 1849, joined a coalition of anti-Conservative leaders in a movement against President Manuel Bulnes (1841–51). He began his political career as a congressional deputy and then held several prominent cabinet positions under his predecessor, President Domingo Santa María (1881–86).

As part of a liberal coalition whose influence was strengthening, Balmaceda was elected president in 1886. With a national treasury swelling with revenues from the prosperous ECONOMY, Balmaceda shored up his support and embarked on an aggressive reform agenda. He devoted a large portion of the national budget to improving infrastructure and other public works, including the construction of bridges, canals, and railroad lines. Balmaceda devoted new resources to improving EDUCATION, supporting the efforts of positivist intellectual VALENTÍN LETELIER MADARIAGA.

Several years of unfettered spending, followed by a downturn in the nation's economy, left Chile with a large public debt. Concern over spending combined with long-standing animosity between the executive and Congress. The legislative body had succeeded in wresting a large degree of control away from the executive in the 1870s. Balmaceda aimed to strengthen the presidency once again. Conflict between the two branches of government culminated in a violent civil war in 1891.

After months of fighting, Balmaceda's forces were overcome by the parliamentary army, and the defeated president fled to the Argentine embassy. He took his own life on September 19, 1891.

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**Banda Oriental** Banda Oriental refers to the southern portion of present-day URUGUAY. Translated as "eastern bank," the Banda Oriental was under Spanish control during the colonial period and became part of the United Provinces of the Río de la Plata during the independence era. In 1817, Brazilian forces under the Portuguese regent and future king John VI (r. 1816–26) invaded the region and claimed the territory for BRAZIL. The Banda Oriental had long been at the center of a boundary dispute between the Spanish and the Portuguese, and John took advantage of the political instability created during the wars of independence to expand Brazil's borders.

In 1821, John formally annexed the Banda Oriental and renamed it the Cisplatine Province. For the next four years, it was occupied by Portuguese troops, but the government in BUENOS AIRES did not cede claims to the territory. In 1825, JUAN ANTONIO LAVALLEJA led a group of rebels known as the THIRTY-THREE IMMORTALS in a revolt against the Brazilian presence in the province. Argentine president BERNARDINO RIVADAVIA supported the movement, and tensions between ARGENTINA and Brazil eventually culminated in the CISPLATINE WAR (1825–28). Both nations struggled, with the new Brazilian emperor PEDRO I facing internal revolts and the Argentine government enduring internal divisions. Eventually, arbitration by British and French mediators created the Republic of Uruguay as a buffer between Brazil and Argentina. European interests secured trading rights with Montevideo, the capital of the new nation, and other parts of the Río de la Plata and Uruguay became an important part of the global economic network that developed in South America through the rest of the 19th century.

See also BANDA ORIENTAL (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**Barbados** See CARIBBEAN, BRITISH.

**Barreda, Gabino** (b. 1818–d. 1881) *Mexican intellectual and promoter of positivism* Gabino Barreda was a Mexican scientist and intellectual who introduced the French notion of POSITIVISM to MEXICO in the late 19th century. Barreda and other intellectuals who followed his ideas modified French positivism to suit Mexico's needs and promoted Mexican positivism as an official ideology of the PORFIRIATO (1876–1911).

Barreda was born in PUEBLA in 1818 and as a young man began studying law. In 1844, he changed to science and medicine and in 1848, went to Paris where he befriended and studied with French philosopher Auguste Comte. Barreda was swayed by Comte's theories on positivism and began writing essays and other works incorporating positivist ideas into his thoughts on Mexican history and society. In 1867, he gave his famous Independence Day speech, which attracted the attention of President BENITO JUÁREZ. The president asked him to lead efforts to reform the nation's educational system along secular, scientific, and positivist lines (see EDUCATION). Barreda founded the National Preparatory School and worked diligently to give Mexico's educational and social foundations a more scientific orientation.

Barreda succeeded in promoting positivism among Mexican intellectuals, and the philosophy continued to morph over the years as the early chaos of the 19th century gave way to more stability in the 1860s and 1870s. Barreda's National Preparatory School educated many of those who would eventually become the *CIENTÍFICOS*, or the inner circle of political advisers to PORFIRIO DÍAZ.

In 1878, Barreda resigned from the National Preparatory School and took a diplomatic post. He died in MEXICO CITY in 1881.

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**Barrios, Gerardo** (b. 1813–d. 1865) *liberal president of El Salvador* Born into one of EL SALVADOR's prominent landholding families, Gerardo Barrios joined the MILITARY in 1840 and 16 years later earned a leadership position in the movement to overthrow WILLIAM WALKER in Nicaragua. As a result of his military prowess, Barrios developed a close relationship with Guatemalan conservative RAFAEL CARRERA, who awarded Barrios with GUATEMALA's highest recognition, the Cross of Honor, in 1858. The friendship soured, however, after Barrios assumed the Salvadoran presidency later that same year.

Barrios accepted the liberal-positivist philosophy that served as the basis for an economic program that benefited mainly the conservative elite. For example, Barrios's land distribution programs were designed to increase production rather than to aid small, poor landowners. In addition, laborers employed on COFFEE plantations were exempted from military service and tax incentives encouraged planters to expand their harvest, and the government attempted to develop its own merchant fleet to aid in the exportation of coffee. Barrios also expanded road and port construction and internal communications. Moreover, like other liberals of that time, Barrios improved the nation's EDUCATION system, although only for the middle and upper social sectors.

Barrios reached an agreement with the Vatican that required all priests to swear allegiance to the Salvadoran constitution but not to a particular government or leader. The Concordia may have assuaged his fears about the church's interference in political affairs, but by 1863, Barrios's liberal policies had earned him many enemies, including conservative clergy and landowning elites, and Guatemala's Carrera, who led an invasion force into El Salvador. The Guatemalan leader defeated Barrios at Cojutepeque in late 1863 but permitted him to flee the country. When Barrios attempted to return the following year, he was captured by a Nicaraguan military contingent, which turned him over to the Salvadoran authorities. Barrios languished in jail until he faced a firing squad on August 29, 1865.

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**Barrios, Justo Rufino** (b. 1835–d. 1885) *president and liberal leader in Guatemala* GUATEMALA's reform period began in 1871 and marked the end of conservative political power. During that time, the country's COFFEE-based export ECONOMY emerged and accelerated. Justo Rufino Barrios was responsible for many of the liberal reforms that were put in place throughout the 1870s.

Born into a landowning and conservative elite family in San Lorenzo, Barrios pursued his education in Guatemala City, where he came under liberal influence, particularly of future president Miguel García Granados (b. 1809–d. 1878).

Barrios followed fellow liberal García Granados into the presidential palace in 1873 and used the new constitution of 1876 as the vehicle to his reelection in 1880. Despite ruling with absolute power, Barrios was popular, and many analysts of Guatemalan politics believe that he could have stayed in power longer had he not been killed in battle in 1885.

During the 1850s, coffee replaced indigo and cochineal as Guatemala's leading export, and Barrios pursued policies that accelerated its growth. He permitted planters to encroach on indigenous communal lands and instituted labor codes that tied most Amerindians to the coffee plantations. Barrios established a banking system to help the planters expand production, and he permitted foreign companies and investments to develop roads, railroads, ports, and port facilities. He allowed thousands of German immigrants into Guatemala, and by 1914, they had become the most influential coffee growers in rural areas, as well as merchants in the urban centers. U.S. investors soon followed, most notably the United Fruit Company, which by the early 20th century had become the country's primary producer and exporter of bananas. The company also controlled the TRANSPORTATION facilities for exporting the nation's coffee. In effect, Barrios

shifted the political power base from the merchant class in Guatemala City and the landowners in the surrounding areas to the coffee growers of western Guatemala.

Barrios further extended liberal reform by pursuing anticlerical policies. These included placing EDUCATION under state control, assigning the government responsibility for keeping vital statistics, expelling foreign clergy, and confiscating church property over the protests of bishops. Amerindian groups lost the most as a result of Barrios's reforms. Foreign priests had traditionally dominated the rural churches, where they also doubled as primary school teachers. Their expulsion brought a deterioration in rural education.

Barrios envisioned a unified CENTRAL AMERICA under Guatemalan command. That vision died with him in battle against Salvadoran troops in the Battle of Chalchuapa on August 29, 1885.

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**Belize** Belize is a country in CENTRAL AMERICA. It is located along the Caribbean coast, south of MEXICO and north and east of GUATEMALA. Belize is a relatively small country, encompassing just under 9,000 square miles (23,310 km<sup>2</sup>). It is the only nation in Central America that was a British colony. English is the main language of Belize, and the nation continues to be part of the British Commonwealth.

Belize is located in the heart of Maya territory, and in pre-Columbian times, large indigenous civilizations populated the region. European incursions into Central America began in the early 16th century as Spanish conquistadores explored the coastal regions. But, Spanish settlers showed little interest in Belize and faced considerable resistance from the Amerindian population. The first permanent settlements in Belize were founded by English sailors in the 17th century. Those early settlers, called Baymen, cut the logwood that was found in abundance in the region and processed it for its natural dye. British economic activities eventually expanded to include the processing of mahogany, which dominated local economic networks by the 1780s. Disputes between the British and the Spanish for control of the area continued until late in the 18th century. The British finally defeated the Spanish and secured control over the small slice of Central America in 1798. Defeat of the Spanish was accompanied by even more British attention to the region.

As British presence expanded in Belize during the 18th century, agricultural activities began to evolve from simple subsistence farming to feed the logging population to plantation AGRICULTURE intended for commodity export production. But, British leaders continued to discourage

agriculture in favor of logging. A series of regulations had gradually gone into effect to regulate land ownership in the small colony. By the turn of the century, a small elite had emerged among British loggers who claimed monopoly ownership of most of the best logwood and mahogany territory. Hoping to maintain the supremacy of logging and to ensure an ample labor supply for the industry, British laws attempted to prohibit plantation agriculture in the region, but Britain was unable to exercise real authority over the area. Belize was under the jurisdiction of the Jamaican superintendent, and there was little presence of British authority. Planters and logging interests began a system of local government in which they elected their own magistrates and passed local decrees dealing with land ownership, TRADE, and taxation.

As the supplies of logwood and mahogany diminished along the coast, the British pushed farther into the interior of Belize in the first decades of the 19th century. British infiltration inland created conflict with the scattered yet significant pockets of Maya still inhabiting the interior. As the British continued to take over interior lands, the scattered NATIVE AMERICAN groups waged several rebellions and challenged the logging companies for control of the territory. The British Crown attempted to bring the region more fully under its authority by sending a superintendant and other Crown officials to administer the region. In 1854, a local constitution was promulgated, and a local legislative assembly was formed in an attempt to fortify British claims to the region, especially as U.S. leaders attempted to rid Central America of European colonization. The region formally became a part of the British colonial system as British Honduras. It was administratively associated with the Caribbean colony of Jamaica but had a more formal system of colonial government.

Much of the manual labor involved in British logging activities was performed by large numbers of African slaves. The first slaves in Belize arrived indirectly via the BRITISH CARIBBEAN colony of Jamaica, but before long, traders were importing slaves directly to Belize from the west coast of Africa. According to some estimates, slaves made up more than 75 percent of the population by the beginning of the 19th century. As in other areas with a large slave ECONOMY, the work performed by African slaves in Belize was dangerous, and life expectancy was low. Slaves were treated harshly by owners, and the continuation of the slave trade prior to 1807 offered few incentives to slave holders to provide more humane living and working conditions. Malnutrition and disease were rampant, and physical abuse was common, particularly as a method of punishing unruly workers. Because the British settlements were concentrated along the coast, many slaves were able to escape and find refuge in the dense, unsettled jungles of the inland territories.

The British ended the transatlantic slave trade in 1807, and in the early decades of the 19th century, the slave population in Belize declined precipitously. In addition, a preference for male slaves in Latin America had

created in imbalanced sex ratio, making natural reproduction all the more difficult. After the abolition of the slave trade, religious reformers continued to pressure the British Crown to abolish SLAVERY completely. In the coming decades, a series of laws were introduced that paved the way for gradual emancipation. Complete abolition of slavery was finally achieved in the British colonies by 1838. Abolition laws called for the emancipation of all slaves and compensated former slave owners. But, slaves themselves received little help in making the transition into the wage-earning workforce.

The former slave population created a diverse demographic network in the Belize population, but white settlers maintained control of local economic and political systems. Colonial officials restricted the freedoms and privileges of the colored population by limiting access to land and maintaining a closed political system. Similar restrictions applied to the local indigenous population, which continued to challenge British authority. Belize became the destination of a large migration of Garifuna (West Indians of mixed African and Amerindian heritage) in the first half of the 19th century. Waves of Maya migrants began arriving after 1847 as the CASTE WAR OF THE YUCATÁN displaced thousands of indigenous inhabitants. The Garifuna and the Maya communities were prohibited from owning land. Instead, they rented from powerful British settlers, and in later decades, many were moved on to reservations. Several groups of Maya defied British colonial authority, and in the 1860s and 1870s, British troops struggled to put down rebellions in the northwestern interior. Partially in response to those rebellions, the British passed a new constitution in 1871 and changed the status of British Honduras to that of “crown colony.” That change weakened local authority but ensured a larger presence by the British MILITARY.

The final decades of the 19th century were defined by even more intensive concentration of land ownership in British Honduras. The British Honduras Company formed in the 1850s, and its owners took advantage of new land laws to begin consolidating control over the region’s most valuable real estate. In 1875, the company changed its name to the Belize Estate and Produce Company. It secured ownership over most of the colony’s arable land, and company officials wielded enormous political power. Unequal distribution of economic and political power combined with long-standing practices discouraging the development of agriculture produced a weak and ineffective economic system in the last half of the 19th century. Little changed for the colony until well into the 20th century. Belize finally became an independent nation in 1981.

See also BELIZE (Vols. I, II, IV).

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**Bello, Andrés** (b. 1781–d. 1865) *Venezuelan intellectual, writer, and founder of the University of Chile* Andrés Bello was born in CARACAS on November 29, 1781. In his youth, he demonstrated a desire and gift for learning and began studying law, philosophy, and science at the University of Venezuela. He knew Alexander von Humboldt and Simón Bolívar and accompanied the former on part of his famous tour of South America, cultivating his own interest in geography and nature. In 1810, he went with Bolívar to London on the orders of the Caracas governing junta. Bello remained there as a diplomatic representative for VENEZUELA and CHILE and wrote several of his most famous literary works (see LITERATURE).

In 1829, Bello relocated to SANTIAGO DE CHILE to work in the Ministry of Foreign Affairs. He continued his intellectual pursuits and entered Chilean politics. In 1843, he founded the UNIVERSITY OF CHILE and as university rector instituted reforms in higher EDUCATION. Bello and the Chilean government saw higher education as a way of reinforcing national identity and instilling civic responsibility in the population. Bello saw language, in particular, as a tool for national cultural advancement and wrote his influential *Gramática de la lengua castellana destinada al uso de los americanos* as an introduction to the theory and practice of the Spanish language in the Americas. He served for a time in the national legislature and helped write Chile’s civil code, which went into effect in 1855. Bello’s code became a model for similar documents in numerous other Latin American countries in later decades of the 19th century.

Bello died on October 15, 1865 in Santiago.

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**Betances, Ramón Emeterio** (b. 1827–d. 1898) *doctor and Puerto Rican revolutionary* Ramón Emeterio Betances was among the most prominent Puerto Rican nationalists, known to many as the father of the Puerto Rican independence movement. A physician, a writer, and an outspoken abolitionist, he was one of the leading opponents of Spanish colonial control of PUERTO RICO during the 19th century.

Betances was born on April 8, 1827, to a wealthy land-owning family in the town of Cabo Rojo, Puerto Rico. As a young man, he was educated in Europe, receiving his medical degree from the University of Paris in 1855. On his return to Puerto Rico, Betances first gained notoriety for his laborious efforts to provide medical treatment

to the poor and needy in the town of Mayagüez, during a five-year cholera epidemic on the island. In 1856, he founded a secret abolitionist society, but after its discovery by the Spanish authorities, he was exiled.

Betances was allowed to return to Puerto Rico in the 1860s but found himself exiled again on two occasions on suspicion of inciting rebellion against the Spanish Crown. He spent the years abroad writing political pieces on the abolition of SLAVERY and the independence of Puerto Rico. In SANTO DOMINGO, he founded the COMITÉ REVOLUCIONARIO DE PUERTO RICO (Puerto Rican Revolutionary Committee), a secret organization dedicated to the violent overthrow of the Spanish colonial regime. Communicating through letters to fellow revolutionaries on the Puerto Rican mainland, Betances was the chief planner of a military uprising on September 23, 1868, known as the GRITO DE LARES. Although the rebels succeeded in taking control of the town of Lares, they did not gain the support of the civilian populace. Hardened Spanish troops defeated the rebel army on the outskirts of the town of San Sebastián de Pepino, killing or capturing most of them less than 24 hours after the uprising began.

After the failure of the uprising, Betances traveled throughout the Caribbean as well as to New York, working as a writer and continuing to advocate for the independence of Puerto Rico. Failing to gain the necessary financial or political support for a second revolution, he spent the remainder of his life in France working as a diplomat for the DOMINICAN REPUBLIC and a delegate to the Cuban Revolutionary Junta. Betances was awarded the French Legion of Honor in 1887 for his work as a diplomat, his medical service while in France, and his contributions to political LITERATURE. He strongly opposed the seemingly inevitable annexation of Puerto Rico by the United States following the conclusion of the WAR OF 1898 in August of that year. He became increasingly frustrated with the Puerto Rican people's unwillingness to demand their independence rather than be absorbed by the United States. He died on September 16, 1898, and his remains were returned to Puerto Rico in 1920, where they were interred in his hometown.

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**Blanco Party** The Blanco Party was originally a political group formed by MANUEL ORIBE in the 1830s in URUGUAY. It became a formal political party in 1872 and was the foundation for the present-day National Party of Uruguay. The *blancos* represented the interests of the rural ranching and agricultural sector in the early years

after independence. The group was at war throughout much of the 19th century with the rival COLORADO PARTY.

Uruguay achieved complete independence in the 1828 Treaty of Montevideo at the conclusion of the CISPLATINE WAR. The region, known as the BANDA ORIENTAL during the colonial era, had been a province of the Viceroyalty of Río de la Plata. Between 1814 and 1820, local forces under the leadership of José Gervasio Artigas fought for provincial autonomy against the centralist leadership in BUENOS AIRES. In 1821, the Banda Oriental was invaded by Brazilian forces, and in 1825, a new MILITARY force under the leadership of JUAN ANTONIO LAVALLEJA led an insurgency against BRAZIL, with the assistance of ARGENTINA. Citizens of the Banda Oriental fractured into two groups, one supporting the Brazilian occupation and the other favoring an alliance with Buenos Aires. The latter group provided the foundation for the formation of the Blanco Party in later decades. The conflict between Brazil and Argentina escalated into the CISPLATINE WAR, and British mediators helped settle the war three years after it began, at the same time securing the independence of Uruguay. Uruguayan patriots wrote the CONSTITUTION OF 1830, which established a strongly centralized government. JOSÉ FRUCTUOSO RIVERA was elected president that same year and began implementing the centralist measures outlined in the constitution.

Rivera's administration began its cautious leadership over the newly formed nation and almost immediately met considerable resistance from the rural CAUDILLOS and other provincial leaders. Lavalleja led a resistance movement against the government and, after its failure, escaped into exile. In 1834, Rivera supported Oribe's candidacy for president, and power changed hands peacefully. Nevertheless, in the coming years, disputes began to surface between the ranchers of the countryside and the merchants of the main urban center of Montevideo. Oribe tended to side with rural interests and emerged as the leader of the *blancos*. He formed a close relationship with Buenos Aires governor and Argentine dictator JUAN MANUEL DE ROSAS. Rivera rejected Uruguayan ranchers' demands for near complete autonomy and formed an opposition group that eventually became the Colorado Party.

In 1838, Rivera overthrew the Oribe government. The deposed Blanco leader went into exile in Argentina, protected by his caudillo ally. Meanwhile, Rivera drew support from *unitario* exiles in Montevideo and actively attempted to destabilize the Rosas government in neighboring Argentina. Hostilities between the *blancos* and the *colorados* quickly escalated into a full-scale civil war. The GUERRA GRANDE raged between 1838 and 1851 as both sides competed for control of the nation. The two parties drew foreign powers into the struggle. The Argentine government under Rosas supported Oribe and the *blancos* as the defenders of federalism in the Southern Cone.



Brazil, France, and Great Britain aided the Colorado Party, seeing Rivera's party as the best alternative for maintaining free and open TRADE networks through Montevideo. The Colorado Party also earned the support of the like-minded *UNITARIOS* of Argentina, many of whom had fled into exile during the Rosas dictatorship.

The Guerra Grande was characterized by a lengthy siege of Montevideo. Oribe's forces, backed by Rosas, forced Rivera to flee to Brazil in 1842. The Blanco leader then ordered the siege of the capital city, which lasted for the next nine years. During that time, Colorado leaders in Montevideo benefited from protection of the British and French naval forces that kept the port city supplied and maintained open sea access. Blanco forces controlled most of the countryside and sealed off the city from the rest of the country. After nine years of a seeming impasse, British and French forces withdrew their assistance, and Montevideo was on the verge of falling to the *blancos*. Before the *blancos* could claim victory, however, their alliance with the Rosas dictatorship collapsed as Justo José de Urquiza led an alliance of disillusioned Argentine caudillos and exiled intellectuals against the dictator. Rosas withdrew from Uruguay, leaving the *blancos* to carry out the Guerra Grande on their own. The Treaty of Montevideo finally ended the conflict and declared neither side the clear winner. Nevertheless, the end of the Guerra Grande marked the beginning of a long period of Colorado domination that lasted well into the 20th century.

The Blanco Party continued to operate within Uruguay's political system, enjoying its traditional support among the nation's rural sectors. Nevertheless, the party struggled beneath the domination of the *colorados*, who controlled Montevideo and other major urban centers. Blanco candidate Bernardo Berro (b. 1803–d. 1868) managed to win the presidency in 1860 only to be overthrown by a Colorado revolt four years later. Berro's overthrow began a period of internal instability in Uruguay and contributed to the emergence of external alliances that culminated in the WAR OF THE TRIPLE ALLIANCE. In that war, the Blanco Party paired up with Paraguayan dictator FRANCISCO SOLANO LÓPEZ against the Colorado Party and its allies, Brazil and Argentina. The War of the Triple Alliance was the most destructive single conflict in all of South America in the 19th century. The conclusion of the war brought defeat for PARAGUAY and once again subjected the *blancos* to the hegemony of the Colorado Party.

In 1872, the Blanco Party changed its name to the National Party, and this remains the name of the party today. Also in the 1870s, leaders in Uruguay introduced the system of *coparticipación*, in which the minority party was guaranteed specific levels of representation and political power. Despite attempts at compromise, conflict between the National and Colorado Parties continued throughout the final decades of the 19th century. One final revolt in 1897 was initiated by National Party

leader Aparacio Saravia (b. 1856–d. 1904), who accused Colorado leaders of failing to fulfill the compromise of *coparticipación*. Saravia forced the Colorado government to agree to new concessions before the rebellion subsided. The National Party leader controlled politics in the countryside until the rise of populist president José Battle y Ordóñez in the early 20th century.

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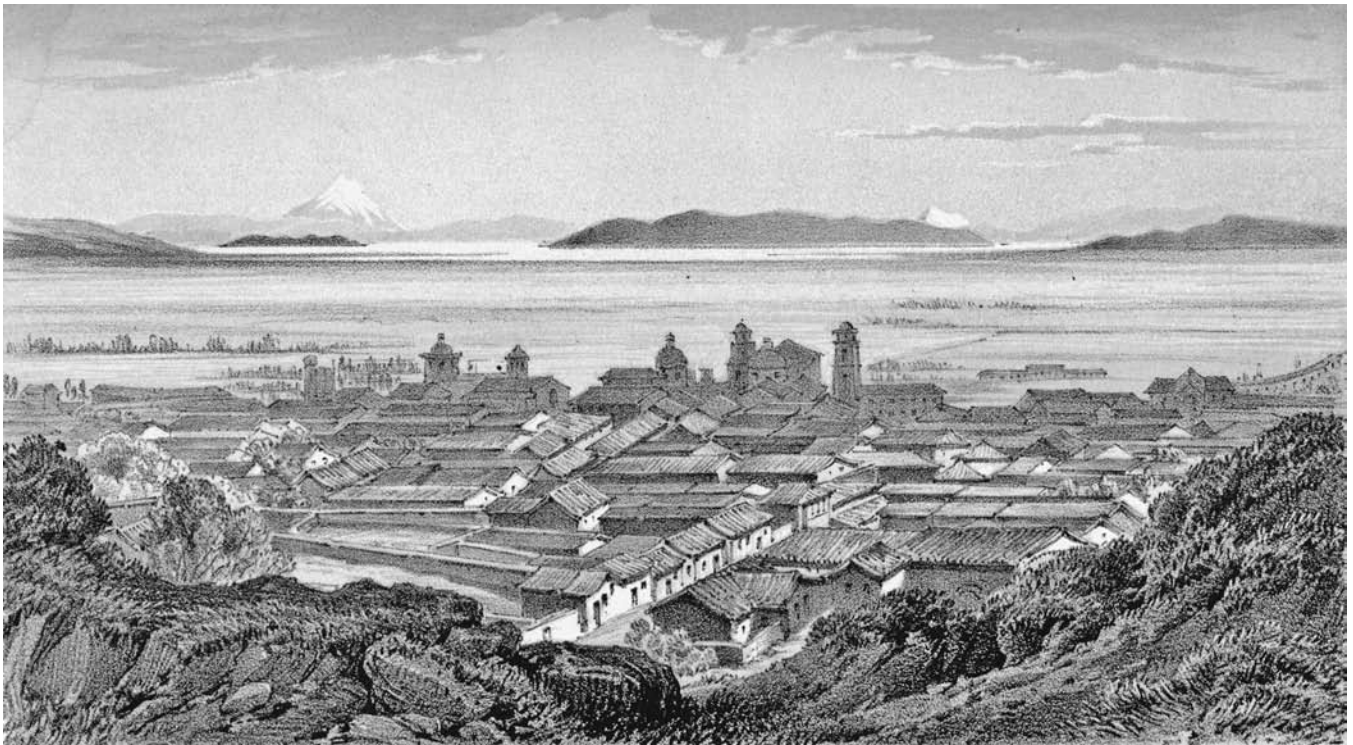
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**Bogotá** Bogotá is the capital city of COLOMBIA. It was home to a relatively large indigenous population in the pre-Columbian era. Spanish explorer Gonzalo Jiménez de Quesada founded the city of Santa Fe de Bogotá in 1538. The city emerged as a cultural and economic center and became the capital of the Viceroyalty of New Granada in 1717.

The colonial elite of Bogotá were some of the first in Latin America to rebel against Spanish authority, declaring the colony's complete independence in 1810. Bogotá was liberated by Simón Bolívar and his insurgent forces in 1814, and the Congress of the recently formed United Provinces of New Granada relocated to the city in 1815. The republic fell back under Spanish control the following year, but by 1819, the independence of New Granada had been secured. Bolívar then established the Republic of GRAN COLOMBIA. Administrative divisions within the new republic were structured to allow power sharing among three equal departments, but Bogotá emerged as the main seat of authority. Conflict over the divisions of power eventually led to the dissolution of Gran Colombia, and Bogotá became the capital of the Republic of New Granada, the predecessor of present-day Colombia.

Despite its role as the administrative and cultural center of Colombia, Bogotá was slow to develop in the early decades of the 19th century. A national museum, public library, and national theater opened in the capital city in the years immediately following independence, but access to such cultural outlets was limited. Factional conflict between liberal and conservative interests plagued the region for decades, impeding the development of a cohesive national culture. Brief periods of liberal rule resulted in increasing secularization of the educational system (see EDUCATION). A national university opened in Bogotá in 1867 and became a center of cultural and intellectual development.

Despite these modest gains, Bogotá remained relatively isolated until an era of conservative rule known as the Regeneration in the 1880s. Under the leadership of President RAFAEL NÚÑEZ, political authority in Colombia was centralized in Bogotá. In the final decades of the 19th century, the government devoted resources to developing



Panoramic sketch of Bogotá, Colombia, circa 1863 (From *Travels in Mexico, South America, Etc. Etc.*, by Godfrey Thomas Vigne. London: Wm. H. Allen & Co., 1863, p. 263)

the infrastructure of the capital city. Foreign investors from the United States and Europe were largely responsible for building railroads and developing a communications infrastructure. By the end of the 19th century, a telegraph network was in place with Bogotá at the center. Railroads connecting Bogotá to the rest of the country were completed, although the expansion of Colombia's TRANSPORTATION SECTOR occurred much more slowly than in other areas of Latin America. Theaters and other cultural centers opened, and the city's educated elite formed literary groups. The modernization trends that began in Bogotá during the Regeneration continued in the 20th century. The city remains one of the most important cultural and economic centers of Colombia.

See also *BOGOTÁ* (Vols. I, II, IV); *BOLÍVAR, SIMÓN* (Vol. II).

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**Bolivarian Constitution (Bolivian Constitution of 1826)** The Bolivarian Constitution was a document written by Simón Bolívar spelling out a system of gov-

ernment for the newly independent republic of BOLIVIA. The document marks the first real attempt by Bolívar to formalize the political ideas he articulated in writings such as the *Jamaica Letter* during the wars of independence in South America. Bolívar's constitution called for a strong executive, reminiscent of the Spanish system during the colonial period. Even though it was replaced by a more liberal document within a few years, Bolívar's vision left a lasting legacy in Bolivia and elsewhere in South America.

The Bolivarian Constitution called for four branches of government. First, a highly centralized executive led by a lifetime president would oversee the government and maintain order. As a lifetime appointment, the presidency was designed to provide the head of state with extraordinary power, including the ability to groom a successor. Bolívar hoped a strong leader would prevent infighting among regional elites and keep the new nation from splintering in its early years. A second branch was the tricameral Congress made up of the Senate, Chamber of Tribunes, and Chamber of Censors. Congress was responsible for making laws and serving as a check on the executive branch. The third and fourth branches were the judicial and electoral branches. The constitution imposed stringent limits on suffrage, granting only educated, wealthy, property-owning citizens the right to vote. Most political experts consider the political system outlined in the document to have been unworkable. Understandably, many of Bolívar's political visions led to a great deal of conflict.

Bolívar drafted the Bolivarian Constitution in LIMA, while serving as president of PERU. Shortly after completing it, the Liberator was called back to GRAN COLOMBIA—the confederation he had helped create, made up of present-day COLOMBIA, VENEZUELA, ECUADOR, and PANAMA—to put down a rebellion against the government. Bolívar had been serving as Gran Colombian president in absentia, having left his vice president, FRANCISCO DE PAULA SANTANDER, in charge. After subduing several local insurrections and restoring himself as president, Bolívar attempted to implement a similar version of his Bolivarian Constitution in Gran Colombia. The liberal-minded elite in Gran Colombia repudiated the Bolivarian Constitution, and Bolívar responded by disbanding Congress and assuming full dictatorial powers. Numerous adversaries began to rise in opposition, and by 1830, Bolívar's attempts to impose an autocratic political system in Gran Colombia had ended with the overthrow of the Liberator and the dissolution of Gran Colombia.

Despite its relatively short duration of being in effect, the Bolivarian Constitution has had an enduring legacy. Numerous Latin American governments resorted to Bolivarian-style executive power throughout the 19th century in an attempt to stabilize fractured political systems. The tendency of strong central rule and the legacy of Bolívar's vision have continued in many areas into the 20th century. Most notably, Venezuela's president Hugo Chávez drafted his own "Bolivarian Constitution" in 1999, in which he articulated many of the same ideas of government and Latin American solidarity that had been proposed by the Liberator in 1826.

See also BOLÍVAR, SIMÓN (Vol. II).

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**Bolivia** Bolivia today is a landlocked Andean country to the north of ARGENTINA and to the east of northern CHILE and southern PERU. During the colonial period, Bolivia was referred to as Upper Peru, or Charcas, and until the late 18th century, it was part of the Viceroyalty of Peru. A small white population controlled the wealth produced in the colony, while a large Aymara and Quechua Indian population labored in mines and agricultural fields. In 1776, the Viceroyalty of Río de la Plata absorbed Upper Peru into its administrative structure.

### INDEPENDENCE

A group of influential creoles and mestizos followed the lead of other independence movements in South America by declaring independence and attempting to initiate self-rule in 1809. Nevertheless, the movement failed to attract necessary support from the elite, who feared a resurgence of ethnic violence after the 1780

Túpac Amaru II revolt in the Andes. The rebellion was easily defeated by the royalist army sent from Peru, but its leaders, known as the Generation of 1809, provided inspiration to future independence movements.

For the next 15 years, citizens of Upper Peru found themselves torn between liberation movements originating in Argentina and the strong arm of Spanish rule in neighboring LIMA. When an Argentine junta declared independence on May 25, 1810, supporters in Upper Peru enthusiastically joined the movement only to be put down quickly once again by royalist forces from Lower Peru. In an era known as the Fifteen Years' War, Argentine armies repeatedly attempted to liberate Upper Peru between 1810 and 1825, and each time, the Spanish MILITARY forces from Lower Peru repelled the invasions. Also during that time, pockets of Bolivian-led guerrilla insurgencies dotted the countryside. The guerrilla leader of the Apopaya region, José Miguel Lanza (b. 1779–d. 1828), is credited with helping to maintain momentum for the struggle until independence was finally achieved in 1825.

Much like its royalist protector Lower Peru, independence for the future republic of Bolivia was secured only after the intervention of outsiders. By 1821, most Spanish strongholds in South America had succumbed to patriot forces. Subduing the last holdouts in Upper and Lower Peru was considered vital to the survival of independence in South America as a whole. In August 1820, the Argentine and Chilean liberator José de San Martín began a campaign to liberate Peru, and less than a year later, his forces took Lima and declared Peruvian independence. Despite those successes, a strong royalist presence remained in important regions of Upper Peru. In the summer of 1822, San Martín joined forces with the Liberator of New Grenada (PANAMA, VENEZUELA, ECUADOR, and COLOMBIA), Simón Bolívar. Under Bolívar's leadership, the two armies defeated royalist forces at the Battle of Junín in August 1824. Bolívar supporter and future Bolivian president ANTONIO JOSÉ DE SUCRE dealt the final blow to the Spanish army at the Battle of Ayacucho on December 9, 1824. After suppressing what remained of the scattered Spanish forces, Sucre declared victory for the independence movement on April 9, 1825.

With independence for all of Spanish South America secured, Bolívar envisioned uniting the former colonies into one large confederation. He wanted to create a united nation consisting of Upper and Lower Peru, similar to the GRAN COLOMBIA confederation he had established in New Granada. Bolívar, however, met with stiff opposition both from within Upper Peru and from bordering Gran Colombia and the United Provinces of the Río de la Plata. The neighboring nations feared that a unified Peru would disrupt the balance of power among other newly sovereign nations in South America, and local leaders were already fostering notions of national identity separate from that of their northern neighbor.

Sucre convened a constituent assembly in July 1825 to decide the future of Upper Peru. The delegates voted

overwhelmingly to create a sovereign nation named the Republic of Bolivia after the great South American liberator himself. The delegates also voted to name Bolívar the first president of the republic. Bolívar approved their actions and accepted the title, although only nominally, for a few months. At the same time, Bolívar was busy articulating his ideas for a new political system in the BOLIVARIAN CONSTITUTION of 1826. The document laid out an awkward and cumbersome governmental structure based on four branches of government, organized under a powerful lifetime president. Although only in effect for a few years, the Bolivarian Constitution of 1826 laid the political foundation for Sucre's election as president in 1826, after Bolívar's departure.

Sucre inherited a fledgling nation that was struggling to recover from the physical and economic destruction of 15 years of war. The Venezuelan native attempted to implement a series of reforms to replenish the national treasury. He nationalized Bolivia's MINING sector and invited the participation of foreign investors in the industry. He resurrected some banking and coinage activities and implemented a new system of taxation in an effort to move the nation away from traditional income-generating measures such as the tribute tax. Ultimately, Sucre's fiscal reforms failed, and Bolivians began to view him as a foreigner meddling in the new nation's affairs. Sucre's government put down several attempted revolts in 1827 and 1828, but finally, a coup led by General AGUSTÍN GAMARRA drove him from power in July 1828. The new government fared no better until the rise of independence leader-turned-CAUDILLO ANDRÉS DE SANTA CRUZ.

### THE AGE OF CAUDILLOS

Santa Cruz was the mestizo son of a Spanish military officer and a Quechua mother from La Paz. He had fought on the side of the royalists against the independence movement, but when the tide started to turn in favor of the liberation leaders, he joined San Martín and Bolívar in the final liberation of Upper Peru. Bolivia's constituent assembly saw him as a natural fit for the presidency because of his military history and his FAMILY connections. Santa Cruz took office in 1829 and immediately embarked on a program to bring economic recovery and political stability to the new nation. He imposed numerous fiscal reforms to balance the budget and replenish the national treasury. Once Bolivia was on more solid financial footing, Santa Cruz devoted public funds to improving EDUCATION and expanding the nation's infrastructure. In 1831, the new president replaced the Bolivarian Constitution of 1826 with a more democratic document. His political vision still granted the executive an inordinate amount of power, and he eventually built a reputation as a hardline dictator. Nevertheless, his administration brought a sustained period of relative stability to a nation that desperately needed it.

Santa Cruz is perhaps best known for his attempt to reunite Upper and Lower Peru in the PERU-BOLIVIA

CONFEDERATION. He claimed that through his mother's Amerindian lineage, he was a direct descendant of the last Inca ruler Túpac Amaru. He dreamed of re-creating the once-great empire under a powerful confederation. Santa Cruz seized on an opportunity provided when Peruvian leaders descended into civil war in 1834. He sent an invading force in 1835 and occupied most of Peru less than a year later. He proclaimed the confederation in October 1836 and implemented similar economic and social policies to those he had introduced in Bolivia. The confederation lasted less than three years, as leaders in neighboring Argentina and Chile considered the unified Peru-Bolivia region to be a threat to the security of their new nations. War with Chile brought an end to Santa Cruz's experiment in 1839.

With the demise of the Péru-Bolivian Confederation came the end of Santa Cruz's dictatorship. The deposed leader fled into exile in Ecuador, and Bolivia was plagued for the next four decades with violence and corruption under a series of caudillo leaders. A period of instability began immediately as two generals who had spearheaded the overthrow of Santa Cruz, José Ballivián (b. 1805–d. 1852) and José Miguel de Velasco (b. 1795–d. 1859), competed for power. When Velasco was elected president, Ballivián led a series of revolts against the government. Peruvian president Agustín Gamarra capitalized on the instability within Bolivia's government and invaded the country, bringing down the Velasco government and seizing the city of La Paz. Ballivián managed to unite the beleaguered Bolivian nation and defeat Gamarra. Ballivián held the presidency for six years, but the short period of relative stability ended abruptly with his overthrow in 1847.

Beginning in 1848, the presidency of Manuel Isidoro Belzú (b. 1808–d. 1865) marked a shift in Bolivian leadership away from the cultured and educated creole elite. Belzú was a *cholo* (person of mixed race) from the lower classes and gained favor among the nation's large and impoverished Amerindian and mestizo population. Belzú oversaw a return to Santa Cruz's protectionist economic policies and the writing of a new constitution in 1851. He survived several attempted overthrows and at least one assassination attempt. He left office in 1855 after a rigged election brought his son-in-law, Jorge Córdova (1855–57), to power. After only two years in office, Córdova was overthrown by José María Linares (1857–61). Linares's dictatorial rule provoked a growing opposition movement, and in 1861, his minister of war, General José María de Achá (1861–64), overthrew him and seized the presidency. Achá was overthrown in 1864 by MARIANO MELGAREJO.

### TERRITORIAL DISPUTES

Melgarejo's rise to power marked the beginning of an era of crisis for Bolivia, characterized by internal economic instability and a series of territorial disputes with neighboring countries. Melgarejo was a military man of meager beginnings. Born illegitimately and of *cholo* heritage,

he was considered by many of the country's elite to be boorish and vulgar. The caudillo reinforced that image through behavior that was often cruel and impulsive. Melgarejo's foreign policy set the stage for future conflicts with neighboring Chile and Brazil.

The 1866 Treaty of Mejillones redefined Bolivia's coastal border, ceding a large tract to Chile. The agreement also ambiguously set up a system of resource sharing in the nitrate-rich region of the Atacama Desert. One year later, the Bolivian dictator signed the Treaty of Ayacucho with Brazil, which ceded a large portion of the Amazonian region to the neighboring nation. For Bolivia, Melgarejo secured official title to the rubber-producing ACRE PROVINCE, but the region remained far from government control, and few Bolivians settled there. The caudillo profited personally through these land swaps, while territorial disputes in both regions continued.

Melgarejo's poor foreign policy decisions were matched by his misguided economic policies. In an effort to augment the national treasury, the dictator imposed a policy of land privatization, charging high rents and fees to indigenous farmers for land they had owned and worked communally for generations. Melgarejo's misrule sparked a series of revolts, and the dictator was finally deposed in 1871 after several bloody confrontations between indigenous communities and the military.

The 1870s brought some relief to the beleaguered nation. Under the dictatorship of Agustín Morales (1871–72) the burdensome land policies of Melgarejo were reversed. Morales's successor, Adolfo Ballivián (1873–74), stabilized the national treasury by renegotiating the exorbitant national debt. Despite those small successes, domestic political infighting continued, as did boundary disputes with Chile and Brazil. The Chilean crisis came to a head under President Hilarión Daza (1876–79). In 1878, the caudillo reneged on an earlier agreement with Chile and raised taxes on Chilean nitrate processing in the Antofagasta region. The Chilean army moved in to support the local nitrate company, prompting Bolivia to declare war. A Peruvian-Bolivian alliance had been established in 1873, and Peru joined forces with its neighbor against Chile in the WAR OF THE PACIFIC. During the four-year conflict, the Chilean army easily dominated the defenses of its weaker neighbors.

Bolivia's contribution to the war effort was minor and ineffective. President Daza left the burden of fighting most of the battles to his Peruvian allies. The incompetent dictator was overthrown in December 1879, but his successors were equally incapable of warding off the formidable Chilean army. Bolivia finally ceded the Antofagasta Province to Chile in the Treaty of Valparaíso on April 5, 1884. Bolivia's defeat in the War of the Pacific cost the nation a large tract of land with valuable natural resources and its only access to the sea.

The War of the Pacific also divided Bolivia's ruling elite, who disagreed on the best course of action and

looked for someone to blame for the defeat. As a result, the Liberal Party emerged in 1883, made up of military and political leaders determined to continue the war. The Conservative Party also formed, led by mining and other business interests who saw the war as destructive to the region's ECONOMY. Many conservative leaders also had close connections to Chilean investors, and they advocated peace between the two nations. The political platforms promoted by the Liberal and Conservative Parties fit the mold of other similarly named movements in 19th-century Latin America, but in practice, neither party remained loyal to its proclaimed ideology. The early years of Bolivia's modern party system were more of a power grab than an ideological contest.

A conservative oligarchy rose to power out of this political struggle in 1884, and the Conservative Party remained in power until a civil war, known as the Federal Revolution, overthrew them in 1899. The new liberal government faced an immediate challenge in the still-unresolved boundary dispute in the Amazonian Acre Province along the Brazilian border. The beginning of the rubber boom in the 1880s brought attention to the region as a rich source of rubber trees. Brazilian migrants in the region tried to pull away from Bolivia and looked to the Brazilian government for annexation. The Bolivian government sent several military expeditions and even tried inviting U.S. investors to control and stabilize the region through the creation of the BOLIVIAN SYNDICATE, an experiment that failed. A brief revolt in 1902 resulted in Bolivia's ceding the province to Brazil. Once more Bolivia lost a large tract of land rich in natural resources to its neighbor.

Despite the loss of the Acre Province, the end of the 19th century ushered in an era of relative political stability. Bolivia also experienced an economic transformation as tin mining came to dominate the nation's economy in the early decades of the 20th century.

See also BOLÍVAR, SIMÓN (Vol. II); BOLIVIA (Vols. I, IV); CHARCAS (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II); PERU, VICEROYALTY OF (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); SAN MARTÍN, JOSÉ DE (Vol. II); TÚPAC AMARU II (Vol. II); UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**Bolivian Constitution of 1826** See BOLIVARIAN CONSTITUTION.

**Bolivian Syndicate** The Bolivian Syndicate was a group of investors from the United States who became involved in the rubber industry in BOLIVIA'S ACRE PROVINCE in 1901. Its formation was perceived by neighboring BRAZIL as an act of U.S. imperialism and pushed the Brazilian government into backing a local rebellion in the region.

The Acre Province had fallen under territory claimed by the Spanish during the colonial period, but after independence, Bolivia and Brazil vied for control over the region, as well as many other border areas. In 1867, Bolivian president MARIANO MELGAREJO signed the Treaty of Ayacucho, which surrendered a large portion of Bolivia's claim to the Amazon region to Brazil and in exchange granted Bolivia official title to the Acre region. Nevertheless, disputes continued between the two countries over the precise location of the border. As numerous Brazilian migrants poured into the Acre to work in the lucrative rubber industry, the Bolivian government grew increasingly concerned that it would be unable to maintain its authority in the remote region.

In 1899, the Bolivian government established a customs house on the Acre River, inciting a revolt by Brazilians living in the region. Local Brazilian officials declared the Independent Republic of Acre and looked to the national government of Brazil for annexation. Bolivia reacted to the insurgency first by dispatching MILITARY units to bring the rebels under control. When armed force failed, Bolivian president José Manuel Pando (1899–1904) devised a colonization scheme with a group of U.S. investors. Through the Aramayo Contract, Pando authorized the formation of the Bolivian Syndicate on December 20, 1901, and granted the U.S.-based group a 30-year lease of the Acre Province. Under the contract, the syndicate became responsible for maintaining order, collecting taxes, building infrastructure, and other public services. Eventually, the U.S.-controlled syndicate would be permitted to purchase the Acre Province.

The creation of the Bolivian Syndicate was an attempt by the Bolivian government to bring the recalcitrant Brazilians in the Acre Province under control by introducing a non-Brazilian governing authority into the remote region. The move, however, further incited Brazilian anger and motivated Brazil's national government to intervene for fear of U.S. imperialism. Brazil backed the Acre rebels, and by January 1903, they had succeeded in forcing all Bolivians out of the territory. The Acre Province officially became Brazilian territory in November 1903, under the Treaty of Petrópolis. The Bolivian Syndicate was abandoned before it had begun its activities in the Acre.

See also AMAZON (Vol. I); U.S. DIRECT INVESTMENT IN LATIN AMERICA (Vol. IV).

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**“Borinqueña, La”** “La Borinqueña” is the national anthem of PUERTO RICO, and the title refers to the Taino Indian name for the island, *Borinquen*. The music for the anthem was originally composed on the piano by Francisco Ramírez Ortíz in 1860, written as a song entitled “La Almojábana” for his lover. The song became a popular folk tune and gained popularity across the island. In 1867, the Catalan musician Félix Astol-Artés (b. 1813–d. 1901) met with Ramírez, who changed the song into a habanera dance tune with romantic lyrics entitled “La Bella Trigueña.”

In 1868, Puerto Rican poet Lola Rodríguez de Tió (b. 1843–d. 1924), inspired by the patriotism of the GRITO DE LARES revolt that same year, used the music of “La Bella Trigueña” to write her own song with new lyrics endorsing the Puerto Rican revolution against Spanish colonial control. As the new song grew in popularity among proindependence Puerto Ricans, the Spanish authorities investigated its origins. Ramírez supposedly credited the song to Astol-Artés when questioned about the authorship of the music, due to the legal protections Astol-Artés's Spanish citizenship would afford him.

Rodríguez's original lyrics were too subversive, so more neutral ones were penned in 1903 by Manuel Fernández Juncos (b. 1846–d. 1928), and the song began being taught in the Puerto Rican public school system. This censored version of “La Borinqueña” became the anthem of the Commonwealth of Puerto Rico in 1952, however the Rodríguez version has become the official anthem of the Puerto Rican independence/liberation movement and is still sung at proindependence rallies today.

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**Boyer, Jean-Pierre** (b. 1776–d. 1850) *president of Haiti* Jean-Pierre Boyer was born a free mulatto in Port-au-Prince. He was a career MILITARY officer, educated in France. Although he served in the French military under General Charles-Victor-Emmanuel Leclerc, the brother-in-law of Napoléon Bonaparte sent to restore SLAVERY and French control of Saint Domingue in December 1801, as well as in the Haitian rebel military under JEAN-JACQUES DESSALINES, HENRI CHRISTOPHE, and ALEXANDRE PÉTION, his loyalty remained with the mulatto elite. It is believed that he participated with Pétion and other mulattoes in the assassination of Dessalines in 1806.

After Dessalines's murder, Christophe and Pétion engaged in a power struggle that resulted in the division

of HAITI into northern (republic) and southern (kingdom) states. The standoff between the two leaders lasted for 12 years. As president of the southern Republic of Haiti, Pétion appointed Boyer secretary and commander of the presidential guard.

Boyer was elected president on March 30, 1818, the day after Pétion's death. When Christophe, king of Northern Haiti, committed suicide in 1820, Boyer took control of the north and reunited the country the following year. Boyer was concerned with the security and prosperity of Haiti. His first move as president was to secure the eastern side of Hispaniola, the newly independent Spanish SANTO DOMINGO. In February 1822, he claimed the entire island in the name of Haiti.

Boyer was also interested in ending the French threat to Haiti's sovereignty and in gaining formal, international recognition of Haiti as an independent nation. He believed that France's continued refusal to settle claims stemming from the 1791 revolution and recognize its former colony's independence was damaging. His administration sued for recognition from France, which resulted in the indemnity of 1825. This stipulated that if Haiti paid 150 million francs to France within five years, independence would be recognized. This "offer" was made with 14 warships in Port-au-Prince harbor, supported by 500 guns. Boyer signed, as it was made clear that to do otherwise would reopen hostilities. The agreement was revised in 1838, when two treaties with France were signed. The first recognized Haitian independence, and the second lessened the indemnity to 60 million francs. Nevertheless, the debt crippled Haiti's finances.

Haiti faced diminished productivity as a result of Pétion's economic policies. Boyer attempted to generate income by reinstating the basic plan of *FERMAGE*, which Toussaint Louverture (1801–03), Dessalines, and Christophe had enforced earlier. He also passed the CODE RURAL, which bound cultivators to their land and placed quotas on them. Towns were exempted, and the code was to be enforced by the Haitian army. However, Boyer's plan failed, because under Pétion, land plots had been divided and sold for small-scale farming, thus agricultural production could not easily be increased. Additionally, the Haitian army had deteriorated to the extent that it could not enforce the new law. Overall, the Code Rural had a profoundly negative effect on Haiti, as it further separated the rural black peasantry from the mulatto elite, who lived in the towns and cities.

Political opposition to Boyer mounted in the 1830s. He was criticized for his economic policies; his adherence to elite French culture; and his corruption, nepotism, and suppression of free expression. He was ultimately overthrown by rebel forces headed by CHARLES RIVIÈRE-HÉRARD in 1843. Boyer received word that most of his army had joined the revolt and fled with his family to Jamaica. Boyer died in Paris, France, in 1850.

See also HAITI (Vol. IV); HISPANIOLA (Vol. II); SANTO DOMINGO (Vol. II); SLAVERY (Vols. I, II).

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**Brazil** Brazil is located in eastern South America. It is the largest Latin American country, encompassing more than 3 million square miles (7.7 million km<sup>2</sup>). Brazil shares a border with every South American country except ECUADOR and CHILE and has a 4,600-mile (7,403-km) coast along the Atlantic Ocean. Because it covers such a large area, Brazil's climate ranges from tropical to temperate, and its varied topography includes the dense jungles of the Amazon, the plateaus of the central regions, and the sandy beaches of the coast.

Brazil was originally home to a number of scattered indigenous tribes. Estimates placed the pre-Columbian population at approximately 7 million. The largest group was the Tupí-Guaraní, who inhabited the coast, while other groups such as the Gê, the Carib, and the Arawak lived in the interior. In 1500, Portuguese explorer Pedro Álvares Cabral became the first European to lead an expedition to Brazil. The Portuguese were slow to settle the country, but by mid-century, sugarcane had been introduced in the tropical coastal regions. Unable to secure a reliable LABOR force from among the country's indigenous inhabitants, the Portuguese began importing African slaves to work on SUGAR plantations in the 1570s. As a result, colonial Brazil developed as a plantation ECONOMY strongly tied to African SLAVERY. By the beginning of the 19th century, Brazilian society was a rich mixture of Portuguese, mixed-blood *mamelucos* and mulattoes, free blacks, and slaves.

### BRAZILIAN INDEPENDENCE

Brazil's movement toward independence was considerably less violent and abrupt than that of its Spanish neighbors. Signs of discontent with colonial rule had manifested in the late 18th century. An insurrection led by a dentist, or *tiradentes*, named Joaquim José da Silva Xavier, developed in 1788–89 in the GOLD MINING region of Minas Gerais. Known as the Tiradentes Conspiracy, the revolt arose over complaints about taxes and debt among the mining oligarchy and some merchants. The Portuguese Crown quickly put down the rebellion, but it was a sign that colonists were starting to question the status quo. Other small attempted revolutions surfaced in the following years, and many of the planners were inspired by the ideals promoted in the French, Haitian, and American Revolutions. HAITI had achieved independence from the French, and slavery had been abolished on the island in the 1790s after a large slave and free black rebellion.

The events in Haiti struck fear into the hearts of Brazil's planter class, and colonial officials passed policies to avoid a similar insurrection in the Portuguese colony.

Formal independence movements emerged throughout most of Latin America initially as a reaction to Napoléon Bonaparte's invasion of the Iberian Peninsula in 1807–08, but Brazil followed a slightly different path. As Napoléon began pressuring the Portuguese and his troops approached Lisbon, the royal court fled the city, relocating to Brazil. Crown advisers had debated transferring the court to the Americas for some time, and their decision to do so reflected the growing importance of Brazil to the Portuguese Empire. The royal family, along with more than 10,000 bureaucrats and other officials, set up a new imperial government in Bahia in 1807. Prince Regent John ruled in place of his mentally ill mother until her death in 1816, at which point he became King John VI. John ruled the entire Portuguese Empire from RIO DE JANEIRO for more than a decade. Even after the British defeated Napoléon in 1814, the Portuguese Court remained in Brazil. John tried to quell the mounting pressure on him to return to Lisbon by making Brazil a kingdom on equal status with Portugal in 1815. Instead of quieting dissent, however, the move only further upset the Portuguese elite.

While John VI maintained Portuguese rule in Rio de Janeiro, Brazil's neighbors engaged in armed insurrections starting as early as 1808 to secure independence from Spain. The challenge to colonial authority in Spanish America provoked a number of boundary disputes, and those conflicts were often complicated by Brazil's near-constant expansion southward and into the interior. Taking advantage of the political uncertainty in the neighboring United Provinces of the Río de la Plata (present-day ARGENTINA), John sent an occupation force into the BANDA ORIENTAL (present-day URUGUAY) in 1817. Brazilian forces occupied the region for four years until John annexed it as the Cisplatine Province.

Eventually John VI's desire to continue running the empire from Brazil was overridden by growing discontent in Portugal. A liberal revolt erupted in Lisbon in 1820, and the Portuguese king left his son Pedro in charge in Rio de Janeiro while he attended to the political unrest in Europe. With the title of prince regent, Pedro immediately faced enormous pressure to separate Brazil fully from Portugal. A nationalist movement had been rising, and native Brazilians had grown sensitive to John's tendency to favor Portuguese bureaucrats over the local elite. The Portuguese Côrtes attempted to revert Brazil to colonial status in 1821 and recalled Pedro to Lisbon. The decision would have effectively erased the privileges that had been granted to Brazil during more than a decade as the imperial seat of power. Brazilians took action, and Pedro's closest advisers urged him to declare independence. With the tacit approval of his father, Pedro issued his famous GRITO DE IPIRANGA on September 7, 1822. He then spent more

than a year driving out the remnants of the Portuguese MILITARY from the provinces.

## THE EMPIRE OF BRAZIL

Pedro's declaration marked the beginning of the independent EMPIRE OF BRAZIL under Emperor PEDRO I (1822–31). A constituent assembly convened immediately and began drafting a governing document to define Brazil as a constitutional monarchy. It quickly became evident that the majority of the assembly's delegates favored a system that would severely limit the powers of the emperor. Pedro reacted by dissolving the assembly and overseeing the drafting of the CONSTITUTION OF 1824, which called for a powerful monarch with extraordinary oversight into the other branches of government.

Pedro's authoritative approach to governing and continuing close ties to Portugal fueled a number of conflicts in the first decade after independence. Several uprisings in the provinces were put down forcefully, and Pedro became increasingly repressive. A revolt in Pernambuco spread into surrounding provinces, with the rebels attempting to break away from Brazil by forming the Confederation of the Equator in 1824. Pedro's army quickly quashed the rebellion and executed its leaders. The beleaguered emperor also faced a revolt in the Cisplatine Province, which escalated into the CISPLATINE WAR between Brazil and Argentina from 1825 to 1828. European mediators eventually brokered a peaceful settlement by creating the independent republic of Uruguay as a buffer state between Brazil and its neighbor. While the numerous provincial uprisings weakened Pedro's regime, his most serious problem surfaced with the death of his father, the Portuguese king in 1826. Many Brazilian elite had long been suspicious of Pedro's ties to Portugal and feared he would take the throne in Lisbon and place Brazil once again under Portuguese imperial control. Opposition to Pedro intensified until 1831, when the monarch abdicated the Brazilian throne and fled to Portugal.

## THE REGENCY

Pedro I's departure left a political void, since his son and the heir apparent, PEDRO II (1831–89), was only five years old. An elected three-man junta took power, and for the next nine years, Brazil was governed by the young Pedro II's surrogates during an era known as the REGENCY. Although the existence of the Regency to some extent alleviated fears that Pedro I would attempt to bring Brazil back under Portuguese control, many of the Brazilian elite remained suspicious of Pedro's intentions until his death in Lisbon in 1834. The politics of the Regency came to be defined by a series of power plays among regents and others in the inner-government circles in Rio de Janeiro and among provincial politicians. Many liberal leaders considered the Regency an opportunity to decentralize the Brazilian political system and strengthen local governments' autonomy. A



constitutional amendment passed in 1834 changed the Regency from a three-man junta to a one-man regent. It also strengthened the authority of provincial legislatures and dissolved the powerful advisory council of state. This measure was reflective of the ideological differences between **CENTRALISM** and **FEDERALISM** that characterized much of Latin America in the 19th century.

Provincial disputes also continued during the Regency period. The War of the Cabanos broke out in Pernambuco from 1832 to 1835. The conflict began as a slave and indigenous insurrection, and more than 30,000 were killed by the government forces that suppressed it. In Rio Grande do Sul and Santa Catarina in the south disputes over trade and economic policies led to the **WAR OF THE FARRAPOS**, from 1835 to 1845. Rebels attempted to form a separate republic, resisting government attempts at reconciliation for more than 10 years. The War of the Farrapos underscored many of the underlying divisions between centrists and regionalists. It also demonstrated that the push toward republicanism was strong in many areas of Brazil throughout the 19th century. By 1840, such turmoil had convinced many within the ruling elite that a strong, centralizing authority figure was needed to unite the struggling nation. At the age of 14, Pedro II took the throne in 1840, and the era known as the Second Empire began.

### SECOND EMPIRE

Pedro II's reign as emperor lasted until 1889. During that time, Brazil underwent enormous political, economic, and social changes. One of Pedro's first orders of business was to recentralize political authority. He supported a conservative legislature and reversed the reformist measure that had been put in place in 1834. The 1840s also became a time of reconciliation and unification. Pedro sent a strong military force to deal with the insurrections in the provinces. By 1845, the War of the Farrapos had ended, with the new emperor granting amnesty to the rebels. By 1850, Pedro had managed to bring a sense of order to Brazil's internal affairs, which allowed him to turn his attention to foreign affairs. He gave his support to **JUSTO JOSÉ DE URQUIZA** in overthrowing the Argentine dictator **JUAN MANUEL DE ROSAS**, with whom Brazil had long-standing disputes over **TRADE** and commerce. Brazil enjoyed good relations with Europe, and the nation eventually achieved relative peace with its South American neighbors. One of the most significant obstacles to harmony among South American nations was the struggle for control of trade and river transport in the border regions between Argentina, Uruguay, **PARAGUAY**, and Brazil. A delicate balance had been achieved among those nations, and Pedro II developed a close alliance with Uruguay's **COLORADO PARTY**. That balance was disrupted when Paraguayan dictator **FRANCISCO SOLANO LÓPEZ** attacked Brazil and Argentina simultaneously, in an attempt to gain a foothold in neighboring Uruguay. An alliance quickly emerged between Brazil, Uruguay, and

Argentina, and between 1864 and 1870, the three nations fought **PARAGUAY** in the **WAR OF THE TRIPLE ALLIANCE**. In the early months of the war, the Paraguayan military captured vital strongholds in Brazilian territory, but by 1866, the Triple Alliance had driven Solano López's forces back and invaded Paraguay. Brazil and its allies eventually won a major victory and forced Paraguay to cede part of its territory. That victory also secured Brazil's position as a major South American power after 1870.

### ABOLITION OF SLAVERY

During Pedro II's rule the issue of slavery in Brazil attracted the attention of foreign powers and the national elite. The country's economy had been reliant on cheap slave labor on sugar plantations and in other sectors from the colonial period. Abolitionist pressure had been building in the first half of the 19th century, coming primarily from the British, who had ceased the Atlantic slave trade in 1807. But, Brazilians were hesitant to embrace the cause, particularly after the ending of slavery in Haiti had effectively destroyed the island's traditionally strong sugar economy. Additionally, the decline in Haitian sugar production had created new demand, which Brazilian planters were eager to fill. The labor-intensive cultivation process required large numbers of manual workers, and plantation owners found themselves ever more reliant on slave labor in the early decades of the 19th century. The Brazilian planter class was economically and politically influential, and to help them meet their labor needs, the Brazilian government generally ignored the pressure from the British. Despite formal agreements to phase out the importation of slaves, an illegal slave trade from Africa to Brazil lasted until 1850.

In the latter half of the 19th century, the sugar industry in the northeastern states of Bahia and Pernambuco declined, while **COFFEE** production increased in the southern state of **SÃO PAULO**. Sugar planters had been reluctant to pursue new labor-saving devices as long as a ready supply of slaves was available. On the other hand, coffee planters were more open to production techniques that would eliminate the need for large amounts of manual labor. Many coffee *fazendeiros* were also influenced by free-market liberal ideals and increasingly turned to wage laborers as demand for coffee rose (see *FAZENDA/FAZENDEIRO*). European immigration brought new workers to Brazil, many of whom found work on the plantations of São Paulo.

The economic changes occurring after 1850 reduced the demand for slave labor and caused many intellectuals and politicians to call into question the viability of the system. By the 1860s, a strong and vocal abolitionist movement had formed, and many of its members made economic as well as moral arguments calling for the end of slavery. Politicians in the **LIBERAL PARTY** championed the abolitionist cause in the national legislature and attempted to introduce a series of bills that would have emancipated Brazil's slaves. Nevertheless, it was a conservative congress that passed the first major antislavery law

in 1871. The LAW OF THE FREE WOMB stipulated that all children born to slave mothers after the date the law went into effect would be born free. The law marked a major victory for the abolitionist cause, though it was challenged by the still-influential planter class of the northeast. The Law of the Free Womb was designed to bring about gradual emancipation to ease the burden of slave owners, while placating abolitionists. The antislavery movement was satisfied for a time, but by the 1880s, calls for additional emancipation measures had been renewed. Legislator and writer JOAQUIM NABUCO became one of the most visible proponents of abolition in the 1880s. He and others spoke out against the Law of the Free Womb as an ineffective measure that would bring about emancipation too gradually. In 1880, Nabuco founded the BRAZILIAN ANTI-SLAVERY SOCIETY, which became one of the nation's leading abolitionist societies. As individual states began passing local emancipation laws, pressure mounted for a national measure to end the forced labor system. In 1888, the Brazilian congress finally passed a nationwide measure calling for immediate abolition, making Brazil the last nation in the Americas to end slavery (see SLAVERY, ABOLITION IN BRAZIL OF).

### THE BRAZILIAN REPUBLIC

Pressures to abolish slavery coincided with a growing republican movement in the latter decades of the 19th century. Various forms of liberal DEMOCRACY had been spreading throughout Europe, and many Brazilian intellectuals came to believe that their system of constitutional monarchy was outdated and inefficient. Calls for political change often dovetailed with the larger economic forces at work in the country. As São Paulo became the new center of economic power, the region's political influence grew as well. In the 1870s, progressive political leaders formed the Republican Party in the coffee-growing region and made the elimination of the monarchical system a central part of their platform. The party gained support among coffee planters and the progressive urban middle sectors, including industrialists, merchants, and intellectuals. Progressive Brazilians were swayed particularly by the positivist theories of Auguste Comte, which suggested new ways of viewing knowledge and power. POSITIVISM found a particularly receptive environment among military leaders, who embraced the notions of "order and progress" as a prescription for the nation's future. They argued that traditional institutions—such as monarchy and slavery—would not bring progress. One of Brazil's leading positivists was BENJAMIN CONSTANT, who taught mathematics at the national military academy and incorporated specific versions of the philosophy into his curriculum.

As military positivism strengthened, influential officers began to challenge some of the policies being passed by Pedro II. Constant joined forces with MANUEL DEODORO DA FONSECA to oppose several measures passed by Pedro to curb the influence of the military. In 1887,

the two officers formed the Clube Militar, which served as a forum for members of the military to dispute government policies. Positivists in the Brazilian military found easy allies in the Republican Party, as both increasingly came to see the monarchical system as a hindrance to national development. By 1889, anti-imperial pressures had mounted, and on November 15 Deodoro led a coup against Pedro II. The emperor was forced to abdicate, and the military declared the beginning of the Republic of Brazil.

The period from 1889 to 1930 is known as the First Republic, or the OLD REPUBLIC. During that time, the Brazilian political system made the transition from a constitutional monarchy to a constitutional republic and witnessed the onset of democratization, imperfect and problematic as it was. Deodoro assumed the role of provisional president and convened a special commission to begin drafting a new constitution. Those efforts resulted in the CONSTITUTION OF 1891, which was modeled on the U.S. Constitution. It reflected the influence of positivists and republicans who had led the effort to dismantle the empire. But, despite the document's democratic rhetoric, participation in the political system remained limited, and government leaders tended to rule with both authoritarianism and impunity throughout the period of the Old Republic. The strong-armed approach to governing began as a reaction to the threat of monarchist rebellions in the early years; for example, in 1897, government forces violently destroyed the religious community of CANUDOS, fearing that the followers of Antônio Conselheiro were plotting a monarchist revolution. In the War of Canudos, four military expeditions laid siege to the city, and most of the community's inhabitants were eventually killed or captured.

The Brazilian government also faced serious economic challenges after the formation of the Old Republic. Deodoro's finance minister attempted to promote economic growth by expanding the monetary supply and the network of available credit in the 1890s in a faulty fiscal plan known as the ENCILHAMENTO. The scheme resulted in inflation and speculation and created a serious economic crisis in the 1890s. Economic instability provoked a major rebellion in Rio Grande do Sul in 1893, and President Floriano Vieira Peixoto—who had assumed the presidency after Deodoro da Fonseca was forced to resign in 1891—struggled to reestablish national authority. The president eventually turned to the elite coffee planter class of São Paulo, which provided economic and militia assistance to bring rebellious areas of the country back under control. In exchange for their support, the president offered the *paulista* elite a greater voice in national politics. In 1893, former São Paulo governor PRUDENTE DE MORAIS (1894–98) was elected Brazil's first civilian president. Throughout the rest of the period of the Old Republic, the *paulista* elite dominated Brazilian politics, and political leaders from São Paulo and Minas Gerais alternated the presidency until 1930. The political

alliance between the two regions was known as “*café com leite*.”

By the turn of the century, Brazil was undergoing rapid INDUSTRIALIZATION and urban growth. Government leaders actively recruited European immigrants to fill the workforce, and an influx of new immigrants arrived to work in coffee cultivation in the south and as urban laborers in cities such as Rio de Janeiro and São Paulo. TRANSPORTATION and communications infrastructure expanded throughout the country, but public services and other support networks in the cities failed to keep up with rapid urbanization. Disease spread quickly in overcrowded urban areas, attracting the attention of medical experts who looked for scientific solutions to the growing problems. São Paulo suffered an outbreak of typhoid in the 1890s, and the bubonic plague spread throughout the country in 1899. In the coming years, public health officials began a program of mandatory vaccinations and other strategies to bring communicable diseases under control. Poverty and crime also became rampant and urban slums, or *favelas*, appeared in the cities. The 1890 novel *THE SLUM (O Cortiço)* by Aluísio Azevedo portrayed the numerous social problems faced by Rio de Janeiro’s poor in the late 19th century.

The quick pace of industrialization, urbanization, and immigration changed the composition of urban populations in the late 19th and early 20th centuries. The economic forces at work helped to create an urban labor class whose influence and participation in national development increased over the coming decades. Brazil also witnessed a surge of nationalism around the turn of the century as intellectuals, government leaders, and the general populace began to reconsider what it meant to be Brazilian. Changing concepts of national identity and the enhancement of a working-class consciousness became important foundations for the emergence of a populist movement in the 20th century.

See also BRAZIL (Vols. I, II, IV); BRAZIL, INDEPENDENCE OF (Vol. II); JOHN VI (Vol. II).

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**Brazil, Empire of** The Empire of Brazil came into existence in 1822 when PEDRO I declared independence from Portugal and was crowned BRAZIL’s first emperor. Throughout most of the 19th century, Brazil existed as an empire under a monarchical form of government. Generally, Brazil’s imperial era is divided into the First Empire, under Pedro I from 1822 to 1831; the REGENCY, during the childhood of PEDRO II, from 1831 to 1840; and the Second Empire, under the adult leadership of Pedro II from 1840 to 1889.

Brazil eased into the independence era of the early 19th century when the Portuguese Court relocated to RÍO DE JANEIRO in 1807. John VI (1816–26) ruled from Brazil until 1821, when he returned to Lisbon to deal with a prodemocracy rebellion. John’s son Pedro took power as regent but, one year later, was persuaded by independence advocates among the Brazilian elite to declare independence. Pedro I established the Empire of Brazil and oversaw the drafting of a new constitution. Liberal attempts to limit the powers of the emperor were immediately thwarted, and Pedro I managed to push through the CONSTITUTION OF 1824, which safeguarded his royal authority. The new governing document established a highly centralized political system and granted the emperor significant oversight over legislative and judicial matters. Pedro I’s authoritative tendencies provoked dissent, and the First Empire was characterized by near-constant turmoil in the provinces. The early empire also witnessed a precipitous expansion of SLAVERY, as independence and the abolition of slavery in HAITI had resulted in an expansion of the Brazilian SUGAR industry. Pedro I was eventually forced to abdicate in favor of his five-year-old son, Pedro II, in 1831.

Between 1831 and 1840, a series of regents ruled in place of the child emperor. The Regency was characterized by continued volatility in the provinces, made worse by a series of power struggles among those in the Regency’s inner circle. Sporadic violence erupted in the provinces, with the unrest becoming particularly serious in the far northern and southern peripheries. The problems of the Regency were epitomized by the WAR OF THE FARRAPOS, when separatist forces in Rio Grande do Sul rebelled between 1835 and 1845. Unable to resolve the disputes in the countryside, leaders in the Regency convinced Pedro II to step into his duties as emperor in 1840 in the hopes of uniting the nation.

Pedro II’s reign from 1840 to 1889 is known as the Second Empire of Brazil. Liberal and Conservative political parties had emerged during the Regency, primarily in the provincial and national legislative bodies. Pedro managed to balance power carefully between the political parties, alternating favor from one party to the other. He filled his inner circle of advisers with members of both parties, and generally the two sides managed to find political accord. During the Second Empire, the focus of Brazil’s ECONOMY shifted from sugar production in the northeast to COFFEE production in the southern regions.

Pedro II and other leaders recognized the need for economic and social modernization. The transatlantic slave TRADE was ended in 1850, and in the second half of the 19th century, Brazil moved ever closer to the abolition of slavery (see SLAVERY, ABOLITION IN BRAZIL OF). The government also began actively recruiting immigrants from various regions of Europe to form agricultural colonies and provide labor in emerging urban markets.

The Second Empire of Brazil ended with the establishment of the OLD REPUBLIC in 1889. Pedro II was overthrown in a coup, and MANUEL DEODORO DA FONSECA became the first president of the Republic of Brazil.

See also JOHN VI (Vol. II).

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**Brazilian Anti-Slavery Society** The Brazilian Anti-Slavery Society was an abolitionist group founded in 1880 by JOAQUIM NABUCO and other leading opponents of SLAVERY. It was one of numerous groups that formed in the late decades of the 19th century to push for an end to slavery in BRAZIL. Nabuco formed the society after growing impatient with the slow pace of abolition that followed the 1871 LAW OF THE FREE WOMB. That law, which Nabuco helped to introduce, freed all children born to slave mothers after its date of enactment. Brazilian emperor PEDRO II and other lawmakers intended the legislation to be the basis for the gradual ending of slavery in Brazil. Nabuco and others, however, argued that the antiquated LABOR system could continue for decades and urged the government to quicken the pace of emancipation. As a member of the national legislature, Nabuco introduced legislation to do so. When this was defeated in 1880, he formed the powerful Brazilian Anti-Slavery Society. For the next eight years, the society engaged in an aggressive propaganda campaign. It published some of Nabuco's most important antislavery works, including *O Abolicionismo* (*Abolitionism*) in 1884. Eventually, the Brazilian government acceded to abolitionist demands by passing the Golden Law of 1888, which granted immediate freedom to all slaves in Brazil (see SLAVERY, ABOLITION IN BRAZIL OF).

See also SLAVERY (Vol. II).

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**British Honduras** See BELIZE.

**British West Indies** See CARIBBEAN, BRITISH.

**Buenos Aires** Buenos Aires is the capital city of ARGENTINA and the province surrounding the city. It is located on the nation's eastern coast at the mouth of the Río de la Plata. Buenos Aires became an important trading post for Argentina's river transport in the 19th century, but the city's dominance in Argentine TRADE led to a number of conflicts with the nation's interior provinces.

Buenos Aires was founded in 1536 by Spanish explorer Pedro de Mendoza. The city was abandoned shortly thereafter and was reestablished in 1580 as a MILITARY and supply outpost. The region's sparse population, lack of precious metals, and distance from the administrative center of the South American colonies meant that Buenos Aires attracted little attention from the Spanish Crown. Few settlers moved to the region, and the city grew slowly throughout most of the colonial period. Buenos Aires initially provided support services to the cattle industry that was emerging in the Argentine PAMPAS, but according to Crown regulations trade had to go through LIMA, PERU. The cumbersome economic policies of colonial mercantilism led to a thriving illegal trade network from the interior provinces through Buenos Aires to neighboring Portuguese settlements in BRAZIL.

Buenos Aires grew largely as a result of the illegal trade networks that passed through it. Spanish policies intended to restrict that trade were unenforceable and had little effect. In the 18th century, the reform-minded Bourbon monarchs in Spain opened the port of Buenos Aires to trade. Eventually, the Crown created the Viceroyalty of Río de la Plata, with Buenos Aires as the capital. Spanish presence in the city increased substantially, but *porteños* (the residents of Buenos Aires) had long ago developed a sense of autonomy and self-sufficiency. When British forces attempted to invade the city in 1806 and again in 1807, it was *porteños* rather than the Spanish military who defended it and successfully repelled the foreign army. That sense of autonomy led Buenos Aires elite to rebel against Spanish authority immediately after Napoléon Bonaparte's invasion of the Iberian Peninsula in 1808. By 1810, *porteño* leaders had declared independence and had established a provisional government to replace colonial officials in the Río de la Plata region.

Leaders in Buenos Aires faced their biggest challenges from the outer provinces of the former viceroyalty. The CONSTITUTION OF 1819 gave Buenos Aires extraordinary power over import and export regulation and the collection of customs duties. Conflict between *porteños* and the rural elite escalated, and the opposing sides eventually coalesced into two competing political parties. The *UNITARIOS* represented the liberal elite from Buenos Aires who advocated a centralized government with power based in the capital city. The *FEDERALES* rejected the centralist vision of *porteños* and argued that the city's trade policies were hurting the interests of the

interior. Buenos Aires became the setting of a number of conflicts and armed confrontations between the two sides. In 1819, a federalist-backed army invaded Buenos Aires, but the *unitarios* quickly gained control again and ruled throughout most of the 1820s.

Buenos Aires enjoyed a brief period of cultural development under the *unitario*-backed governments. BERNARDINO RIVADAVIA founded the UNIVERSITY OF BUENOS AIRES in 1821 as part of a larger effort to secularize the educational system. Throughout most of the 1820s, the university was well funded, and it quickly became a center of artistic and intellectual advancement. During the dictatorship of federalist CAUDILLO JUAN MANUEL DE ROSAS, Buenos Aires continued to be a cultural center. *Unitario* intellectuals resisted Rosas's autocratic rule by forming literary groups, many of which were based in the capital city. Notable future leaders such as DOMINGO F. SARMIENTO and BARTOLOMÉ MITRE joined other literary figures such as JUAN BAUTISTA ALBERDI and ESTEBAN ECHEVERRÍA in producing a number of propagandistic publications against the Rosas dictatorship (see LITERATURE). Many of Rosas's critics were forced to flee into exile as the caudillo censored the press and relied on his MAZORCA security detail to force compliance. Anti-Rosas propaganda writings describe the streets of Buenos Aires as beset with fear of the dictator.

Even though Rosas claimed support from the provincial *federale*, his policies increasingly privileged the economic interests of Buenos Aires. He imposed tariff policies intended to make the capital city the primary hub of all national trade. Rosas's trade policies provoked a backlash among foreign merchants, and in 1838, the French blockaded Buenos Aires in an attempt to force a change in tariff laws. The blockade created an economic crisis in the capital and also affected the interior provinces. Rosas reacted by attempting to control all trade along the Paraná River and in the Río de la Plata. Using MILITARY patrols, he enforced tariff and other trade policies in favor of the capital city. Opposition to Rosas's policies mounted, and an alliance formed between *unitarios* and the neighboring governments of URUGUAY and Brazil. Foreign pressure on Buenos Aires continued until the anti-Rosas alliance invaded and marched on the capital city.

Rosas was overthrown in 1852, and his departure renewed the underlying tensions between Buenos Aires and the Argentine interior. The national congress met to write a new constitution, but delegates from Buenos Aires boycotted the Constitutional Convention after disputes surfaced over the role the capital city would play. The CONSTITUTION OF 1853 diminished the commercial dominance Buenos Aires had held since the years immediately following independence and erased the autonomy the city had enjoyed. The document was ratified by all of the nation's provinces except Buenos Aires, whose leaders took steps to separate from the rest of the country. For six years, Buenos Aires Province existed

as an autonomous state, while the rest of the provinces formed the Argentine Confederation. Buenos Aires benefited from its location on the Río de la Plata and took in large revenues from foreign trade. The interior provinces under President JUSTO JOSÉ DE URQUIZA struggled to compete, and both sides resorted to periodic armed confrontations, blockades, and aggressive tariff policies throughout the 1850s. Mitre assumed control of the Buenos Aires Province in 1860 and began maneuvering for support in the interior. By 1861, new amendments to the Constitution of 1853 had been passed granting concessions to Buenos Aires. Leaders from the recalcitrant city finally ratified the constitution, and Buenos Aires was united once again with the interior provinces. Nevertheless, Buenos Aires retained a large degree of autonomy and power over national monetary and trade policies. The original constitution had designated Buenos Aires as the federal capital, but *porteño* leaders had rejected attempts to federalize the city. Although changes to the constitution made federalization difficult, the city was eventually federalized in 1880.

In the final decades of the 19th century, Argentina underwent a period of economic growth and experienced relative political stability. Under the presidency of Sarmiento in the 1870s, the Argentine government implemented policies intended to reform EDUCATION and to attract foreign investment in the national ECONOMY. Sarmiento and other leaders actively promoted industrial expansion in Buenos Aires and other major cities. Early industry focused on commercial AGRICULTURE, particularly meatpacking, and integrated the rural interior with the capital city. Meatpacking plants opened in Buenos Aires to prepare beef for sale and export. The advent of refrigerated transport facilitated an enormous growth of this industry. The first refrigerated shipment of beef left Buenos Aires in 1876. Refrigeration technology eventually gave way to freezing meat for transport. In 1882, the first plant specializing in processing frozen lamb, mutton, and beef opened in Buenos Aires. Modernization efforts in meat processing continued through the turn of the century, making beef and other meats some of the nation's top exports. The nation also experienced growth in other agricultural sectors such as wool and WHEAT production.

The expansion of Argentine agriculture and the corresponding need for processing industries created an enormous demand for laborers to fill the ranks in agriculture and in industry. Argentine leaders actively pursued policies to attract European immigrants to the nation, and those efforts were largely successful by the end of the century (see MIGRATION). Many immigrants settled in the interior, but others pursued agricultural opportunities in Buenos Aires Province. Recently arrived immigrants also made up a large part of the urban industrial workforce at the end of the century. The population of Buenos Aires grew precipitously, and the city faced a number of challenges as leaders tried to absorb new arrivals. Working-

class neighborhoods suffered from overcrowding and unsanitary living conditions. By the 1890s, middle-class reformers were spearheading public health campaigns in an attempt to reform immigrant tenements and resolve other dangerous conditions in the city.

The dramatic growth of Buenos Aires was facilitated by investments in TRANSPORTATION and communications networks that reinforced the city's long-standing role as the commercial and cultural hub of the nation. An expanding railway system connected the capital city to agricultural providers in the interior, and port renovations ensured that the city would continue to be the leading center for imports and exports. By the 1890s, Argentine leaders had determined to showcase the progress the nation had made toward modernization. Buenos Aires became an exhibit to demonstrate to the world Argentina's transformation into a sophisticated

and cosmopolitan culture. *Porteños* and foreign visitors alike began referring to the city as the "Paris of South America." By the turn of the century, Buenos Aires boasted modern buildings, theaters, restaurants, and public spaces modeled after the architectural styles of European cities.

See also BUENOS AIRES (Vols. I, II, IV).

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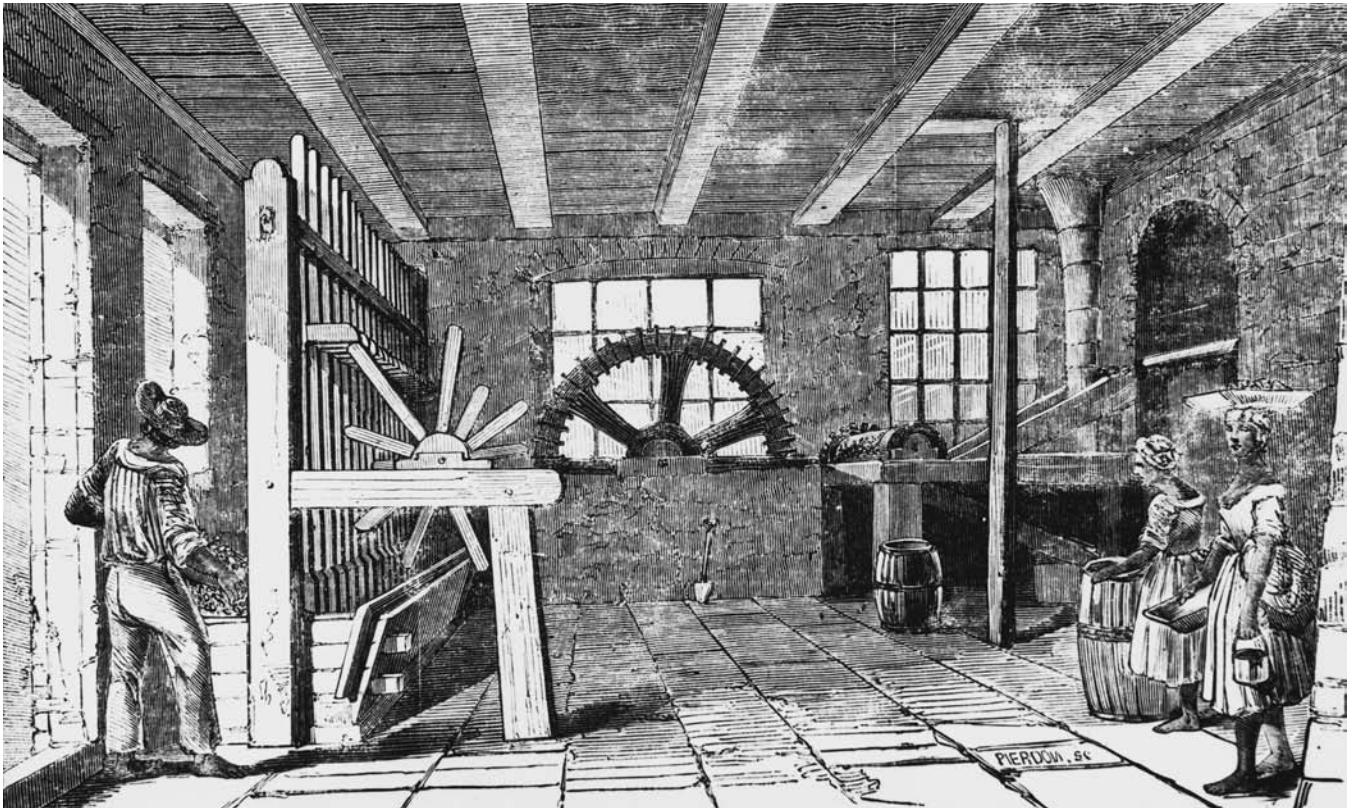
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# C

**cacao** Cacao refers to the beans used to make chocolate and the trees on which the beans grow. The beans themselves are commonly referred to as cocoa beans. The cacao tree is native to Latin America and grows

best in the tropical lowlands and equatorial climate of Mesoamerica and northern South America.

Cocoa beans have long been an important part of Latin American AGRICULTURE. They were cultivated



Cacao is native to Latin America, and the cacao tree is well suited to the tropical climate of Mesoamerica and the Caribbean. This 1855 drawing shows a cocoa mill in Grenada. (Hulton Archive/Getty Images)

by pre-Columbian civilizations and used to make a rich chocolate drink. The beans were also used as currency by some indigenous civilizations. In the complex Aztec tribute system, subordinate groups often used cocoa beans to make tribute payments. European conquistadores noted the widespread consumption of chocolate and the importance the beans held in the local economies. Cocoa continued to hold a privileged place throughout much of the colonial period, with the beans of the cacao tree being used as currency in many areas of the Spanish colonies.

Before long, cacao had traveled across the Atlantic, and a more sweetened version of the Mesoamerican chocolate drink became a favorite treat in Spain. Despite Spanish attempts to safeguard the secrets of cacao cultivation, rival European powers quickly picked up on the new crop. French and Italian merchants began marketing chocolate beverages as early as the 17th century, and the popularity of cocoa production grew rapidly throughout Europe.

By the beginning of the 19th century, cacao cultivation had spread to other European colonies in the Americas and in Africa. As the production of cacao, chocolate, and related products spread throughout Europe, the finished product evolved. European entrepreneurs began processing cocoa powder in the early 19th century by extracting cocoa butter from ground beans. A British company perfected the art of producing solid chocolate confections in the mid-19th century. A few decades later, Swiss candy makers added milk powder to the confection, inventing milk chocolate.

Worldwide consumption of chocolate increased substantially during the 19th century as industrial innovations affected the cocoa industry. The cost of cocoa and chocolate concoctions dropped, and as the market for cacao-based products expanded, cultivation of the plant came to dominate many Latin American economies. By the end of the 19th century, cacao made up a significant portion of the agricultural exports of such nations as ECUADOR, the DOMINICAN REPUBLIC, VENEZUELA, and HAITI.

See also CACAO (Vols. I, II); FOOD (Vol. I).

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**Cáceres, Andrés Avelino** (b. 1833–d. 1923) *military leader and president of Peru* Andrés Avelino Cáceres was a MILITARY general who led Peruvian forces against the Chilean army in the WAR OF THE PACIFIC. He served

as president of PERU during that conflict, as well as on two subsequent occasions. He helped to stabilize the country's chaotic political system after its defeat in the war against CHILE but was later accused of political corruption and ousted from office.

Cáceres was born on February 4, 1833, in Ayacucho. He pursued an early military career and supported the presidency of RAMÓN CASTILLA against internal insurrections. Cáceres also participated in defending the nation against foreign threats in minor wars against Spain and ECUADOR in the 1860s. In the 1870s, Cáceres won support from the newly formed CIVILISTA PARTY and began looking toward a political career.

Cáceres was forced into a position of political leadership with the outbreak of the War of the Pacific in 1879. He led the Peruvian military against the Chilean offensive and became de facto leader of the country when President NICOLÁS DE PIÉROLA fled the country in 1881. Despite suffering defeat in the war, Cáceres was celebrated as a national hero and won the presidency in 1886. In 1889, he tried to repair the nation's struggling ECONOMY by signing the Grace Contract, which restructured Peru's national debt under the privately held PERUVIAN CORPORATION. The corporation, made up of British investors, effectively won nearly unlimited control of Peru's national resources and infrastructure. The contract was highly controversial but did succeed in stabilizing the economy and provided funding to repair TRANSPORTATION lines that had been damaged by war.

Cáceres won a final term as president in 1894 in a questionable election. He was ousted one year later by Piérola. Cáceres continued to be involved in Peruvian politics as a diplomat in Europe. He died in Chile in 1923.

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**Calderón de la Barca, Fanny** (b. 1804–d. 1882) *Scottish writer and traveler in Mexico* Fanny Calderón de la Barca was a writer and wife of Ángel Calderón de la Barca, Spanish minister to MEXICO in the 1830s and 1840s. Her travel writings, *Life in Mexico during a Residence of Two Years in That Country*, were published in 1843. Her observations of Mexico are considered to be among the most valuable recorded in English in the mid-19th century (see LITERATURE).

Calderón de la Barca was born Frances Erskine Inglis on December 23, 1804, in Edinburgh, Scotland. She moved to the United States and was raised on the east coast. In 1838, she married Ángel Calderón de la Barca, and later that year, he was named the first Spanish



minister to the newly independent Mexico. The couple relocated to MEXICO CITY. Calderón de la Barca began chronicling her journey and experiences in the country through letters to her family and personal journal entries. She recorded her observations of a vast array of diverse cultures, ranging from those of the urban aristocrats and landed elite to those of the poor and peasant classes. Her writings provide valuable accounts of everyday life, such as the role of WOMEN, entertainment and recreation, and the aesthetics of urban and rural residences (see SPORTS AND RECREATION). She paid notable attention to the culture of the CATHOLIC CHURCH in Mexico and eventually converted to Catholicism.

William H. Prescott, historian and family friend, encouraged Calderón de la Barca to publish her writings, and a number of U.S. diplomats relied on her testimony as a guide to Mexico in the 1840s. After the death of her husband, Calderón de la Barca became a tutor to Infanta Isabella, youngest child of Spanish queen Isabella. She died in Madrid on February 3, 1882.

#### Further reading:

Fanny Calderón de la Barca. *Life in Mexico: The Letters of Fanny Calderón de la Barca* (Garden City, N.Y.: Doubleday, 1966).

**candomblé** Candomblé is a RELIGION that was introduced to BRAZIL by African slaves (see SLAVERY). Its ceremonies involve ritualistic MUSIC and dance, and the religion has incorporated some Catholic traditions.

Slaves newly arrived in Brazil continued to worship African spirits, despite slave owners and church leaders forbidding rituals other than those of the Catholic tradition. Slaves often feigned conversion to Catholicism while continuing to worship African deities in secret. The Catholic saints offered a parallel to the pantheon of African spirits, or *orixas*, that form the foundations of candomblé. Additionally, the Catholic belief in God as the creator and leader of the saints corresponds to the candomblé belief in Olodumare, the creator and all-powerful deity whose will is carried out by the many *orixas*. The *orixas* serve as messengers for Olodumare, acting as intermediaries between the spiritual and human worlds, and protect and guide individual practitioners of candomblé. These parallels made it relatively easy for Africans and Afro-Brazilians to disguise candomblé rituals as Catholic traditions. Over time, many candomblé *orixas* became associated with Catholic saints, and some Catholic rituals became part of the syncretic Afro-Brazilian religion.

Practitioners of candomblé were persecuted by leaders of the CATHOLIC CHURCH and government officials for centuries. Plantation owners worried that the continuation of African religious practices allowed slaves to maintain too many ties to their cultural heritage. Slave owners also feared that religious gatherings could be

used to plan rebellions. Indeed, at times they served just that purpose. Despite the efforts to suppress African traditions, candomblé worship continued, and the religion grew throughout the 19th century. Although the gradual elimination of the slave trade and the eventual abolition of slavery gave Afro-Brazilians greater freedom to practice the religion, the Brazilian government continued its attempts to stifle it until well into the 20th century (see SLAVERY, ABOLITION IN BRAZIL OF). It was only in the 1970s that legal restrictions on candomblé were lifted. The religion has since become enormously popular, drawing the attention of pilgrims and tourists alike.

See also RELIGION (Vols. I, II, IV).

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**Canudos** Canudos was a religious community in the northeastern Bahia Province of BRAZIL in the 1890s (see RELIGION). It became the setting of a major confrontation between the new republican government and the inhabitants of the secluded town.

Canudos was founded in 1893 by Antônio Conselheiro in the *sertão*, or backlands, of Bahia. Conselheiro was a messianic figure who opposed the general direction in which the nation was moving after the establishment of the OLD REPUBLIC in 1889. He worried that Brazilians were embracing progress and secularism too eagerly and began attracting a sizable following of rural folk from the interior who saw an opportunity to resist the push for modernization coming from the coastal urban areas. Conselheiro and his followers rejected the new government's efforts to establish a civil marriage registry and defied new republican decrees on taxation. Confrontations with government forces in 1893 compelled Conselheiro and his followers to retreat into the interior of Bahia. The group settled in the isolated community of Canudos and within a few years had attracted thousands more followers. Although population estimates are imprecise, it is likely that Canudos boasted more than 20,000 inhabitants at its height. They lived a simple existence, practicing a version of folk Catholicism and engaging in communal AGRICULTURE.

The new republican government in RIO DE JANEIRO considered Canudos a threat to national author-

ity. Government leaders were also suspicious that Conselheiro's objections to new republican institutions represented an effort to reestablish a monarchy. Tensions mounted after an altercation between residents of the isolated community and merchants of a neighboring town. Brazilian president PRUDENTE DE MORAIS determined to bring anti-republican opposition under control. A small contingent of government troops marched on Canudos in 1896 and were violently repelled. That initial confrontation marked the beginning of the War of Canudos. Over the next year, government troops led three more expeditions into the interior, only to be overpowered by the fiercely loyal residents of Canudos. The fourth and final expedition involved more than 8,000 soldiers, who laid siege to the city. For months, the defenders fought back the large government force; even as they suffered considerable casualties, they refused to surrender. Conselheiro died during the siege, and government troops finally captured the city in October 1897. While a small number of survivors were captured, the majority of inhabitants had been killed or had died of starvation and disease in the preceding months.

Euclides da Cunha (b. 1866–d. 1909), a journalist who accompanied the MILITARY expedition and witnessed the destruction of Canudos, wrote *Os Sertões (Rebellion in the Backlands)* in 1902 to tell the story of the violent war (see LITERATURE). While *Os Sertões* is somewhat sympathetic to the inhabitants of Canudos, da Cunha illustrates the underlying influence of POSITIVISM among urban intellectuals by privileging the pursuit of progress over the traditions of the past.

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**Caracas** Caracas is the capital city of VENEZUELA. It is located in a valley within the Andes mountain system, approximately 10 miles (16 km) from the Caribbean coast. Caracas is the largest city in Venezuela and is one of the country's main economic and political centers. The city was founded in 1567 by Spanish explorer Diego de Losada. It played an important role in Venezuela's national development throughout the 19th century.

There was considerably less Spanish presence in Venezuela than in PERU and MEXICO throughout most of the colonial period. Caracas emerged early as a main administrative center, but a strong sense of regional

autonomy persisted. That regional identity defined the developing sense of Venezuelan nationalism during and after the independence era. After Napoléon's invasion of Spain in 1808, some creole elite in Caracas used the opportunity to push for greater autonomy, while others began to demand independence. By 1810, *caraqueños*, or citizens of Caracas, had overthrown the captain general, formed a resistance junta, and declared self-rule in the name of the Spanish monarch.

Independence leaders Simón Bolívar and Francisco de Miranda supported the junta's decision to declare independence and to establish a Venezuelan republic in 1811. The new government was based in Caracas and produced a constitution articulating a new political structure. One year later, a major earthquake struck the city, killing thousands. The natural disaster marked the end of the First Republic, with church leaders claiming that divine powers had intervened to stop the insurgency. Within a few months, royalist forces had overtaken the independence movement, and Caracas fell back under Spanish control. Bolívar joined the resistance movement in neighboring COLOMBIA and gathered reinforcements to attack Spanish strongholds in Venezuela once again. The independence leader took Caracas in 1813 and established a second Venezuelan republic based in the capital city, but that attempt at self-government also failed by 1814. Bolívar fled to the Caribbean, and Caracas fell back under royalist control.

It was not until 1821 that the insurgent army finally secured independence by uniting the region encompassing present-day Colombia, PANAMA, ECUADOR, and Venezuela under the republic of GRAN COLOMBIA. Caracas became the capital of the Venezuelan province, and local leaders including JOSÉ ANTONIO PÁEZ continued to push for local autonomy. Páez and his *caraqueño* supporters eventually withdrew Venezuela from Gran Colombia and formed a separate and sovereign nation in 1830. Caracas remained the national capital, but the city was beset by instability throughout much of the 19th century.

Between 1830 and the end of the century, Venezuela was ruled by a series of CAUDILLOS, and the country suffered a number of revolutions, civil wars, and violent overthrows of government. Much of the conflict arose from the power struggle between conservatives and liberals that dominated 19th-century Latin America. Venezuela was also particularly vulnerable to disputes over federalist, or provincial, autonomy versus centralized control. Leaders in Caracas often attempted to consolidate national power in the capital city, only to be met by resistance among local strongmen in the country's provinces. It was not until the 1870s that liberal leader and dictator ANTONIO GUZMÁN BLANCO managed to bring some order and stability to the country.

Guzmán Blanco implemented a number of reforms that transformed the city of Caracas into a modern cosmopolitan area. He had spent time in Europe and wanted to model the city after Paris and others on the

Continent. He initiated public works projects to improve the infrastructure, devoted money to develop water and sewage systems, and expanded the street system. Within a decade, opulent government buildings adorned Caracas, and the elite could enjoy the finest in European cuisine, theater, and other entertainments. The Caracas Municipal Theater was built in 1880, and a new capitol building was completed around the same time. Both structures are examples of the dictator's attempts to emulate European ARCHITECTURE and culture. Guzmán Blanco's administration also built railroads to connect Caracas with the rest of the country and to facilitate shipping from the capital city to nearby ports. Additionally, Guzmán Blanco commissioned the construction of various national monuments in Caracas to reinforce a sense of patriotism and national identity. He poured money into Plaza Bolívar, the city's central square, and unveiled a monument to the independence leader in 1874. The theme of patriotism is reinforced in the works of one of Venezuela's most famous painters Martín Tovar y Tovar (b. 1827–d. 1902) (see ART). His masterpieces *Battle of Carabobo*, *Battle of Boyacá*, and *Battle of Junín* depict major victories in Venezuela's independence struggle and have adorned the walls of government buildings in Caracas since the 1880s and 1890s. Infrastructure development, cultural growth, and industrial expansion saw the city's population expand in the late decades of the 19th century.

Despite the apparent progress made under the administration of Guzmán Blanco, political strife continued to plague Venezuela for the rest of the 19th century, and many of the underlying administrative disputes played out in Caracas. In 1892, a revolt known as the Legalist Revolution broke out, and the well-established press in the capital city played an important role in challenging national power structures. It was not until the early decades of the 20th century that Venezuelan politics stabilized under the leadership of CIPRIANO CASTRO. Power became more centralized in Caracas, and after the discovery of oil in 1914, the city began another period of modernization and growth.

See also BOLÍVAR, SIMÓN (Vol. II); CARACAS (Vols. II, IV).

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**Caribbean, British (British West Indies)** The British Caribbean refers to the islands of the Caribbean that were historically part of the British Empire. While Spanish settlers laid claim to the largest and most desired islands of the Greater Antilles, other European powers—such as the British, the Dutch, and the French—shared and later competed for control of the Lesser Antilles and other southern islands. By the 19th century, a large

grouping of Caribbean colonies known as the British West Indies had taken shape. Those islands included the British Virgin Islands, Anguilla, Saint Kitts, Nevis, Antigua and Barbuda, Montserrat, Barbados, Redonda, Dominica, Saint Lucia, Saint Vincent, the Grenadines, Barbados, and Grenada. Trinidad and Tobago, the Cayman Islands, Jamaica, the Bahamas, the Bay Islands, and the Turks and Caicos Islands are also considered part of the British Caribbean. The mainland colonies of BELIZE and GUYANA came under the administration of the British West Indies in the 19th century.

The islands of the Lesser Antilles were originally inhabited by small groups of Arawak, Carib, and Ciboney Indians. Spanish explorers were the first Europeans to have contact with these groups, and by the early 16th century, the Spanish had established an administrative center in Hispaniola. From there, expeditions set out to capture slaves from other Caribbean islands to supply the workforce on Hispaniola. Since few valuable resources were immediately available on the small islands of the eastern and southern Caribbean, the Spanish did not establish permanent settlements there. As the Spanish consolidated power over the Greater Antilles and then expanded into the mainland, privateers from northern European countries flocked to the Caribbean to disrupt Spanish shipping. English and French pirates attacked Spanish fleets throughout the 16th century. One of the leading personalities was Sir Francis Drake, who led at least seven expeditions, some on orders directly from the British Crown.

In the early decades of the 17th century, northern European powers looked to establish their own colonies in the Americas to compete with the Spanish. The British, French, and Dutch became the leaders in these enterprises, and the three powers formed an alliance of sorts as they worked to challenge Spanish dominance in the Caribbean (see CARIBBEAN, DUTCH; CARIBBEAN, FRENCH). The first permanent British settlement was established by Thomas Warner in 1624 on the island of St. Kitts. Settlers in this early colony planted TOBACCO, and their success inspired additional settlements. The British extended settlements to Barbados, Nevis, and Montserrat. The islands attracted thousands of settlers who experimented with a variety of crops. SUGAR eventually emerged as the most profitable agricultural product and large sugar plantations created a need for slave LABOR. By the end of the 17th century, the British colonies in the Caribbean were importing large numbers of African slaves.

The early colonies in the Lesser Antilles also provided a base for future expeditions to challenge Spanish control over the larger islands of the Greater Antilles to the north. In 1655, a large British expedition attacked Spanish strongholds in Hispaniola with the intention of taking the entire Caribbean from Spanish control. The mission failed to oust the Spanish from its largest settlements in SANTO DOMINGO and CUBA, but the British did

conquer Jamaica, which had been home to small and poorly defended Spanish settlements. Under British control, Jamaica soon joined the settlements in the Lesser Antilles as a major producer of sugar throughout the 18th century. Settlements in other British Caribbean colonies attempted to imitate the successful model of plantation AGRICULTURE established in Barbados and Jamaica, with varying success. The Bahamas were settled by a Puritan group in the 1640s, but the climate and terrain were ill suited for the cultivation of plantation crops. Instead, the islands became an outpost for British privateers until well into the 18th century.

The last half of the 18th century witnessed a series of wars between the French and the British, and the colonial possessions of the two European powers became popular targets. Control of several Caribbean islands changed hands a number of times, but since both sides wanted to profit from the lucrative sugar industry on those islands, the conquering powers generally did not destroy the existing economic infrastructure. Nevertheless, decades of near-constant warfare brought about a series of power shifts that had a lasting impact on the British Caribbean into the 19th century. French and Spanish forces took advantage of the perceived British weakness with the outbreak of the American Revolution in 1776, and many of the British Caribbean possessions fell under French control. The British were able to retaliate after the onset of the French Revolution in 1789 and the uprising in the large French colony of Saint Domingue (present-day HAITI). That insurrection eventually escalated into a massive slave rebellion and coalesced in the movement for Haitian independence. British forces attacked and occupied many of the French possessions in the Caribbean, with the British retaining control of some of those areas into the 19th century.

The early decades of the 19th century in the British Caribbean were defined largely by abolitionist campaigns that originated on the mainland. Quakers and other religious and reformist groups began the earliest crusades against SLAVERY in the 1780s. They put pressure on the British Parliament by organizing various abolitionist societies, publishing pamphlets, and organizing public gatherings defending the humanity of African slaves and condemning the institution of slavery on ethical grounds. Many of those abolitionists argued that the institution of slavery was cruel and immoral, and their concerns were well founded. Plantation slavery in the British colonies and elsewhere relied on brutality and repression. Working conditions were notoriously dangerous in the tropical climates, and life expectancy for slaves on colonial plantations was very low. Slaves died of diseases and injuries sustained as part of plantation work. Many suffered from malnutrition, as most plantation owners did not provide them with an adequate diet. Small slave revolts were common in the colonies, and escaped slaves formed maroon communities in Jamaica, St. Lucia, St. Vincent, Dominica, and on other islands as well. Jamaican maroon

communities proved to be particularly intractable and a series of maroon wars took place between the semi-autonomous villages formed by escaped slaves and colonial officials on the island. Planters feared the maroon communities would incite a widespread slave revolt on the island, and those fears escalated after the outbreak of revolution in Saint Domingue in 1791. Colonial officials led a violent campaign against one of the main settlements in 1795. They captured more than 500 maroons and deported them to Nova Scotia and other regions of the British Empire. Abolitionist groups often pointed to such mistreatment in their arguments for ending slavery. In response, Parliament and local colonial assemblies passed a series of decrees that were intended to improve the treatment of slaves in the British Caribbean. Most of those laws were ineffective and were only loosely enforced, while the calls for abolition continued.

In 1807, Parliament responded to abolitionist pressures by banning the transatlantic slave TRADE. The legislation made it illegal for British vessels to transport African slaves to the Caribbean colonies. Some smuggling rings continued to operate, however, as British captains found the slave trade too lucrative a business to abandon immediately. The powerful British navy undertook the task of policing the Atlantic and enforcing the ban. The British government also began pressuring other slave-importing nations to follow suit and end all transatlantic transport of slaves. The United States ended slave imports in 1808, and in the following decade, the British reached agreements with the Spanish and the Portuguese to institute a gradual ban on the slave trade. The now independent Spanish and Portuguese colonies invalidated many of those agreements, but the British continued to pressure the newly independent nations of mainland Latin America to end slave imports as well.

In the 1820s, the British government began considering measures to abolish slavery completely in its colonies. Talk of emancipation provoked strong protests among elite white planters. Many argued that ending slavery would effectively ruin the Caribbean sugar industry and render the British Caribbean possessions useless. As talk of and opposition to abolition circulated among the planters on the islands, slaves began to anticipate emancipation. In Jamaica, Barbados, and elsewhere there were numerous uprisings as slaves came to believe abolition was imminent and perceived planters' opposition as delaying its implementation. Revolts were put down violently and tensions escalated. British missionaries who attempted to spread an abolitionist message in the colonies were often accused of inciting slave revolts. Some planters even entertained the idea of seceding from the British Empire and pushing for annexation by the United States, where the abolitionist movement was still in its infancy.

Despite the vocal protests coming from the planter class, Parliament passed the Abolition of Slavery Act in 1833. The legislation called for emancipation to go into

effect the following year. In an effort to ease the transition from slave labor to wage labor, the law required a period of apprenticeship, during which time slaves would continue to work for their former masters in exchange for food, housing, and other essentials. The apprenticeship period was intended to last until 1840 and was designed to regulate working conditions during the transition period. Apprenticeship laws even stipulated that former slaves be paid a wage for any work over 45 hours per week. Finally, the legislation provided a budget of more than 16 million pounds to compensate slave owners for their lost property. On average, slave owners received amounts ranging from 20 pounds to 50 pounds each. Missionaries remained in the colonies to oversee the transition from slavery to emancipation. The official date came on August 1, 1834, and the occasion was commemorated with church services in most colonies.

Even though the official start to emancipation occurred without incident, the long-term transition to free labor was far from smooth. Planters in general were dissatisfied with the compensation they received and with the conditions of the apprenticeship system. In some colonies—such as Bermuda and Antigua—planters disregarded the apprenticeship stipulation and immediately granted slaves complete freedom. In other areas, planters grudgingly implemented the system but remained skeptical of its potential for success. Planters who planned for the switch to wage labor in 1840 made the transition more successfully. In Antigua and St. Lucia, planters began experimenting with new technologies and labor-saving devices to improve their cultivation techniques. In those areas, former slaves earned a wage that was low but sufficient to sustain them, which allowed them to become consumers and helped spur economic activity. But, there were many instances where planters tried to compensate for the loss of slave labor by paying meager wages and charging high rents. In those instances, many former slaves abandoned the plantations completely, and sugar production fell into decline. That was the situation in Jamaica and Trinidad and in the mainland colony of Guyana. In those areas, immigration and indentured servants from other areas of the British Empire kept some plantations going, but many sugar plantations were abandoned, and the land was often divided among former slaves, who engaged in small-scale farming.

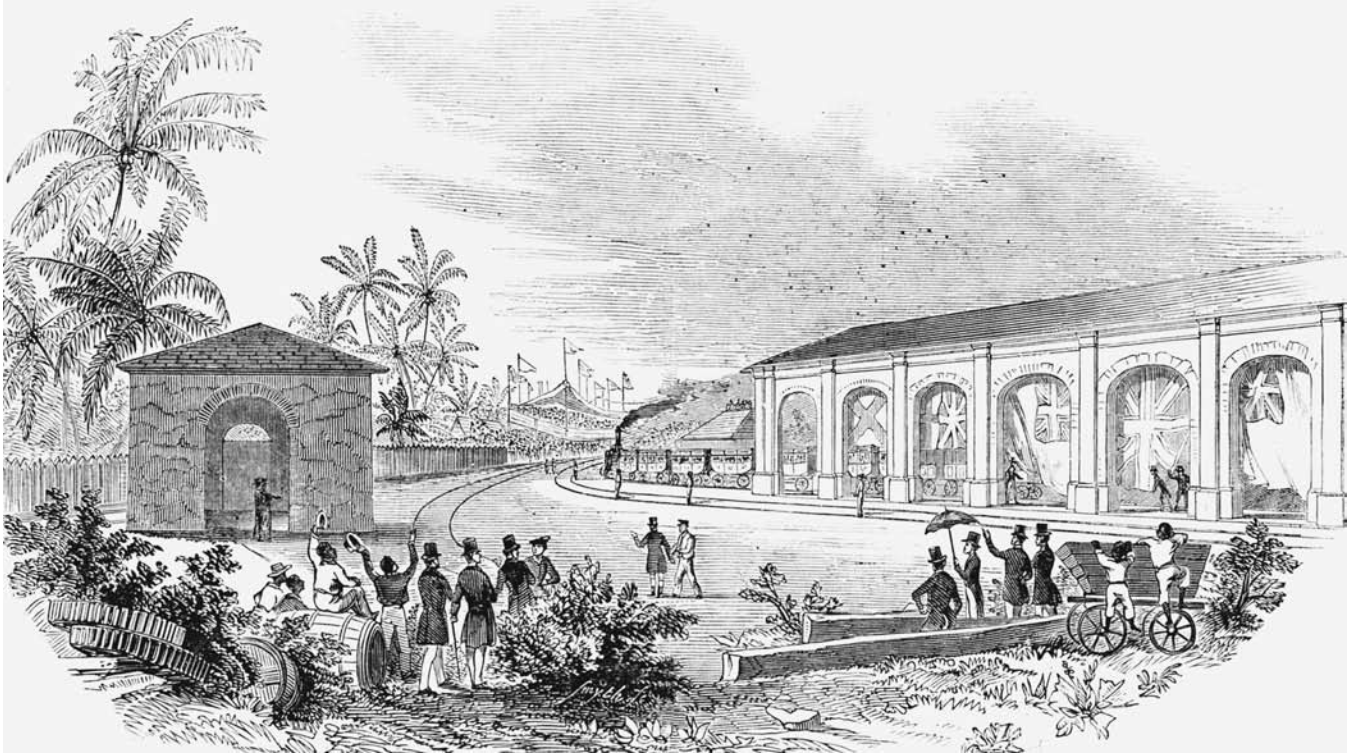
In the decades following emancipation, former slaves saw some notable improvements in their daily lives. Small communities formed—oftentimes on the territory of abandoned plantations—and those communities eventually built schools, churches, and other institutions. Missionaries helped facilitate the establishment of many of those communities. Missionaries were also instrumental in creating an incipient system of EDUCATION, but education programs were not without problems. Many teachers had received little to no formal training, and the quality of the mission schools was often called into question. While former slaves formed communities and made

attempts to advance within the British colonial system, many of those communities remained underdeveloped.

Most British Caribbean colonies experienced general economic decline in the 19th century. As planters abandoned their estates, few individuals found much incentive to invest significant resources into the local economies and supporting infrastructure. A loose parliamentary system allowed local assemblies to approve spending projects without much oversight. Unable or unwilling to implement a taxation system, many colonies suffered budget and debt problems and failed to provide basic public services. Roads fell into disrepair, and crime rates rose in many of the once-prosperous colonies. Tropical diseases kept life expectancy low, and social segregation became increasingly noticeable. Emancipation had expanded the franchise, but strict property requirements for voting kept many blacks from participating in the political system. Many of the white elite and former planters accused the black population of laziness and blamed former slaves for the decline of the sugar industry. Those social tensions were at the heart of the Morant Bay Rebellion, which was a major revolt that broke out on the island of Jamaica in October of 1865. Dozens were killed before the Jamaican governor declared martial law and violently suppressed the insurrection.

After decades of economic decline, the British government had grown convinced that the local autonomy granted to the Caribbean colonies was not working. The Morant Bay Rebellion reinforced concerns among mainland leaders that the colonies were not capable of self-government. The British instituted a system of direct rule with the intention of bringing order and stability to the region that had experienced such turmoil throughout the 19th century. They also hoped to stimulate some economic development, given that the sugar industry was now in full decline. Under the system of direct rule, the crown colony government established a legitimate law enforcement system and managed to instill a sense of public order by bringing crime under control. The new administrative system allowed the government to devote resources to public services and infrastructure. In the late decades of the 19th century, roads and bridges were built throughout the British colonies, and many saw the opening of railroads. Government programs replaced the earlier missionary-based education system, although education was neither free nor universal. Sanitation was improved, and hospitals were established, helping to raise life expectancy rates, which had remained low due to disease and unhealthy living conditions. Other reforms included changes to the legal codes governing property ownership. Those changes gave more small farmers the opportunity to own land.

The economic and social changes that took place in the British colonies in the late 19th century precipitated a general improvement in the daily lives of many of the inhabitants of those islands. Although economic growth was not readily evident by the end



The Jamaica Railway began operations in 1845. This artist's rendition shows the opening of the Kingston Terminus. (*Time & Life Pictures/Getty Images*)

of the 19th century, the policies of the crown colonial government did pave the way for the emergence of new economic sectors in the 20th century. Jamaica's tropical climate was suitable for the cultivation of bananas and other fruits. By the 1880s, the powerful United Fruit Company was operating banana plantations on the island and extending its fruit empire farther into the Caribbean. Other industries developed from the cultivation of small-scale agricultural crops such as tobacco, CACAO, vegetables, and some spices. Some modest INDUSTRIALIZATION had occurred by the end of the century, and many industries were oriented toward the production of consumer goods.

Much of the British Caribbean is known today for its tourism industry, and these activities also had their beginning in the late 19th century. Investors opened the first hotels in the Bahamas in the 1860s. Then, in 1891, the Jamaica International Exhibition held in Kingston provided an opportunity to showcase the island as a viable tourist destination. Caribbean tourism expanded significantly in the 20th century and is the basis for many of the islands' economies today.

See also ANTIGUA AND BARBUDA (Vol. IV); BAHAMAS (Vol. IV); BARBADOS (Vol. IV); BRITISH OVERSEAS TERRITORIES (Vol. IV); BUCCANEERS (Vol. II); CARIBBEAN, BRITISH (Vol. III); DOMINICA (Vol. IV); GRENADA (Vol. IV); JAMAICA (Vols. II, IV); SAINT CHRISTOPHER AND NEVIS (Vol. IV); SAINT LUCIA (Vol. IV); SAINT VINCENT AND THE GRENADINES (Vol. IV); TRINIDAD AND TOBAGO (Vol. IV).

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**Caribbean, Dutch (Dutch West Indies)** The Dutch Caribbean includes the islands of Aruba, Curaçao, Bonaire, Sint Eustatius, Saba, and Sint Maarten. Historically, the Netherlands first shared power and then competed with the French and the British for control of its Caribbean possessions (see CARIBBEAN, BRITISH; CARIBBEAN, FRENCH). By the 19th century, Dutch rule had been firmly established in the islands, as well as in the mainland colony of SURINAME.

The Spanish were the first to explore most of the islands of the Caribbean, and they established some settlements in the region. The Spanish encountered small groups of Arawak, Carib, and Ciboney native peoples, and by the beginning of the 16th century, conquistadores had established an administrative center on the island of Hispaniola. From there, Spanish expeditions explored the neighboring islands of the Greater Antilles, the smaller eastern islands of the Lesser Antilles, and the southernmost islands that make up the Dutch Caribbean in search of treasure and Amerindians to enslave. Failing to find GOLD or other valuable resources, the Spanish did not establish permanent settlements. Other European

powers showed an interest in Spain's new Caribbean possessions, and throughout the 16th and 17th centuries, British, French, and Dutch pirates actively attacked Spanish ships in the area. Privateers were often sponsored by European merchants who wanted to TRADE in the Spanish colonies. By the 1620s, those northern European challengers began establishing permanent colonies in the Caribbean. They appeared first in the southern and eastern Caribbean and then began pushing into Spanish strongholds in the Greater Antilles.

In the first half of the 17th century, an alliance of sorts formed between Dutch, French, British, and other European merchants in an attempt to challenge Spanish dominance in the Caribbean. The Dutch took the lead in this alliance, and in 1621, the Dutch West India Company received a monopoly charter to administer Caribbean trade. The company's traders helped to support permanent French and British settlements in Barbados, Martinique, and Guadeloupe. The Dutch West India Company established settlements in Sint Maarten, Sint Eustatius, and Saba, which all had a ready supply of salt. The Dutch also settled Aruba, Curaçao, and Bonaire. Most Dutch settlements served as MILITARY posts as well as trading outposts for colonies of the other northern European nations. In later decades, the Dutch West India Company was reorganized, and many of the Dutch possessions in the Caribbean became slave trading depots and bases for smuggling goods into the Spanish colonies that were closed to wider European trade.

A series of wars erupted among the northern European powers in the late 17th century, which weakened Dutch power in the Caribbean. By the beginning of the 19th century, Dutch settlements were limited to Curaçao, Aruba, Bonaire, and the far southern Leeward Islands. In the early decades of the century, major changes took place in the Dutch Caribbean. The British had emerged as the major sea power in the Atlantic, and abolitionist pressures urged the Crown to abolish the slave trade and to force other European powers to do the same. Although SLAVERY still existed, the Dutch ended the import of slaves into its colonies in 1814. Ending the slave trade eliminated one of the economic functions that the Dutch Caribbean possessions had played. Some settlers attempted to develop an agricultural sector in the 19th century, but most of the southern Dutch-controlled Caribbean islands were arid, with a hilly and volcanic topography that made them unsuitable for AGRICULTURE. While the Dutch government attempted to subsidize agricultural activities, planters for the most part experienced little success. Sint Maarten's climate and topography was more suited to agriculture. Some small plantations and ranches developed there, with small populations of African slaves making up most of the workforce. Salt MINING dominated the economies of most Dutch islands, and that industry continued in the 19th century, supported by the labor of the few thousand African slaves who remained after the slave trade

ended. But, salt mining declined as the slave population dwindled. After slavery was finally abolished in the Dutch colonies in 1863, the salt mining industry collapsed.

Most of the Dutch possessions in the Caribbean suffered devastating economic decline throughout the 19th century. Curaçao was one notable exception. The island's location just off the coast of VENEZUELA made it an ideal spot from which to assist Spanish royalist forces fighting against independence movements in the colony. Curaçao provided a base for Spanish forces, and its merchants readily traded with the Spanish to keep the royal army supplied. Trading rights did not extend to the patriot forces. Dutch support for the Spanish army created an awkward diplomatic environment after Venezuelan forces ousted the last of the royalist forces in 1821. Further complicating matters, the Dutch government refused to recognize the new government in Venezuela—at the time GRAN COLOMBIA—and continued to withhold trading rights. Dutch officials held out for a full year before establishing relations with Gran Colombia and opening up trade between Curaçao and the newly independent confederation.

Curaçao continued to be a trading outpost for Dutch merchants, and economic activity on the island picked up considerably after the rest of the mainland Spanish colonies achieved independence. Independent governments opened up the previously closed mercantilist economies and allowed relatively free trade through LAISSEZ-FAIRE economic policies. Curaçao became a trading station for commerce between Dutch merchants and the Venezuelan market. But, the island continued to find itself pulled into the conflict and instability that plagued the mainland nations. Leaders in Curaçao attempted to remain neutral throughout the period of liberal-conservative conflict in Venezuela. In 1849, Venezuelan dictator José Tadeo Monagas (1847–51, 1855–58) seized several Dutch ships that he suspected of smuggling arms to an opposition movement. Relations with Venezuela were precarious over the coming decades as a series of uprisings and civil wars brought about repeated changes of government and near-constant accusations of Curaçao's complicity in one conspiracy or another.

By the late decades of the 19th century, the salt industry that had sustained many of the Dutch Caribbean islands had completely folded. The economies of the smallest islands never fully recovered, but Aruba developed a modest agricultural sector—particularly in the cultivation of aloe. Curaçao continued to serve as a trading outpost, but other industries emerged there as well. By the late 19th century a shipbuilding sector had been established and many transatlantic vessels docked at the island for repairs and supplies. In the 1870s, phosphate deposits were discovered, and that industry thrived until the 1930s. Shortly after the turn of the century, foreign oil companies built refineries on Curaçao to process the crude extracted from Venezuelan oil deposits. The development of the oil-processing industry contributed

to the economic autonomy that eventually led to a push for self-government later in the 20th century.

See also **BUCCANEERS** (Vol. II); **CARIBBEAN, DUTCH** (Vol. IV); **DUTCH WEST INDIA COMPANY** (Vol. II).

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**Caribbean, French (French West Indies)** The French Caribbean refers to the group of Caribbean islands historically under French colonial rule. Most are located in the Lesser Antilles, and control of many of those islands shifted among the British, Dutch, and French from the 17th through the 19th centuries. The most important French colony in the Caribbean was Saint Domingue (present-day HAITI) on the western portion of the island of Hispaniola (SANTO DOMINGO). Other major French possessions included Saint Croix, Martinique, Guadeloupe, and Saint Martin in the southern and eastern Caribbean, as well as FRENCH GUIANA on the mainland.

Spanish explorers were the first Europeans to have contact with the Caribbean islands. The small islands throughout the region were inhabited by groups of Arawak, Carib, and Ciboney Indians, and the first Spanish settlers captured NATIVE AMERICANS throughout the Caribbean and sent them to work as slaves on Hispaniola. After the local native population was decimated and the islands revealed little in the way of valuable natural resources, the Spanish showed little interest in the Lesser Antilles, which eventually fell under French control. Spanish conquistadores expanded their explorations to the vast mainland of present-day MEXICO, CENTRAL AMERICA, and South America, and by the end of the 16th century, Spain had established settlements in these areas and had demonstrated its supremacy in the Americas. Spanish monopolization of resources and TRADE from its mainland colonies created an environment that was ripe for piracy and warfare in the Caribbean as other European nations challenged Spanish power. An alliance of convenience formed between French, Dutch, and British merchants who sponsored privateering expeditions in an attempt to disrupt and confiscate Spanish shipments of bullion and other goods. In the 1620s, the British and French established several joint settlements in the Caribbean with the intent of developing a TOBACCO plantation ECONOMY (see **CARIBBEAN, BRITISH**; **CARIBBEAN, DUTCH**). One of the first such colonies was on the island of Saint-Christophe, where a French royal company was granted a monopoly over tobacco production. Other early French settlements were established on St. Kitts, Martinique, and Guadeloupe, and planters on those islands also engaged in the cultivation of tobacco. Private companies administered the French Caribbean

possessions throughout most of the 17th century until a decree by Louis XIV placed the island economies under royal supervision. At the same time, the alliance of convenience between the French, British, and Dutch began to fall apart, and a series of wars broke out among the former economic allies of northern Europe. Those wars also generated disputes for control of select islands in the Caribbean.

The most successful of the French colonies in the Caribbean was Saint Domingue on the western third of Hispaniola in the Greater Antilles. The eastern half of the island had been under Spanish control since the beginning of the 16th century, but the Spanish had neglected the colony and there were few settlements along the western coast. French pirates often stationed themselves along the coast and on the tiny neighboring island of Tortuga to attack Spanish fleets. In 1665, French officials claimed the western portion of Hispaniola for France and established the colony of Saint Domingue. Tobacco plantations thrived in the tropical climate, but tobacco production was eventually supplanted by SUGAR cultivation in the 18th century. Saint Domingue grew to be one of France's most prosperous colonies, and by the end of the 18th century, it produced approximately 40 percent of the world's sugar. The colony's sugar industry was sustained by steady imports of African slaves, and by the 1790s, slaves made up a majority of Saint Domingue's population. There was also a sizable population of non-white freedmen, who suffered varying degrees of discrimination under French laws.

The outbreak of the French Revolution in 1789 brought more freedom and equality for all in France. Although the same were not intended to apply to the colored population of France's colonies, slaves and former slaves in Saint Domingue were nonetheless inspired. When in 1791 it became clear that white leaders intended to continue to limit the rights of the colony's colored freedmen, a revolt broke out and gradually spread throughout the western portion of the island. The revolt escalated into a full-scale slave rebellion and marked the beginning of the movement for Haitian independence. Other French Caribbean colonies went through a period of turmoil as the unstable situation in France provoked slave revolts throughout the Caribbean. The British also seized the opportunity to challenge the French for other colonial possessions in the Lesser Antilles. British forces invaded Saint Domingue and also took control of Martinique and Guadeloupe, which eventually reverted back to French control. Other small islands in the Lesser Antilles that were in dispute—such as Grenada, Saint Lucia, Saint Vincent, and Trinidad—remained under British control in the 19th century. In an attempt to contain the Saint Domingue rebellion, the French government in Paris abolished SLAVERY throughout the French colonies in February 1794.

Napoléon Bonaparte came to power in France and reestablished slavery in the French colonies in 1802. New



shipments of African slaves arrived in Guadeloupe and Martinique in the coming decades to provide the LABOR force for those islands' emerging sugar industry. After Haiti achieved independence, leaders of the new nation attempted to institute alternative labor systems, but the adjustment to a free labor system combined with the long and destructive war led to a collapse of the island's long-standing sugar ECONOMY. As a result, other slave economies, such as BRAZIL and CUBA, stepped in to fill the worldwide demand for sugar. In the French colonies of Martinique and Guadeloupe, the transition was short lived. The British abolished the Atlantic slave trade in 1807 and began pressuring other European powers to follow their lead. France ended the slave trade in 1818, although some illegal smuggling of slaves continued. Over the next three decades, an abolitionist movement gained strength in France, and in 1848 an emancipation decree was approved for all French colonies. Most newly freed slaves abandoned the sugar estates, and planters faced a labor shortage. Between 1850 and the turn of the century, thousands of indentured servants arrived in Martinique and Guadeloupe from India, China, and Africa.

French colonies underwent a number of social changes in the last half of the 19th century. After leaving the plantations, some former slaves managed to acquire small plots of land and engage in subsistence farming. As a result, large plantations owned by whites often operated side-by-side with small farms owned by blacks. Although the economic inequality between the two sectors was clearly evident and the white planter class continued to control the economy, a peaceful coexistence began to emerge. Racial tensions did exist, but those tensions were less likely to lead to violence than in areas of Spanish or British colonial rule with a similar demographic makeup. Adjustments to political and individual rights on the islands often mirrored the changes that were taking place in France. A new revolution in France brought a liberal government to power in 1848, and a rush of social and political reforms were applied to the colonies. The complete abolition of slavery was the most momentous of those changes, and the French government followed up that sweeping legislation by instituting universal male suffrage in 1849. But, the rise of Napoléon III in 1852 reversed many of those reforms, and residents of the French Caribbean waited two more decades before again receiving political rights.

Upon the establishment of the Third Republic in France in 1870, many French leaders argued that political and social reforms were urgently needed in the French colonies. Martinique experienced a rebellion in 1870 known as the Southern Insurrection when cane field workers rose up to protest their continued economic and social oppression. Although the revolt was short lived, it brought to light the need for additional reforms in the French Caribbean social structure, which continued to be dominated by white elites. Many leaders of the Third

Republic genuinely believed in the notion of equality and incorporated the French colonies into their reforms. Voting rights were expanded to include all adult males, and people of color were increasingly elected to political positions in Martinique and Guadeloupe. French colonies also were granted the right to representation in the French parliament.

One of the most notable areas of improvement in the late 19th century was in the EDUCATION system, which fell under the jurisdiction of the French government in the 1880s. Primary education became widely available throughout the French colonies, and more advanced schools were established in some areas. Despite the political and social reforms, however, the economies of French colonies suffered in the late decades of the 19th century. Indentured servitude had allowed a modest sugar industry to continue after the abolition of slavery, but strains in the worldwide sugar market in the late 19th century severely affected the local economies. The introduction of sugar beets in the United States and elsewhere allowed many areas that had not traditionally produced sugar to compete for the world sugar market. Increased sugar supplies drove prices down throughout the world, and French islands such as Martinique and Guadeloupe struggled. Other agricultural sectors eventually emerged, and in the 20th century the French Caribbean islands began exporting tropical fruits.

After 1946, the French colonies in the Caribbean became *départements* of France, which have equal status with other mainland provinces.

See also BUCCANEERS (Vol. II); HISPANIOLA (Vols. I, II); SANTO DOMINGO (Vol. II).

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**Carlota** See FRENCH INTERVENTION.

**Carrera, Rafael** (b. 1814–d. 1865) *military leader and president of Guatemala* Rafael Carrera was an illiterate but charismatic, manipulative, and ruthless mestizo who dominated Guatemalan politics for a quarter of a century, from 1840 to 1865. Denied access to an EDUCATION because of his racial status and poverty, Carrera entered the Central American federal army in 1826 at the age of 12 and rose rapidly through its ranks. When the Honduran FRANCISCO MORAZÁN established a liberal government in GUATEMALA in 1829, the federal army was disbanded, and Carrera drifted into the countryside before settling in the village of Mataquescuintla, where he married Petrona García, the daughter of a large landowner, and came under the influence of the local parish priest. During this time, he developed a conservative philosophy.

Morazán's liberal programs, especially his attack on the privileges enjoyed by the CATHOLIC CHURCH and the heavy taxation of large estates, met with resistance from many conservative landowners and clergy. When a cholera epidemic swept through the country beginning in 1837, the leading families of Mataquesuintla persuaded Carrera to put together an army made up of poor but devout Catholic peasants to challenge the central authority. For the next three years, Carrera carried out a guerrilla war against the federal government's better trained and equipped army. Finally, on March 14, 1840, as the UNITED PROVINCES OF CENTRAL AMERICA collapsed around him, Morazán succumbed to Carrera, who became Guatemala's head of state until 1844, when he was chosen president of Guatemala. Liberal opposition continually challenged Carrera's conservative administration until the defeat of their army in 1847. Carrera handed the government reins to Mariano Paredes (ca. 1800–1856) and departed for a short-lived stay in MEXICO.

Carrera returned to Guatemala in March 1849 to assemble an army consisting largely of Amerindians to fight against the liberal cause. Carrera's endeavors included an effort by the Honduran, Salvadoran, and Nicaraguan governments to revive the Central American union. Finally, on February 2, 1851, Carrera's army defeated the allied forces in the Battle of San José la Arada, and Carrera again became head of state. Eight months later, he oversaw the implementation of a new conservative constitution. It centralized the government and restored most of the church's privileges, including separate courts for the clergy, tithes, and the record-keeping role. Three years later, on October 21, 1854, Carrera declared himself "president for life" and ruled with few restrictions until his death in 1865. The church enjoyed its former privileges throughout his tenure. Additionally, convents were reopened, and the Jesuits were allowed to return to the country. In effect, the Catholic Church gained considerable influence over people's daily lives.

Carrera intervened in the internal affairs of HONDURAS and EL SALVADOR to assist the conservative causes there. When the North American filibusterer WILLIAM WALKER sought to establish his rule over Central America, Carrera sent a large contingent of troops into NICARAGUA in 1857 to defeat and eject him temporarily from the isthmus.

Upon his death on April 14, 1865, Carrera was credited with advancing Guatemala's economic growth and protecting the Amerindians from exploitation by landowners, but at a cost of a highly centralized government in which the MILITARY became a permanent fixture. His immediate successor, General Vicente Cerna (1865–71), continued his conservative policies.

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**Caste War of the Yucatán (1847–1901)** The Caste War of the Yucatán was a Maya uprising against the white population in the Yucatán Peninsula of MEXICO. It erupted over a complex set of issues, including racial tensions, land ownership, LABOR abuses, and political strife between centralist and federalist forces in the national and regional governments.

Mexican independence in 1821 brought many changes to the Yucatán. The legally defined ethnic hierarchy in areas such as the Yucatán was called into question by new liberal ideas, raising the expectations of the large Maya population. At the same time, new government policies allowed landowning creoles to confiscate communal lands that had traditionally been owned and worked by the Maya. Further instability came as leaders in the national government clashed over how much autonomy state governments should have. The promulgation in 1836 of the SIETE LEYES by ANTONIO LÓPEZ DE SANTA ANNA provoked a backlash among federalists. They declared the Yucatán independent, and many political leaders attempted to recruit Maya, promising reform.

The Caste War broke out in summer 1847, when a group of Maya instigated an uprising in Valladolid, targeting the white creole population. The ringleaders were captured and executed, while local officials ransacked the homes of others suspected of being involved in the plot. This oppressive reaction convinced many Maya that armed conflict was the only way to redress the abusive system of social and economic inequality (see NATIVE AMERICANS).

A full-scale rebellion developed quickly under the leadership of Jacinto Pat and Cecilio Chi. Within months, many major cities, including Valladolid, had fallen to Maya militias. The rebels were poised to take Mérida in May 1848, but many peasant soldiers left the battlefield to plant their crops, and the rebels lost their advantage. State officials also negotiated a reconciliation with the national government, which sent reinforcements to help put down the rebellion. During the next few months, Maya rebels were forced into hiding in remote areas of the southeastern jungle.

Pockets of resistance continued for the next several years, and the Caste War turned into a type of guerrilla movement. It picked up momentum in 1850 with the discovery of the "Speaking Cross": Rebel leader José María Barrera had led his followers to an area deep within the forest, where they discovered a cross carved into a tree. The cross resembled the sacred Maya tree of life and spoke to the rebels, ordering them to continue the war. A religious community developed from this sighting—the Chan Santa Cruz—and its followers, the Cruzob, kept the antigovernment movement alive for more than a half century (see RELIGION). The Chan Santa Cruz and other Maya communities continued to control the eastern portions of the Yucatán for decades and became independent communities while the national government struggled to

bring them under control. Great Britain even recognized the sovereignty of the Chan Santa Cruz and traded with them from British Honduras (BELIZE).

The movement began to decline when the British withdrew recognition and trading preferences in favor of improved diplomatic relations with PORFIRIO DÍAZ's government in 1893. Finally, in 1901, Mexican federal troops secured the Chan Santa Cruz region and declared the war officially over. Unrest erupted several times over the next several decades as the entire nation descended into the turmoil of revolution. The last confrontation between government forces and local militia occurred in 1933.

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**Castilla, Ramón** (b. 1797–d. 1867) *caudillo and president of Peru* Ramón Castilla was a Peruvian CAUDILLO who emerged on the political scene in 1841 on the heels of a 20-year period of political strife and instability. The MILITARY and political leader dominated Peruvian politics for more than two decades and is generally credited with bringing a sustained period of relative peace and growth to the new nation.

Castilla was born on August 27, 1797, in the northern Tarapacá region of PERU. As a young man, he joined the Spanish armed forces against the independence movement in colonial Peru, but in 1821, he changed allegiance and joined the forces of independence leaders José de San Martín and Simón Bolívar. After Peru finally achieved independence, Castilla served as military leader and adviser to several presidents. He was serving as finance minister to President AGUSTÍN GAMARRA when German traveler and scientist Alexander von Humboldt (b. 1767–d. 1835) traveled to South America and brought samples of guano back to Europe. Then in 1824, *American Farmer* published studies outlining the potential of Peru's guano deposits as a source of fertilizer for the world's growing agricultural needs. Castilla negotiated Peru's first contracts with British investors in 1841, marking the beginning of the GUANO AGE, more than four decades of economic growth and social transformation in the country.

Castilla's guano diplomacy continued after President Gamarra died while attempting to invade BOLIVIA in November 1841. The president's death created a power

vacuum and resulted in a brief but chaotic period when various local strongmen competed for power. In 1844, Castilla seized power and stamped out local rebellions long enough to reinstate a sense of constitutional order. The following year, Castilla was elected to his first six-year term as president. Between 1845 and 1851, the military man succeeded in suppressing opposition and putting down various rebellions. He quickly earned a reputation for his ability to maintain law and order and was generally known for his charisma, patriotism, and energy—all common characteristics of 19th-century Latin America caudillos. Castilla also continued to cultivate Peru's guano TRADE, which quickly exploded into a lucrative export industry. As the national coffers filled, so did his popularity. Castilla used the swelling national treasury to fund infrastructure and public works projects, such as the construction of schools and the development of a national railroad system. The president was also able to straighten out the nation's finances and reduce the national debt.

Castilla's six-year administration was followed by the presidency of José Rufino Echenique (b. 1808–d. 1887). Castilla, however, found himself at odds with his successor over a number of social policies, and the former president led a rebellion against Echenique in 1854. He enjoyed enormous support among the lower classes and promised to enact aggressive reforms to benefit them as a reward for their loyalty. Castilla seized power in 1855 and used his popularity to push through liberal social reform. He passed laws abolishing SLAVERY, using revenues from guano contracts to purchase freedom for a sizable black slave population. Castilla also used his power and influence to eliminate the Amerindian tribute tax. Following the trend of other liberal Latin American political movements in the 19th century, Castilla also curbed the power of the CATHOLIC CHURCH and established a platform for ensuring some individual freedoms.

In 1856, Castilla and his supporters attempted to push through a new constitution, but they were opposed by a powerful land-owning lobby, and a two-year civil war ensued. In 1860, Castilla finally oversaw the promulgation of his new constitution. Although many of Castilla's policies were overtly liberal, the Constitution of 1860 included a number of provisions that reflected a more conservative ideology. It called for a strong executive, though it extended political participation to numerous groups that had previously been left out of the political process, such as the indigenous and former slaves. The Constitution of 1860 remained in effect until the 1920s.

When Castilla's term ended in 1862, Peruvian politics reverted once more to chaos and instability. The once-popular president made several attempts to retake the presidency and was imprisoned and exiled for his efforts. He spent time in neighboring CHILE and in Spain trying to garner support for a comeback as Peru's leader. Castilla was killed while leading an invasion force around the city of Arica in May 1867.

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**Castro, Cipriano** (b. 1858–d. 1924) *military leader and president of Venezuela* Cipriano Castro was a local MILITARY leader from the Andean state of Táchira who built his image as a regional CAUDILLO and used his local power to ascend in Venezuelan national politics. His presidency marked the beginning of an era of Andean participation and dominance in national politics. He also helped to transform the image of VENEZUELA as a caudillo state of the 19th century to a country with a more populist social and political system in the 20th century.

Castro was born in Capacho, Táchira, on October 12, 1858, into an agricultural family. In 1872, he initiated formal religious EDUCATION and was exposed to many of the philosophical foundations of the Venezuelan LIBERAL PARTY. In 1873, he abandoned his seminary training to pursue a career in politics. In the city of San Cristóbal in his home state, he earned a reputation of opposing state leaders who appeared too beholden to the central government in CARACAS. Throughout the 1880s, Castro challenged local authorities in the name of regional autonomy. He served briefly as governor of the state of Táchira and in 1890 was selected to represent his state as a deputy in the National Congress. In 1892, Castro and several local allies—among them his future vice president Juan Vicente Gómez (b. 1857–d. 1935)—fought against the Legalist Revolution of Joaquín Crespo (1884–86, 1892–97). Crespo's victory forced Castro and his cronies into exile for the next seven years.

While in exile in COLOMBIA, Castro engaged in illegal cattle TRADE and accumulated a substantial fortune, which allowed him to garner supporters and challenge the likely fraudulent election of Ignacio Andrade in 1899. He declared the Restorative Liberal Revolution and began marching toward Caracas. As he advanced, Castro secured alliances with discontented regional caudillos who had grown impatient with the near-constant chaos in Caracas. A movement that started with only 60 followers grew to a force of more than 2,000 by the time Castro reached Caracas. On October 22, 1899, the once-exiled caudillo took the capital and became provisional president of the republic. He oversaw a reform of the nation's constitution, and in 1904 he was elected constitutional president with Gómez as his vice president.

Castro's presidency marked an important shift in Venezuelan politics. Although he had risen to power in typical caudillo fashion, Castro quickly put an end to the infighting and political rifts that had defined regional politics throughout the 19th century. Where earlier

administrations had failed, Castro managed to bring the remnants of the 19th-century caudillos under his centralized control. He ruled as a despotic dictator but at the same time oversaw the beginnings of full popular participation in the nation's political system.

Castro fell ill in 1908, while undergoing surgery in Europe. In November of that year, his own former confidant and vice president Gómez led a coup and took over the presidency. Exiled from Venezuela, Castro spent the last years of his life in PUERTO RICO. He died there on December 4, 1924.

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**Catholic Church** The Catholic Church has historically been a principal foundation of Latin American culture. The church played a leading role in the European conquest of the Americas and continued to be a dominant institution throughout the colonial period of Latin American history. Its power and influence ensured that Catholicism became the major RELIGION throughout the colonies. Indeed, a vast majority of Latin Americans belong to the Catholic Church today. The church's privileged position also became the basis of much conflict in the century following independence. New governments attempting to restructure political and social networks according to liberal principles often challenged the church's authority. This resulted in much instability and infighting between conservative and liberal groups in a number of countries throughout the 19th century (see CONSERVATISM; LIBERALISM). Challenges from liberals eventually compelled church leaders to reconsider the role Catholicism would play in Latin American society. By the end of the century, Catholic doctrine had begun to emphasize the church's role in promoting social justice. The trends initiated in the late decades of the 19th century evolved into sweeping reform movements in the 20th century.

Spain's initial conquest and settlement of Latin America was partly motivated and justified by the desire to spread Catholicism to the millions of indigenous peoples who inhabited the Americas in the 16th century. An arrangement between the Spanish Crown and the Vatican gave the church enormous influence in the colonies in the interest of converting souls. Members of the clergy were a part of exploration and conquest missions from the outset, and conversion efforts immediately followed MILITARY conquests. Religious orders set up missions throughout Latin America, and in the early years of the colonial period, mass conversions took place as the Spanish Crown consolidated control over its new territory. Portuguese settlers soon did likewise in BRAZIL, where the church played a similar role.

The emphasis on the immediate conversion of large numbers of people inevitably led to numerous false conversions. Many NATIVE AMERICANS continued to practice their own religions and resisted wholesale conversion to Catholicism. Throughout the 300-year colonial period, church leaders found themselves constantly investigating what they considered to be sacrilegious practices. While some Amerindians continued to worship native deities, others incorporated aspects of their native religions into the daily practice of Catholicism. In areas with large numbers of slaves, a similar amalgamation of Catholicism and African spirituality occurred. The church officially denounced this merging of religious traditions, but many individual members of the clergy allowed it to happen. As a result, various hybrid religious practices emerged in Latin America, and in some cases the fusion of Catholicism and native religions produced entirely new spiritual movements that survive even today. SANTERIA developed as a combination of Catholicism and African religions in the Caribbean and in some regions of the mainland. In HAITI, VODOU emerged as a competing force against Catholicism, even though many Haitians have historically practiced the two religions simultaneously.

The power of the Catholic Church was evident in the wealth and social status attained by members of its clergy. Church leaders regularly charged fees for performing various sacraments, and parish priests were often seen as prevailing authority figures in local affairs. Devout members of the elite endowed the church with donations and other contributions in an attempt to secure a path to heaven for both themselves and their deceased relatives. Wealthy families often pursued admission to the religious orders for their children as a way of elevating their social status and protecting the family estate from being dismantled by inheritance laws. Admission to convents and monasteries was generally accompanied by large endowments of property, cash, and other materials goods to the church. As a result, the Catholic Church became extraordinarily wealthy. By the end of the colonial period, it owned vast amounts of land in Latin America. It had also become a principal money lender and profited from the loans it made and the rents it collected.

Church wealth allowed many members of the clergy to live an opulent lifestyle. Church leaders also profited from the long-standing special relationship between the church and the Crown. Under colonial laws, the Catholic Church was a corporation, or a special group with legally protected rights and privileges. Its members were exempt from many Crown taxes and were bestowed with various *FUEROS*, or legally defined entitlements and protections. The most common *fuero* in colonial Latin America was a parallel court system that shielded members of the clergy from prosecution in the criminal court system. Priests and bishops accused of crimes came under the jurisdiction of ecclesiastical courts, which tended to be more lenient. The church also administered most social programs. Members of the clergy ran orphanages, hospi-

tals, and cemeteries. The church controlled EDUCATION throughout the colonial period and served as the main recorder of vital statistics such as marriages, births, and deaths through its registry of the sacraments.

By the end of the colonial period, the Catholic Church wielded enormous power, but the wars for independence and their aftermath divided and weakened the church. Some members of the clergy opposed the insurgencies that sprang up throughout the region and maintained their support for the Spanish Crown. Many religious leaders—particularly a number of bishops and other members of the church hierarchy—viewed independence as a first step in the dismantling of the church’s power and influence. But, other individuals, including some local parish priests, threw their support behind the independence armies, and several even participated directly in the fighting. The initial insurrection in MEXICO that eventually escalated into a full-scale war for independence was led by parish priest Miguel Hidalgo y Costilla in 1810. After Hidalgo was later captured and executed, the movement was carried on by another parish priest, José María Morelos.

Many of the church leaders who had remained loyal to Spain during the wars for independence either fled to Spain or were expelled by newly formed Latin American governments in the 1820s. In the years immediately following independence, the church found itself considerably weakened by the disruption in leadership caused by the wars. Making matters worse, church leaders in Rome refused to recognize the independence of Latin American nations for more than a decade. Many new governments in Latin America were formed by liberal independence leaders, and a number of them were already suspicious of church authority. A rift between liberal governments and the Catholic Church was immediately evident, and that schism only deepened during the remainder of the 19th century.

Liberalism had influenced the independence movements in Latin America, and its impact was evident in new constitutions and government policies in the newly independent nations. Liberals were generally forward looking and wanted to break away from many of the colonial traditions that they believed were preventing progress. Liberalism rejected the privileged role the Catholic Church had played, thus many postindependence political systems were structured to limit its authority. Perceived attacks against church interests provoked a backlash among conservatives throughout Latin America; they believed that weakening the authority of traditionally powerful institutions such as the Catholic Church would lead to chaos. For several decades after independence, conservative and liberal political factions fought for control of national leadership. Constitutions were written and rewritten as power changed hands through civil wars and violent overthrows in many nations. At the heart of a number of those conflicts were liberal reforms intended to diminish the power of the

Catholic Church and to transform the long-standing roles of church and state in Latin American society.

Liberal regimes or oligarchies secured control in most nations in the last half of the 19th century. As they consolidated power, they pursued even more aggressive reforms, many of which targeted the Catholic Church. Liberal regimes throughout Latin America ended the mandatory tithe and abolished the ecclesiastic *fuero*. Furthermore, liberals believed that in order for republicanism to succeed, the state must be the most powerful institution. Many leaders feared that the Catholic Church competed with the national government as the institution with the most authority in Latin American society. Therefore, other reforms sought to replace church authority with that of the state. New laws established civil registries to allow the state, rather than the church, to record marriages, births, and deaths. Liberal governments also began passing civil codes that brought FAMILY and social laws under state jurisdiction. Many of the civil codes passed in the late 19th century established the practice of civil marriage. Making marriage a civil contract, as opposed to a sacramental bond, theoretically made divorce more accessible. Some liberal regimes considered laws to allow for the legal dissolution of marriage, although divorce did not become legal in most areas until the 20th century.

Liberal reforms that limited church power continued to meet with some resistance, but the greatest opposition emerged when liberal governments targeted church properties and wealth. Liberals operated under the theory that the individual should be the basis for republican forms of government and that the well-being of society in general was directly tied to the well-being of individual citizens. Many Latin American liberals modeled their theories after the notion of Jeffersonian republicanism in the United States and argued that responsible citizens would emerge through ownership of private property. Liberals therefore also asserted that encouraging the establishment of small, family-sized farms would make nations economically and politically viable. Since the Catholic Church was the largest owner of property at the end of the colonial period, liberals looked to confiscate and auction off church land in order to reach their objective. Land laws were passed in Mexico and CHILE in the 1850s and in COLOMBIA in the 1860s. Violent civil wars erupted once again as conservative interests rose up to defend the church. Despite several decades of conflict and violence, the church's influence and wealth were severely diminished by the end of the 19th century.

While liberal attacks against church property and privilege provoked an outcry among Latin American conservatives, the general trend toward liberalism generated an official protest by the Vatican. In 1864, Pope Pius IX issued the SYLLABUS OF ERRORS as an addendum to his encyclical *Quanta Cura*. The syllabus denounced 80 ideas that the Holy See considered hostile to Catholicism. ENLIGHTENMENT philosophies and the theory of POSI-

TIVISM, which in many ways served as the foundation of Latin American 19th-century liberalism, were cited as particularly anti-Catholic. The syllabus condemned liberal reform laws that sought to separate church and state, and the document was critical of liberal laws that allowed for the seizure and sale of church properties. Conservative elite in Latin America praised the papal statement, while liberals reacted by hardening their anti-clerical position.

By the end of the century, many Catholic leaders had begun to take a different approach to the social changes that liberalism and other movements had helped create. A number of internal reforms took root within the church, and members of the clergy began to promote what some referred to as "social Catholicism." The movement was formalized by Pope Leo XIII in his 1891 *RERUM NOVARUM*, which argued that the forces of modernization promoted by liberal governments around the world had created injustices and social inequality. Problems engendered by liberal policies that encouraged rapid industrialization and urbanization in the late 19th century were visible in the growing numbers of people living in poverty throughout Latin America. The *Rerum Novarum* declared the Catholic Church to be the defender of those who had been harmed by liberal policies of modernization.

By the end of the 19th century, the Catholic Church had begun to distance itself from its long-standing affiliation with the conservative elite. Instead, church leaders began taking up social justice issues. The changes that the Catholic Church underwent in the final decade of the 19th century continued into the 20th century and laid a foundation for later movements of Christian democracy and liberation theology.

See also CATHOLIC CHURCH (Vols. I, II, IV); RELIGION (Vols. I, II, IV); SYNCRETISM (Vol. I).

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**caudillo** *Caudillo* is a term that refers to a charismatic strongman in 19th-century Latin American nations. Caudillo rule existed in most countries of the region after the colonial period. The governments of newly independent nations struggled to make the transition from an extremely centralized political structure under a monarchy to a more open form of government. Further complicating national development was the relatively lax and pliable system of local authority that was also

the legacy of the colonial system. The enigmatic and at times paradoxical personality of the caudillo emerged as the dominant authority figure at the national and local level after independence. Caudillos relied on a complex and inclusive combination of patronage, personality, and persuasion—often by force—to seize and maintain control. The height of *caudillismo*, or the age of the caudillo, occurred in the middle decades of the 19th century.

The colonial system in Latin America was characterized by at least the perception of irrefutable royal authority. In practice, however, local administrators were given a large degree of latitude, as indicated in the phrase “*obedezco pero no cumplo*” (I obey, but I do not execute). This attitude among Spanish and Portuguese administrators allowed local officials to enforce royal decrees selectively. As a result, strong personalities often challenged one another to be the dominant local authority; however, conflicts created by overlapping or competing jurisdictions could be settled by the overarching supremacy of the monarch. Independence removed the monarch as the only legitimate authority capable of settling such jurisdictional disputes, and local strongmen emerged to contest other would-be leaders for power.

*Caudillismo* was most prevalent in countries experimenting with incipient forms of DEMOCRACY, as well as in those that faced significant security threats either from within or abroad. Caudillos were most common in Spanish America in the 19th century. BRAZIL, which maintained close ties to Portugal and where monarchy continued until 1889, did not experience *caudillismo* to the same extent as its South American neighbors. Caudillos often held the official title of president, although regional governors and municipal leaders also ruled in caudillo fashion. Some caudillos never held formal political office, yet wielded extraordinary political and/or MILITARY power.

Caudillos were an enigmatic group and often defy simple classification, but a characteristic that all caudillos shared was their personal charm or charismatic appeal. This generation of leaders first built a local network of loyalty by establishing personal bonds and later often broadened that appeal through pompous displays of power. The caudillo ANTONIO LÓPEZ DE SANTA ANNA ruled MEXICO 11 times between 1833 and 1852. Each time he returned to power, his public displays of authority and prestige were more ostentatious. When charisma and personal magnetism did not work, caudillos often resorted to violence and repression. Argentine caudillo JUAN MANUEL DE ROSAS (1829–32, 1835–52) formed a secret security detail known as LA MAZORCA, which was charged with silencing his political enemies. In the interest of maintaining order and control, caudillos regularly suspended the individual rights and freedoms they included in their constitutions.

Caudillos had a reputation for being rough and ready. Many of the earliest caudillos had participated in the wars of independence and had developed strong cre-

dentials as capable military leaders. It was common for rumors and grand tales to turn caudillos into living legends, whose supposed physical strength rendered them capable of carrying out impossible feats. The perceived physical prowess of caudillos extended to all aspects of masculinity. JUAN FACUNDO QUIROGA, a regional caudillo in postindependence ARGENTINA, was known to have single-handedly killed a cougar and went by the nickname “Tiger of the Llanos.” Although he was outnumbered, Venezuelan caudillo JOSÉ ANTONIO PÁEZ (1830–35, 1839–43, 1861–63) won a major battle at San Juan de Payara in 1837. His reputation for military prowess earned him the nickname “Lion of Payara.”

Caudillos often commanded their own private militias, the ranks of which were filled with loyal followers. Numerous regional militias loyal to competing caudillos created an environment of instability and near-constant conflict. Presidents moved in and out of office with alarming regularity as challengers violently overthrew their opponents. Because local caudillos commanded such loyal and efficient groups of military followers, national armies often fractured after caudillos were forced from power by their opponents.

The military strongmen did not necessarily conform to one political ideology. Rather, caudillos were pragmatic, supporting whichever platform they perceived as most necessary and beneficial to current circumstances. A caudillo leader might completely abandon his political ideology to suit new circumstances. Ecuadorean caudillo GABRIEL GARCÍA MORENO (1861–65, 1869–75) imposed highly centralized and conservative policies that safeguarded the power of the CATHOLIC CHURCH. Paraguayan dictator JOSÉ GASPAR RODRÍGUEZ DE FRANCIA (1814–40), on the other hand, exhibited a number of liberal preferences, such as limiting the influence of the church. Nevertheless, he was also one of the only 19th-century Latin American leaders who did not impose liberal, LAISSEZ-FAIRE economic policies. Mexico’s Santa Anna rose to power as a liberal but was quickly persuaded by conservatives to switch sides.

Caudillo rule began to decline throughout Latin America in the late decades of the 19th century during the LIBERAL OLIGARCHY era, although many of the most well-known leaders of that period are often considered a type of caudillo as well. Remnants of the authoritarian and personality-based politics common after independence survived well into the 20th century. Leaders such as Fidel Castro and Hugo Chávez are often classified as present-day caudillos.

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**Cayenne** See FRENCH GUIANA.

**Central America** Conventional wisdom defines Central America as the countries of COSTA RICA, EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA. These countries made up the units of the Audiencia of Guatemala, or Captaincy General of Guatemala, and were popularly referred to as the Kingdom of Guatemala during Spanish colonial times. While a geographer would correctly place BELIZE and PANAMA in Central America, their historical development differed from that of the other nations in the region. Belize, until its independence in 1981, came within the sphere of the BRITISH CARIBBEAN. Panama, at first, fell under the umbrella of the Viceroyalty of Peru and, subsequently, under the Viceroyalty of New Granada. Panama became a province of COLOMBIA when it achieved independence in 1819 and remained so until its own independence in 1903. Because the United States constructed the canal that traverses Panama, a special relationship between those two countries kept Panama separate from Central America until the efforts at economic unity in the late 20th century tied Panama more closely to its neighbors through TRADE agreements.

Immediately following independence in 1823, a handful of Central American leaders wished to continue the five-state unity based in Spanish colonialism and formed the UNITED PROVINCES OF CENTRAL AMERICA, but the ill-fated experiment lasted only until 1839. Individual state nationalism and resistance to the continuation of centralized government stalled the effort at union. Subsequent 19th-century efforts at unification met a similar fate.

The ECONOMY, politics, and social structure of each state were dominated by a landed elite not anxious to share power or prestige with middle or lower socioeconomic groups (see LATIFUNDIO). In the 1850s, COFFEE became the major export of each Central American nation, and except for Costa Rica, by the end of the century, the landed elites controlled the most productive lands and had initiated discriminatory LABOR laws and imposed voting restrictions that ensured the continuation of their political power. Not until the mid-20th century was this system effectively challenged.

See also CENTRAL AMERICA (Vol. IV).

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**centralism** Centralism describes a system of government under which power is concentrated in one overarching authority and local or provincial institutions lack autonomy. Latin American nations have a centralist tradition dating back to the monarchies of the colonial period. In the postcolonial period, proponents of FEDERALISM challenged centralists and attempted to impose governing systems under which political power would be shared more equally between the national government and states or provinces. The merits of federalism over centralism became part of an intense political debate that helped to shape Latin American governments in the decades following independence. Conflict between federalists and centralists often occurred alongside or were tied to other political movements, such as those surrounding LIBERALISM and CONSERVATISM. At times, those confrontations escalated into violent clashes; the resulting political strife kept many Latin American nations in a state of instability for decades.

Some Latin American leaders saw centralism as a way to preserve the structure of the colonial period and thereby ensure a more stable transition to self-government. The colonial political system theoretically was organized in a centralized fashion with one powerful executive authority, the Spanish or Portuguese monarch. The European monarchical system was based on the notion of absolute power, and the Spanish and Portuguese set up their empires to follow this autocratic tradition. The Spanish divided their vast colonies into viceroalties administered by a viceroy who was appointed by and answered to the king. Each viceroalty was further subdivided into separate judicial districts, called *audiencias*, and smaller local provinces. The administrative division was designed to ensure that all decisions and all authority flowed through the king.

Despite the highly centralized design of the Spanish colonial system, in practice there was a degree of regional



and local autonomy. The Crown understood that it could not respond to many of the colonies' immediate needs from across the Atlantic. Many royal decrees were established without a clear understanding of how those laws would apply in the local setting. Furthermore, the Crown in Europe sometimes lacked the power to enforce laws in the colonies, particularly on small and remote islands. As a result, the more realistic attitude of "*obedezco pero no cumpla*" (I obey, but I do not execute) emerged as local authority figures enforced only those royal decrees they felt would work in their local circumstances. The network of local power brokers in the Latin American colonies undermined the idea of a centralized monarchy, though the king did still hold final authority. The pretense of consolidated executive power helped maintain relative order and stability in the colonies.

One immediate consequence of the successful independence movements of the early 19th century was the removal of the king as a centralizing authority figure. Some political elite feared that drifting too far from a system of highly centralized government control would create a power vacuum and cause a mass uprising. Leaders who advocated centralism also tended to support maintaining other traditions of the colonial period, such as continuing the influential role of the CATHOLIC CHURCH, protecting the *FUEROS* and other privileges for certain groups, and perpetuating the existing social hierarchy. Supporters of traditions and strongly centralized government coalesced in conservative political parties in numerous newly independent nations in the first half of the 19th century.

In MEXICO, those who wanted to maintain the political structure of the colonial period advocated a system of monarchy for the nation immediately after independence. In 1821, Spanish MILITARY officer AGUSTÍN DE ITURBIDE brokered a peaceful conclusion to the war for independence that stipulated that Mexico would be an independent nation under a monarch. Iturbide's centralist experiment (and empire) was thrown out in 1824 in favor of a federalist republic under a constitution. Conflict between conservative centralists and liberal federalists escalated throughout the 19th century, with conservative leaders repeatedly attempting to reinstate a more centralized form of government. The 1835 SIETE LEYES, or Seven Laws, dissolved state governments and provoked a backlash in the northern provinces, which eventually led to the TEXAS REVOLUTION. A formal CONSERVATIVE PARTY emerged, and its members attempted to reestablish a monarch in 1853 and again in 1862.

BRAZIL also favored a centralized government throughout the 19th century. The former Portuguese colony achieved independence relatively peacefully. After Napoléon's invasion of the Iberian Peninsula in 1807, the Portuguese Crown relocated to Brazil and made it the seat of the Portuguese Empire. King JOHN VI ruled from RIO DE JANEIRO until 1821, when he returned to Portugal and left his son Pedro in control. The following year,

Brazil declared its independence under PEDRO I; the new nation remained under a monarchical system until 1889.

Leaders in other regions of Latin America pursued a more moderate version of centralist government that did not include a monarch. Independence leader Simón Bolívar envisioned establishing one large, powerful South American nation and articulated that vision in the BOLIVARIAN CONSTITUTION of 1826. The document applied specifically to the newly independent nation of BOLIVIA, but Bolívar hoped eventually to unite the entire Andean region under one government. He recommended an authoritarian, lifetime president in order to preserve order and stability. Bolívar saw the federalist tendencies of many new nations as a threat to the political well-being of the region in the midst of internal and external challenges after independence. He did not succeed in uniting South America under one sovereign government, but Bolivian CAUDILLO and dictator ANDRÉS DE SANTA CRUZ did bring together Bolivia and PERU under the short-lived PERU-BOLIVIA CONFEDERATION in the 1830s. Despite these attempts at unification through a strong, centralized government structure, federalist interests and the desire for more local autonomy eventually led to the dismantling of the Peru-Bolivia Confederation and quashed future attempts at uniting the region.

Confrontations between centralists and federalists turned violent on many occasions in the 19th century. In one civil war after another, centralists joined with conservatives, while liberals found themselves supporting federalist systems of local authority. In VENEZUELA, conflict between the two political ideologies eventually led to the FEDERAL WAR, from 1858 to 1863. Venezuelan centralists aligned with social and political conservatives to promote a strong central government and maintain the traditional social hierarchy. Venezuelan federalists enjoyed the support of the mixed-race rural *llaneros*, who equated a more egalitarian social system with their pursuit of regional autonomy. In Mexico, the WAR OF REFORM erupted as a conservative response to liberal social reform and as a backlash against the liberals' attempt to dismantle the centralist political system. COLOMBIA's vacillation between centralism and federalism in the last half of the 19th century generated frustration and a desire for more autonomy in the province of PANAMA. The citizens of the Central American isthmus tried to break away from Colombia on several occasions and finally achieved independence in 1903.

One notable exception to the tendency for centralism to correspond to a larger conservative ideology was in ARGENTINA. In that country, centralists coalesced under a liberal political and social platform under the Unitario Party. *UNITARIOS* were generally from BUENOS AIRES and wanted to establish a strong central government based in the port city. Unlike other Latin American advocates of centralism, however, *unitarios* hailed from the liberal intellectual circles of Argentina's postindependence society. They found themselves constantly opposed by

the *FEDERALES*, or the more conservative and federalist political party that advocated for provincial interests. The conflict escalated between the two competing parties in the first half of the 19th century, particularly during the dictatorial regime of federalist caudillo JUAN MANUEL DE ROSAS. As in other areas of Latin America, the lines between centralism and federalism in Argentina were not entirely clear and could frequently change. Even though Rosas claimed to stand for the federalist cause, for example, many of his policies became increasingly centralist. When he was overthrown in 1852, disputes over federalism and the role of Buenos Aires continued to divide national leaders. The CONSTITUTION OF 1853 attempted to define a less centralized system, with greater provincial autonomy. In retaliation, leaders in Buenos Aires refused to ratify the document until 1860; in the meantime, the port city operated as an independent province.

By the final decades of the 19th century, the conflicts between centralists and federalists in Latin America had subsided. Many nations found relative political stability under liberal oligarchies that consolidated power after the 1850s (see LIBERAL OLIGARCHY). Liberal governments rewrote constitutions to conform more closely to their preferred social order and political organization. But, by the late 19th century, even liberal regimes realized that the loosely connected federalist systems they had tried to enforce in earlier decades would not produce the political stability needed for economic growth. Most governments found some balance between the highly centralized structure that had characterized the colonial period and the loose confederation that many federalists advocated.

See also BOLÍVAR, SIMÓN (Vol. II).

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Michael P. Costeloe. *The Central Republic in Mexico, 1835–1846: Hombres de bien in the Age of Santa Anna* (Cambridge: Cambridge University Press, 1993).

**Céspedes, Carlos Manuel de** (b. 1819–d. 1874) *Cuban independence leader* Carlos Manuel de Céspedes was a plantation owner from the eastern region of CUBA who initiated the TEN YEARS' WAR in 1868 in an effort to secure the island's independence from Spain and end SLAVERY. Céspedes briefly led a revolutionary government and pushed for numerous progressive reforms.

Céspedes was born in Bayamón on April 18, 1819. He was educated in HAVANA and later in Spain. From an early age, Céspedes was inspired by anti-Spanish politics, and he was known to speak out regularly against the government. On October 10, 1868, Céspedes incited a rebellion with his GRITO DE YARA, in which he called for Cuba's complete independence from Spain and an end to

slavery. Leading by example, Céspedes freed the slaves on his own plantation and recruited them to serve in his army. Other planters in the region joined the movement, and Céspedes's army grew quickly.

In 1869, Céspedes formed a provisional government and oversaw the writing of a constitution. As head of the government, Céspedes insisted on major reforms such as free TRADE, equal taxation, and universal suffrage for men. Ending slavery was also one of his main objectives, but that issue proved divisive among other leaders of the independence movement. An insurrection within the rebel government ousted Céspedes in 1873, and the deposed independence leader went into hiding. He was captured the following year by the Spanish army and executed on February 27, 1874.

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**Charter of Slavery** In 1843, Ecuadorean president JUAN JOSÉ FLORES promulgated a new constitution that liberals dubbed the “Charter of Slavery” because of its highly conservative nature. As one of Simón Bolívar’s “faithful friends,” General Flores accepted many of the Liberator’s political ideas, including his penchant for powerful rulers.

Flores’s preference for a monarchical government came to the fore in 1843–45, during his second term as president. Several individuals, primarily exiled Bolivian general ANDRÉS DE SANTA CRUZ, who was living in Guayaquil, had helped persuade Flores that the solution to ECUADOR’s ongoing political instability lay in establishing a monarchy, or failing that, a “monocracy” (long presidential terms). After the failure of LIBERALISM in the 1820s, hailing back to Spanish tradition for monarchical models of state formation appealed to many of the country’s conservative elite.

When Congress could not agree on Flores’s successor in 1843, he called a constitutional assembly to adopt his draft constitution, which greatly strengthened the role of the chief executive by granting him a 10-year term of office to which he could be reelected. In addition, the president could appoint and remove all government officials, including the governors of provinces and the local district officials. The Senate, elected for life, dominated the weakened legislative branch.

Nevertheless, former president VICENTE ROCAFUERTE demanded changes reducing the length of the presidential term. When Flores held on to the presidency in violation of their private agreement, Rocafuerte fled to PERU where he dubbed the new constitution the “Charter of Slavery.” Flores’s monocracy quickly deteriorated. His proposed tax reforms, which included an income tax on white and mestizo Ecuadoreans and an increase in tariff

rates, coupled with Rocafuerte's strident opposition, brought down his government in 1845.

See also BOLÍVAR, SIMÓN (Vol. II).

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**Chile** Present-day Chile stretches along the western coast of the bottom half of South America. No more than 115 miles (185 km) across at its widest point, Chile is bordered on the east by the Andes Mountains and on the west by the Pacific Ocean. It runs more than 2,600 miles (2,184 km) long from the Atacama Desert in the north down to the tip of South America at Cape Horn in the south.

### INDEPENDENCE

During the colonial period, Chile was part of the Viceroyalty of Peru, but because of its peripheral location and rugged terrain, it remained relatively isolated from the center of administrative authority; Chileans thus developed a sense of local identity. When Napoléon Bonaparte invaded Spain in 1808, the Chilean elite reacted by establishing a local ruling junta. When the local Spanish governor attempted to thwart their actions, patriots rebelled and overthrew him. As in other areas of the colonies, the Chilean junta declared loyalty to Spanish monarch Ferdinand VII but used his absence to enact important changes in local political and economic systems. The junta imposed a free TRADE decree in 1811 and soon after convened a national congress, which began implementing radical reforms. Spaniards and conservative creoles correctly sensed that the junta was moving the colony toward a complete break from Spain, and an internal confrontation over the issue erupted. José Carrera (1785–1821) and Bernardo O'Higgins emerged as leaders of the patriot cause, but by 1814, MILITARY forces sent from PERU had stalled their quest for liberation.

As a Peruvian military force led by Mariano Osorcio regained control of Chile, independence leaders escaped across the Andes into ARGENTINA. Over the next several years, O'Higgins devised a strategy to liberate Chile and allied himself with Argentine liberator José de San Martín. In 1817, a force led by O'Higgins and San Martín crossed back over the Andes and defeated a royalist force at the Battle of Chacabuco. One year later, O'Higgins, serving as supreme director, declared Chilean independence, and one more major victory at the Battle of Maipó ousted the remaining royalist forces. O'Higgins worked to set up a new system of government in Chile, while San Martín took his army north to secure the independence of Peru.

As supreme director, O'Higgins held considerable power, which he was reluctant to relinquish after seeing

the early independence movement splinter. Nevertheless, his vision for Chile's future as an independent nation was progressive and democratic. O'Higgins passed numerous decrees allowing the government to seize enemy property in an attempt to raise money for the penurious national treasury. He managed to provide important financial assistance to San Martín's liberation efforts in Peru, but his aggressive levies angered many influential merchants. O'Higgins also initiated a number of liberal reforms during his administration, including restrictions on the power of the CATHOLIC CHURCH, the elimination of titles of nobility, and an expansion of EDUCATION. He tended, however, to implement his well-intentioned policies with heavy-handed tactics, and by 1823, the elite in SANTIAGO DE CHILE demanded his resignation. Chile's independence hero retired into exile in Peru, and an interim junta selected Ramón Freire (1823–26) to replace him.

With O'Higgins's departure, politics in Chile began to fracture. Those who had opposed the authoritarian nature of the previous administration began to coalesce into a liberal movement, calling themselves *pipiolo*s, or "novices." Opposing them were the supporters of O'Higgins who advocated a strong government and argued that O'Higgins's dictatorial style best suited the needs of the new nation. Liberals referred to them as *pelucones*, or "big wigs." Freire fell into the former camp but continued many of O'Higgins's seemingly liberal policies over the next several years. Freire abolished SLAVERY and expropriated some church properties. But, the new leader also nearly bankrupted the national treasury by continuing to fund the liberation movement in Peru and failing to pay the new nation's foreign loans. He resigned in 1826, and for the next five years, Chile was marred by political instability.

### THE EMERGENCE OF THE PORTALIAN STATE

President Francisco Antonio Pinto (1827–29) managed to push through the liberal CONSTITUTION OF 1828 during a period of intense political conflict, but a conservative opposition movement had been mounting. In the late 1820s, the conservatives joined forces with a reactionary faction of conservatives known as the *estanqueros*, led by businessman and politician DIEGO PORTALES, against the progressive policies of the *pipiolo*s. A controversy over the presidential election of 1829 led to a brief armed confrontation in which conservative leaders quickly came out on top. General Joaquín Prieto (1831–41) took over as president, but his administration was controlled behind the scenes by Portales.

Portales believed in order and the rule of law before all else. He helped to oversee numerous changes to usher in an era of marked political stability but often at the expense of individual freedoms and civil rights. Portales did not value freedom of speech or freedom of the press and took a firm stance with government dissenters. He also created a civil militia to maintain internal order, effectively taking that function and a large degree of

power away from the army. Portales influenced the writing of the CONSTITUTION OF 1833, which provided a legal foundation for political stability for the remainder of the 19th century. It reflected the typical conservative ideology of the 19th century with a strong, centralized executive, limited suffrage, and protections for the Catholic Church. The Portalian state, as the era is often called, allowed Chile to attain a degree of stability and progress while most of its newly independent neighbors were struggling in the transition from colony to sovereign nation.

The disparity between Chile's power and that of its neighbors became evident in a conflict over the PERU-BOLIVIA CONFEDERATION in 1836. Bolivian president ANDRÉS DE SANTA CRUZ, attempting to unify Peru and BOLIVIA under one large and powerful confederation, marched his army into the neighboring nation and set up a new administration. Chileans saw the creation of a large and powerful confederation to the north as an economic and strategic threat. Tensions mounted over trade routes and tariffs, as both nations tried to dominate Pacific coast commerce. President Prieto declared war and sent an invading force in 1837 after Santa Cruz supported an insurgency by exiled former Chilean president Freire, who was trying to overthrow the Prieto regime.

The initial Chilean reaction to the declaration of war provides a glimpse into the autocratic nature of the Portalian state. Numerous merchants and military leaders opposed the war, but Prieto suppressed any opposition. In reaction, a small contingent within the Chilean military revolted and arrested Portales, who was serving as minister of war. The uprising was put down by Prieto, but not before Portales was executed, ending his direct influence over Chilean politics. After suffering an initial defeat in the CHILE-PERU WAR OF 1836, the Chilean army regrouped and annihilated Santa Cruz's military at the Battle of Yungay in January 1839. With Santa Cruz's defeat, the confederation disbanded, and Chile proved itself to be the dominant power along South America's Pacific coast.

### POLITICAL AND ECONOMIC STABILITY

Chile's victory against the Peru-Bolivia Confederation was the first in a long line of national successes that marked a sustained period of growth and prosperity for the country. President Prieto set a precedent of two-term conservative presidential administrations that lasted until the 1870s. Manuel Bulnes (1841–51), military leader and war hero, won the presidency in 1841 and oversaw a period of economic growth and cultural advancement. Those trends continued throughout the 19th century. Bulnes maintained the conservative preference for order and stability but exhibited similar political ambiguities as other 19th-century Latin American leaders. The new president did moderate the government's tendency to suppress political opposition and opened the nation to some degree of liberal reform. For the next four decades,

Chile remained a nation under a strong, conservative executive who implemented numerous liberal-leaning policies. In particular, Bulnes and his successors practiced liberal-oriented LAISSEZ-FAIRE economic policies and allowed a degree of intellectual openness that rivaled policies of more doctrinaire liberal regimes.

Chile owed much of its economic prosperity in the 19th century to its expanding MINING industry. New discoveries of SILVER deposits in the 1830s rejuvenated the ailing national treasury and attracted foreign investors, who brought new industrial mining techniques. By the 1840s, COPPER deposits had been discovered in many areas of the country, and copper production soon surpassed the mining of silver and other elements. The mining industry also benefited other areas of the Chilean ECONOMY. The Bulnes government was hesitant to devote a significant portion of the national budget to infrastructure development, so several mine owners and other private capitalists took it upon themselves to invest in railroads, irrigation canals, and other infrastructure projects necessary to sustain the growth of mining and other industries. Nitrate deposits in Chile's northern Antofagasta Province also drew the attention of investors, and soon the region became the subject of bitter territorial disputes between Chile and neighboring Bolivia.

Growth in the mining industry spurred growth in other economic sectors. One enterprising copper miner by the name of Matías Cousiño found that imported British coal provided a more reliable energy source for powering his smelters, so he purchased a coal mining operation in the northern region of Chile to fulfill his copper-processing needs. He then built a railroad connecting the two and regularly shipped copper ore to his coal mine for processing. He became a major coal producer and, like many business leaders in 19th-century Chile, also developed a prominent political career. Agricultural production also thrived throughout most of the century (see AGRICULTURE). Government policies lowered tariffs and developed coastal ports to encourage trade. The port of VALPARAISO, in particular, became a principal stopping point in the larger global trade network, allowing that city to grow and thrive.

The 1840s also began an era of cultural advancements in Chile as the Bulnes presidency tolerated and even encouraged more progressive intellectual trends. Bulnes and his minister of education and future president, Manuel Montt, embarked on an aggressive policy of secularizing education. At their request, prominent writer, diplomat, and politician ANDRÉS BELLO wrote legislation that created the UNIVERSITY OF CHILE in 1843. The new university replaced the colonial Royal University of San Felipe and quickly gained a reputation as one of the most renowned institutions of higher learning in the Americas. The creation of the university was the first step in a long line of educational reforms over the next several decades. Collectively, 19th-century education policies reflected the belief of Chilean leaders

that education provided an important tool for engendering a populace with a sense of national identity, political responsibility, and civic consciousness.

Chile's welcoming cultural environment attracted intellectuals from all over the world in the 1840s. Many foreign scholars joined the faculty of the nation's burgeoning university system. Lithuanian scientist Ignacio (Ignacy) Domeyko and French scholar Jean-Gustave Courcelle-Seneuil both taught at the University of Chile. Liberal leaders and academicians from other areas of Latin America often sought refuge in Chile from repressive CAUDILLO regimes in their home countries. Future Argentine presidents BARTOLOMÉ MITRE and DOMINGO F. SARMIENTO both resided in Chile during the 1840s.

The presence of exiled intellectuals fueled the vibrancy of the Chilean cultural milieu and motivated Chilean liberals to continue pressuring the conservative regime. Generally, conservative administrations reacted by repressing the opposing political voice, while maintaining an air of tolerance. A brief liberal movement led by Santiago Arcos and Francisco Bilbao organized the Society for Equality in 1850 to protest President Bulnes's selection of his own successor. Bulnes shut down the society's publications and used force to suppress minor revolts that arose in protest of the election. Despite Bulnes's supposed liberal leanings, he maintained absolute authority and ensured that his choice of successor, Manuel Montt, won the presidency.

During the Montt presidency (1851–61), pressure from the liberal camp accelerated, while the president also faced defections from within his own party. The aristocratic *pelucon* segment of the CONSERVATIVE PARTY became increasingly uneasy, as Montt seemed to favor merit over social class in his choice of advisers and administrative leaders. Infighting among conservatives worsened after the president backed measures to impose greater state control over the church. *Pelucos* broke away as Montt and his supporters attempted to form a National Party to strengthen his position. Conservatives, led mainly by *pelucos*, formed an alliance with liberals and attempted to overthrow the Montt administration in 1859. The movement ultimately failed, but the controversy left both parties severely divided, and in the following decade, a political realignment became inevitable.

Throughout the 1860s, political loyalties shifted constantly as congressional leaders vied for power and proposed numerous reforms. By the end of the 1860s, Congress had determined to alter dozens of articles of the Constitution of 1833. By 1871, political jockeying allowed liberals to elect the first nonconservative president since 1831, and Federico Errázuriz Zañartu (1871–76) took office. With a political ally in the president's chair, Congress pushed through the proposed changes to the constitution, and the nation's political landscape changed even more. Throughout the 1870s, Chileans witnessed a flurry of reform, including limiting the president to one term and expanding the electorate. Once in

power, liberal politicians set a precedent of resorting to electoral fraud if necessary to maintain power and keep the Conservative Party subordinate within the evolving political system.

## WAR OF THE PACIFIC

Zañartu's successor, fellow liberal Aníbal Pinto Garmendia (1876–81), intended to continue the pace of liberal reform, but his administration was distracted by a foreign conflict that eventually culminated in the WAR OF THE PACIFIC (1879–84). After independence, the territory of neighboring Bolivia extended across the Atacama Desert in the Antofagasta region to the Pacific coast, although a precise border had never been determined. Rugged terrain and undeveloped infrastructure in Bolivia prevented the central government from having easy access to its territory, whereas movement between Chile and Antofagasta was much less troublesome. After 1840, Chilean investors became increasingly interested in the nitrate-rich Antofagasta region, and border disputes quickly emerged. In 1866, Bolivian president MARIANO MELGAREJO and Chilean president José Joaquín Pérez (1861–71) had signed a treaty defining the border and creating a poorly defined system of resource sharing, under which Chilean nitrate companies were exempted from high Bolivian taxes. The agreement surrendered a number of long-standing Bolivian claims, and when silver deposits were discovered in the region just a few years later, the ambiguities in the treaty became particularly problematic. In 1878, new Bolivian president Hilarión Daza (1876–79) rejected the treaty and began to tax Chilean companies in the region. The Chilean government responded by invading Bolivian territory, and in spring 1879, war began.

Peru eventually joined forces with Bolivia, but both nations had suffered varying degrees of political and economic crises in the years leading up to the conflict and proved to be no match for the Chilean armed forces. Chile's powerful navy dominated the sea, and despite being outnumbered, the Chilean army was more organized and better equipped to sustain a major war. The Chilean military won a series of major battles and by July 1880 controlled much of the disputed northern region. President Pinto then pushed farther north toward Lima to pressure the Peruvian government into ceding portions of its southern territories. In October 1883, the TREATY OF ANCÓN brought a final end to the conflict and granted Chile control over the northern nitrate regions, as well as the former Peruvian territory of Tarapacá. The war had reaffirmed Chilean military dominance in South America and had given the nation access to even more natural resources.

## CHILEAN CIVIL WAR

Chile's victory in the War of the Pacific helped solidify a sense of national pride and identity but did little to abate the internal political strife that continued to fester among

the nation's leaders. Domingo Santa María (1881–86) was elected in the middle of the war and continued liberal control of the political system. He selected as one of his main advisers fellow liberal and future president, José Manuel Balmaceda. The two politicians embarked on a program to move the nation's social and economic systems further toward liberal ideals. They introduced laws that aimed to curb the power of the Catholic Church by setting up a system of civil registry for births, marriages, and deaths. They also laid the groundwork for creating a system of public cemeteries. To push through such aggressive legislation, Santa María frequently had to meddle in local elections to secure the necessary support in Congress. Conservative Chileans protested the anticlerical policies imposed by Santa María, while liberals chafed at the antidemocratic inclinations of the Santa María administration. The outgoing president provoked even more protest from members of Congress when he supported his trusted adviser, Balmaceda, in the 1886 election. Balmaceda's victory in a highly fraudulent electoral process made a confrontation between the executive and legislative branches virtually inevitable.

Balmaceda's presidency was marred from the beginning by constant conflict with Congress. Legislators attempted to rein in the president and limit executive authority, while Balmaceda aimed to inject into the political system the spirit of the original centralist system, established in the Constitution of 1833 (see *CENTRALISM*). Animosity between the two branches escalated in January 1891 when Balmaceda issued an unconstitutional executive decree after Congress failed to approve the year's budget. In response, a coalition of congressional members issued a decree calling for the impeachment of the president. Backed by the Chilean navy, Congress waged war against Balmaceda, who enjoyed the support of the army. The *CHILEAN CIVIL WAR* between the two branches of government lasted for less than nine months but cost more than 6,000 lives. Congressional forces occupied Santiago in September 1891, and the defeated Balmaceda committed suicide rather than surrender.

After the defeat of Balmaceda, Chilean naval officer Jorge Montt was elected president in 1891, and his administration witnessed the beginning of a period of congressional control of politics known as the Parliamentary Republic. That political structure persisted until the 1920s. At the same time, at the end of the 19th century, the Chilean economy remained strong, and growth within key sectors allowed strong working and middle classes to develop into the 20th century.

See also *CHILE* (Vols. I, II, IV); O'HIGGINS, BERNARDO (Vol. II); *SAN MARTÍN*, JOSÉ DE (Vol. II).

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**Chilean Civil War** (1891) The Chilean Civil War was an armed conflict between CHILE's Congress and the nation's president JOSÉ MANUEL BALMACEDA in 1891. Hostilities erupted originally as a conflict over budgetary and taxation policies, but the insurrection also reflected deep-seated animosities over legislative versus executive power. The war can also be seen as a result of growing acrimony within the nation's evolving party system.

When liberal president Balmaceda took office in 1886, he inherited a political system that was already rife with conflict. Conservatives dominated Chilean politics from 1831 to roughly 1861, during which time opposition politicians constantly pressured the national government to impose liberal policies. Conservative presidents Manuel Bulnes (1841–51) and Manuel Montt (1851–61) both allowed varying degrees of liberal reform, blurring the ideological lines between the two political factions (see *CONSERVATISM*; *LIBERALISM*). The Montt administration, in particular, alienated many of the older-stock conservative supporters by allowing several anticlerical measures to pass. By the end of the 1850s, Chile's conservative faction had fractured into two formal parties. The National Party formed around President Montt, while the *CONSERVATIVE PARTY* opposed the policies of the president and formed a precarious alliance, the Liberal-Conservative Fusion, with some liberal leaders. In the 1860s, the liberal movement split. Those who supported the Liberal-Conservative Fusion formed the *LIBERAL PARTY*, and the hard-core anticonservative faction formed the Radical Party. The Fusion managed to dominate Chilean politics throughout the 1860s and into the 1870s: Liberal and conservative allies passed legislation limiting presidential powers and reducing the executive's term limits to one five-year term.

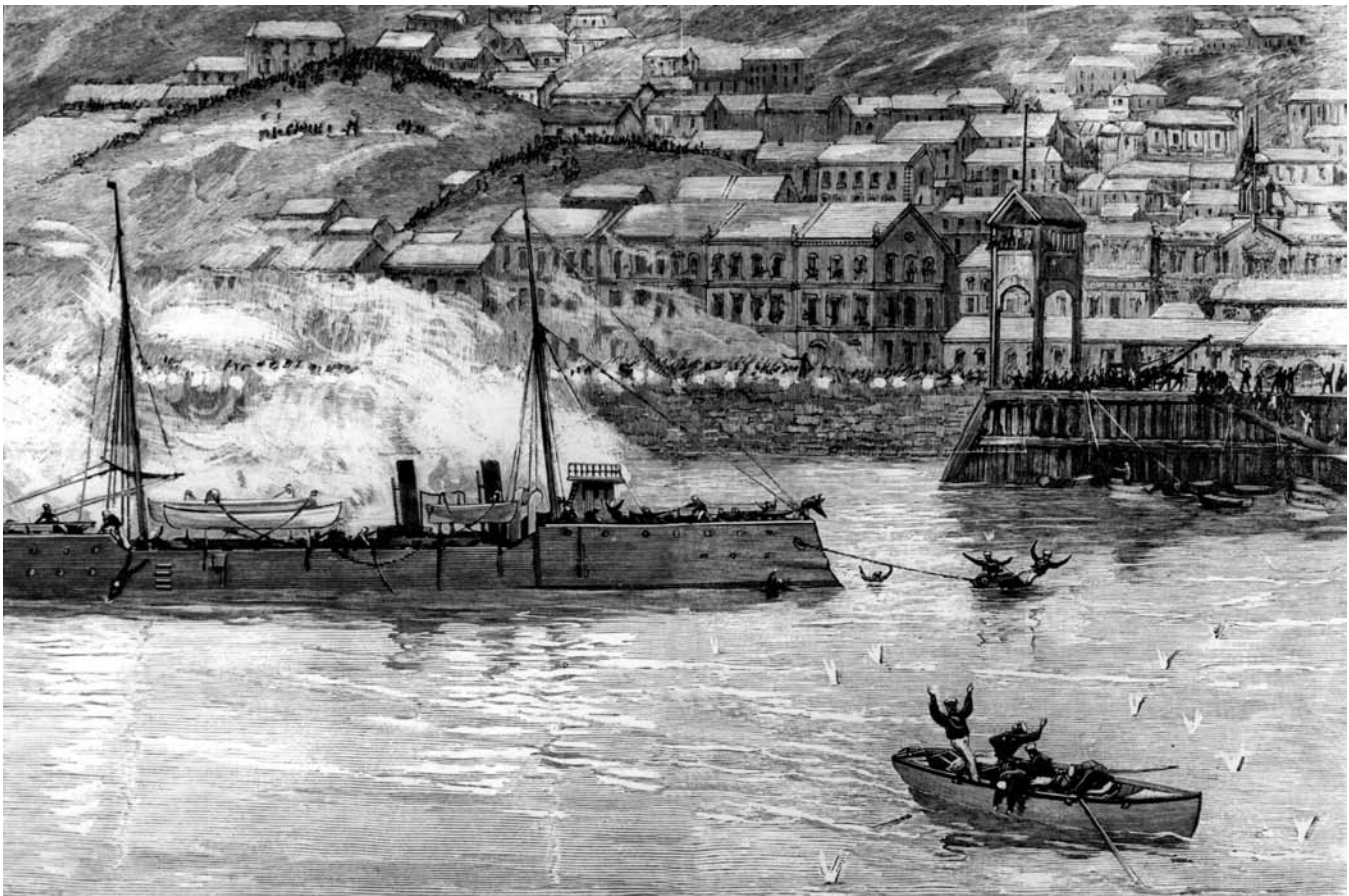
Strange and volatile shifting alliances resulted from the political reshuffling of the 1850s. New electoral laws that expanded the electorate complicated the scenario even further into the 1870s. Liberal president Domingo Santa María (1881–86) vowed to use the new Liberal Party dominance to enact even more aggressive social reform. Santa María and his minister of the interior and future president, Balmaceda, took steps to secularize Chilean society by taking away authority over marriages, births, death, and other social functions from the *CATHOLIC CHURCH*. Santa María took his anticlerical reforms one step further by placing all public cemeteries under state control. To enact such measures, Santa María and Balmaceda often resorted to electoral fraud and other ways of manipulating the political system to ensure passage of the controversial legislation. Conservatives railed over anticlerical measures, while many liberals looked askance at brazen violations of political freedoms. The presidential election of 1886 proved to be one last exercise in electoral manipulation by Santa María. His hand-selected successor and loyal adviser, Balmaceda, won the questionable election and was inaugurated president in September 1886.

Balmaceda claimed that he wanted to reconcile the political disunity, but congressional wariness of abusive presidential authority was already deeply entrenched. The new president announced plans to use the nation's expanding treasury to launch a program of improving public works and the national infrastructure. Concerned congressmen from all political factions saw Balmaceda's spending strategy as a way to bolster presidential authority and take power away from the Congress. The president attempted to sway Congress by forming a Liberal-Conservative coalition within his cabinet, but his efforts had little impact on the distrusting and recalcitrant legislators. The country moved closer to major conflict when the economy hit a slump in 1890 and mining workers throughout the country began to strike. As the masses demonstrated against the government, Congress became even more hostile toward the struggling president.

In the final months of 1890, crisis became inevitable. The government had failed to come to an agreement with Balmaceda on a budget bill for 1891. Fearing the president would use the lack of an approved budget as a pretense for exercising an executive mandate, leading members of Congress had secretly drafted legislation calling for Balmaceda's impeachment. In January 1891, the president gave them the justification they were looking for when he unilaterally declared a budget policy

for the year. In response, the legislators cited their "Act of Deposition" and called on naval captain and future president JORGE MONTE to support Congress in deposing the president. Navy ships escorted select members of Congress to Iquique, where they set up a new "congressional" government and a headquarters for the anti-Balmaceda forces.

Backed by the navy, the congressional mutiny enjoyed a considerable degree of liberal backing, so the liberal Balmaceda looked for support in yet another awkward alliance with conservatives. Initially, the army also claimed loyalty to the president and for a brief but bloody number of months the two branches of the armed forces fought each other on behalf of the battling politicians. From the beginning, it was evident that the congressional forces' dominance of the waterways gave them a distinct advantage over Balmaceda. By August, congressional leaders had put together a sizable land force, and the congressional army began its march toward SANTIAGO DE CHILE. Legislative and presidential forces engaged in two particularly bloody battles at Concón and La Placilla as the congressional army advanced toward the capital. By the end of the month, Balmaceda had taken refuge inside the Argentine embassy as the congressional army marched triumphantly into Santiago. Balmaceda spent three weeks in hiding in the Argentine embassy.



Battle scene from Valparaiso during the Chilean Civil War, 1891 (Hulton Archive/Getty Images)

On September 19, the day after his presidential term formally ended, the defeated president took his own life with a bullet to the head.

Balmaceda's suicide marked the end of the Chilean Civil War. The conflict had cost more than 6,000 lives and equally devastating destruction of property. The congressional victory simultaneously marked the beginning of a period when the legislative body dominated Chilean politics. Known as the Parliamentary Republic, the era of congressional control lasted until the 1920s.

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**Chile-Peru War of 1836 (War of the Confederation) (1836–1839)** During the Chile-Peru War of 1836, CHILE declared war and invaded its northern neighbor to break up the newly formed PERU-BOLIVIA CONFEDERATION. The three-year conflict ended with the disintegration of the confederation and the rise of Chile as the dominant Andean power in South American affairs in the 19th century.

Antagonism over the confederation emerged almost immediately after its inception in 1836. Bolivian dictator ANDRÉS DE SANTA CRUZ sent an invading army into PERU ostensibly to help quell a civil war. His forces occupied the nation, and Santa Cruz declared the creation of the confederation. Chilean and Argentine leaders perceived the unification of BOLIVIA and Peru as a threat to their own stability and power in the region. Chilean leaders feared that Pacific coast TRADE from the port city of VALPARAISO would now have to compete with commerce from the more powerful confederation. Indeed, as the confederation was forming, local Peruvian leaders antagonized the government of Chilean president Joaquín Prieto (1831–41) by backing out of trade agreements that had been signed the year before. Tensions flared, but diplomatic efforts maintained a delicate peace until Santa Cruz supported an expedition led by deposed Chilean leader Ramón Freire (1823–26), who was attempting to overthrow the Prieto government. Prieto and his cabinet minister DIEGO PORTALES claimed that the Peru-Bolivia Confederation under Santa Cruz upset the balance of power in the region and threatened Chilean sovereignty.

Chilean forces launched an attack against the confederation navy, and the Prieto administration declared war in December 1836. Argentine leader JUAN MANUEL DE ROSAS also declared war against Santa Cruz, and in 1837, forces from Argentina and Chile attacked Peruvian territory. Santa Cruz easily repelled the Argentine forces, and initially, it seemed he would easily defeat the Chilean forces as well. Going to war meant the Chilean government had to impose an unpopular conscription policy to raise an adequate army, and many elite failed to see the

benefit in taking such a hard line against Santa Cruz. The conservative CONSTITUTION OF 1833, however, allowed the president to declare a state of emergency and claim supreme powers on occasions such as this. Opposition to the war mounted within Chile, and several antigovernment conspiracies began to form. The Prieto government, backed by Portales, dealt with suspected conspiracies by executing dissidents, further provoking antigovernment sentiment. In summer 1837, one conspiracy, which was almost discovered by the government, was carried out. As Portales arrived in Quillota to inspect Colonel José Antonio Vidaurre's regiment, Vidaurre led a mutiny and arrested the politician. Portales was killed before the mutiny could be suppressed. Vidaurre was executed and his head displayed at Quillota as a deterrent to other would-be conspirators.

Despite his reputation for oppression and extralegal tactics, the death of Portales served as an ironic turning point in Chile's war with the confederation. Portales became a martyr and hero for the nation, and a clear sense of Chilean identity began to emerge. A large Chilean expedition departed for southern Peru in September 1837 under Manuel Blanco Encalada, only to be defeated at Arequipa. Blanco Encalada was forced to sign the Treaty of Paucarpata in November 1837, which recognized the sovereignty of the Peru-Bolivia Confederation. The Chilean government rejected the treaty outright, and military leaders began preparing a new expedition.

The new plan of attack took shape under military general and future president Manuel Bulnes (1841–51). As the 5,000-man expedition departed for Peru in summer 1838, internal dissension within the confederation indicated that the fragile nation itself was beginning to unravel. General Luis Orbegoso, president of North Peru, had declared independence. As Santa Cruz saw his once-powerful confederation fall apart from within, Bulnes and his Chilean army occupied LIMA. Fighting continued for several months, but by January 1839, Bulnes had effectively destroyed the confederation with his victory in the Battle of Yungay. Santa Cruz was forced to flee to ECUADOR, and the confederation disbanded.

Aside from dismantling the Peru-Bolivia Confederation, the Chile-Peru War of 1836 left an important legacy in Chile itself. The Chilean military had proven itself against a formidable opponent, and the nation gained a reputation as one of the most powerful and prominent nations in South America in the 19th century. The war also assured that the Chilean port of Valparaiso would dominate much of the commerce along the Pacific coast. For his part, Bulnes was celebrated as a national hero and was elected to two terms as president in the 1840s.

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**Christophe, Henri** (Henry Christopher, King Henri [Henry] I) (b. 1767–d. 1820) *president and king of Haiti* Henri Christophe was born into SLAVERY in the British Caribbean. He ran away to sea at 23 years of age by stowing away on a French brig. It is believed that Christophe was the drummer boy for the Chassures-Volontaires de St-Domingue, the French troops who assisted in the American Revolution during the siege of Savannah in 1779. Around 1799, Christophe was sold to a French naval officer as a handyman, taken to Saint Domingue (formerly SANTO DOMINGO), and sold to the owner of the Crown Hotel restaurant, where he worked as a waiter. He saved his wages, bought his freedom, and became a career officer in the Haitian army under Toussaint Louverture (1743–1803) in the early days of the 1791 revolution.

The Haitian Revolution was a long, hard-fought struggle for abolition and, ultimately, complete independence from France. Toussaint's movement enjoyed a number of early successes, but in 1802, French leaders, fearing the eventual autonomy of Saint Domingue and desiring to reimpose slavery there, dispatched nearly 20,000 fresh reinforcements under General Charles-Victor-Emmanuel Leclerc, Napoléon Bonaparte's brother-in-law, to bring the rebellion under control. It quickly became clear to Christophe and Toussaint that the French army's superiority in manpower, weapons, and other resources put them at a distinct disadvantage. Christophe and Toussaint began conducting peace talks with French leaders, and both of the Haitian rebels agreed to switch their allegiance to the French forces. The French did not honor the peace accord, however, and immediately imprisoned Toussaint. Christophe then resumed the struggle against the French, convinced that armed insurrection was the only way to bring the desired changes to Saint Domingue. When the French were expelled and JEAN-JACQUES DESSALINES (1804–06) assumed power, Christophe was promoted to general-in-chief in the north. After Dessalines's assassination, a temporary political compromise between Christophe and ALEXANDRE PÉTION (1806–18) ended with the election of Christophe as president under a constitution drawn up by Pétion. This constitution centered power in the Senate (where Pétion was in control) and gave no power to Christophe. Refusing to be a simple figurehead, Christophe organized forces and marched on the south, which resulted in a standoff with Pétion. Christophe retreated to the north of the Artibonite River and declared the northern territory the State of HAITI, with himself as president, in February 1807. One month later, Pétion was elected president of the south, and HAITI was divided into two territories for almost two decades.

Christophe crowned himself King Henri I of the Kingdom of Haiti on March 26, 1811. Attempting to create his own European monarchy, he created an entire cast of nobility for his royal court, assuming the titles of earls, counts, and barons. He also brought African war-

riors from Dahomey and formed them into an elite corps of bodyguards known as the Royal Dahomets. These warriors loyally defended him. The nobility followed the rules of dress and behavior laid out in the king's *Almanack Royal d'Haiti*, with varying colors delineating rank, for example.

Christophe had monumental ARCHITECTURE designed and built. Because France would not recognize Haiti's independence, he remained obsessed with the possibility of the return of the French or invasion by another imperial power. He feared that Haiti was vulnerable to conquest by a large part of the world and had several structures built in the interest of security. The Versailles-like royal palace Sans Souci and, behind it, the massive fortress Citadel Laferrière were constructed to help prevent invasion. After Christophe's fall, the palace was raided, and an earthquake in 1842 destroyed it. The Citadel Laferrière was begun in 1805 when Christophe was general-in-chief of the north under Dessalines and was designed to function as an impenetrable fortress. The structure cost more than 20,000 workers their lives and was equipped to hold the king and 5,000 soldiers for one year. It is situated on the mountain Bonnet-à-l'Évêque at 3,000 feet (914 m) above sea level and covers an area of 107,639 square feet (10,000 m<sup>2</sup>). The construction of the citadel was completed shortly before Christophe's death in 1820.

Life was less cruel for the general populace under Christophe's leadership. Forced LABOR laws were relaxed, and while laborers remained bound to their plantations, work hours were more flexible, and wages were increased to one-fourth of the harvest. However, many people disliked the autocratic "feudalism" of their monarch. Christophe did strive to improve the EDUCATION of children, but only those of the elite.

Christophe suffered a stroke, which left him partially paralyzed. After falling ill, he lost control of his army. Fearing that he would be taken captive by rebels, he committed suicide by shooting himself on October 8, 1820. He was immediately entombed in the floor of the citadel with quicklime, as per his instructions. In this way, he avoided mutilation of his body by his political rivals. The north and south of Haiti were reunited following Christophe's death.

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**Cibao** Cibao is the region made up of the northern provinces of the DOMINICAN REPUBLIC on the island of Hispaniola. Encompassing just under 150 miles (241 km)

of the northern coast, the Cibao includes the whole of seven provinces and parts of several others. The Cibao consists mainly of fertile valley lands and is bordered by the mountainous Cordillera Central and the Cordillera Septentrional. While it is a generally rural area, many parts are densely populated. The climate varies, and the region produces agricultural products such as TOBACCO, COFFEE, WHEAT, MAIZE, and rice (see AGRICULTURE).

The Cibao was the region of the island first settled by the Spanish in the late 15th century and has been home to many of the nation's historic leaders. General GREGORIO LUPERÓN (1879–80), who led Dominican forces against the Spanish in the WAR OF RESTORATION, started his movement in his native Puerto Plata in the heart of the Cibao. Luperón helped coalesce opposition to the CAUDILLO BUENAVENTURA BÁEZ (1849–53, 1856–58, 1865–66, 1868–73, 1876–78) into the Blue Party and recruited members from the residents of the Cibao. The region became an important base of support for the Blue Party in the late decades of the 19th century.

ULISES HEUREAUX (1882–84, 1887–99), Luperón's one-time ally and eventual dictator of the Dominican Republic, was also a native of the Cibao. Economic policies that favored SUGAR cultivation in the southern regions of the island fueled conflict between the government and residents of the Cibao. Nevertheless, as sugar plantations became increasingly dependent on U.S. investments in the late decades of the 19th century, Cibao peasants maintained a sense of economic autonomy, and a local tobacco industry thrived.

See also HISPANIOLA (Vols. I, II).

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**científicos** *Científicos* is the name used to describe the group of Mexican political and intellectual leaders who espoused the philosophy of POSITIVISM in the late 19th century. They used the scientific emphasis of positivism as the basis for government policies to bring about order and progress during the PORFIRIATO (1876–1911).

The earliest *científico*, GABINO BARREDA, is credited with introducing the positivist philosophy to MEXICO. Positivism privileged scientific and empirical knowledge and sought to use scientific theory to improve society. Borrowing from the ideas of French philosopher Auguste Comte, Mexican intellectuals initially applied these liberal ideas to EDUCATION and social policies during the era of LA REFORMA. In particular, early positivism in Mexico stressed the need to strengthen secular government institutions and curb the power of the CATHOLIC CHURCH. Many early positivist policies championed education as the most effective way of bringing order and progress.

The later generation of intellectuals, many of whom were educated at the National Preparatory School founded by Barreda, changed the emphasis and application of positivist thought in Mexico. Many Comtean disciples, educated in science and MEDICINE, turned their attention to what they perceived as the backwardness and social disparity that plagued the nation. They were troubled by the large numbers of illiterate peasants in the countryside and workers living in poverty in urban areas who seemed to defy their attempts to bring progress and modernization to Mexico. By the 1890s, a modified version of positivism became the official ideology of the Porfiriato, and an important group of intellectuals, including JUSTO SIERRA, José Yves Limantour, Francisco Bulnes, and Manuel Romero Rubio, promoted its tenets.

These *científicos* were early technocrats who served as advisers to President PORFIRIO DÍAZ on such issues as economic development and social policies. Many of their policies incorporated aspects of Herbert Spencer's theories of social evolution. They believed that Mexico needed to progress from a simple agricultural society to a more sophisticated, industrial society and that the nation's traditionally minded Amerindian population was hindering the nation's social evolution (see AGRICULTURE; INDUSTRIALIZATION). These attitudes provided the foundation for two important characteristics of government policies. First, the Díaz administration became increasingly dictatorial over the three-plus decades of the Porfiriato. Díaz and his advisers argued that because such a large portion of the population was holding back the rest, a "brief" period of highly centralized administrative power was necessary to continue the nation's social evolution. Second, Porfirian policies toward the indigenous became increasingly paternalistic, as government leaders believed NATIVE AMERICANS were incapable of the type of advanced social awareness necessary for "progress." Many policies aimed to counteract the Indians' perceived backwardness rather than fix the structural inequalities that kept many of them in a state of poverty and underdevelopment.

While Díaz's *científico* advisers can be credited with improving many aspects of Mexico's economic and industrial landscape through their positivist policies, overall, their application of scientific reasoning failed to address many underlying social disparities that could not be explained as a part of social evolution. The outbreak of the Mexican Revolution in 1910 brought an end to the Porfiriato and generally served to delegitimize many of the positivist theories of the *científico* elite.

See also MEXICAN REVOLUTION (Vol. IV).

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**Cinco de Mayo** Cinco de Mayo, or May 5, is a Mexican holiday celebrated primarily in PUEBLA, as well among Mexican communities in the United States and elsewhere. The Cinco de Mayo holiday commemorates a major victory by the Mexican army over the French at the Battle of Puebla on May 5, 1862, at the beginning of the FRENCH INTERVENTION. While that victory is still celebrated in Puebla, in the United States, the day has taken on greater meaning as a celebration of Mexican culture and heritage.

The French intervention was the result of Napoléon III's aspirations to build a French empire in the Americas. Citing large amounts of outstanding debt owed by the Mexican government, he sent more than 6,000 French troops to blockade the port city of Veracruz in January 1862. Over the next several months, the French army subdued major cities along the coast and began marching inland toward the capital. Between MEXICO CITY and the coast stood Puebla, a city with a reputation for conservative political leanings and where the CATHOLIC CHURCH had considerable influence. French leaders expected little resistance, unaware that MEXICO's president, BENITO JUÁREZ, had sent General Ignacio Zaragoza (b. 1829–d. 1862) to defend the city.

On the morning of May 5, Zaragoza's troops confronted the invading French force at the Forts of Lareto and Guadalupe. Zaragoza ordered a cavalry brigade to flank the enemy formation, while French forces foolishly attacked head on through swampy, muddy terrain. Zaragoza's troops, many of them poorly armed indig-

enous peasants, fought bravely and repelled the main onslaught. The cavalry, led by future president PORFIRIO DÍAZ, overpowered the French cavalry, clinching victory for the Mexicans. When the battle was over, nearly 500 French troops were dead, and the French army was forced to retreat to Veracruz in order to regroup.

Although Cinco de Mayo celebrates victory in just one battle, Zaragoza's stand that day was vital in the larger context of resisting the French invasion. It was more than a year before the French army could continue its march inward, and Napoléon had to send 30,000 more troops to augment his forces. Symbolically, the victory was even more significant. Word of Zaragoza's win against the larger, more formidable French army spread quickly throughout the country and the entire Latin American region. In Mexico, it motivated the resistance to the French and brought a strong sense of national pride.

In the 1930s, the Forts of Guadalupe and Loreto were converted into historical sites and war museums. Every year, the city of Puebla hosts a celebration commemorating Zaragoza's victory, and the date is also recognized in the rest of the country. In recent decades, Mexican immigrants in the United States have popularized the holiday north of the border.

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A Cinco de Mayo celebration in Mexico City, circa 1884 (Library of Congress)

**Cisplatine Province** See BANDA ORIENTAL.

**Cisplatine War (Argentine–Brazil War) (1825–1828)**

The Cisplatine War was fought between ARGENTINA (known at the time as the United Provinces of the Río de la Plata) and BRAZIL from 1825 to 1828 over the BANDA ORIENTAL, which had been renamed the Cisplatine Province by the Brazilians. The war brought financial and political instability to both newly independent nations. It also resulted in the Banda Oriental becoming the independent republic of URUGUAY.

Today the Cisplatine Province makes up the southern portion of Uruguay on the eastern shore of the mouth of the Río de la Plata. Known by Spanish Americans as the Banda Oriental (eastern bank), the region was part of the United Provinces of the Río de la Plata when Brazilian forces occupied it in 1821. Argentines protested the potential loss of national territory, and in 1825, JUAN ANTONIO LAVALLEJA led an independent MILITARY force to retake the province. Encouraged by the government of the United Provinces, the “Easterners” revolted against the Brazilian occupation. The Brazilian government reacted by declaring war on its neighbor. By 1826, BERNARDINO RIVADAVIA had been chosen as president of the United Provinces and raised a formal army to support the revolt in the Banda Oriental.

Lavalleja and the Argentine army attacked Montevideo but failed to take the city. In retaliation, Brazilian emperor PEDRO I ordered his navy to blockade BUENOS AIRES, which substantially disrupted TRADE revenues throughout 1827. As a result of the financial instability created by the war, the Rivadavia government defaulted on British loans. Rivadavia faced mounting opposition because of the war and other internal conflicts. Growing dissension within the United Provinces eventually forced the president to step down in July 1827.

Despite the internal turmoil in the United Provinces, the war quickly reached a stalemate. Brazilian ground forces failed to advance against the Easterner rebellion. Pedro I also faced numerous revolts within his nation as he struggled to wage war on neighboring Argentina. The new Argentine leader, Manuel Dorrego, and the Brazilian emperor eventually invited arbitration by British and French representatives. In 1828, the belligerents agreed to a peace proposal that guaranteed the independence of the República Oriental del Uruguay (Eastern Republic of Uruguay). Free trade rights into the Río de la Plata region were also secured.

The war and its aftermath had important consequences for both Argentina and Brazil in the early years after their independence. The cost of waging war mounted in both countries during a time when neither government could afford to deplete national coffers. The economic distress brought by the Cisplatine War also exacerbated political turmoil within each country. The Brazilian people grew increasingly disillusioned with

Pedro I, and the emperor was forced to step down in 1831. Political infighting in the United Provinces also increased as *UNITARIOS* continued to confront *FEDERALES*. That instability eventually led to the dissolution of the United Provinces and brought about the rise of the CAU-DILLO and dictator JUAN MANUEL DE ROSAS in 1829.

See also UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**civil code** See FAMILY.

**Civilista Party (Partido Civil)** The Civilista Party was a probusiness political party in PERU founded by MANUEL PARDO in 1872. The party aimed to counter the historical domination of the MILITARY over Peruvian politics, to clean up the nation’s electoral process, and to rejuvenate economic and TRADE policies.

The predecessor to the Civilista Party was the Sociedad Independencia Electoral (Electoral Independence Society) formed after the first election following the promulgation of the Constitution of 1860. Party members, known as *civilistas*, included prominent businessmen, merchants, and liberal intellectuals. Their opponents were supporters of former finance minister and future president NICOLÁS DE PIÉROLA, who were known as *piérolistas*. Piérola was responsible for the 1869 contract that gave French investors a monopoly over the nation’s guano industry, contributing to a growing economic crisis (see GUANO AGE). *Piérolistas’* prescription for the nation contrasted sharply with that of the *civilistas*, and the two groups clashed over their competing political and economic programs.

The Civilista Party backed Peru’s first civilian president, Pardo, in 1872. Pardo was a railroad magnate who, by the 1870s, felt that the authoritarian nature of previous regimes had weakened Peru and compromised the nation’s economic resources. Pardo ruled for four years and during that time attempted to stabilize the nation’s ECONOMY, which was suffering from a downturn in the guano industry. Pardo and the *civilistas* aimed to decentralize the national government and passed measures to give greater authority to the provinces. They also paid close attention to the plight of the wider populace, calling for the first national census in 1876, which revealed a high level of both poverty and illiteracy among the mestizo and Amerindian populations. Although Pardo responded by passing measures to mandate compulsory primary EDUCATION, his four-year term in office yielded few measurable results.

The Civilista Party was instrumental in revitalizing the nation after its humiliating and devastating defeat in

the WAR OF THE PACIFIC (1879–84) with CHILE. Peru had entered the war in alliance with neighboring BOLIVIA to defend against Chilean encroachments in the Atacama Desert in western Bolivia and southern Peru. After losing the war and being forced to cede part of its southern territory to Chile, Peru descended into chaos. Eventually, military leader ANDRÉS AVELINO CÁCERES took leadership of the country and ruled intermittently between 1886 and 1895. In the latter year, he was overthrown mainly through the efforts of the Civilista Party, which was now allied with Piérola.

Piérola and the *civilistas* devoted the final years of the 19th century to rebuilding the nation's economic and fiscal institutions. The nation's currency was reformed, and national authority over most of the nation's economic processes was streamlined. The party's favoritism toward the business oligarchy was evident in policies that remained in place well into the 20th century.

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**Clayton-Bulwer Treaty** (1850) The Clayton-Bulwer Treaty was a U.S.-British agreement that prohibited the colonization, fortification, or exercise of exclusive influence in CENTRAL AMERICA and provided for joint Anglo-American protection of any interoceanic canal built on the isthmus (see TRANSISTHMIAN INTERESTS). Following the end of the U.S.-MEXICAN WAR in 1848, U.S. interest awakened to the potential importance of Central America as a transit route between the Atlantic and Pacific Oceans. The first U.S. emissaries to the region, ELIJAH HISE and EPHRAIM GEORGE SQUIER, found a strong British presence there, thanks largely to the efforts of London's emissary to the region, Frederick Chatfield. The British also had a strong presence on NICARAGUA'S MOSQUITO COAST, where the San Juan River had for long been considered the possible Atlantic Ocean terminus of a canal through Nicaragua.

In September 1849, U.S. secretary of state John C. Clayton and British diplomat Henry Bulwer commenced negotiations that resulted on April 19, 1850, in the treaty bearing their names. At the time, each nation interpreted the treaty as preventing the other's expansion into the region, but some historians have argued that other factors during the 1850s were more important. As the United States inched toward civil war in the 1850s, interest in isthmian affairs waned (see U.S. CIVIL WAR AND CENTRAL AMERICA). The same was true in Britain, where the Crimean War and the protection of British

interests in the Mediterranean Sea were, for the moment, more important than distant Central America. The treaty remained in effect until 1901, when it was abrogated by the second Hay-Pauncefote Treaty.

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**clothing** Clothing has always had both practical and symbolic uses. People wear clothing for warmth and protection but also select the types of clothing they wear—or fashion—to make statements about identity and status. Furthermore, the manufacture, distribution, and sale of clothing has historically been an important part of local, national, and global economic networks. Often, trends in fashion and clothing have reflected important trends in Latin American history.

Latin American society was stratified and segregated by race and identity during the colonial period. "Pure-blooded" white Europeans were held in the highest esteem, while NATIVE AMERICANS and African slaves were considered inferior (see SLAVERY). Mestizos and other people of mixed race theoretically fell somewhere in between. Generally, the colonial social ideal relied on purity of birth to define status; nevertheless, purity of birth could be difficult to prove and was not immediately evident through physical appearance alone. Colonial officials passed various sumptuary laws in an effort to designate social class according to clothing and other personal adornments. Leaders hoped that by regulating dress they could control the physical distinction between the elite and the commoners. While some slaves, Amerindians, and poor mestizos challenged those laws by adorning themselves in silk and jewelry, generally, a person's class could be distinguished by their clothing.

The social stratification that characterized the colonial period persisted after independence, as did the penchant for using clothing and fashion to define identity and status. During and immediately after the wars for independence, many Latin Americans found themselves struggling financially, as violence and war had damaged local and national economies. Despite their financial woes, however, many people still exuded opulence in the clothing they wore. Foreign travelers in the 19th century often commented that people in all sectors of Latin American society took great care to dress themselves well. Fashion trends were largely defined by the European cultural centers of London and Paris and were

most evident in urban areas. Mexicans, Argentines, and Brazilians, who tended to have had more regular contact with Europe, adopted European clothing trends more wholeheartedly, though they also exhibited their own distinctiveness. Argentine women, for example, adopted a unique headdress in the 1820s that many observers began associating with the new nation's identity. What started as a small comb, or *peineta*, morphed into an enormous hair ornament known as the *peinetón*, and for more than a decade, the women of BUENOS AIRES proudly sported the large accessory.

In MEXICO, the *china poblana* dress generally associated with rural peasants became part of the national costume in the 19th century. The brightly colored embroidery on flowing white cotton dresses made the style distinctive. Mexican women often added a *rebozo*, or woven shawl, that could be worn around the shoulders and head for warmth or protection from the Sun. The *rebozo* was also used to carry babies or goods.

Latin American political and economic leaders promoted ethnic imagery in an attempt to portray a quaint national culture. The Argentine national exhibitions at world fairs in the late years of the 19th century tended to feature picturesque indigenous costumes and other imagery. But, in reality, "peasant clothing" did not imply such privileged status. By the end of the 19th century, elites in Latin America had adopted a discriminatory attitude toward clothing styles that were associated with the urban and rural poor. During the era of LIBERAL OLIGARCHIES, governments attempted to attract foreign investors as a way to fund economic expansion. Politicians and economic leaders tried to make their national images conform to European and U.S. notions of modernity to cater to the preferences of foreign businessmen. In an ironic reversal of colonial sumptuary laws, the Mexican administration of PORFIRIO DÍAZ passed laws prohibiting indigenous and rural peasants from entering certain urban areas without shoes or European-style trousers.

Clothing also became an important part of several Latin American economies in the late 19th century (see ECONOMY). The economic policies of liberal oligarchies that encouraged basic manufacturing and textile factories were some of the first to emerge in places such as Mexico and ARGENTINA. Furthermore, Argentine wool supplied textile industries in several European economies.

See also CLOTHING (Vol. I).

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**Clube Militar** See CONSTANT, BENJAMIN.

**Cobija** Located in the Bay of Cobija in present-day CHILE, the port of Cobija was part of BOLIVIA in the early 19th century. Immediately following independence, Bolivian president ANTONIO JOSÉ DE SUCRE had established a national port in the bay and sought to develop it as a major point of access to the sea.

From the beginning, Cobija's location in the Atacama Desert limited its usefulness as a major transit point for Bolivian TRADE. The port of Arica farther to the north was closer to major Bolivian cities and did not require a dangerous trek through the desert. Bolivian leaders, however, lost Arica to PERU in the 1820s, leaving Cobija as the only national sea port.

After 1840, investors began developing the guano industry in the Atacama Desert. During this period, known as the GUANO AGE, Chile challenged Bolivia's claim to the Atacama Desert and to the port of Cobija. The two nations teetered on the brink of war for more than two decades until Bolivian dictator and CAUDILLO MARIANO MELGAREJO signed a treaty in 1866 favoring Chilean claims. The agreement moved the Bolivian boundary claim north from the 27th parallel to the 24th parallel and stipulated that the territory between the 23rd and 25th parallels would be a shared zone. Bolivians reeled at the treaty, and tensions flared even more when SILVER deposits were discovered in the shared zone in 1871.

Subsequent Bolivian administrations made desperate attempts to revise the treaty, but stubborn Chilean leaders refused to yield important provisions to their neighbor. Eventually, war broke out over Pacific coast resources and boundaries. The WAR OF THE PACIFIC involved Chile, Bolivia, and neighboring Peru and lasted until 1884. The war devastated Bolivia and ended with the defeated nation ceding the entire Atacama region to Chile. The war made Bolivia a landlocked country but did give it controlled import and export rights through Chile.

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**coca** Coca is a plant native to the Andean regions of South America. For centuries, the leaves of the coca plant have been used as a stimulant and as a cure for various gastrointestinal maladies by South American indigenous peoples. Scientists discovered ways to alter the plant's chemical makeup in the 19th century to produce the drug cocaine. Since then, coca production has been the source of a great deal of conflict in Latin America.

Coca consumption was first observed by Spanish conquistadores and explorers, who noted that the Andean peoples who regularly chewed coca leaves had more endurance and were better able to tolerate the effects of working at high altitudes. During the colonial period, Spanish officials quickly realized the value of the potent leaves and imposed a tax on local coca exchanges. The

Spanish also made coca available to Andean mine workers as a way to increase productivity, and in some areas the plant served as currency.

It was not until the 19th century that coca use outside of Latin America became common. The leaves in their natural form were difficult to transport, and the flavor and potency of the coca deteriorated during the journey across the Atlantic Ocean. But, by the 1850s, European scientists had begun experimenting with the coca plant in pursuit of medical advances. In 1855, Friedrich Gaedcke isolated the ingredient that gives the plant its potency. The new chemical, erythroxyline, was later purified by Albert Niemann, who named the resulting substance *cocaine*.

Scientists and entrepreneurs quickly began looking for ways to market the new substance. In the 1860s, Vin Mariani, a French Bordeaux wine containing cocaine extract, became available, and coca tonics began appearing in pharmacies throughout Europe and the United States. In 1886, in response to temperance legislation in the United States, pharmacist John Pemberton formulated Coca-Cola as an alcohol-free alternative to French coca wine. By the 1880s, medicinal cocaine was in widespread use throughout the world; it came as pills, tonics, powders, and even cigarettes. Cocaine products were marketed as pain relievers, stimulants, and antidepressants, while makers also claimed they could cure ills including constipation, nausea, asthma, and general fatigue. Most of the “cure-all” patent MEDICINES that were common in the late 19th century contained unspecified amounts of cocaine.

Much of the coca used in the production of patent medicines and other cocaine-based products came from PERU and other Andean regions of South America during the 19th century. At the same time, traditional consumption of coca leaves continued in these areas. By the turn of the century, the recreational use of nonmedicinal cocaine had become prevalent in the United States, and experts began to consider its impact. They examined the addictive properties of cocaine, and government leaders began to question the widespread use of the substance. The Pure Food and Drug Act of 1906 gave the U.S. government regulatory powers over cocaine and other medications. The Harrison Narcotics Act of 1914 restricted the use and distribution of cocaine-based products. After 1914, coca and its chemical derivative, cocaine, became part of drug-based conflict that has featured in U.S.-Latin American relations.

See also COCA (Vols. I, II); DRUGS (Vol. IV).

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**Code Rural (Rural Code)** The Code Rural was an attempt by Haitian president JEAN-PIERRE BOYER to

generate income through agricultural production as a means to help repay the indemnity owed to France in recognition of HAITI as an independent republic. The code, signed at the National Palace in Port-au-Prince on May 6, 1826, reduced most Haitians to slave status (see SLAVERY). The code was a severe reinstatement of the basic plan of *FERMAGE*, a serflike system of forced LABOR previously used by Toussaint Louverture (1801–03), JEAN-JACQUES DESSALINES (1804–06), and HENRI CHRISTOPHE (1807–20). Under the system of *fermage*, workers were bound to their land, and production quotas were placed on them. Laborers had minimal autonomy under the system and suffered strict penalties for not complying with its provisions. The idea was to force small-scale cultivators into large-scale production of export crops (see AGRICULTURE). Under Boyer's Code Rural, towns and cities were exempted from the system, and the Haitian army was to oversee the plan. The Code Rural failed for several reasons. The first was that land plots were not big enough to accommodate large-scale agricultural production, such as required for sugarcane and/or COTTON (see SUGAR). Under Boyer's predecessor, ALEXANDRE PÉTION, a large portion of land had been broken into small plots, making it more suitable for small-scale, subsistence farming. Second, when Haiti signed the treaty with the French, recognizing its independence, the fear of a return to colonial rule ended. As a result, there was little motivation for people to cooperate in the spirit of “national need.” Third, the army had been deteriorating since the revolution and was not strong enough to enforce the code.

Boyer's Code Rural contained 202 articles aimed at identifying those who are “bound” to the soil and cannot, as he put it, “otherwise justify their means of existence.” The Code Rural had a very negative effect on Haiti. In essence, it created two Haitis: one rural and black, consisting of subsistence farmers, governed by a black army; the other made up of the mulatto urban elite governed by the official government. The end result of the Code Rural was that it further solidified existing class and race divisions.

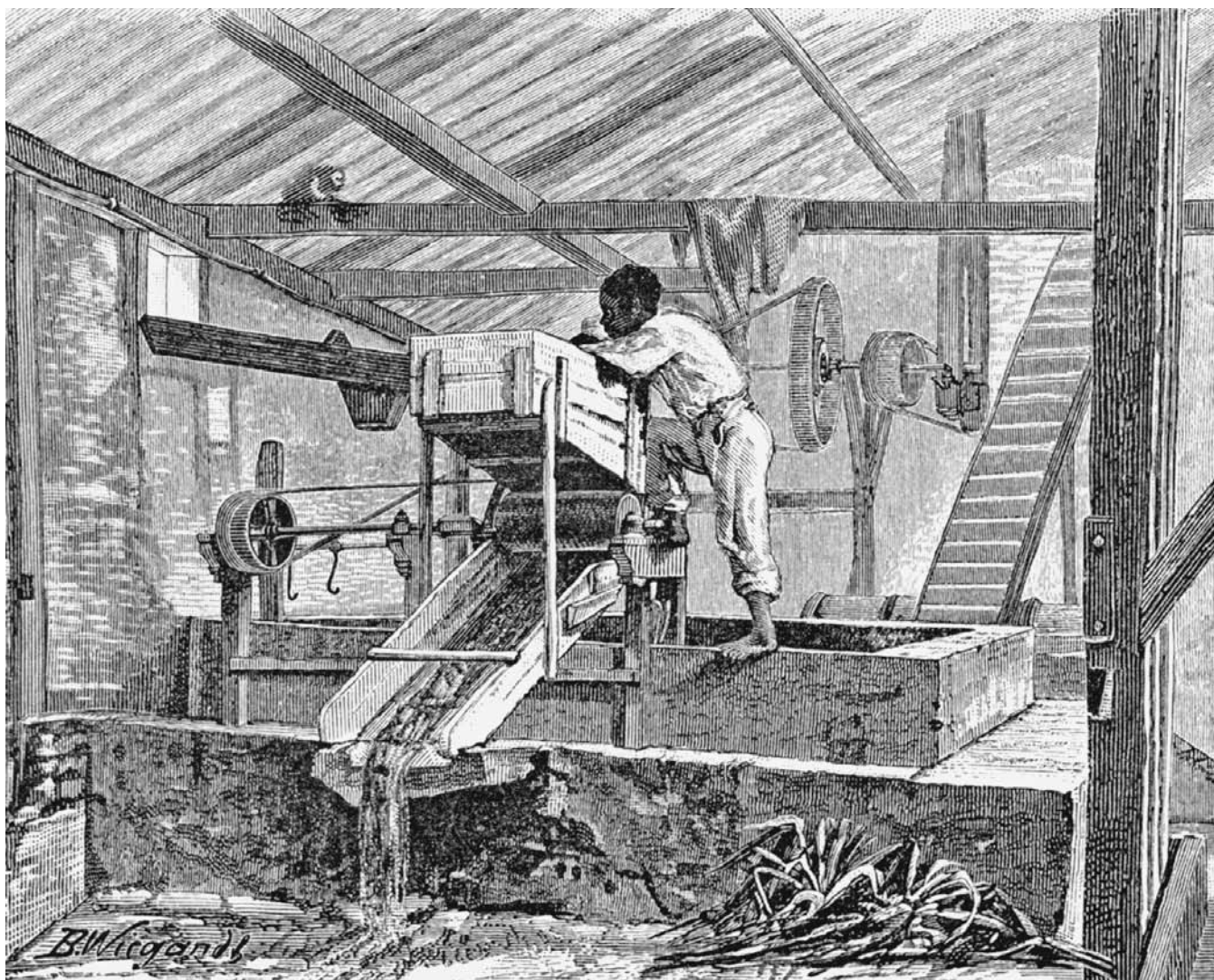
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**coffee** Coffee is one of the chief agricultural products in many Latin American countries (see AGRICULTURE). The seeds or beans of the coffee plant are cultivated, roasted, and ground to be used primarily in making coffee beverages. The coffee plant grows well in the warm, temperate climates of the region.

Europeans introduced the coffee plant to the Caribbean during the colonial era. The French island



Coffee became one of Brazil's main agricultural products in the last half of the 19th century. This sketch from circa 1879 shows the pulping machine on a Brazilian coffee plantation. (From *Brazil, the Amazons and the Coast: Illustrated from Sketches by J. Wells Champney and Others*, by Herbert H. Smith. New York: Charles Scribner's Sons, 1879, p. 520)

of Martinique, where the crop flourished, became home to numerous coffee plantations in the 18th century. Coffee plants were introduced in the Portuguese colony of BRAZIL and in northern South America a short time later. The plant had the biggest impact in Brazil, where a strong plantation ECONOMY based on slave LABOR emerged. Coffee plantations, or FAZENDAS, sprang up around RIO DE JANEIRO, and concurrently, the demand for slave labor increased.

By the middle of the 19th century, a newly independent Brazil had become the largest coffee producer in the world. From 1840 until 1930, coffee production dominated the country's economy, accounting for more than 60 percent of total exports. Growth in worldwide demand for coffee created an economic boom in Brazil, and the crop became intricately tied to the nation's development. Coffee income helped to fund an expansion in infrastructure. New rail lines allowed coffee to be grown

farther inland in the last half of the 19th century. Coffee also contributed to vast changes in Brazil's demographics. The government had been under enormous international pressure to abolish SLAVERY in the early decades of the 19th century. The growth of the coffee industry created a labor demand, and government leaders sought to attract immigrants to fill the ranks of the free labor market. By the end of the century, hundreds of thousands of immigrants had come to Brazil from Spain, Italy, and other countries in southern Europe. Slavery was eventually abolished in 1888.

Coffee played a vital role in the economies of other Latin American countries as well. By the end of the 19th century, it was the leading export in VENEZUELA and COLOMBIA in South America and GUATEMALA, EL SALVADOR, and NICARAGUA in CENTRAL AMERICA. Coffee was also the primary export product in HAITI. In Brazil and Colombia, the production of coffee was controlled



by powerful national oligarchies, while in other regions of Latin America foreign investors owned most of the coffee lands. U.S. investors dominated the coffee industry in Central America; their control of the economy created inequality and social unrest that destabilized the region well into the 20th century.

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**Colombia** Colombia is located in the northern Andean region of South America between VENEZUELA to the northeast and PERU and ECUADOR to the southwest. Prior to the independence movements of the 19th century, Colombia made up the bulk of the Spanish Viceroyalty of New Granada, which was formed in the 18th century. With the viceregal seat at Santa Fe de BOGOTÁ, Colombia played an increasingly important role in Spanish colonial administration.

### INDEPENDENCE

The close presence of Spanish authority meant that Colombia was not as open to ideas and influences from the outside as more peripheral regions of the colonies were. Nevertheless, stirrings of discontent began in the late decades of the 18th century when a rebellion broke out in response to new taxes introduced by Spanish authorities and more aggressive tax collection. Known as the Comunero Rebellion, the insurgency did not seek a complete break from Spain but merely immediate local reforms. A more direct precursor to independence appeared in 1794 when Antonio Nariño translated and reprinted the *French Revolutionary Declaration of the Rights of Man*. He was arrested and exiled to Spain but in 1796 escaped to England and began to talk of independence for the Spanish colonies in more explicit terms. Nariño eventually returned to New Granada and was in prison

when Napoléon Bonaparte's invasion of the Iberian Peninsula provoked a more calculated and widespread movement for independence.

Napoléon's invasion and occupation of Spain in 1808 prompted the formation of local ruling juntas in the Americas. Local elites in New Granada banded together in CARACAS, Cartagena de Indias, and eventually Bogotá to resist the French incursion and, at least initially, to pledge their loyalty to the Spanish monarch, Ferdinand VII. Each junta declared the autonomy and self-government of its region, which quickly fragmented the Viceroyalty of New Granada. Ruling juntas in Tunja, Cartagena, and Socorro formed the United Provinces of New Granada in 1811, while Bogotá formed its own ruling entity under the name Cundinamarca. Nariño, recently released from prison, became president.

The different directions taken by Cundinamarca and the United Provinces of New Granada presaged the rift between CENTRALISM and FEDERALISM that eventually destabilized many newly independent Latin American nations. Nariño believed the loose conglomeration of provinces in New Granada was too weak to withstand the immediate pressures of new government. He imposed a highly centralized form of government in Cundinamarca and refused to join the United Provinces. Many perceived Nariño's government as a dictatorship, and conflict between the two regions quickly developed. Between 1812 and 1814, in addition to confronting royalist forces trying to crush the independence movement, Cundinamarca and the United Provinces fought a civil war in the former viceroyalty of New Granada. The senseless infighting that took place there between 1810 and 1815 led to the period's name of "Patria Boba," or "foolish fatherland."

From 1815 to 1816, the Spanish army, propelled by the restoration of Ferdinand VII to the throne and aided by disunity in the Americas, engaged in a reconquest of New Granada. General Pablo Morillo led the Spanish offensive against small pockets of resistance. Morillo dealt the opposition swift and tyrannical punishment, and his methods initially succeeded in destabilizing the independence movement. But, Morillo's repression also fostered discontent, and the liberation movement enjoyed a resurgence under the leadership of FRANCISCO DE PAULA SANTANDER. By 1819, Santander had joined forces with Simón Bolívar, who had been leading the Venezuelan independence movement. Bolívar firmly believed that independence in the Spanish colonies would come about only if the various regions unified to form one large and powerful South American nation. In February 1819, he convened the Congress of Angostura to begin laying plans to create one centralized government for the former viceroyalty of New Granada.

On August 7, 1819, forces under Bolívar and Santander defeated the royalist army at the Battle of Boyacá, effectively annihilating the Spanish army in the interior of New Granada. Within days, Bolívar had taken Bogotá,

allowing the liberation of the remainder of New Granada to proceed with relative ease. Bolívar established his base in New Granada and continued his attempts to liberate the remainder of Venezuela and Ecuador. Following the victory at Boyacá, leaders from New Granada joined Bolívar's Congress of Angostura, and in December the delegates promulgated a decree declaring the creation of GRAN COLOMBIA. The new nation was made up of the various provinces of the Viceroyalty of New Granada. Bolívar saw this as a first step toward creating a unified United States of South America, but Gran Colombia was beset by the same problems and instability that had led to the demise of the Patria Boba.

Gran Colombia was organized geographically under three departments: Cundinamarca (present-day Colombia and PANAMA), with its capital at Bogotá, which was also the central capital of Gran Colombia; Venezuela, with its capital at Caracas; and Quito (present-day Ecuador), with its capital at QUITO. The Congress of Cúcuta continued the work started at Angostura, and in 1821, the new congress finalized a constitution formalizing the Gran Colombian union. The constitution called for a highly centralized form of government, and delegates elected Bolívar president, with Santander as vice president. Shortly after promulgating the new constitution, Bolívar departed to continue leading the independence movement in PERU, and Santander took over the presidential duties in Bogotá. Despite Santander's attempts to stabilize the ECONOMY and implement modest social reform, regional discontent began to overshadow his administration. Provincial leaders in Venezuela and Ecuador grew to resent the centralized authority of the national government in Bogotá. Caracas, in particular, was geographically isolated from the seat of power, and local leaders felt they had little or no voice the national government.

In 1826, Venezuelan MILITARY leader JOSÉ ANTONIO PÁEZ rose in revolt against Santander's government. His insurrection precipitated the return of Bolívar, who succeeded in temporarily placating regional rivalries, but Bolívar became increasingly autocratic after 1826 and ruled in dictatorial fashion. His attempts to centralize Gran Colombia's government provoked Páez to rebel again in 1829. This time, the Venezuelan CAUDILLO was followed by numerous liberal leaders throughout the struggling nation, and by 1830, Venezuela and Ecuador had withdrawn from Gran Colombia. Bolívar resigned the presidency and died en route into exile. The republic was formally dissolved the following year.

### REPUBLIC OF NEW GRANADA

With the dissolution of Gran Colombia, the former department of Cundinamarca became the sovereign Republic of New Granada. Santander, who had been forced into exile in the final years of the Bolívar dictatorship, returned in 1832 to become president of the new republic. He faced some opposition by remaining Bolívar

supporters but managed to maintain a sense of order. He took steps to stabilize the nation's economy and initiated modest social reforms according to his proclaimed liberal platform. In 1837, Santander stepped down, and José Ignacio de Márquez (1837–41) became president. Márquez generally approved of the liberal direction in which his predecessor had taken the country but had invited some former Bolívar supporters into his administration. This stirred up liberal opposition and eventually led to civil war.

The War of the Supremes began with an uprising in 1839 in the conservative southern province of Pasto over anticlerical reform measures. In 1840, liberal general José María Obando—an unlikely ally—joined the insurrection under the banner of federalism. Obando was soon joined by other disaffected liberal-minded military leaders throughout New Granada. Earlier, liberals had not taken a strong stand on federalism, but Márquez's inclusion of Bolívar supporters in his administration had brought attention to the issue and fuelled the rebellion. A number of those supporters provided military support for the Márquez government and helped defeat Obando. The coalition formed by Márquez with former Bolívar supporters became the predecessor to Colombia's CONSERVATIVE PARTY, which was formally established in 1849.

Márquez's victory in the War of the Supremes in 1841 ushered in a 10-year period of virtually uninterrupted conservative rule. Throughout the 1840s, leaders such as Pedro Alcántara Herrán, Mariano Ospina Rodríguez, and Tomás Mosquera articulated a political direction for the conservative movement. They moderately expanded the power of the executive and halted the liberal educational reforms that had been initiated by Santander. Instead, they favored an educational curriculum based on doctrine approved by the CATHOLIC CHURCH. Conservative leaders also imposed a number of seemingly liberal measures, such as reducing tariffs in the interest of LAISSEZ-FAIRE economic policies. Furthermore, they engaged in some modernization and improved the nation's infrastructure, expanding TRANSPORTATION and communication lines to overcome the natural barriers such as mountains and rivers that had kept much of the nation fragmented.

### LIBERAL REFORM

This initial era of conservative rule came to an end in 1849 with the election General José Hilario López (1849–53). López had fought in the wars of independence and had become a wealthy landowner in the decades following the break from Spain. As a liberal candidate, he took advantage of a schism within the Conservative Party over the policies of President Mosquera. That rift allowed the once-disadvantaged LIBERAL PARTY to gain the upper hand. The Liberal Party itself was divided, among GÓLGOTAS, DRACONIANOS, and urban artisans. Nevertheless, the various factions were able to unite against the conservative ruling elite to win the presidency in 1849 and

institute aggressive reforms. In later years, discord within the Liberal Party produced a new set of problems.

Under López, liberals pursued a reform agenda that was intended to transform society according to the theoretical foundations of 19th-century LIBERALISM. López and his successor, Obando (1831–32, 1853–54), passed a slew of laws that aimed to protect individual liberties and guarantee some measure of social equality. The CONSTITUTION OF 1853 entrenched those reforms and called for additional measures as well. Liberal leaders passed universal male suffrage, abolished SLAVERY, and declared complete freedom of the press. In the interest of establishing a system of private property ownership, they passed laws providing a mechanism for parceling out communally owned indigenous lands—a measure that ultimately led to *LATIFUNDIO*, or land concentration in the hands of a few elite. Furthermore, liberal reforms reinforced the laissez-faire economic policies of low tariffs that had defined the conservative governments' economic policies. This measure angered the urban artisan faction of the Liberal Party, who pushed for greater TRADE restrictions to protect their ailing commercial enterprises. Artisans united with *draconianos* to overthrow the Obando government in 1854, which prompted a brief alliance between *gólgotas* and conservatives. Backed by the Conservative Party, Ospina Rodríguez became president in 1857, and a new federalist constitution was promulgated in 1858.

Federalism produced a degree of instability in 19th-century Colombia. The new constitution granted states new rights and greater autonomy, and liberal leaders in states where the party was strong managed to manipulate laws to prevent the Conservative Party from competing for power. Conservatives in those states often rebelled against the local government, and increasingly President Ospina used national power to back conservative revolts at the local level. By 1860, full-scale civil war had erupted, and the once-conservative ex-president Mosquera now led the liberal opposition. In July 1861, Mosquera captured Bogotá and imprisoned conservative members of government. His victory ushered in a new era of liberal dominance known as the Radical Republic, from 1863 to 1880.

The second wave of liberal ascendancy saw the imposition of even more progressive reforms. Many of the aggressive anticlerical measures that liberals wanted to introduce in 1849 were now codified in laws passed by Mosquera and subsequent leaders. Liberals promulgated another constitution in 1863, which consolidated the new reform measures. Liberals outlawed all religious orders and passed laws granting the government new powers of administration and supervision over the CATHOLIC CHURCH (*tuición de cultos*). In keeping with liberal theories on private property ownership, in 1861, the government issued the Mosquera decrees, which allowed officials to seize church-held lands and sell them to private interests. In an attempt to safeguard federalism, liberal leaders

granted even more powers to state governments and changed the name of the republic to the United States of Colombia. Many states exercised their new power to set voting criterion by abolishing the universal male suffrage that had been achieved a decade earlier and limiting the vote once again to the educated elite. In a final move to strengthen local authority over the national government, liberals reduced the presidential term to two years.

### THE REGENERATION

The zealous nature of liberal policies began to wear thin by the 1880s. The Mosquera decrees and other, similar anticlerical measures had alarmed citizens in a nation that was predominantly Catholic. Furthermore, economic liberalism under laissez-faire trade policies worked only as long as Colombia's export sector remained strong. A downturn in commodity export prices shook the entire economy and challenged the liberal mandate. Economic and social questions incited numerous acts of defiance against the national government. Those acts often turned to serious threats thanks to the loose federalist political system, which safeguarded a large degree of regional authority. In 1884, President RAFAEL NÚÑEZ, now in his second term, put down one such attempted revolt and used the conspiracy as a rationale for abolishing the Constitution of 1863 and replacing it with a more centralist, conservative document.

Núñez's abrogation of the Constitution of 1863 marked the beginning of an era of conservative reform known as the Regeneration (1878–1900). The one-time Liberal Party member attempted to establish his own Nationalist Party, which was ultimately encompassed by the more dominant Conservative Party. The party splintered between hardline Nationalists and a more moderate faction referring to themselves as Historical Conservatives. Nevertheless, Núñez did succeed in garnering support for a number of reforms that severely diminished local government authority in favor of a strong central administration. The CONSTITUTION OF 1886 changed voting laws to include literacy requirements and extended the presidential term from two to six years. Núñez scaled back many of the liberal measures that had been passed in the 1860s and 1870s, including the Mosquera decrees and other anticlerical measures. Indeed, his administration closely allied itself with the Catholic Church, as Núñez signed the Concordat of 1887 agreeing to a full restoration of church privileges and protections under Colombian law. Protections of civil rights and individual liberties that had been articulated by the Liberal Party were diminished.

In the 1890s, the conservative government also began tampering with economic policy. Miguel Antonio Caro (1894–98), who had become president after Núñez's death, imposed an export tariff on COFFEE to offset an economic decline that threatened the financial stability of his administration. He also inundated the money supply with paper money, driving up inflation and further

destabilizing the economy. Vocal opponents within the radical faction of the Liberal Party began pushing for armed insurrection to bring down the government. When Nationalist candidates Manuel A. Sanclemente (1898–1900) and José Manuel Marroquín (1900–04) won the presidency and vice presidency in 1898, liberal militias under the leadership of radical Liberal RAFAEL URIBE URIBE and General Benjamín Herrera rose in revolt. A minor skirmish in October 1899 gave way to a lengthy and bloody civil war that is known as the WAR OF THE THOUSAND DAYS (1899–1902).

### THE INDEPENDENCE OF PANAMA

The War of the Thousand Days lasted for three years and, after a handful of isolated battles fought in the fashion of conventional warfare before the summer of 1900, was played out as a guerrilla war that plagued most of the country. The war claimed more than 100,000 lives and caused incalculable hardship through destruction of property and disruption of the economy. By 1902, the war had reached a stalemate, but eventually the conservative government, now under President Marroquín, negotiated the Treaty of Wisconsin, which granted amnesty to liberal insurgents and ended the conflict.

Events in PANAMA can largely be credited for precipitating the resolution. U.S. political and economic leaders had long been interested in the Isthmus of Panama as a narrow transit route for trade between the Atlantic and Pacific Oceans (see TRANSISTHMIAN INTERESTS). Overland transport had provided the basis for a thriving economy since the colonial period. Federalist autonomy granted in the era of the Liberal Revolution and the constant liberal-conservative bickering in Bogotá only fueled those sentiments. As Panamanians saw Bogotá benefit from the revenues of that trade, many local leaders began to advocate secession. Indeed, the Colombian government had stymied several separation movements in earlier decades. Furthermore, Panama had been a major front in the War of the Thousand Days, and future Panamanian president Belisario Porras (1912–16, 1918–20, 1920–24) and Victoriano Lorenzo used that war as justification for pushing for Panamanian secession once again. The Colombian government only managed to prevent the province from breaking off with the help of U.S. forces in the region.

By 1902, the United States began to look more like an adversary than an ally on the Panama issue. U.S. leaders determined that Panama would be the ideal location of an interoceanic canal, and U.S. secretary of state John Hay invited Colombian foreign minister Tomás Herrán to negotiate terms that would allow the United States to build the canal. Backed by a government weakened by civil war and with very little leverage, Herrán signed the Hay-Herran Treaty in January 1903. The agreement would have given the United States sovereignty over the Panama Canal Zone as well as numerous internal affairs in the region; however, Colombian leaders saw the treaty

as unreasonable and refused to ratify it. In response, U.S. president Theodore Roosevelt lent support to a Panamanian secessionist movement and ordered a U.S. warship to anchor off the coast of Panama to prevent the Colombian army from putting down the insurrection. In November 1903, Panama seceded from Colombia, and the United States immediately recognized its sovereignty as an independent nation (see PANAMANIAN INDEPENDENCE). Three weeks later, U.S. and Panamanian leaders reached an agreement to allow the United States to build the canal across the isthmus.

The 19th century did not end particularly well for Colombia, but national leaders learned important lessons from the War of the Thousand Days and the loss of Panama. The early decades of the 20th century finally brought a modicum of stability, as liberal and conservative leaders became more disposed to compromise. Many of the extreme measures advocated by both parties gave way to policies that aimed to create a more inclusive system.

See also BOLÍVAR, SIMÓN (Vol. II); COLOMBIA (Vols. I, IV); COMUNERO REBELLION OF NEW GRANADA (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II).

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**Colorado Party, Paraguay** The Colorado Party of PARAGUAY was founded in 1887 by Bernardino Caballero (1880–86), who had been a loyal supporter of Paraguayan dictator FRANCISCO SOLANO LÓPEZ (1862–70). Caballero later served as president. He and fellow *lopiztas* (supporters of López) Cándido Bareiro and Patricio Escobar launched the new party in an attempt to wrestle control of the government away from a young group of anti-López intellectuals who had risen to power in the years after Paraguay's defeat in the WAR OF THE TRIPLE ALLIANCE. The *colorados* rose to prominence in the 1880s and dominated Paraguayan politics until the so-called Liberal Revolution of 1904. The *colorados* resumed leadership with the rise of Alfredo Stroessner in 1954 and remained the ruling party of Paraguay for the remainder of the 20th century.

Paraguayan politics in the late 19th century were defined by growing tensions between the *colorados* and the Liberals. The Liberal Party also formed 1887, in opposition to the *colorados* and Caballero's political manipulations. The *colorados* have traditionally promoted a more conservative platform; nevertheless, the loyalties of both parties shifted considerably in the final decades of the 19th century, and both defied simple ideological categorization. The end of the War of the Triple Alliance crippled traditional power structures that had been tied to economic wealth, and the rival political parties stepped in to fill that void. Therefore, the maneuverings of both parties can best be understood as an internal power struggle, complicated by external interference by both BRAZIL and ARGENTINA.

In the wake of the War of the Triple Alliance, Brazil supported an interim governing triumvirate in Paraguay made up of anti-López exiles who had earlier sought refuge in BUENOS AIRES. This group of idealists was quick to accede to the demands of the foreign powers in exchange for a voice in the formation of Paraguay's new government. Liberal-minded, antidictator intellectuals oversaw the writing of a new constitution in 1870 and began positioning themselves to direct national politics. At the same time, conservative leaders—many of whom had been firm supporters of Solano López—also jockeyed for power. Conservative leader Juan Bautista Rivarola was elected president by the 1870 assembly but was forced to step down a short time later as the power struggle continued.

In 1872, a liberal government briefly rose to power under the presidency of Salvador Jovellanos and his close adviser Benigno Ferreira. Jovellanos immediately faced a diplomatic dilemma over the final peace concessions to the War of the Triple Alliance. The new president attempted to stand up to Argentine stipulations that Paraguay cede more territory. As Jovellanos resisted Argentina's demands, a group of conservative leaders including Rivarola, Bareiro, Escobar, Caballero, and Juan Bautista Gill began plotting to overthrow the liberal government. The conservative coalition sought assistance from both Argentina and Brazil, and the group carried out a revolution from 1873 to 1874.

Gill became president in 1874 and was followed by Bareiro four years later. When Bareiro died in office in 1880, Caballero led a coup against the vice president and took power. The undemocratic means by which Caballero came to power, as well as his autocratic governing style, provided the basis for much of the opposition to the Colorado Party. Colorado political tactics—known as *caballerismo*—included all varieties of corruption, a lack of DEMOCRACY, and general violations of individual rights. Caballero stepped down from office in 1886 but continued to control national politics from behind the scenes. The Liberal Party formed in 1887 in opposition to Caballero's practices, and in response, Caballero and his supporters formally established their movement as

the Colorado Party. The Colorado Party dominated the national government for the rest of the 19th century.

As in earlier years, internal politics under the *colorados* continued to be influenced by foreign powers in the 1890s. Brazilian leaders, in particular, sought to maintain close commercial ties between the two nations and actively interfered in local Paraguayan politics to protect Brazilian interests. The most egregious of these interventions took place in 1894 when José Segundo Decoud—who had a reputation as an anti-Brazil nationalist—seemed poised to win the presidency in Paraguay. A Brazilian diplomat spearheaded the Cavalcanti coup of 1894 and placed Juan Bautista Egusquiza in the presidency.

The Brazil-sponsored coup of 1894 sparked a series of events that transformed the rivalry between the political parties and eventually brought an end to the Colorado Party's dominance. Egusquiza aspired to end the divisive party rivalries and began proposing concessions to the Liberal Party. His actions were welcomed by some but reviled by many. Both parties split into factions over the issue of interparty cooperation. Within the Colorado Party, *egusquistas*—or those who supported the new president—found themselves at odds with the old guard of more hardline *caballeristas*. Liberal Party members also split into the *cívicos*, who approved of Egusquiza's policy of cooperation, and radicals who resisted interparty conciliation.

The schism over Egusquiza's policies afflicted both parties, but it weakened the Colorado Party the most. By the end of the 19th century, the old guard of powerful generals who had once controlled the party had been pushed aside by *egusquistas*. The growing rift between the two Colorado factions weakened the party, and in 1904, the Liberals led a revolution that removed Colorado leaders from power. Ferreira, who had been deposed as part of the liberal administration in 1874, helped lead the revolt. He became president two years later. The Liberal Party controlled Paraguayan politics for the first half of the 20th century until the rise of Stroessner in 1954 brought the Colorado Party back to power.

#### Further reading:

Harris Gaylord Warren and Katherine F. Warren. *Rebirth of the Paraguayan Republic: The First Colorado Era, 1878–1904* (Pittsburgh, Pa.: University of Pittsburgh Press, 1985).

**Colorado Party, Uruguay** The Colorado Party of URUGUAY is the liberal political party founded by JOSÉ FRUCTUOSO RIVERA to oppose the BLANCO PARTY in the 1830s. Members of the Blanco Party were more conservative and favored the interests of rural landlords throughout the countryside. The *colorados* relied on a support base of merchants and intellectuals in Montevideo and other large urban areas. The Colorado Party's name derived partly from the red color its adher-

ents used to set themselves apart from the white *blancos* on the battlefield.

Although the rival Colorado and Blanco Parties did not formally exist prior to Uruguay's independence, signs of dissent were visible in earlier decades. As independence movements sprang up in South America, inhabitants of the BANDA ORIENTAL—a province in the Viceroyalty of Río de La Plata and part of present-day Uruguay—began to demand autonomy from governing forces in BUENOS AIRES. An insurrection led first by José Gervasio Artigas produced separatist sentiments within the Banda Oriental. Artigas's movement also created concern for PEDRO I in neighboring BRAZIL. The emperor sent an occupation force, only to confront another insurrection led by JUAN ANTONIO LAVALLEJA. Lavalleja's revolt was supported by the government of BERNARDINO RIVADAVIA in Buenos Aires, and the conflict quickly escalated into the CISPLATINE WAR between Brazil and ARGENTINA.

The Cisplatine War lasted from 1825 to 1828, and residents of the Banda Oriental divided between the warring nations of Brazil and Argentina. The war finally ended with a treaty that guaranteed the complete independence of the Banda Oriental as the Eastern Republic of Uruguay. The CONSTITUTION OF 1830 provided a governing structure for the new nation, and Rivera was elected its first president. Rivera initially cooperated with his successor, MANUEL ORIBE, but the former allies began to diverge, and Rivera overthrew Oribe's presidency in 1838. The rift created within Uruguay during the Cisplatine War surfaced once again and remained long after the war's conclusion. Residents who had supported Brazil rallied around Rivera and formed the Colorado Party. Those who had supported Buenos Aires backed Oribe and formed the rival Blanco Party.

Hostilities between the two opposing parties escalated as Oribe sought exile in Argentina and formed an alliance with the dictator JUAN MANUEL DE ROSAS. The deposed Blanco leader waged war against Rivera. The Colorado Party won the support of Great Britain, France, and Brazil, as the foreign powers believed the liberal and urban-oriented political party would support policies favorable to free and open TRADE in the Southern Cone. As foreign nations became involved in the conflict, hostilities between the Colorado and Blanco Parties escalated into a full-scale civil war known as the GUERRA GRANDE.

Rivera led the Colorado Party against the *blancos* for the next several years but was forced to flee to Brazil in 1843. Oribe and the *blancos*, supported by Argentina's Rosas, attacked Montevideo and placed the city under siege for the next nine years. During that time, British and French forces continued to support the *colorados* and provided vital sea support to help maintain the city's defenses. When the European forces withdrew in 1850, Oribe and the *blancos* were poised to take the city, but an insurrection in Argentina deposed Rosas, and Oribe lost the support of his crucial ally. Without Rosas's support, the *blancos* were unable to penetrate Montevideo's

defenses. A peace treaty brokered by Brazil in 1852 declared no victor, but placed the *colorados* in power. The treaty also solidified the close alliance between the Colorado Party and neighboring Brazil.

In the coming years, Brazil came to the aid of Colorado leaders on numerous occasions as the *blancos* continued to challenge the rival party for power. In 1864, Brazil helped Colorado leaders overthrow the presidency of Blanco Bernardo Berro (1860–64), setting off a series of alliances that culminated in the WAR OF THE TRIPLE ALLIANCE. The Blanco Party leadership joined forces with Paraguayan dictator FRANCISCO SOLANO LÓPEZ in an effort to destabilize the Colorado Party alliance with Brazil and Argentina. War between the neighboring countries lasted from 1864 to 1870 and ended with the complete destruction of the Paraguayan MILITARY. The Colorado Party emerged from the war as the dominant political force within Uruguay, although Blanco leaders continued to challenge the rival party.

Colorado Party leaders put down an attempted Blanco rebellion in 1872, and in an effort to bring political stability, the two parties introduced a power-sharing system known as *coparticipación*. Between 1875 and 1890, Colorado Party dominance was further challenged by military leaders who aimed to rid the country of the political favoritism that surrounded the party system. Colorado leaders resisted the attempts of Colonel Lorenzo Latorre (1875–80) and Máximo Santos (1882–86) to dismantle the Colorado Party. Instead, a powerful antimilitary faction within the party—known as the *civilistas*—emerged, and by 1890, the Colorado Party's control of the political system had been restored.

The Colorado Party faced one last challenge by Blanco leader Aparicio Saravia in 1897. Colorado presidents granted even more concessions to the *blancos*, granting Saravia virtually unrestricted control in many rural areas. The traditional Blanco Party control of the countryside finally came to an end with the emergence of Colorado leader and populist president José Batlle y Ordóñez (1903–07, 1911–15) in the early 20th century. Batlle y Ordóñez refocused the political platform of the Colorado Party to reflect the changing needs of the nation in the 20th century. The changes he introduced helped the Colorado Party consolidate its power throughout much of the 20th century.

See also BATLLE Y ORDÓÑEZ, JOSÉ (Vol. IV); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); URUGUAY (Vol. IV).

#### Further reading:

David Rock. "State-Building and Political Systems in Nineteenth-Century Argentina and Uruguay." *Past and Present*, No. 167 (May 2000): 176–202.

**Comité Revolucionario de Puerto Rico (Puerto Rican Revolutionary Committee)** The Comité Revolucionario de Puerto Rico was a revolutionary group devoted to the independence of PUERTO RICO

from Spanish control. Formed in January 1868 by Puerto Rican political exiles Dr. RAMÓN EMETERIO BETANCES and Segundo Ruiz Belvis (b. 1829–d. 1867) in the DOMINICAN REPUBLIC, the Puerto Rican Revolutionary Committee actively sought the independence of Puerto Rico from the authority of the Spanish Crown. As independence had not been achieved through political channels, the group's immediate goal was the violent overthrow of the Spanish regime in Puerto Rico.

While Betances and Ruiz Belvis were unable to return to Puerto Rico, they corresponded with fellow revolutionaries on the island, establishing independent cells under the leadership of several key members of the committee. A U.S. citizen by the name of Matías Brugman was the cell leader in Mayagüez, Venezuelan-born Manuel Rojas in Lares, another Venezuelan by the name of Manuel María González in Camuy, and Puerto Rican Carlos Elio Lacroix in Ponce. Together with Betances and Ruiz Belvis, these six men formed the committee's core leadership. Those in Puerto Rico recruited new members for their cause, while the exiles focused on writing anti-Spanish publications in an attempt to raise funds for weapons and gain political sympathy from more powerful nations.

Betances hoped to capitalize on a slump in the local ECONOMY and the popularity of his recent anti-Spanish writings and planned a military uprising on September 23, 1868, known as the GRITO DE LARES. Originally to take place on September 28, it was moved to September 23 after Spanish authorities learned of an impending revolt following the capture of several rebel conspirators in the Camuy region. Following the eventual failure of the uprising and the imprisonment, exile, or death of several members of its leadership, the committee ceased to function as a viable political or MILITARY force for independence in Puerto Rico.

#### Further reading:

Olga Jiménez de Wagenheim. *Puerto Rico's Revolt for Independence: El Grito de Lares* (Boulder, Colo.: Westview Press, 1985).

Manuel Maldonado-Denis. *Puerto Rico: A Socio-Historical Interpretation* (New York: Random House, 1972).

**Comonfort, Ignacio** (b. 1812–d. 1863) *liberal leader and president of Mexico* Ignacio Comonfort was a liberal leader and president of MEXICO during the era known as LA REFORMA. He oversaw the overthrow of ANTONIO LÓPEZ DE SANTA ANNA in the REVOLUTION OF AYUTLA and the subsequent drafting of the CONSTITUTION OF 1857. Comonfort was known for working to find a middle ground between LIBERALISM and extreme CONSERVATISM.

Comonfort was born to French parents in PUEBLA in 1812. He studied at a local school and joined the MILITARY at a young age. In 1832, he joined the liberal opposition in challenging the conservative dictatorship of Anastasio

Bustamante. He fought against the United States in the U.S.-MEXICAN WAR and was elected several times to serve as a deputy and senator in Mexico's national congress.

He was in Acapulco in 1854 when Juan Álvarez began the revolt that gave rise to the Revolution of Ayutla. Comonfort joined the rebellion immediately and went to the United States to secure support and resources for its prosecution. In 1855, with Santa Anna deposed, Álvarez named him minister of war, and later that year, Comonfort became interim president of the republic. He oversaw the implementation of the Reform Laws and the drafting of the Constitution of 1857. After that document was finalized, new elections formally made Comonfort president.

Throughout the era of La Reforma, Comonfort gave voice to the *moderados* (moderate Liberals) by urging compromise and only modest reforms. His position was largely overruled by the *puros* (staunch Liberals) who pushed through radical reform measures that directly threatened the power and wealth of the CATHOLIC CHURCH and other conservative institutions (see LIBERAL PARTY, MEXICO). Comonfort attempted to stymie a confrontation between liberals and conservatives by backing the Plan de Tacubaya, which suspended implementation of the constitution. Shortly thereafter, conservative general Félix Zuloaga led a rebellion against liberal leaders, and Comonfort resigned the presidency and fled to the United States.

In later years, Comonfort returned to Mexico to aid in repelling the French during the reign of Maximilian and Carlota (see FRENCH INTERVENTION). He died on November 13, 1863, from wounds he suffered after being attacked by bandits.

#### Further reading:

Brain Hamnett. "The Comonfort Presidency, 1855–1857." *Bulletin of Latin American Research* 15, no. 1 (1996): 81–100.

**comparative advantage** Comparative advantage is an economic principle that became popular in the 19th century. In part, it explained how and why free TRADE would benefit nations. The idea that nations should produce and trade according to comparative advantage was part of the argument for LAISSEZ-FAIRE economics. Most Latin American countries established laissez-faire-inspired economic policies by favoring the production and export of goods in which they held a comparative advantage. Those models brought some short-term, export-led economic growth as Latin American nations developed agricultural monocultures. Their agricultural products, however, were subject to fluctuations in global markets. Among the long-term consequences of laissez-faire economic policies was a lack of industrial and manufacturing development and thus diversity that could sustain them during downturns.

According to the theory of comparative advantage, each nation should produce and export the goods that it can make relatively more effectively than other countries. Each nation should also import goods that it is less effective at producing than other nations. The concept was first suggested by David Ricardo in his 1817 study *On the Principles of Political Economy and Taxation*. In this book, Ricardo advocated that countries should specialize in a small number of products they could make very well and import other goods from countries that could make them more efficiently. In the 19th century, Latin American nations had a comparative advantage in agricultural goods and in raw materials, such as MINING products. The principle of comparative advantage and its larger companion theory, laissez-faire economics, became the accepted model in both Latin America and throughout the world. Postindependence governments in Latin America implemented relatively open trade policies as advocated by laissez-faire in an attempt to move their economies away from the closed and tightly controlled mercantilist policies of the colonial period. As laissez-faire became the trade model of choice, the concept of specializing in AGRICULTURE and mining products in the interest of comparative advantage also took root.

In the first half of the 19th century, nearly all Latin American nations developed a comparative advantage trade model with Great Britain as the main trading partner. There were some notable exceptions, however. PARAGUAY and BOLIVIA maintained more closed economies in the decades after independence, and MEXICO's proximity to the United States diminished the role of British trade there (see ECONOMY). But, much of Central and South America produced fruit, COFFEE, CACAO, and other foodstuffs in addition to wool, nitrates, and precious metals for trade with Britain. In the last half of the 19th century, other European nations and the United States joined Britain as important markets for Latin American exports. In exchange, Latin American nations imported manufactured goods such as textiles, machinery, and luxury consumer goods.

Adherence to laissez-faire-based economic principles and reliance on the notion of comparative advantage allowed Latin American economies to grow precipitously in the late 19th century, but limited economic specialization created a host of problems as well. By exporting primarily raw materials, Latin American nations sold goods at a relatively low price, and they imported finished goods at a relatively high price. That incongruity created a trade imbalance in many countries. Furthermore, commodities such as coffee, fruit, and minerals were vulnerable to price fluctuations in the global market. By the turn of the century, some governments were attempting to move away from the comparative advantage model, but the export of raw materials continued to dominate Latin American economies. The imbalance in trade and economic development that emerged in the 19th century exacerbated the effects of the Great Depression in Latin America after 1929.

### Further reading:

Joseph L. Love and Nils Jacobsen. *Guiding the Invisible Hand: Economic Liberalism and the State in Latin American History* (New York: Praeger, 1988).

**Conquest of the Desert** (1878–1879) The Conquest of the Desert was an offensive led by JULIO ARGENTINO ROCA from 1878 to 1879 to subdue Amerindian inhabitants of the Argentine PAMPAS and the region of Patagonia. The campaign succeeded in opening large expanses of land to settlement but resulted in a large-scale slaughter of NATIVE AMERICANS in the region.

The indigenous inhabitants of the frontier Pampas had a long history of resisting Spanish and, later, Argentine control. The land was well suited for cattle ranching, and the national government sought to encourage further economic development of the area. Furthermore, populating the periphery of the country would provide security from neighboring CHILE, where the government had initiated the OCCUPATION OF THE ARAUCANIA to settle its frontier lands in 1860. Early efforts to bring the Pampas Indians under government control had been largely unsuccessful. BUENOS AIRES governor and CAUDILLO JUAN MANUEL DE ROSAS had made some inroads in the early 1830s, but subsequent campaigns had failed. Minister of War Adolfo Alsino attempted a combination of negotiations and settlement campaigns in 1875, but violent attacks against white settlers continued.

In 1877, Roca became minister of war and initiated a campaign to subdue the indigenous people by any means necessary. Roca led a massive MILITARY force into the Pampas and systematically removed or slaughtered any Amerindians who did not acquiesce to government control. Thousands were killed, and tens of thousands captured and placed under arrest. Roca's "Conquest of the Desert" was extremely popular among the Argentine population at the time. The military leader claimed large areas of once-hostile territory, opening up more land to settlement. His achievements in the campaign helped him win the presidency in 1880. Today, scholars consider Roca's offensive to be a virtual genocide.

### Further reading:

John Lynch. *Massacre in the Pampas: 1872 Britain and Argentina in the Age of Migration* (Norman: University of Oklahoma Press, 1998).

**Conselheiro, Antônio** See CANUDOS.

**conservatism** Conservatism refers to a broad political and social philosophy aimed at protecting tradition and maintaining the status quo. Conservatism characterized the colonial period in Latin America as the Spanish and Portuguese governed according to long-standing



principles, including the divine right of monarchs and mercantilism. The conservative ideology was challenged as Latin American colonies approached independence. Throughout the 19th century, much of the region was plagued by violence as conservatives battled proponents of LIBERALISM for control of the newly independent nations.

### FROM MONARCHY TO INDEPENDENCE

The colonial political structure in Latin America was based on the system of monarchy that had existed in Europe for centuries. The Spanish and Portuguese Crowns governed under the concept of the divine right of monarchs. This idea stated that a monarch's legitimacy, or right to rule, was bestowed by God, giving the Crown absolute power. As a result, monarchs in Spain and Portugal were closely tied to the CATHOLIC CHURCH, and that relationship carried over to the colonies in Latin America. The Spanish Crown enjoyed a particularly strong relationship with the church after Pope Alexander VI granted the Spanish extraordinary spiritual power over newly conquered lands in the Americas in 1493. Pope Julius II strengthened Crown authority over spiritual affairs in 1508 when he instituted the *patronato real*, or royal patronage. That decree gave the Spanish monarch the power to control the administrative functions of the church in the Americas, such as collecting tithes and naming high-ranking members of the clergy. The church believed such arrangements were necessary in order to convert the millions of non-Christian indigenous people throughout MEXICO and South America. As a result, royal authority in colonial Latin America was closely associated with the Catholic Church.

The monarchical political system went unchallenged throughout most of the colonial period, and an authoritarian system of local and regional rule emerged throughout Latin America. That system was based on viceroys, who served as a type of executive authority over large territories, plus a series of judicial officials known as *oidores* (*audiencia* judges). The administrative divisions within the colonies provided a system of checks and balances and power sharing among colonial officials, but ultimate authority rested with the Crown. The highly centralized nature of monarchical rule was a hallmark of conservatism.

Political currents in late colonial Latin America responded to liberal developments in France and other areas of Europe. In the 18th century, Enlightenment ideas challenged some of the beliefs of the conservative system. Proponents of the Enlightenment favored human reason over practices they considered traditional and superstitious. New ways of thinking suggested that the human experience could be improved, and many intellectuals throughout Europe pushed for a variety of political, economic, and social reforms. The Spanish and Portuguese monarchs responded to the demand for change and improvement by instituting the Bourbon

Reforms and Pombaline Reforms, respectively. These measures decentralized political power to some extent, eased some TRADE restrictions, and attempted to reform the social structure of the Latin American colonies. The Bourbon and Pombaline Reforms can be seen as the first step away from conservatism in Latin America, although the changes they brought about were relatively small.

Enlightenment thinkers also questioned the conservative structure of monarchy and the divine right of kings and queens. New political philosophies suggested that legitimacy was not bestowed by God but rather should come from those who were governed. These tenets inspired movements in Spain and the Americas in the early decades of the 19th century that eventually gave way to full-scale independence efforts. Liberal leaders rose up in the Spanish colonies to lead wars against the Spanish monarch and fight for the right to national sovereignty. Although liberalism's connection to DEMOCRACY was problematic in 19th-century Latin America, new political trends did mark a fundamental shift away from the traditional, conservative system of monarchy. Enlightenment thought laid the foundations for constitutionalism and the push for democracy that spread throughout Europe and the Americas in the 19th century, but many who favored tradition opposed the liberal political trends.

After independence, competing political camps emerged in many Latin American countries to vie for control of the newly formed governments. Liberals wanted to move away from the traditional political, economic, and social structures of the colonial period. Conservatives generally supported the idea of independence, although in some areas such as Mexico and PERU conservatives were only reluctant advocates of breaking from Spain. Many traditional-minded leaders feared that dismantling the established systems of authority would throw the entire region into chaos. Political conservatism manifested in varying degrees throughout Latin America, but most conservatives agreed that a strong, centralized, authoritarian government needed to be maintained (see CENTRALISM). Some conservative leaders advocated a continuation of the monarchical system. Mexican conservatives made several attempts to impose an emperor or other royal figure in the decades following independence. BRAZIL remained under a monarchical system even after achieving independence from Portugal in 1822; it did not adopt a republican form of government until 1889. Conservatives in other nations supported nominal democracy under a constitutional framework, but many ostensibly democratic governments maintained a highly centralized and authoritarian structure. The insistence on order and centralized power contributed to the rise of some 19th-century CAUDILLOS. ECUADOR'S GABRIEL GARCÍA MORENO and Mexico's ANTONIO LÓPEZ DE SANTA ANNA both supported a political and social platform that catered to conservative interests.

## SOCIAL ORDER

Just as Latin American conservatives wanted to safeguard the traditional political structure, they advocated maintaining the long-standing social hierarchies that had characterized the colonial period. Proponents of conservatism generally included those elite who had benefited from the highly stratified nature of colonial society. The colonial social structure was characterized by strictly defined ethnic categories, with pure-blooded Spaniards born in Spain at the top and the mixed, black, and indigenous populations at the bottom. That hierarchy was complicated by a system under which members of certain groups, or corporations, received certain privileges, or *FUEROS*. The most powerful corporations were the Catholic Church, the MILITARY, and the nobility. After independence, conservatives generally wanted to maintain that system because they stood to reap the benefits of legally defined *fueros*.

Liberalism challenged the long-standing colonial social order. At the heart of the liberal argument was that the individual should play a central role in building a strong society. Liberals sought reforms that directly targeted the privileges enjoyed by members of the church, the military, the nobility, and others. Liberal reforms included measures such as confiscating and selling church landholdings in the interest of creating a nation of private property owners. Conservatives rallied to the church's defense in such countries as Mexico and COLOMBIA where ideological divisions ran deep. Liberals also passed laws to eliminate the parallel court system that had allowed members of the church and the military accused of crimes to be tried in ecclesiastical or military courts. Primogeniture, which had allowed noble families to entail the entire FAMILY estate to the oldest son rather than divide family property evenly among all descendants, also came under attack. Conservatives viewed these reforms with concern and feared that even the illusion of upsetting the long-standing power structure would breed instability and anarchy. Conservatism found strength in the traditional framework of social and political authority that had relied on the legitimacy of the monarch to keep conflict in check. After independence, conservatives clung to the remnants of the colonial social order as a stabilizing force.

Conservatism in 19th-century Latin America manifested in various ways. In many nations, formal conservative political parties emerged to vie for political power. In Mexico, for example, conservatives joined forces in the 1850s to contest liberal reform measures (see CONSERVATIVE PARTY, MEXICO; LA REFORMA). Colombian conservatives also formed a formal party, and civil wars between conservatives and liberals plagued both of those countries throughout much of the century (see CONSERVATIVE PARTY, COLOMBIA). In ARGENTINA, conservatism emerged in the *FEDERALES*, led by CAUDILLO and dictator JUAN MANUEL DE ROSAS. Chileans also formed a CONSERVATIVE PARTY, but in CHILE as in some other areas

as well, the Conservative Party platform was simply a less zealous version of 19th-century liberalism. In Brazil, under a monarchical form of government for most of the 19th century, conservatism dominated national politics until the 1880s.

## CONSERVATISM AND NINETEENTH-CENTURY ECONOMICS

Although conservatism challenged many of the ideas about the need for a forward-looking political and social order that 19th-century liberalism introduced, proponents of the ideology did not reject all liberal concepts outright. In economic matters, many conservative governments looked to divest themselves of the mercantilist models of the colonial period, under which the colonies produced raw materials such as agricultural and MINING products for export to the "mother country." The Spanish and Portuguese Crowns absorbed the wealth produced by the colonies to expand the fortune of the entire empire. Mercantilism was enforced by maintaining closed and tightly regulated networks of production and trade. Imperial laws prevented the colonies from producing certain products and established Crown monopolies over the most lucrative industries, such as mining and TOBACCO. A closed port system limited trade to select ports in the Americas and in Spain and restricted the colonies' ability to trade with other European powers.

The mercantilist model benefited the economies of Spain and Portugal but generally kept the colonial economies in a state of infancy as much of the rest of the world witnessed the onset of the industrial revolution. A desire to open the colonial economies compelled many merchants and other colonists to support breaking away from Spain during the wars for independence. In the early decades of the 19th century, new Latin American governments eliminated the mercantilist model, and most leaders adopted a LAISSEZ-FAIRE-inspired system of relatively open trade. The laissez-faire structure is generally considered a liberal economic model, but even most conservative leaders in 19th-century Latin America advocated free trade and less government regulation of the ECONOMY. Along with a laissez-faire model, most Latin American nations adopted specialization in export products according to the notion of COMPARATIVE ADVANTAGE. Since Latin American countries had a comparative advantage in AGRICULTURE and mining, free trade based on the export of agricultural products and raw materials became the norm for most 19th-century economies. One notable exception was PARAGUAY, under the dictatorship of caudillo JOSÉ GASPAR RODRÍGUEZ DE FRANCIA. Francia kept Paraguay politically and economically isolated from its neighbors and from European influence in the decades immediately after independence. His rejection of liberal economic models allowed Paraguay to begin developing an industrial sector, but later administrations reversed those trends.

Few Latin American leaders adopted all aspects of conservatism in the 19th century, but the resolve to maintain long-standing systems of power and authority was prevalent throughout the region. As conservatives pushed to safeguard tradition in the interest of maintaining order, liberals challenged them, believing that Latin American nations needed to move forward and progress. Liberal and conservative groups competed for power throughout Latin America after independence, and clashes between the two ideologies brought decades of war and instability to many nations.

#### Further reading:

Frederick B. Pike. *The Conflict between Church and State in Latin America* (New York: Knopf, 1964).

**Conservative Party, Brazil** The Conservative Party of BRAZIL was active in the legislative branch of Brazil's government under constitutional monarchy in the 19th century. Conservatives originally came from members of the Brazilian elite who supported the policies of PEDRO I (r. 1822–31) in the early years of the empire. They generally advocated a centralized government headed by a strong monarch. For much of the 19th century, conservatives also wanted to preserve Brazil's colonial traditions.

Pedro I declared Brazilian independence in 1822. With the conservatives' support, he pushed through the CONSTITUTION OF 1824, which established constitutional monarchy based on an authoritarian emperor. Pedro I abdicated in favor of his five-year-old son PEDRO II (r. 1831–89) in 1831 and fled to Portugal. Brazilian conservatives coalesced during the period of the REGENCY from 1831 to 1840, when a series of surrogate leaders ruled in place of the child emperor. During that time, liberal advocates pushed through constitutional amendments to limit the power of the monarch and decentralize power. Provincial unrest was common and conservative leaders argued that a strong central government under a powerful monarch was the only way to hold the nation together.

When Pedro II assumed the throne in 1840, he faced a divided nation and an unstable political system. The Conservative Party and LIBERAL PARTY had formed, and the two sides faced off regularly in the national legislature. Conservatives pushed for a recentralization of monarchical power and in 1840 succeeded in reinstating the Council of State, which had traditionally checked the power of provincial governments. Conservatives generally advocated maintaining traditional power structures, and they garnered significant support from the rural elite of the northeastern SUGAR-producing regions. Sugar production declined in the last half of the 19th century as the Brazilian ECONOMY shifted to COFFEE production. Coffee planters, based in the southern provinces of SÃO PAULO and Rio Grande do Sul, tended to support liberal

politicians and their calls for economic and political modernization.

Pedro II appeared to understand the potentially divisive nature of party politics and engaged in masterful manipulation of the two competing sides. The young emperor regularly vacillated from one party to the other, supporting a conservative legislative majority in one term only to switch his support to a liberal majority in the next. Pedro II filled his advisory council with members of both parties and for decades managed to strike a delicate balance between them. Indeed, conservatives and liberals often complemented each other on policy platforms. The Liberal Party endorsed abolitionist legislation throughout most of the 19th century as a step toward economic modernization and moral reform. While the pressure to end SLAVERY came primarily from the liberal politicians, it was the conservatives who secured the most substantive legislative changes to bring about the emancipation of slaves. A conservative government ended the transatlantic slave trade in 1850 and promulgated the LAW OF THE FREE WOMB in 1871. And even though conservative leaders opposed complete abolition throughout most of the 1880s, they finally acceded to a complete emancipation decree in 1888 (see SLAVERY, ABOLITION IN BRAZIL OF).

#### Further reading:

Jeffrey D. Needell. *The Party of Order: The Conservatives, the State, and Slavery in the Brazilian Monarchy, 1831–1871* (Stanford, Calif.: Stanford University Press, 2006).

**Conservative Party, Chile** CHILE'S Conservative Party was formed in the years immediately following independence and came to dominate the nation's politics for much of the 19th century. Chilean conservative leaders were responsible for promulgating the CONSTITUTION OF 1833. Although many conservative politicians suppressed civil liberties in the interest of maintaining public order, their tactics brought an extended era of stability that was unmatched by Chile's more politically turbulent neighbors.

Chilean leaders began segmenting into political factions on the resignation of independence leader and first leader of the independent republic, Bernardo O'Higgins (1817–23). A group of liberal leaders, referring to themselves as *pipiolo*s, or "novices," rejected O'Higgins's autocratic tendencies and advocated a more open and egalitarian political system. Former supporters of O'Higgins also consolidated their political efforts as a conservative alternative to the *pipiolo*s. They pushed for a more centralized government that would maintain order and stability in the precarious postindependence environment (see CENTRALISM). Liberals dubbed them the *pelucones*, or "big wigs," a name that endured for most of the century. *Pipiolo*s gained control of the government and attempted to impose a liberal constitution in 1828. Those efforts provoked a rebellion by a conservative alliance

made up of *pelucones* and an influential group of businessmen, known as *estanqueros*, led by DIEGO PORTALES. With Portales orchestrating the political landscape behind the scenes, conservatives took power in 1831 and imposed a highly centralized government system that lasted for four decades.

The conservative platform reflected the priorities articulated by Portales, who emphasized the need to maintain order and stability for the greater good of the country. The Constitution of 1833, penned primarily by conservative leader Mariano Egaña (b. 1793–d. 1846), imposed a powerful executive and limited suffrage to the educated elite. With the constitution as a backdrop, conservative leaders retained power in Chile until Congress reformed the political system in the 1870s. Between 1831 and 1861, conservative presidents often used repression to silence opposition, justifying their actions with the nature of executive power outlined in the constitution. In the 1840s, President Manuel Bulnes (1841–51) allowed a degree of social and economic reform that reflected a more liberal political platform—such as secularizing EDUCATION and opening the nation's ECONOMY—but resorted to despotic methods when necessary.

By the 1850s, the conservatives had started to fracture, largely due to the more liberal measures being ushered in by President Manuel Montt (1851–61). Older-stock *pelucones* grew wary of the president's inclination to privilege merit over aristocracy and chafed at policies that limited the power of the CATHOLIC CHURCH. They formed an alliance with liberals, known as the Liberal-Conservative Fusion, to challenge presidential authority, while pro-Montt politicians formed the National Party in an attempt to maintain executive power. In the 1860s, however, Nationalists found themselves outnumbered by the allied liberals and conservatives. Liberal president Federico Errázuriz Zañartu (1871–76) worked with Congress to change the constitution and gave Congress increasing power. Liberal politicians manipulated those powers to prevent conservatives from gaining control of the political system. Over the next several years, tensions between Congress and the executive mounted until Liberal president JOSÉ MANUEL BALMACEDA (1886–91) attempted to exert presidential authority over Congress once again. In 1891, Congress, backed by the navy, rebelled against Balmaceda, who was backed by the army. Balmaceda was overthrown in the CHILEAN CIVIL WAR that ensued, and an era of congressional dominance that lasted until the 1920s began. During that era, known as the Parliamentary Republic, the Conservative Party remained one of the nation's dominant political parties.

See also O'HIGGINS, BERNARDO (Vol. II).

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**Conservative Party, Colombia** COLOMBIA'S Conservative Party formed as the result of an odd coalition of would-be adversaries in the 1840s. Members of the party vied for power with Liberals between the 1840s and the 1880s. Despite divisions among Conservative leaders, a sustained period of Conservative rule began in 1884 and continued well into the 20th century.

Colombian leadership immediately following independence consisted primarily of self-proclaimed liberals of one stripe or another. Divisions existed between those who fully supported independence leader and first New Granadan president FRANCISCO DE PAULA SANTANDER and former supporters of Simón Bolívar who still held out for a stronger form of government (see CENTRALISM). One of these Bolívar supporters, Dr. José Ignacio de Márquez (1837–41), succeeded Santander as president. Márquez invited several former Bolivarian allies into his administration, upsetting MILITARY strongmen across New Granada.

Opposition to Márquez reached a critical point in 1840 when General José María Obando used an isolated revolt over anticlerical policies as an excuse to rebel against the central government. Obando called together a coalition of liberal military leaders across the country and began the conflict that became known as the Guerra de los Supremos (War of the Supremes). Ostensibly, the liberal alliance fought for FEDERALISM, but Obando's ideological platform did not appear significantly different from that of the central government. Eventually, Márquez was forced to strengthen his alliance with the old guard of Bolívar collaborators. What started as an alliance of necessity to put down the liberal revolt in the War of the Supremes morphed into a formal political party in the following years.

Throughout the 1840s, Conservative successors of the Márquez presidency ruled Colombia. During that decade, the ideological line between the two parties became even more ambiguous. Conservatives and Liberals advocated similar political systems, although Conservative administrations did work to strengthen the authority of the central government. Both parties also believed in free TRADE and the basic LAISSEZ-FAIRE 19th-century economic model. Conservative administrations lowered tariffs and devoted a portion of the national treasury to improving TRANSPORTATION infrastructure. Conservative economic policies, in fact, provoked a temporary alliance of urban artisans looking for trade protection and radical idealists in the LIBERAL PARTY.

Conservatives did differ from Liberals on issues of religion. When the Liberal Party came to power in 1849 and began the era of reform known as the Liberal Revolution (1849–54), concerns over anticlerical measures divided the parties even further. Liberal leaders promulgated the new federalist CONSTITUTION OF 1853, only to create a rift within their own party. Liberal infighting allowed Conservative leader and party founder Mariano Ospina Rodríguez (1857–61) to win the presidency.

Ospina oversaw the creation of yet another constitution that, among other things, intended to resolve confusion over the relationship between states and the national government. The 1853 document had given more power to the provinces, and numerous small provinces had begun breaking off from larger entities in search of greater autonomy. Fearing the nation could break apart, Liberal leaders tried to consolidate small regional divisions into large provinces throughout the country. Furthermore, in 1855, the increasingly important Isthmus of PANAMA was declared a “sovereign federal state.” Ospina intended the Constitution of 1858 to resolve the uncertainties that emerged from these changes in status.

The new governing document changed the country’s name to the Granadine Confederation. It recognized eight sovereign states and gave local governments enormous power. Nevertheless, the Conservative administration of Ospina attempted to rein in the federalist inclinations of the provinces by giving himself more control over local government. Many Conservatives disapproved of the move toward confederation in the 1858 constitution, and Liberals reacted to Ospina’s increasingly autocratic governing style. The confused state of politics eventually developed into full-scale civil war. The victorious Liberals wrote a new constitution in 1863 and changed the nation’s name to the United States of Colombia. They remained in power for the next 20 years.

RAFAEL NÚÑEZ, elected president for the second time in 1884, led to the restoration of conservative politics in an era known as the Regeneration (1878–1900). A small regional conspiracy against the central government allowed Núñez to abrogate the Constitution of 1863. Núñez and his Conservative allies worked to create a new document that would limit local autonomy and strengthen the central government. The CONSTITUTION OF 1886 lengthened the presidential term to six years and allowed the national executive to appoint state governors. The document restored national government control over major economic sectors and public lands. It further reflected a more doctrinaire foundation of CONSERVATISM by limiting some civil liberties, such as freedom of the press, and by strengthening the relationship between church and state.

At the same time, Núñez attempted to consolidate the conservative platform under a party called the Nationalists, a move that ultimately divided the Conservative Party between Núñez’s Nationalists and the so-called Historical Conservatives. For the rest of the 19th century, the conservative policies implemented during the Regeneration dominated Colombian politics. Members of the Liberal Party had few opportunities to participate fully in the political system. For their part, conservatives remained splintered into Historical Conservatives, who often aligned themselves with Liberals on issues of trade, and Nationalists, who defended the staunch version of the conservatism that Núñez ushered in. Eventually, those divisions culminated

in the WAR OF THE THOUSAND DAYS (1899–1902). The drawn-out and bloody civil war weakened the nation, allowing U.S. president Theodore Roosevelt to back PANAMANIAN INDEPENDENCE in 1902.

See also BOLÍVAR, SIMÓN (Vol. II).

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**Conservative Party, Mexico** The Conservative Party of MEXICO was founded formally in 1848 by renowned statesman LUCAS ALAMÁN. Conservative political leaders vied for power with Mexican Liberals throughout most of the 19th century, and often, competition between the political factions escalated to armed conflict.

The broader conservative movement in Mexico dates back to before independence, and the origins of conservative politics go back to the establishment of the Scottish Rite Masonic Lodge during the war of independence. Its ranks were made up mainly of elite creoles with strong economic and political ties to the Spanish aristocracy. Royalist army officer and future Mexican emperor AGUSTÍN DE ITURBIDE was a member.

In the years immediately following independence, Scottish Rite Masons worked to ensure their livelihood and well-being. Particularly after the overthrow of Iturbide and the imposition of the CONSTITUTION OF 1824, they collaborated to advocate a centralist form of government and a more conservative social system. The Scottish Rite’s attempts to support CENTRALISM were quickly countered with the establishment of the York Rite Masons by U.S. emissary Joel Poinsett in 1825. Political antagonism erupted as York Rite Masons allied themselves with proponents of FEDERALISM, in opposition to the Scottish Rite Masons and centralists. Civil war broke out between the two sides in 1828, and the Mexican government responded by outlawing all secret societies. Although the Scottish Rite Masons seemed to disappear when reformists ANTONIO LÓPEZ DE SANTA ANNA and his vice president VALENTÍN GÓMEZ FARIÁS took office in 1833, a group of likeminded creole elite, calling themselves “*hombres de bien*” (righteous men), emerged. This group feared the extremist reform being implemented by Gómez Farías, to whom Santa Anna had handed power, and in 1835, they managed to convince Santa Anna to join their ranks. The once-liberal president abandoned his reform agenda and backed the conservative and centralist SIETE LEYES to replace the Constitution of 1824.

Throughout the 1830s and 1840s, the conservative elite of the *hombres de bien* constantly found themselves at odds with the liberal descendants of the York Rite Masons. Infighting among the factions created a sense

of chaos and disunity within Mexico, making the country vulnerable to external threats. Those same political fractures counteracted attempts by government leaders to prevent the TEXAS REVOLUTION in 1836 and the subsequent U.S.-MEXICAN WAR in 1846.

Mexico's defeat at the hands of the U.S. Army compelled Alamán to formalize the coalition of conservative elite into an official political party in 1848. The newly formed Conservative Party articulated its political vision in promoting a strong central government in the interest of defending long-standing social and cultural traditions. In particular, Conservatives advocated legal protections for the CATHOLIC CHURCH and argued for a preservation of corporate *FUEROS*, or privileges, enjoyed by members of the church, the MILITARY, and aristocratic nobility. Conservatives insisted that because Mexico had broken with those traditions, the nation had been weakened and was open to foreign invasion and internal instability.

After the formation of the Conservative Party, Alamán garnered support to invite the exiled former president Santa Anna back for his 11th stint as head of state in 1853. This time, Santa Anna ruled as an ultra-conservative dictator, and liberal opponents immediately rallied together to form a resistance movement.

A liberal coalition ousted the dictator during the REVOLUTION OF AYUTLA in 1855, and the Conservative Party continued its struggle for political dominance. Conservative leaders contested Liberal attempts to alter the traditional system of privilege and social hierarchy in an era known as LA REFORMA. After suffering defeat in the three-year WAR OF REFORM in 1862, a conservative alliance invited Napoléon III of France to impose a European monarch in Mexico in yet another period of foreign invasion called the FRENCH INTERVENTION. By the time the Liberal army defeated the French in 1867, much of the Conservative platform had been discredited. Liberal leaders dominated Mexican politics for the rest of the century, although the dictatorship of PORFIRIO DÍAZ did bring a restoration of some conservative ideals.

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**Conservative Party, Venezuela** VENEZUELA'S Conservative Party started as a coalition of supporters of independence leader and CAUDILLO president JOSÉ ANTONIO PÁEZ. The MILITARY leader's strong stance in opposition to Gran Colombian leader FRANCISCO DE PAULA SANTANDER generated a sense of unity among Venezuelans. Páez declared the region's secession from GRAN COLOMBIA in 1830 and for several years succeeded

garnering support for his nation-building efforts. His tenure as president (1830–35) and as the main political influence behind the scenes until 1848 is known as the conservative oligarchy.

In the 1830s, members of Páez's coalition did not refer to themselves as conservatives. In fact, many of the policies implemented by the caudillo were relatively liberal in nature. Páez decreed freedom of religion in 1834 and took measures to decrease the budget and size of the military. New legislation limited religious and military privileges, or *FUEROS*, such as the parallel court system that had been common in the colonial period. Furthermore, economic policies reflected a close adherence to LAISSEZ-FAIRE principles of little government interference in commerce and TRADE.

For the first 10 years of the Venezuelan republic, Páez and his coalition faced little political opposition. By the end of the 1830s, however, an economic downturn had prompted a rift within the conservative oligarchy. A law passed by the Páez administration allowed money-lenders to raise interest rates without limit, and when the price of COFFEE exports dropped in the following years, many coffee farmers were unable to make the rising payments. Discontented small merchants, farmers, and intellectuals coalesced behind journalist and former Páez cabinet member Antonio Leocadio Guzmán (1801–84) to establish a formal political party. Guzmán's LIBERAL PARTY, through the newspaper *El venezolano*, criticized the Páez administration and called for greater protection of the larger populace. In response, wealthy and upper-class supporters of the president organized the Conservative Party. Páez and the two top members of his oligarchy, José María Vargas (1835–36) and Carlos Soublette (1837–39, 1843–47), led the party.

As opposition mounted, Páez attempted to assuage animosities by supporting Liberal Party member José Tadeo Monagas (1847–51, 1855–58) in the 1847 presidential election. Monagas initially deferred to Páez's tutelage but then abandoned his loyalties to the caudillo, expelling all Conservatives from the government and sending Páez into exile. Monagas and his brother ruled in dictatorial fashion until a delicate and temporary alliance of Liberals and Conservatives ousted them in 1858. Conservatives hoped to regain power with the presidency of Julián Castro (1858–59), but the power vacuum caused by the overthrow of the Monagas brothers culminated in the FEDERAL WAR, which plagued the country from 1858 to 1863. Páez supporters challenged the Liberal Party and succeeded in bringing the caudillo back to power. He served as dictator from 1861 to 1863, but even under his leadership, the Conservative Party splintered. In April 1863, the Treaty of Coche ended the Federal War with a Conservative surrender. Remnants of the conservative movement remained, and later Liberal administrations often adopted many of the centralized government policies that had been advocated by the Conservative Party. Nevertheless, after the conclusion of the Federal War,

the Liberal Party dominated most of Venezuelan national politics for the rest of the 19th century.

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**Constant, Benjamin** (b. 1836–d. 1891) *Brazilian political and military leader* Benjamin Constant was a Brazilian positivist whose ideas were instrumental in BRAZIL'S transition from an empire to a republic in 1889. He is considered the “Founder of the Brazilian Republic.” He was a member of the MILITARY and played a role in the abolitionist movement that developed in the late 19th century.

Constant was born on October 18, 1836. He began a military career in 1852 and fought in the WAR OF THE TRIPLE ALLIANCE against PARAGUAY in the 1860s. But, his most visible role was as a professor of mathematics at the National Military Academy. Constant was influenced by Auguste Comte's theories of POSITIVISM and carried those ideas into the classroom. Positivists in Brazil generally advocated the abolition of SLAVERY and believed that the ideals of a republic were superior to the imperial structure of the Brazilian government. The movement became particularly strong among young military cadets, who tended to be the sons of the bourgeoisie and who found the underlying positivist tenets of “order and progress” especially appealing. Positivism and republicanism blossomed in Brazil's military circles, and military leaders began to challenge the existing structure of government. Constant and other military officers, including MANUEL DEODORO DA FONSECA founded the Clube Militar in 1887 as a forum for promoting military interests.

By 1889, the budding Republican Party had formed a de facto partnership with positivists within the military. On November 15 of that year, a military coup led by Deodoro overthrew the emperor and established the Republic of Brazil. Constant served as a cabinet minister in the new government, first as minister of war and later as minister of public education. He died on January 22, 1891. “Order and Progress,” the positivist slogan he endorsed throughout his career, appears on the flag of the Brazilian republic.

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**constitutional development, Peru** In the 19th century, PERU had seven different constitutions, the first five of which were enacted in the first two decades after independence. In early deliberations over constitutional structure, political leaders debated whether to establish

a constitutional monarchy or form a more democratic republic. In later decades, the debates shifted to whether a controlled and centralized governmental organization or more open and popular political participation was more desirable. Constitutions also became a forum in which the power struggle between the executive and the legislature often played out.

Throughout the war for independence in Peru, MILITARY leaders and regional elite competed for power and clashed over what type of governing system should be put in place. Independence leader José de San Martín attempted to create a constitutional monarchy in 1821, but he was forced to accede to the wishes of Peru's first constituent congress, which met in 1822. Peru's first constitution in 1823 established the nation as a republic, but Peru's political environment was unstable and the governing document was challenged by the last Spanish strongholds in the Andes. Conspiracies abounded as traditionally minded elite attempted to dismantle the republican form of government and replace it with a monarchy. A year later, Simón Bolívar and ANTONIO JOSÉ DE SUCRE defeated the last of the Spanish forces and secured independence for Peru.

Bolívar ruled from LIMA and in 1826 promulgated a new constitution, modeled after his BOLIVARIAN CONSTITUTION introduced in BOLIVIA that same year. The Constitution of 1826 created a highly centralized government with a lifetime president and a somewhat confusing system of checks and balances. Bolívar was deposed in 1827, and political chaos ensued. A new, more liberal constitution was created in 1828, modeled largely after that of the United States. The creation of a new governing document did little to stabilize Peru's political climate, and the next 15 years were marred by political infighting and foreign intervention. Local CAUDILLOS battled for power within Peru, and in 1836, Bolivian dictator ANDRÉS DE SANTA CRUZ capitalized on that instability by invading Peru and declaring the PERU-BOLIVIA CONFEDERATION. During those years of instability, two more constitutions were written; they were adopted in 1834 and 1839. The constitutions promulgated between 1828 and 1839 all called for a similar form of government with a separation of powers between three branches of government. All of the early constitutions stipulated a limited electorate and indirect election of the president and legislature. The documents differed on the specific powers granted to the president, reflecting the various inclinations of individual caudillos. Despite those distinctions, all Peruvian constitutions up to 1839 were essentially conservative in that they privileged a powerful executive leader.

President RAMÓN CASTILLA introduced a more liberal and democratic constitution in 1856. It introduced direct popular election of national officials for the first time in Peru. That document was replaced in 1860 with a more conservative one, which remained in place for the rest of the century. The Constitution of 1860 moved

electoral participation back to an indirect vote and reinforced property, income, and EDUCATION requirements to vote. The constitution strengthened the power of the executive, but it did set up a system of greater oversight between the Congress and the executive. The Constitution of 1860 remained in place until 1920.

See also BOLÍVAR, SIMÓN (Vol. II); SAN MARTÍN, JOSÉ DE (Vol. II).

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## constitutional development, Venezuela

Constitutional development in VENEZUELA began with the promulgation of the Constitution of Gran Colombia in 1821. The federation of former colonies created by independence leader Simón Bolívar included present-day Venezuela, ECUADOR, COLOMBIA, and PANAMA. GRAN COLOMBIA's constitution set up a governing system whereby Venezuela, Ecuador, and Colombia were supposedly equal and autonomous, but in reality, the central government in Colombia retained a large degree of control over the federation. Under the administrations of Bolívar and fellow independence leader FRANCISCO DE PAULA SANTANDER, the government of Gran Colombia became increasingly centralized, frustrating the local Venezuelan leadership. CAUDILLO and independence hero JOSÉ ANTONIO PÁEZ led a revolt against Santander in 1826 but stood down when Bolívar assumed the presidency of Gran Colombia. Within two years, Venezuelans were convinced that Bolívar was even less responsive to local needs than his predecessor, and Páez led a secessionist movement and created the Republic of Venezuela.

Venezuela's first constitution as an independent republic was created in 1830. The system of government it set up reflects the misgivings local elite felt toward the strong central government of the Bolívar era. The Constitution of 1830 called for a president who would serve one four-year term, and a bicameral legislature. Strictly enforced literacy and income requirements restricted the electorate to the educated and the elite. The constitution also called for the abolition of SLAVERY, but this measure—like many other policies—was not instituted. Páez was elected Venezuela's first president under the constitution, and in the age of caudillos, his charisma and hero status from the independence era made him an efficient ruler in the eyes of many Venezuelans. He served multiple terms as president despite the constitution's original one-term restriction and its stipulations on reining in the central government.

The Constitution of 1830 remained in place until the rise of the Monagas brothers—José Tadeo (1847–51, 1855–58) and José Gregorio (1855–58). The brothers formed the LIBERAL PARTY in 1840 and took over the

presidency in 1847. By 1857, they had garnered enough political support to reform the constitution and give the executive greater powers. Their political maneuvering, however, provoked an immediate uprising among influential Páez supporters and other political leaders who saw the move as a return to the centralist government of the pre-republic period. Regional caudillos fought the bloody FEDERAL WAR between 1858 and 1863, which quickly became a battle between the governing systems of FEDERALISM and CENTRALISM. Both sides claimed to be fighting on behalf of the wider populace, and over the next decade, the electorate expanded significantly. At the beginning of the Federal War, a federalist constitution of 1858 was approved; it set up a system of powerful and autonomous provinces with a weak central government. The Constitution of 1864, written by ANTONIO GUZMÁN BLANCO, strengthened the federalist system and called for an array of liberal reforms. Guzmán Blanco oversaw implementation of the constitution in his position as long-term dictator between 1870 and 1888. Although he changed the constitution several times, the basic liberal federalist structure remained. Under Guzmán Blanco, Venezuela's 20 provinces became sovereign and autonomous states with the power to secede from the central government.

A final constitutional change came in the 1890s, when the Revolución Legalista (Legalist Revolution) broke out over constitutional reform. Joaquín Crespo (1884–86, 1892–98) led the revolt and promulgated the Constitution of 1893–94, which introduced the first secret ballot and system of direct elections in Venezuela's history. For the rest of the 19th century, Venezuela's government became increasingly centralized, paving the way for more conflict and numerous constitutional changes in the 20th century.

See also BOLÍVAR, SIMÓN (Vol. II).

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## Constitution of 1805, Haiti (Imperial Constitution of 1805)

The Constitution of 1805 was the first constitution of the newly independent HAITI. After the defeat of the French, Haitian independence was declared on January 1, 1804, under the leadership of JEAN-JACQUES DESSALINES. At this time, the Act of Independence was read in La Place des Armes in Gonaïves. This document changed the name of the former French colony of Saint Domingue to *Hayti* in honor of the original inhabitants of the island, permanently abolished SLAVERY, and declared independence from France.

On October 8, 1804, Dessalines crowned himself Emperor Jacques I of Haiti. On May 20 of the following year, he ratified Haiti's first constitution. The most striking features of the constitution concern issues of land,



race, and religion. Regarding land, Article 12 states that “no white, whatever his nation, could set foot on Haitian soil as master or owner of land.” This article was preserved by the Haitian government until the U.S. occupation of Haiti in 1915. During the occupation, President Woodrow Wilson authorized the Haitian constitution to be rewritten, thereby allowing foreign ownership and investment of local land for the first time since colonial rule.

Article 14 addresses race by allowing “certain whites, such as white women who conceived or will bear Haitian children, and those Germans and Poles who deserted Leclerc’s army in order to fight with the rebels to be naturalized and referred to hereafter as *black* in the generic sense of the word.” Dessalines recognized that racial divisions were a problem in Haiti, and this article was intended to help unify the population.

Freedom of RELIGION (Articles 50 and 51) was protected in the Constitution of 1805. Both the preceding leader, Toussaint Louverture, and the subsequent one, HENRI CHRISTOPHE, recognized only Roman Catholicism as the religion of the state. By allowing VODOU and other African religions to be recognized and practiced, Dessalines was addressing the needs of the black majority.

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**Constitution of 1819, Argentina** The Constitution of 1819 was the first attempt by the ruling elite in ARGENTINA to establish a formal governing document for the newly formed nation after independence. The Constitution of 1819 followed shortly after the official formation of the first Argentine congress in 1816 and Congress’s Declaration of Independence.

The drafting of the Constitution of 1819 was spearheaded by *unitario* leader Juan Martín de Pueyrredón (see *UNITARIOS*). Pueyrredón had been selected as director of the national congress in 1816, and his policies toward the interior had already alienated many provincial CAUDILLOS. The *unitario*-inspired constitution included a number of measures that angered provincial elite even more. The document stipulated that national authority would be concentrated in the capital city of BUENOS AIRES and gave *porteño* leaders the ability to designate many provincial leaders. *FEDERALES*—or members of the opposing political factions from the provinces—rejected many of the provisions contained in the constitution, arguing that they gave too much power to Buenos Aires. Others took issue with a controversial measure that would have allowed national leaders to establish a constitutional monarchy.

The Constitution of 1819 was never ratified. Shortly after its completion, civil war broke out between *unitarios*

and *federales* over centralized versus provincial control. Martín Rodríguez was selected as governor of Buenos Aires the following year and managed to restore some calm to the struggling nation. *Unitarios* attempted to push through yet another constitution in 1826. This document did not allow for a monarchy and outlined a clear separation of branches of government. Despite several articles intended to safeguard provincial autonomy, *federales* opposed other *unitario*-sponsored measures, and one year later, the two political factions had descended into conflict once again.

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**Constitution of 1824, Brazil** The Constitution of 1824 was the governing document promulgated by BRAZIL’s first emperor, PEDRO I. The document gave the emperor considerable control over other governing institutions, such as the legislature and provincial governments. The Constitution of 1824 remained in effect until the end of the EMPIRE OF BRAZIL, in 1889.

Pedro I declared Brazil’s independence in 1822 largely in response to mounting pressure from Brazilian liberals who wanted to move the former Portuguese colony toward self-government. Those same liberal supporters envisioned a postcolonial governing system based on a parliamentary monarchy with the emperor retaining little real power. A constituent assembly met in 1823 to draft a new constitution outlining the parameters of government, but when the delegates attempted to limit the sovereign’s authority, Pedro disbanded the assembly and exiled José Bonifácio de Andrada e Silva, one of its more influential leaders. Under a hastily organized Council of State, Pedro oversaw the writing of the Constitution of 1824, for which he secured approval from important sectors of the population.

Brazil’s Constitution of 1824 created a conservative and centralist governing system. It called for a parliamentary branch made up of a Senate of lifetime appointees selected by the emperor and a Chamber of Deputies chosen through indirect elections. The document severely restricted the political system by establishing property requirements for voting and holding political office. It safeguarded the authority and power of the emperor by allowing him to reject legislation and dissolve Parliament. Pedro also held enormous sway over judicial decisions. The document called for a circle of advisers in the Council of State and a cabinet of ministers to be appointed directly by the emperor. Pedro had the ability to name provincial leaders, in an attempt to secure executive oversight of local politics. The constitution maintained the religious legacy of Brazil’s colonial past

by declaring Catholicism the nation's official religion. Pedro also continued the long-standing tradition of appointing CATHOLIC CHURCH officials.

Some aspects of the constitution reflected the liberal influence of some of Pedro's close advisers. The document called for a protection of individual liberties in a way similar to the U.S. Constitution promulgated decades earlier. It allowed for freedom of RELIGION. It called for social equality—at least in theory—while maintaining the legality of SLAVERY. The Constitution of 1824 also provided relatively straightforward mechanisms for changing the document, and many scholars credit those amendment measures for the constitution's longevity.

Pedro's autocratic approach to promulgating the constitution provoked a number of rebellions throughout the country. The emperor put down those revolts violently and temporarily forced the compliance of regional elite. Deep-seated resentment toward Pedro eventually resurfaced in 1831, when in the face of widespread revolt, he abdicated the throne in favor of his five-year-old son, PEDRO II. The Constitution of 1824 remained in place until 1889, when advocates of political and economic modernization overthrew Pedro II and formed the Republic of Brazil. The 1824 constitution was replaced by a democratic constitution in 1891.

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#### Constitution of 1824, Mexico (Constituent Act of the Mexican Federation)

MEXICO'S Constitution of 1824 was enacted following the overthrow of AGUSTÍN DE ITURBIDE and the dismantling of his postindependence imperial rule. Upon Iturbide's abdication, the interim government convened a constitutional congress, beginning in November 1823, at which political leaders debated what kind of political system to put in place. Generally, conservative leaders wanted to maintain a strong centralist form of government (see CENTRALISM). They felt that deviating too much from the colonial political heritage of monarchy would lead the nation to failure. Liberal leaders wanted to follow the lead of the American and French Revolutions and Spain's Constitution of 1812, whose progressive political platforms marked a complete break from traditional monarchy. These leaders aimed to replace Mexico's highly centralized government with a more balanced, federalist system (see FEDERALISM).

In the end, the Constitution of 1824 created a federal republic, with 19 states making up the Estados Unidos Mexicanos (United Mexican States). The system

of government was similar to that created by the U.S. Constitution of 1787, with three branches of government authority: the executive, the legislative, and the judicial. It stipulated a bicameral congress with a Chamber of Deputies, whose representation was to be based on population, and a Senate made up of two senators per state. The executive branch included a president and vice president elected to four-year terms, and the federal judiciary followed a similar structure to that in the United States.

The Constitution of 1824 reflected the wariness of a strong executive after the failed experiment with monarchy by Iturbide. The document significantly restricted the executive branch by stipulating the indirect election of the president and vice president through state legislatures. It also prohibited immediate reelection of the executive, requiring the president to sit out one term before seeking reelection. Other provisions restricted the president's ability to command the MILITARY without the permission of Congress. The writers of the constitution attempted to limit presidential abuses such as depriving individuals of their rights and liberties. These powers could only be exercised in times of emergency.

The conservative centralist influence is also evident in the document. Article 3 preserved Catholicism as the national RELIGION and safeguarded the extraordinary privileges, or *FUEROS*, of church and military leaders.

The constitution was promulgated on October 4, 1824. Although never fully enforced, it remained in place until suspended by ANTONIO LÓPEZ DE SANTA ANNA in 1833. In 1835, Santa Anna's SIETE LEYES (Seven Laws) dissolved the federal republic in favor of a centralized government and replaced the Constitution of 1824.

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#### Constitution of 1826, Bolivia

See BOLIVARIAN CONSTITUTION.

#### Constitution of 1828, Chile

The Constitution of 1828 of CHILE established a liberal and unitary system of government in the newly independent nation after five years of political uncertainty and experimentation. The constitution agitated the conservative elite, who began organizing a resistance movement. It also upset those who had advocated a more federalist form of government. The Constitution of 1828 was replaced by the conservative CONSTITUTION OF 1833, which remained in effect for the remainder of the 19th century.

Political anxieties began to surface in Chile almost immediately after the colony achieved its independence from Spain in 1818. Independence leader Bernardo O'Higgins served as supreme director for the first five years, but his authoritarian style disturbed the more

liberal-minded elite, especially as the wars of independence in the region began to subside. In 1823, a powerful political cabal forced O'Higgins to resign. This group, led by Ramón Freire (1823–26), eventually coalesced into the LIBERAL PARTY. Between 1823 and 1828, Liberal leaders struggled to devise a new system of government that would meet the new nation's needs. In a five-year period, four constituent congresses convened and wrote numerous constitutional drafts, all of which pleased virtually no one. The propositions being articulated by those congresses gradually became more liberal and more federalist. The 1826 congress introduced the progressive idea of locally elected assemblies in the provinces that would share a number of lawmaking functions with the national government. The move toward FEDERALISM angered a large number of Liberals, who argued that giving authority to local governments would ultimately weaken the nation. Liberals began to splinter over the issue of federalism, until writer and political intellectual José Joaquín de Mora (b. 1783–d. 1864) helped to guide the writing of the Constitution of 1828.

The new document attempted to create a compromise based on the federalist designs of earlier congresses, but with a strong central government. The Constitution of 1828 retained a nominal representative presence in provincial assemblies, but most power rested in the national government, which was divided into the executive, legislative, and judicial branches. The document also adhered to a true sense of LIBERALISM by calling for the abolition of traditional legal privileges that had been enjoyed by the nobility and members of the CATHOLIC CHURCH.

It immediately became clear that nearly every political subgroup found some aspect of the constitution unacceptable. Those advocating greater provincial authority felt that the document was not federalist enough. Conservatives reeled at the attacks on the clergy and aristocracy, while Liberals felt the reforms included in the document did not go far enough. In 1829, a dispute over the presidential elections ignited the conflict that had been building throughout the decade. After a brief but violent armed conflict, Conservatives defeated the Liberals, who were still divided among themselves. By 1831, a new government was in place under General Joaquín Prieto (1831–41). His adviser, DIEGO PORTALES, helped draft a new conservative constitution in 1833, which replaced the Chilean liberal experiment in the Constitution of 1828.

See also O'HIGGINS, BERNARDO (Vol. II).

### Further reading:

Paul Vanorden Shaw. *The Early Constitutions of Chile, 1810–1833* (New York: Chile Publishing Co., 1931).

**Constitution of 1830, Uruguay** The Constitution of 1830 was the first governing document produced by

leaders in URUGUAY after the nation achieved complete independence in 1828. It was modeled largely on the constitution of the United States, although it reflected the influence of the emerging COLORADO PARTY by imposing a strongly centralized government (see CENTRALISM). Over the course of the 19th century, several governments failed to implement the constitution fully, and governing practices were reformed substantially in the final decades of the century. Nevertheless, the Constitution of 1830 remained in effect until replaced by a new document in 1917.

Uruguay was once known as the BANDA ORIENTAL and made up the easternmost province of the United Provinces of the Río de la Plata, the region of South America that eventually became the nation of ARGENTINA. Between 1825 and 1828, the United Provinces and BRAZIL fought the CISPLATINE WAR for control of the Banda Oriental. The conflict was resolved when British mediators intervened and secured the complete independence of the Banda Oriental, to be known as the Eastern Republic of Uruguay, in 1828. Leaders in Uruguay immediately began drafting a constitution. It was ratified on July 18, 1830, by parties in Uruguay and by the leaders of the United Provinces and Brazil.

The constitution established three branches of government with a highly centralized executive. Under the document, the president held extraordinary powers, while the General Assembly and the judicial branch had little means to serve as a check on his authority. JOSÉ FRUCTUOSO RIVERA, who had led the Uruguayan insurgents during the Cisplatine War, was elected as the nation's first president under the new charter. The document also specified that the new nation would be organized into regional departments, and each of those would be headed by a governor, appointed by the president. Like many early 19th-century Latin American constitutions, Uruguay's Constitution of 1830 provided for only a limited electorate and established the Catholicism as the official RELIGION of the new nation. SLAVERY had been abolished in earlier years by independence hero José Gervasio Artigas, and the constitution reinforced that decree by stipulating that slavery was illegal in Uruguay.

The centralized government and powerful executive established in the 1830 constitution produced numerous conflicts over the next 40 years as regional CAUDILLOS demanded a more federalist structure (see FEDERALISM). In the 1830s, these regional leaders, representing rural interests, coalesced in a new political faction led by MANUEL ORIBE and known as the BLANCO PARTY. The *blancos* battled the centralizing tendencies of the newly formed Colorado Party, led by President Rivera. The *colorados* generally represented urban and intellectual interests. The two parties split further as foreign leaders continued to intervene in Uruguay's internal politics. Those divisions eventually escalated into the GUERRA GRANDE, (1838–51) a lengthy and violent civil war between the *blancos* and the *colorados*. During that

time, various governments ignored numerous aspects of the Constitution of 1830. In 1878, the two rival political parties implemented the system of *coparticipación* (coparticipation), which allowed for formal and informal sharing of power between the parties. The 1830 constitution remained in place until President José Batlle y Ordóñez introduced a new governing document in 1917.

See also ARTIGAS, JOSÉ GERVASIO (Vol. II); BATLLE Y ORDÓÑEZ, JOSÉ (Vol. IV).

#### Further reading:

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**Constitution of 1833, Chile** CHILE'S Constitution of 1833 was put in place by the government of Conservative president General Joaquín Prieto (1831–41) under the guidance of political mastermind DIEGO PORTALES. It was written primarily by MARIANO EGAÑA. The document imposed a centralist political system that was intended to allow the government to maintain order and a sense of stability in the newly independent nation (see CENTRALISM). The Constitution of 1833 remained in effect until 1924 and is often cited as one of the reasons the 19th century was a period of relative peace and prosperity for Chile, in contrast to the more tumultuous experiences of its South American neighbors.

The predecessor to the 1833 document was the CONSTITUTION OF 1828. The earlier plan had been drafted by a Liberal government during a time when national leaders were considering a more federalist system of regional authority. Although the Constitution of 1828 included only token measures of FEDERALISM, it concerned leaders such as Portales, who considered any fracturing of the national government's power to be a step toward weakening the nation. The 1828 constitution also angered hardline Conservatives with its provisions to dismantle the privileges enjoyed by the aristocracy and members of the CATHOLIC CHURCH. Prieto and the Conservatives formed an alliance with Portales's centralists in 1829 and rebelled against the Liberal government. Prieto's victory in 1830 ushered in an era of Conservative rule and provided an opportunity to replace the 1828 constitution.

Portales's insistence on a strong central government and the rule of law was evident in the new constitution. Formalized in May 1833, the document called for a powerful president, elected for up to two five-year terms. Suffrage was limited, and the president was to be chosen by a small, select group of electors. Although the constitution included a legislative arm, in practice, the head executive held extraordinary powers over all aspects of government. Furthermore, the slight degree of provincial power allowed for in the Constitution of 1828 disappeared. The 1833 system established provincial

intendants, who were appointed by and answered to the president.

Other aspects of the Portalian system reflected the leader's pragmatism. The Constitution of 1833 protected Catholicism as the official RELIGION of Chile. It restored the ecclesiastical and aristocratic privileges that had been attacked in 1828. Portales also created a system that aimed to prevent the MILITARY from threatening internal stability. He forbade high-level military officers to become involved in politics and created a civil militia, led by businessmen and landowners, to maintain domestic order.

In the 1840s and 1850s, suffrage was gradually expanded, and even though the CONSERVATIVE PARTY monopolized the presidency for four full decades, opposition parties began to gain momentum. The legislative branch of the Chilean national government became more vocal in the last decades of the 19th century, and in 1891, the constitution was amended to limit presidential authority. The basic text of the Constitution of 1833 remained in place in Chile until it was replaced by a new document in 1924.

#### Further reading:

Paul Vanorden Shaw. *The Early Constitutions of Chile, 1810–1833* (New York: Chile Publishing Co., 1931).

**Constitution of 1843, Haiti** HAITI'S Constitution of 1843 was created by a constituent assembly following the overthrow of the regime of JEAN-PIERRE BOYER (1818–43). Important features of this constitution are that it appointed a new president, created a variety of civil and elected offices and jurisdictions, and extended the vote to peasants.

Boyer's regime was criticized for its oppressive economic, social, and diplomatic policies. Political opposition grew and finally organized under the mulatto poet and political activist Hérard Dumesle. The rebels, under the Society of the Rights of Man and the Citizen, used 18th-century French Enlightenment rhetoric and excerpts from the 1789 French document the Declaration of the Rights of Man to express their desire for guaranteed, fundamental human rights.

When Dumesle's group began openly criticizing Boyer, all its members were immediately purged from the legislature. This overt attempt to suppress opposition significantly compromised Boyer's power. Political opponents headed by General CHARLES RIVIÈRE-HÉRARD (1843–44), Dumesle's cousin, gained public support and began marching toward the capital. The threat of a MILITARY coup forced Boyer from office and into exile. Rivière-Hérard then rose as military leader.

A constituent assembly, sensitive to the political agenda of the Society of the Rights of Man and the Citizen, then organized and drafted a new constitution, which legally appointed Rivière-Hérard as president on

December 31, 1843. The liberal and democratic provisions, such as widespread suffrage, of the constitution were ineffectual due to the chaotic and unstable nature of Haitian politics during this period.

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### Constitution of 1844, Dominican Republic

THE DOMINICAN REPUBLIC'S Constitution of 1844 was the nation's first constitution after achieving its independence from neighboring HAITI. The constitution was signed and promulgated on November 6, 1844, at Benemérita de San Cristóbal following a successful revolt by LA TRINITARIA movement, which had been fighting for years against the HAITIAN OCCUPATION OF SANTO DOMINGO. The Constitution of 1844 marked the onset of self-determined government in the Dominican Republic but also set off a long period of conflict among competing national leaders.

Trinitaria leaders Juan Pablo Duarte (b. 1813–d. 1876), Matías Ramón Mella (b. 1816–d. 1864), and Francisco del Rosario Sánchez (b. 1817–d. 1861) envisioned a republic based on democratic ideals. A constitutional congress initially drafted a constitution based on that of the United States. The document was considered a liberal statement of government, with separate branches to provide a system of checks and balances. The Constitution of 1844 also included a progressive series of individual rights and protections for Dominican citizens, modeled on the United States Bill of Rights. Constitutional constituents established the nation's motto as "God, Fatherland, Liberty" (*Dios, patria, libertad*) but also took measures to maintain the separation of church and state in the first governing document.

Independence leaders generally agreed on the basic principles of democratic self-government, but continued threats of invasion by Haiti caused the tenuous consensus to break down. As the Haitian MILITARY attempted to reoccupy the eastern portion of the island, hardline military leaders began to advocate a more authoritarian system of government in the interest of protecting the nation's independence. PEDRO SANTANA forced Trinitaria leaders into exile and claimed the presidency for himself in 1844. He then pressured the constitutional congress to approve Article 210 to protect national sovereignty. The controversial article gave Santana dictatorial powers with the understanding that more autocratic rule may be necessary to defeat the Haitian military and safeguard Dominican independence. Santana led the nation in repelling the Haitian invasion, but the neighboring coun-

try persisted in its attempts to reoccupy the Dominican Republic in the coming years. As a result, Santana refused to cede his tight control over the government and instead revised the constitution to extend his autocratic rule. Santana ruled by executive decree and summarily suspended basic individual rights. Tight executive authority allowed him to control his political opponents with the threat of arrest and exile. Nevertheless, opposition to Santana mounted and government control seesawed over the next 20 years. Santana's meddling in the constitution began a trend of oscillation between authoritarian and more democratic constitutional systems.

November 6, or Constitution Day, is still commemorated as a national holiday in the Dominican Republic.

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### Constitution of 1853, Argentina

THE CONSTITUTION OF 1853 IN ARGENTINA created a democratic and constitutional government after the overthrow of CAUDILLO and dictator JUAN MANUEL DE ROSAS. The constitution consisted of 31 articles outlining individual rights and 76 articles defining the structure and organization of the government. It was reformed several times (in 1860, 1866, 1898, 1957, and 1994), but the original document is still the foundation of the nation's governmental structure today.

After achieving independence, leaders in Argentina immediately set about creating a constitutional government. Ideological divisions between *UNITARIOS* and *FEDERALES* led to violent clashes as political leaders from BUENOS AIRES produced the CONSTITUTION OF 1819 and the Constitution of 1826. Federalist politicians in the provinces perceived both of these early documents as favoring Buenos Aires over the interior and rebelled against the *unitario* leadership. Rosas abandoned the idea of establishing a constitution in the 1830s and 1840s, and the caudillo violently stifled any attempts to create consensual government. Only after his overthrow in 1852 by JUSTO JOSÉ DE URQUIZA were political leaders able to move the nation toward constitutional government.

Shortly after Rosas's overthrow, Urquiza called for a constitutional congress to convene and draft a new governing document. Delegates met in Santa Fe in August 1852 and spent the next several months debating and writing the constitution. Shortly after the inauguration of the congress, Buenos Aires rose in revolt, with delegates from that province boycotting the convention. The traditional conflict between the port city and the provinces became a point of contention in the deliberations over the constitution. In the end, delegates approved a document that created a national government based

on a bicameral legislature, an executive branch, and an independent judicial branch. Many of the details relating to the organization of the government were influenced by the writings of JUAN BAUTISTA ALBERDI. The constitution gave the legislative branch considerable power in an attempt to prevent the reemergence of strongman rule after the era of Rosas. Delegates also anticipated that a strong legislature would safeguard the rights and interests of the interior.

The Constitution of 1853 was approved immediately by all provinces except Buenos Aires. Urquiza, who became president the following year, promulgated the document without the participation of the province, which for the next six years existed autonomously from the rest of the nation. As the main seaport, the city of Buenos Aires was able to obstruct the interior's export and import TRADE. Urquiza invaded the city on several occasions, and eventually, Buenos Aires came to an agreement with the interior and ratified the Constitution of 1853, with several amendments. Constitutional changes in 1860 offered significant protections to Buenos Aires, including financial safeguards and constraints on federalizing the capital city. Buenos Aires was eventually federalized in 1880. The constitution also changed the name of the nation from the Confederación Argentina (Argentine Confederation) to the República Argentina (Argentine Republic).

Minor amendments followed in later years of the 19th century. Nevertheless, the Constitution of 1853 retained much of its original structure until major reforms in the 20th century.

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**Constitution of 1853, Colombia** COLOMBIA'S Constitution of 1853 was drafted by radical Liberals and became the first formal attempt to implement a liberal and federalist system of government in the nation in the 19th century (see FEDERALISM). The document authorized numerous controversial reforms that eventually led to conflict between Liberals and Conservatives and within the LIBERAL PARTY itself. Although the Constitution of 1853 was replaced by a conservative constitution in 1858, it paved the way for the even more progressive Constitution of 1863.

The predecessor to the Constitution of 1853 was the Constitution of 1832, which had been drafted upon the dissolution of GRAN COLOMBIA. The 1832 document established a moderately federalist system. It was amended by the Conservative government of Pedro

Alcántara Herrán (1841–45) in 1843 to strengthen the central government after a series of divisive wars. The election of General José Hilario López (1849–53) in 1849 marked the beginning of the so-called Liberal Revolution propelled by the *gólgota* faction of radical Liberals. López led a reform movement that aimed to move Colombia's political system away from CENTRALISM and CONSERVATISM. López's reforms culminated in the new national Constitution of 1853.

Inspired by a radical and doctrinaire version of LIBERALISM, GÓLGOTAS drafted the constitution to bring drastic changes to Colombian society. The document called for universal male suffrage and gave new powers to state governments. Other liberal reforms included the abolition of SLAVERY and land reform measures. Liberal leaders envisioned parceling out communally owned indigenous lands in the hope of creating a nation of private property owners. This measure had the unintended consequence of allowing the wealthy, elite classes to begin acquiring formally protected indigenous properties and consolidating their landholdings into enormous estates.

A final liberal cause championed in the Constitution of 1853 was that of RELIGION. The document included measures that limited the authority of the CATHOLIC CHURCH. One of the most important was the elimination of the ecclesiastical *FUERO*, a colonial legal protection that allowed members of the church to stand trial for offenses in the ecclesiastical, rather than the civil, courts.

Although radical Liberals envisioned even more progressive reform, the more cautious, old-line *dracónico* faction of the Liberal Party prevented more drastic changes from being included in the 1853 document. In particular, DRACONIANOS grew concerned that the increasingly federalist platform being advocated by the radical *gólgota* faction would ultimately divide and weaken the country. *Draconianos* led a rebellion against the *gólgota*-dominated government in 1854, a move that led to a revival of the CONSERVATIVE PARTY.

Conservative leaders replaced the Constitution of 1853 with a federalist constitution in 1858. The new document renamed the nation the Granadine Confederation. The new political structure called for eight states with greater powers. But, a civil war in 1860 brought the radical Liberals back to power. In 1863, leaders approved the Constitution of Rionegro, which called for a staunchly federalist system and changed the nation's name to the United States of Colombia. The Constitution of 1863 remained in effect until replaced with the CONSTITUTION OF 1886.

#### Further reading:

William Marion Gibson. *The Constitutions of Colombia* (Durham, N.C.: Duke University Press, 1988).

**Constitution of 1857, Mexico** The Constitution of 1857 was written and promulgated by the Liberal

leaders in MEXICO who deposed ANTONIO LÓPEZ DE SANTA ANNA in 1855. Under the leadership of IGNACIO COMONFORT, a cadre of intellectuals including BENITO JUÁREZ consolidated the liberal laws of LA REFORMA (1855–58) and incorporated additional measures aimed at dismantling the conservative political and social structures favored by previous administrations. The document contained 128 articles and clearly expressed the liberal political platform of its creators. The constitution, along with the Reform Laws that preceded it, triggered intense resistance from conservative interests, and the nation eventually descended into the WAR OF REFORM (1858–61).

Precedent for the Constitution of 1857 was set in the Spanish constitution of Cádiz in 1812, in José María Morelos's Constitution of Apatzingán, and in the Mexico's CONSTITUTION OF 1824. The three earlier documents represented attempts to infuse liberal institutions into a culture deeply entrenched in conservative and religious traditions. Even the Constitution of 1824, which established Mexico as a federal republic and attempted to create a democratic tradition, preserved Roman Catholicism as the nation's official RELIGION. Conservative and centralist interests that aimed to protect the religious and monarchist legacy of the Spanish colonial model resisted.

In 1835, Conservatives backed Santa Anna's efforts to centralize authority by abolishing the federal republic and replacing the Constitution of 1824 with his SIETE LEYES. The new government, based on a strong executive, dissolved states and nullified local authority. Those measures led to rebellions and secessionist movements in the Yucatán and Texas. Mexico lost the latter in the TEXAS REVOLUTION of 1836, and the nation faced further threats from abroad. In 1843, Congress began laying the foundation for a new constitution and created Bases Orgánicas de la República Mexicana (Organic Bases of the Mexican Republic). The bases reaffirmed the conservative and centralist system specified in the Siete Leyes. They were replaced only a few years later with the Acta Constitutiva y de Reforma in 1847, which restored the federalist system originally outlined in the Constitution of 1824. These acts were created in the midst of the chaos of the U.S.-MEXICAN WAR and proved to be short lived. In 1853, Conservatives managed to put Santa Anna back in power, but the dictator was overthrown just two years later in the REVOLUTION OF AYUTLA, paving the way for a new, stronger liberal constitution.

As stipulated in the Plan of Ayutla, once in power, Liberal leaders implemented a series of measures that attacked corporate and conservative interests, collectively known as the Reform Laws. These included the Juárez Law (1855), which abolished the parallel court system of the MILITARY and the CATHOLIC CHURCH; the Lerdo Law (1856), which divested corporate institutions of nonessential real estate; and the Iglesias Law (1857), which supplanted church oversight of births, deaths, and

marriages with a civil registry for vital statistics. The Plan of Ayutla also called for delegates to write a new constitution. The new document was to encompass the liberal Reform Laws, as well as pose additional challenges to conservative interests.

Debate surfaced almost immediately among Liberals over numerous measures to be included in the constitution, revealing a rift between *moderados* (moderates) and *pueros* (staunch Liberals). *Puros* advocated the pursuit of liberal reform and the dismantling of corporate privileges, while *moderados* worried that such drastic measures would lead to a backlash and further instability. Some of the most intense debate erupted over the issue of religious freedom. While the final version of the constitution did not specifically provide the right of religious freedom, it also did not protect the Catholic Church as the official religion of the nation.

Adopted by Congress in February 1857, the constitution was based on the U.S. Constitution as well as the Constitution of 1824 and pursued a liberal political agenda much more aggressively than its predecessor. It streamlined the governing powers of the legislative branch into one strong lawmaking body in an attempt to curtail the power of the executive. It called for indirect election of the president and justices of the Supreme Court, but direct election for members of Congress; the electorate was expanded to include all adult males. Reflecting the *puro* Liberal agenda, the constitution repealed many of the legal rights that had traditionally been preserved for members of the church, military, and nobility. It upheld the Reform Laws that abolished separate court systems for the church and military. Finally, in keeping with liberal philosophy that advocated EDUCATION as a way to build a strong nation, the constitution secularized education, removing it from church control.

Some of the most notable measures of the new constitution were its protections of individual freedoms. Detailed articles spelled out freedoms of speech, press, and assembly. It reinforced earlier measures abolishing SLAVERY and prohibited the death penalty and other forms of extreme punishment. By privileging civil liberties, the Constitution of 1857 reflected the central tenet of LIBERALISM that valued the rights and well-being of individuals as the foundation of a strong nation.

Even while the constitution was being written, opposition to its liberal measures began to mount. Conservative leaders unsuccessfully attempted to counteract *puro* efforts at aggressive liberal reform by derailing the new constitution. Church leaders used their religious influence to encourage parishioners to reject the new document. President Comonfort, a *moderado* Liberal, refused to implement the most controversial measures and eventually cooperated with Conservative leaders in the Plan de Tacubaya to nullify the constitution. That plan gave rise to a revolt led by Conservative military leader General Félix Zuloaga. Once again, political infighting plunged Mexico into a period of tur-

moil. Between 1858 and 1861, Conservative and Liberal forces—divided over the Constitution of 1857 and other political measures—fought a destructive and violent civil war known as the War of Reform.

The Constitution of 1857 remained in place for the remainder of the 19th century, although during the dictatorship of PORFIRO DÍAZ (1876–80, 1884–1911), many of the measures protecting the democratic process and civil liberties were ignored. After 1910, revolutionary leader Venustiano Carranza pushed for a reinstatement of the Constitution of 1857, earning him and his followers the name “Constitutionalists.” The document was replaced with the Constitution of 1917.

See also CONSTITUTION OF 1812 (Vol. II); MORELOS Y PAVÓN, JOSÉ MARÍA (Vol. II).

### Further reading:

Jaime E. Rodríguez O. *The Divine Charter: Constitutionalism and Liberalism in Nineteenth-Century Mexico* (Lanham, Md.: Rowman & Littlefield, 2005).

**Constitution of 1886, Colombia** COLOMBIA’S Constitution of 1886 was written by Conservatives led by President RAFAEL NÚÑEZ to replace the liberal and federalist Constitution of 1863. The older document had instituted a progressive social and political system, emphasizing individual liberties, provincial autonomy, and a weak central government. The liberal constitution also weakened the power of the CATHOLIC CHURCH. Creators of the Constitution of 1886 sought to reverse the liberal policies that they perceived were weakening the nation.

The drafting of the Constitution of 1886 was overseen by President Núñez during his second term as part of the Regeneration movement (1878–1900). Initially a member of the LIBERAL PARTY, the nationalist politician formed an alliance with Conservatives after putting down a failed federalist conspiracy against the central government. He abrogated the Constitution of 1863 and began implementing a series of reforms known as the Regeneration, which aimed to strengthen the central government. Among the reforms included in the Regeneration and the new constitution was an expansion of the presidential term from two to six years, allowing for reelection. Conservatives hoped that a strong executive figure would put an end to the regional instability that had plagued the country for most of the 19th century. In addition, the document severely weakened individual state authority and changed the name of the country from the United States of Colombia to the Republic of Colombia. Núñez’s reforms curtailed individual states’ ability to raise money and gave the national government greater oversight in the administration of local budgets. At the same time, the national budget increased, as many duties that had been undertaken by local authorities, such as law enforcement, were taken over by the national government.

The aspects of the Constitution of 1886 dealing with RELIGION marked a major change for Colombian society. Liberal policies implemented in the 1860s had diminished the role of the Catholic Church in society and politics by confiscating and selling off church properties and outlawing several religious organizations. The Regeneration reforms rolled back these anticlerical measures and established a strong system of collaboration between church and state. Núñez formalized his prochurch position by signing the Concordat of 1887, an agreement with the Vatican that effectively restored church privileges and autonomy in Colombia. Catholic doctrine was once again included in the EDUCATION of the nation’s youth, and the church regained its monopoly over the institution of marriage.

Finally, the Constitution of 1886 reversed many of the social protections and individual liberties that had been embraced in the earlier liberal document. Literacy requirements limited suffrage, and the central government gained greater censorship powers over the nation’s press. Other measures included limiting the right to public assembly and reinstating the death penalty. Measures included in the constitution, combined with other conservative policies, prompted a backlash among Liberals that eventually led to the destructive WAR OF THE THOUSAND DAYS (1899–1903). Nevertheless, Conservative leaders eventually defeated their Liberal opponents and upheld the conservative system outlined in the constitution.

The Constitution of 1886 laid a political foundation that allowed Conservatives to remain in power until 1930. Although amended numerous times during the 20th century, the document remained in effect until replaced by the Constitution of 1991.

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William Marion Gibson. *The Constitutions of Colombia* (Durham, N.C.: Duke University Press, 1988).

**Constitution of 1891, Brazil** The Constitution of 1891 in BRAZIL was the governing document promulgated by the government of MANUEL DEODORO DA FONSECA to usher in the era of the OLD REPUBLIC. The constitution was ratified about two years after the EMPIRE OF BRAZIL was overthrown. The document remained in effect until the rise of dictator Getúlio Vargas in the 1930s.

For most of the 19th century, the Brazilian government operated under the system of constitutional monarchy established in the CONSTITUTION OF 1824. The drafting of that document was overseen by the first Brazilian emperor, PEDRO I, shortly after he declared Brazil’s independence from Portugal. The Constitution of 1824 called for a powerful monarch, with legislative, judicial, and advisory branches of government having less authority. The original document provided mechanisms for changing the constitution and allowed for the development of political parties. The flexibility written into the



Constitution of 1824, balanced by monarchical authority, allowed Brazil's imperial system to operate with relative stability for more than 60 years. The freedoms provided in the constitution also allowed new ideas to emerge in the second half of the 19th century that included discussions of establishing a republic.

A number of MILITARY leaders and Brazilian intellectuals were influenced by the theories of POSITIVISM—originally espoused by Auguste Comte—in the 1860s and 1870s. BENJAMIN CONSTANT taught at the National Military Academy, which became a forum for developing positivist ideas. Adherents of positivism found common ground with political leaders who promoted republican ideals. A Republican Party formed in SÃO PAULO in the 1870s, and positivist and republican supporters came together in the coming years to promote significant government changes. In 1889, a military coup led by Deodoro da Fonseca dethroned Emperor PEDRO II and established the Republic of Brazil. Two years later, a committee of positivist and republican thinkers created the Constitution of 1891.

The new document was modeled largely on the U.S. Constitution, but parts were inspired by the Argentine CONSTITUTION OF 1853 and the Swiss Constitution of 1874. It established Brazil as a federalist republic, converting the former provinces into states and calling for an elected president to replace the monarch. The legislative

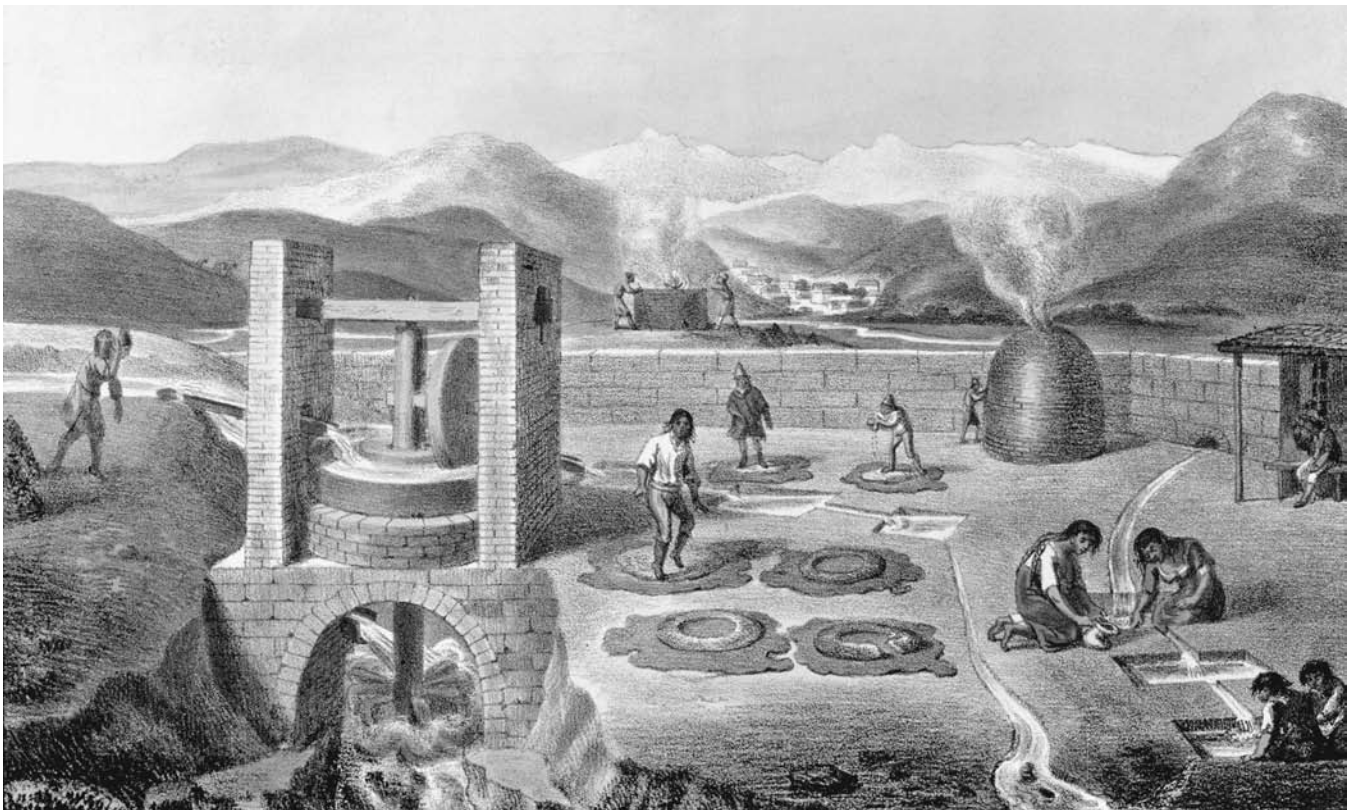
branch was made up of a Chamber of Deputies—with representation based on population—and a Senate—with equal representation per state and whose members no longer served life terms. The federalist nature of the constitution gave states considerably autonomy, allowing them to raise money and form their own militias (see FEDERALISM). The electorate was still limited under the Constitution of 1891, but the document did provide for a direct vote of representatives. Deodoro da Fonseca was elected the nation's first president under the new constitution, but political turmoil plagued the nation throughout most of the 1890s. By the beginning of the 20th century, a network of regional elite had usurped the political system, and many of the structures outlined in the constitution were being effectively ignored. Nevertheless, the document remained in force—at least nominally—until 1934.

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**contradanza** See MUSIC.

**copper** Copper is a metal that is mined throughout the world. In Latin America, it is found primarily in the



Chile became a major world supplier of copper in the 19th century. This 1824 illustration from Peter Schmidtmeier's *Travels into Chile* shows a silver and a copper mining operation. (Private collection/The Bridgeman Art Library)

mountainous regions of Andean South America and in some areas of MEXICO. Copper is used to make coins, and it is a good conductor of heat and electricity. It is also used in alloys such as bronze and brass. Copper MINING was a small but viable economic activity in Latin America during the colonial period. After independence, CHILE emerged as a major supplier of copper in the world, and much of the nation's economic growth during the later decades of the 19th century was tied to the copper industry (see ECONOMY). The copper industry also grew in Mexico in the late 19th century. As the world embraced electric energy starting in the late 19th century, the demand for copper wiring and other products increased substantially.

Copper mining and processing techniques in Chile and elsewhere in Latin America were crude and inefficient prior to the 1830s. Only high-quality ore could be processed until new smelting techniques were introduced. Technological innovations evolved as international demand for copper increased. For example, trees were cut down to fuel the copper furnaces, causing deforestation, until smelters began using coal as fuel. While coal imports increased, coal mining was also undertaken locally to support the growth of copper mining and smelting activities. After 1840, a more mature copper industry developed based on exporting ore, as well as bars and other forms of processed copper.

During the 19th century, much of the investment and technological innovation in Latin American copper industries came from abroad. The British exerted enormous influence in the Chilean copper industry, while U.S. interests controlled mining activities in Mexico and PERU. Foreign investors also supported the expansion of infrastructure such as railroads and ports to transport the copper and the coal required to process it (see TRANSPORTATION). Indeed, the extraordinary growth of the Latin American copper industries often benefited foreign investors at the expense of local laborers. Working conditions in the mines were often unsafe, and miners were underpaid. Some remote mines paid workers in credit at the company store, where workers were forced to pay inflated prices for food and other necessary items.

By the end of the 19th century, social strains created by inequalities in the copper industry were becoming evident. In Mexico, the unrest turned into resentment of foreign ownership. A major strike occurred at the Cananea Consolidated Copper Company in the northern state of Sonora in 1906, when workers protested unfair treatment by U.S. owners and managers. Mexican dictator PORFIRIO DÍAZ put down the strike forcefully; the episode is considered one of the precursors of the Mexican Revolution, which broke out in 1910. Chilean mining companies became increasingly reliant on the British market and on foreign financiers throughout the 19th century. After the WAR OF THE PACIFIC, Chile took over new mining regions from neighboring BOLIVIA and looked to foreign investors to develop these. By the turn of the century,

foreign companies had assumed almost complete control of Chilean mining interests, setting the stage for conflict when the Chilean government attempted to nationalize the mining industry later in the 20th century.

See also CHILE (Vol. IV); MEXICAN REVOLUTION (Vol. IV).

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**corrido** See MUSIC.

**Costa Rica** Traversed by the mountains of the Continental Divide, this nation of CENTRAL AMERICA is 19,652 square miles (50,898 km<sup>2</sup>) and is bounded on the north by NICARAGUA, on the east by the Caribbean Sea and PANAMA, and on the south and west by the Pacific Ocean. The ash from Costa Rica's volcanoes provided the highlands with rich, fertile soil, which, combined with its humid coastal plains, contributed significantly to the country's agricultural development (see AGRICULTURE).

Because of distance and poor TRANSPORTATION facilities during the Spanish colonial period, Costa Rica remained an outpost in the captaincy general, whose capital was Guatemala City. This isolation contributed to the emergence of four distinct political units, based in the towns of Cartago, San José, Heredia, and Alajuela. When independence was achieved in 1821, Costa Ricans reluctantly joined the Mexican Empire until its collapse in 1823 and subsequently joined the UNITED PROVINCES OF CENTRAL AMERICA. Although Costa Rica remained part of the United Provinces until its collapse in 1838, most Costa Ricans had little interest in the federation; indeed, they often looked down on the mestizos who made up the majority of people in their neighboring states. Additionally, the political turmoil and inward-looking foreign policy that characterized the other federation members contrasted sharply with Costa Rican's historical experiences, which had led them to place national interests over political ideology.

In 1824, the provincial congress elected Juan Mora Fernández (b. 1784–d. 1854) as the first president of the Free State of Costa Rica. In the early 1830s, a rivalry developed among the four political units, but by 1835, Braulio Carrillo Colina (b. 1800–d. 1845) was elected president and brought some stability. Carrillo was a committed liberal who established the capital at San José. His forces fought off an armed rebellion in 1835, and he seized control of the government after losing the 1838

election. Despite his dictatorial rule, Carillo introduced government and legal reforms, paid off foreign debts, and directed the efficient and honest handling of public finances. He also decreed that titles to municipally owned lands be given to those who farmed them, a move that significantly increased the number of small landowners. In 1841, Carillo suspended the constitution and declared himself dictator for life, but one year later, he was overthrown by FRANCISCO MORAZÁN. Costa Rica descended into political turmoil until 1847, when a 29-year-old publisher, José María Castro Madríz (b. 1818–d. 1892), was elected president. He abolished the army, emphasized public EDUCATION, and guaranteed basic liberties such as freedom of expression and freedom of association.

In the mid-1850s, COFFEE planter and President Juan Rafael Mora Porras (b. 1814–d. 1860) came to view U.S. filibusterer WILLIAM WALKER's vision of a personal empire in Central America as a threat to Costa Rican sovereignty. With the financial support of Commodore Cornelius Vanderbilt, who had a personal score to settle with Walker, Mora Porras raised a 9,000-man army and, with other Central American armies, drove Walker from Nicaragua in 1857. Costa Rica and Nicaragua then feuded over control of the San Juan River, which at the time was considered the best route for a transisthmian canal. Although the 1858 Cañaz-Juárez Treaty recognized Nicaragua's claim to the river, Costa Ricans continued to challenge the decision, and this became a factor in the U.S. decision to instead select Panama for its transisthmian canal in 1903 (see TRANSISTHMIAN INTERESTS).

A new constitution in 1859 retained limited suffrage and the indirect election of a president through the Congress. Although three successive presidential elections were peaceful, political power was in the hands of the Montealegres, a wealthy coffee-growing FAMILY that had risen to power early in the 19th century and used political clout to favor the landed coffee interests. Then, in 1870, General TOMÁS MIGUEL GUARDIA GUTIÉRREZ engineered a coup. Despite declaring himself a populist and promising to end the dominance of the coffee barons, Guardia ruled as a dictator until his death in 1882. He did much to modernize the country, however. Guardia fostered the growth of public education, installed modern sanitation facilities in cities, abolished capital punishment, and expanded TRADE opportunities that led to increased coffee and SUGAR production. His successors, Próspero Fernández Oreamuno (b. 1834–d. 1885) and particularly Bernardo Soto Alfaro (b. 1854–d. 1931), continued and expanded these reforms. For example, Oreamuno's Liberal Laws provided for the separation of church and state and introduced civil marriage and divorce. Some church properties were confiscated, and the Jesuits were expelled from the country for allegedly interfering in politics.

The most significant economic accomplishment of latter decades of the 19th century was the completion of a railroad from the central highlands to Puerto Limón

on the Caribbean coast in 1890. MINOR COOPER KEITH, nephew of the South American railroad tycoon Henry Meiggs, did more than build the Atlantic coast railroad. Keith came to own the wharf at Puerto Limón. He eventually brought the banana industry to Costa Rica, a move that earned him extensive wealth before he sold his holdings to the United Fruit Company. Keith's place in Costa Rican society was guaranteed by his marriage to the daughter of former president José María Castro Madríz.

The 1890 presidential election of José Joaquín Rodríguez Zeledón (b. 1837–d. 1917) marked the transition of power to the "Generation of '89," which dominated Costa Rican politics for the next 50 years. Before the close of the 19th century, these liberals had overseen the construction of the Pacific Railroad, linking the central valley to the port at Punta Arenas, and placed the national currency on the GOLD standard, actions that further stimulated the agro-export ECONOMY.

See also COSTA RICA (Vols. I, II, IV); UNITED FRUIT COMPANY (Vol. IV).

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**cotton** Cotton is a soft, natural fiber that grows around the seeds of the cotton plant. It is native to tropical and subtropical climates; the plants were first found in regions of India, Africa, Asia, and the Americas. The fibers have been used for centuries to make textiles. Over time, cotton became an important commodity in international TRADE.

In Latin America, indigenous peoples cultivated the plant long before 1492 and the arrival of Europeans. The cultivation of cotton for textile production continued throughout the colonial period, although the cotton and textile industries remained both small and local until 19th-century industrial advancements.

The emergence of the British textile industry in the 18th century propelled greater interest in the cultivation of cotton, which was soon closely linked to the institution of SLAVERY. Throughout the century, the Portuguese-controlled Pombaline Company encouraged the growth of cotton plantations in the Brazilian regions of Maranhão and Pernambuco. This increased the demand for slave LABOR, and slave-based cotton plantations spread throughout those regions. Indeed, cotton production became their main economic activity. By the end of the century, BRAZIL provided 30 percent of cotton exports to British textile manufacturers, and more than 30,000 slaves worked on its cotton plantations. A similar

trend occurred in the French colonies of Guadeloupe and Martinique and in British colonies such as Jamaica (see CARIBBEAN, BRITISH; CARIBBEAN, FRENCH).

The invention of the cotton gin in 1793 paved the way for industrial textile production in the 19th century. The new machine removed the cotton seeds from the soft fiber more efficiently than manual removal methods. The cotton gin and the precipitous growth of the textile industry created a new demand for slaves in the United States, as more manual labor was now required to pick large amounts of cotton for production. The gin did not have the same effect in Latin America. Cotton plantations in Brazil found it impossible to compete with the enormous surge in output in the U.S. South. French colonies also saw a decrease in cotton cultivation, although that decline was driven in part by the flight of French planters after the outbreak of the Haitian Revolution in the 1790s (see HAITI).

Throughout the 19th century, Latin American economies struggled to compete with the industrial production of cotton and textiles in the United States and Europe (see ECONOMY). Liberal TRADE policies favored unencumbered access to foreign markets, and U.S. and British cotton producers quickly claimed the COMPARATIVE ADVANTAGE in producing affordable, quality cotton textile products. As a result, in Latin America other agricultural and commodity products replaced cotton both as an export product and one cultivated for local consumption. By the end of the century, some of the larger Latin American countries, such as MEXICO and Brazil, had seen a modest growth in local textile manufacturing, but the cotton continued to come from abroad (see CLOTHING).

See also CLOTHING (Vol. I); COTTON (Vol. I); TEXTILES (Vol. I).

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**Creel, Enrique** See TERRAZAS FAMILY.

**crime and punishment** The criminal justice system in colonial Latin America was complex and cumbersome. Spanish and Portuguese law established layers of jurisdiction and appeals that varied by location, severity of crime, and social class. Royal *audiencias* were the highest court of appeal in Spanish America and served as a type of check and balance to the colonial viceroys, who

oversaw the judicial system. Simultaneously, a series of parallel courts existed for members of corporations, such as the CATHOLIC CHURCH and the MILITARY. Membership in those groups provided access to certain corporate privileges such as the ecclesiastical and military *FUEROS*, which allowed members of the clergy and the military to be tried in ecclesiastical and military courts, respectively, rather than in civil courts.

The wars for independence brought a period of disorder and lawlessness to many areas of Latin America between 1808 and 1825. As insurgent militias rose up against royal authority in the Spanish colonies, traditional colonial authority figures were often driven from power. The absence of legitimate authorities created a power void, and many areas suffered from rampant banditry and other crimes throughout the first half of the 19th century. Some independence leaders emptied jails and exonerated prisoners in exchange for military service against the royal army.

After independence, new governments in Latin America inherited the unwieldy justice system left over from the colonial period. The complicated system of criminal justice was aggravated by the expansion of social banditry that occurred during the wars for independence. In many new nations, crime and law enforcement became ambiguously intertwined in the first half of the 19th century as military strongmen rose to power using a combination of oppression and personal appeal. CAUDILLO dictators dominated the Latin American political system for several decades. Many, like Argentine dictator JUAN MANUEL DE ROSAS, established extralegal security forces ostensibly to maintain law and order (see MAZORCA, LA). Oftentimes, caudillos' personal armies used violence and intimidation to ensure loyalty to their leader.

By the middle decades of the 19th century, Latin America's political future was being debated by conservative and liberal elite who had differing views on the direction their nations should take. Liberal leaders began consolidating power in such nations as MEXICO, ARGENTINA, and COLOMBIA. They believed that the privileges that existed for certain corporations under the colonial justice system needed to be erased. Under liberal governments the colonial *fueros* for members of the church and the military were abolished.

In the final decades of the 19th century, many Latin American leaders had adopted a positivist philosophy toward society and national development (see POSITIVISM). National policies began to reflect an emphasis on modernity and progress and the belief that there were scientific and social explanations for crime. Positivist leaders in Mexico, Argentina, and elsewhere devoted national resources to studying criminology and modernizing the criminal justice system. Prisons and asylums were renovated, or new ones were built. Punishments began to focus on reform and rehabilitation.

See also AUDIENCIA (Vol. II); CRIME AND PUNISHMENT (Vols. I, II, IV).

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**Cuba** Cuba is an island nation located in the Caribbean Sea, to the west of the island of Hispaniola (HAITI and the DOMINICAN REPUBLIC) and about 90 miles (145 km) south of the Florida Keys. Cuba is a relatively small nation, roughly the size of Pennsylvania. Its topography is a mixture of mountainous terrain and fertile plains.

**THE COLONIAL BACKDROP**

Cuba played a prominent role in the Spanish Empire throughout the colonial period. As one of Spain's oldest settlements, the island became a bastion of royal authority. Its strategic location on the outskirts of the Gulf of Mexico made Cuba an ideal transit point for Spain's commercial fleet, which tightly controlled colonial TRADE. Cuba also became an outpost for the Spanish MILITARY, as numerous garrisons were stationed on the island to protect the empire's commercial and territorial interests.

Cuba's indigenous population was wiped out by disease and mistreatment shortly after the arrival of Spanish settlers in the 16th century. Without a large native LABOR supply and lacking the mineral wealth of MEXICO and PERU, Cuba held little economic interest for the Spanish for most of the colonial period. That changed in the late 18th century when TOBACCO, COFFEE, and SUGAR cultivation boomed on the island, due to its fertile soil. The production of cash crops required a large and reliable labor source, and Cuba became a prime destination of the African slave trade throughout the 19th century. The drastic changes brought about by the expansion of sugar production and SLAVERY defined much of Cuba's history in the 19th century.

**THE EXPANSION OF SLAVERY**

Napoléon's invasion of the Iberian Peninsula in 1808 sparked independence movements throughout the Spanish Empire. The Cuban population, however, was not as quick to embrace the idea of a complete break from Spain. Plantation AGRICULTURE—and in particular sugar cultivation—had come to dominate the island's ECONOMY, and many of the planter elite understood that they relied on their relationship with Spain for continued economic growth. Furthermore, by the early 19th century, more than one-third of Cuba's population was made up of black slaves. Cubans had witnessed the independence movement in Haiti only two decades before, which had quickly erupted into a massive slave uprising. The planter elite in Cuba feared a similar violent and uncontrolled reaction if they dared challenge the traditional authority

of the Spanish Crown. As a result, Cubans did not follow the example of Spain's mainland colonies and push for complete independence in the early 19th century. Instead, they pledged their loyalty to the Spanish Crown, and the island maintained its colonial status.

Cuba's sugar industry boomed throughout the 19th century aided by changes in Spanish policy that allowed more open and free trade between Cuba and foreign nations. As the production of sugar grew, so did the island's need for slave labor. Despite an 1817 treaty between Spain and Great Britain abolishing the transatlantic slave trade, an illegal slave trade into Cuba thrived for decades. During the 19th century, the island's slave population grew exponentially, as hundreds of thousands of new slaves were imported. Their labor helped to fuel the expanding plantation economy. Nevertheless, a strong abolitionist movement emerged led by liberal-minded writers and social critics. JOSÉ ANTONIO SACO became a leader in advocating for the abolition of slavery and the formation of a strong Cuban national identity.

The large number of African slaves made many of the planter elite fearful of a massive slave uprising, and several attempted uprisings occurred in 1826, 1837, and 1843. In 1844, evidence of an abolitionist plot provoked violent government retribution. Thousands were arrested and hundreds killed in what became known as the LADDER CONSPIRACY. The ruling elite foiled all early attempts at overturning the social order, and slavery continued until 1886. An African-based culture accompanied the growth of the slave population and remains an important component of Cuban culture today. African traditions often fused with Spanish customs to form new practices unique to Cuba. SANTERIA is one example of the merging of West African religious beliefs with practices of the CATHOLIC CHURCH.

After the death of King Ferdinand VII, the Spanish Crown enacted a series of reforms in the 1830s. These included a move toward LIBERALISM in social and economic policies. The Crown allowed even greater access to foreign investment in Cuba. Additionally, railroads on the island were expanded, financed largely by British investors. The advent of railroad transport led to a further expansion of the sugar economy. Spain progressively relaxed trade restrictions, and a new trading partner emerged to dominate Cuba's export market. The United States grew to become one of the most important destinations for the island's sugar. Through all of these changes, the planter elite struggled to maintain their position at the top of Cuba's economy and society. Many landowners understood that their success relied largely on the continuation of slavery. Since the abolition of the transatlantic slave trade in 1817, any slaves arriving in Cuba after that date were technically being held illegally. Planters constantly worried that Spain would bow to pressure from the British and crack down on the illegal trade. Some of the elite even looked to the United States for protection and possible annexation as another slave

state. These hopes were dashed with the onset of the American Civil War. The war also changed the economic dynamic of the U.S. South, with many sugar plantations collapsing with the cessation of slavery there. As a result, demand for Cuban sugar grew. Many planters on the island adopted new technologies and modernized their production.

Additionally, Cuban planters understood that abolitionist pressures coming from abroad might eventually lead to an end to Cuban slavery. By mid-century, some of the smaller plantations in Cuba were experimenting with nonslave labor. Large numbers of Chinese contract workers went to work on plantations and in other industries, almost as indentured servants. White immigration also increased, and the island's nonslave population grew precipitously in the 1840s and 1850s.

### THE TEN YEARS' WAR

Throughout the 19th century, the creole elite in Cuba pushed to have a greater say in the island's economic interests. In the 1860s, the Reformist Party emerged, demanding political representation and equality among creoles and peninsulars. The party also looked to modernize Cuba's economy by altering the tariff structure and restricting the slave trade. The Spanish government finally established the *JUNTA DE INFORMACIÓN* in Madrid to propose reforms in the overall administration of the colony. Several delegates represented Cuban interests, but the meetings failed to bring about any meaningful changes.

As reformist delegates tried to push for change in Madrid, politicians in Cuba's eastern provinces began conspiring to rebel against the Spanish government. In 1868, plantation owner *CARLOS MANUEL DE CÉSPEDES* issued the *GRITO DE YARA*, declaring independence and initiating the *TEN YEARS' WAR*. Céspedes freed his slaves and recruited them into his army. Many planters in the surrounding provinces followed his example, and a revolutionary army quickly formed. Céspedes and other leaders of the insurgency demanded a large array of reforms, including changes in taxation, social equality, and open trade. By 1869, the insurgents had gained control of most of the eastern provinces. Leaders formed a parallel government and promulgated a constitution.

The issue of slavery proved to be a divisive topic, as some within the independence leadership favored complete abolition, while others feared a slave insurrection. Another controversial issue was the type of relationship Cuba should form with the United States. Some Cuban elite pushed for annexation, while others advocated complete Cuban independence. Such divisions resulted in the overthrow of Céspedes in 1873. The leadership fell to *MÁXIMO GÓMEZ*, who continued to dominate the eastern portion of the island. *ANTONIO MACEO* also emerged as an important military leader during the Ten Years' War, but the conflict eventually reached an impasse, as neither side could gain the advantage. Most revolutionary leaders

signed on to the *TREATY OF ZANJÓN* in 1878, which called for a cease-fire and offered amnesty to those who had fought against the Spanish government. The treaty also freed slaves who had fought on the side of the revolution, and the offer of reprieve convinced many revolutionary soldiers to abandon the cause. Gómez and Maceo rejected the treaty and fled into exile.

Even though the Ten Years' War failed to bring about complete independence for the island, Cuba experienced significant changes in the decades following the war. As the Cuban economy struggled to recover after a decade of armed conflict, sugar prices declined across the world. Furthermore, the clauses in the Treaty of Zanjón that offered freedom to slaves who had fought on the side of the rebellion inspired many others in Cuba to challenge the institution of slavery. Spain passed laws in 1880 that gradually eliminated the forced system of labor over the next six years. These changing economic conditions forced many plantations into bankruptcy. U.S. investors often stepped in to take over ownership of plantations and related businesses. The new owners modernized production, and economic ties between the United States and Cuba strengthened considerably. By the end of the century, Cuba was sending nearly all of its agricultural exports to the United States. The island also became reliant on the United States for imports of finished goods. The old Cuban planter elite, which had kept the island so closely tied to Spain, virtually disappeared in the last two decades of the 19th century.

### CUBAN INDEPENDENCE

Over the next decade, nationalist Cuban exiles began to mobilize from abroad, with many of them coming together in New York to organize a resistance movement. *JOSÉ MARTÍ*, an exiled Cuban nationalist and writer, emerged as one of its leaders. He used his writings to encourage racial equality and to speak out against imperialism. He eschewed Spanish rule but also cautioned that by allying themselves too closely with the United States, Cubans risked replacing one unwanted imperialist power with another. In 1892, Martí helped found the Cuban Revolutionary Party (*Partido Revolucionario Cubano*), and he recruited other Cuban exiles to reignite the independence movement. The group spent the next several years planning a general uprising. Martí contributed to the movement by writing propaganda and teaching less educated Cuban exiles to help prepare them for revolution. By 1895, a new group of revolutionaries was ready to renew the struggle for independence.

In January of that year, Martí joined up with Gómez in the Dominican Republic, and the two issued the *Manifiesto de Montecristo*. The manifesto called for Cuban independence, racial equality, and an end to imperialism on the island. Gómez and Martí led a small invasion army to Cuba and met up with other insurgents, and the War of 1895 began. After only six weeks, Martí was killed in a battle with the Spanish military. Despite

the loss of one of its principal leaders, the independence movement grew stronger as the rebellion spread throughout the island. Revolutionaries quickly gained control over much of the eastern portion of the island, and after a year of guerrilla warfare, areas of western Cuba fell to the insurgents as well.

The Spanish government tried to control the situation by sending General Valeriano Weyler to serve as governor of Cuba and suppress the rebellion. Weyler tried to weed out guerrillas by forcing all noncombatants into concentration camps. Deplorable conditions in the camps and cruel tactics on the battlefield earned Weyler a reputation as a ruthless tyrant. The American population watched the conflict unfold with curiosity that turned to shock as the death toll mounted. Furthermore, a number of U.S. businessmen lost property in the conflict; in the United States, the public began to pressure President William McKinley to intervene. McKinley sent the USS *Maine* warship to anchor in HAVANA harbor in the early months of 1898. A mysterious explosion killed most of the crew on February 15, and a month later, the United States went to war with Spain in the WAR OF 1898.

The war was short lived, and both militaries were devastated by tropical disease. After destroying Spain's Pacific fleet in the Philippines, the U.S. military set its sights on Cuba. Actual fighting on the island lasted only a few months before Spain was forced to surrender. The Treaty of Paris officially ended the war on December 10 and forced Spain to relinquish all of its colonial possessions in the Caribbean and the Pacific. Those possessions included the Philippines, Guam, and PUERTO RICO, which the United States kept as protectorates. Cuba was granted independence in accordance with the Teller Amendment passed by the U.S. Congress at the beginning of the war.

Independence did not bring the autonomy many Cuban leaders had hoped for. The U.S. military occupied the island from December 1899 until May 1902, and U.S. leaders controlled most of the postwar reconstruction. More U.S. investors rushed to the island to take advantage of new opportunities in the now independent nation. Many Cuban businesses struggling to recover after the war were forced to sell to Americans. With even

more Americans involved in the Cuban economy, U.S. leaders insisted on being able to safeguard American interests in the new political system. Pressured by U.S. diplomats, delegates to the Cuban constitutional convention approved the Platt Amendment, which gave the United States the authority to intervene in Cuba to protect American interests. The United States used the Platt Amendment as justification for several interventions in Cuba in the first half of the 20th century. Nationalist Cubans despised the clause, and many argued that Martí's fears had been realized: Cuba had replaced one imperial power with another. The conclusion of the War of 1898 set the stage for the growing resentment toward the United States that would define Cuba politics in the 20th century.

See also CUBA (Vols. I, II, IV); HISPANIOLA (Vols. I, II); PLATT AMENDMENT (Vol. IV).

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**Cuban Revolutionary Party** See MARTÍ, JOSÉ.

**cumbia** See MUSIC.

**Cunha, Euclides da** See CANUDOS.

**Curaçao** See CARIBBEAN, DUTCH.

# D

**Democracia, La** Founded in 1890 by politician and writer Luis Muñoz Rivera (b. 1859–d. 1916), *La Democracia* was the newspaper of the Puerto Rican Autonomist Party. The autonomists sought Puerto Rican self-government through nonviolent means, wishing to unite with the Spanish Liberal Party in order to gain PUERTO RICO greater freedom from Spanish control.

Denouncing the evils of the Spanish regime against Puerto Rican society, *La Democracia* attempted to stir up popular sentiment for greater independence from Spain without completely severing existing political and cultural ties. This view was controversial even among some Liberal Puerto Ricans, with some advocating for complete Puerto Rican independence and others for full assimilation with Spain. To promote the autonomist position, Rivera journeyed to Spain in 1895 as part of a four-member commission to meet with Práxedes Mateo Sagasta (b. 1825–d. 1903), head of the Liberal Party in Spain. Upon securing Sagasta's assurances that once in power he would grant Puerto Rico autonomous control of local politics and resources, the group journeyed home and voted to change their name to the Fusionist Liberal Party.

After the death of Spanish prime minister Antonio Cánovas del Castillo (b. 1828–d. 1897) at the hands of Spanish terrorists in August 1897, Sagasta quickly climbed to power during the political and social chaos that followed. As promised, Prime Minister Sagasta promptly issued a royal decree granting Puerto Rican autonomy on November 25, 1897, giving the island a level of political freedom previously unseen in its history.

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**democracy** Democracy is system of government in which authority comes from the people. Democracies are characterized by elections and are generally accompanied by an assumed set of individual rights and freedoms. Most democratic governments are representative democracies, meaning that elected representatives, such as legislators and executives, make decisions on behalf of the people. The precise structure and function of democratic systems differ from one country to another. Most Latin American nations attempted to introduce some form of democracy in the 19th century to replace the monarchies of the colonial period.

Modern democracies have their origins in 18th-century Enlightenment thinking. The writings of philosophers such as John Locke, Thomas Paine, Voltaire, Thomas Hobbes, and Jean-Jacques Rousseau challenged the power structures that had for centuries defined European political networks. In particular, they questioned the validity of the divine right of monarchs, the concept that legitimized monarchical forms of government. Enlightenment thinkers argued that divine authority was irrational and that authority to rule was not bestowed by God; rather, it should come from the people. The American and French Revolutions of the late 18th century were strongly influenced by Enlightenment thinking. After the North American colonies achieved independence from Great Britain, the newly established United States of America became the first modern democracy. Later democratic movements often held up



the U.S. experience as the model for creating a representative governing system.

The former Spanish colonies in Latin America were among the first countries to follow the U.S. example in attempting to create democratic forms of government. Only BRAZIL differed; it maintained both its ties to Portugal and a monarchy for most of the 19th century. After fighting wars of independence for more than a decade, all of the Spanish mainland colonies successfully ousted the royal government and formed new political systems. Most independence leaders had been inspired by the liberal ideals that emerged during the Enlightenment, including the concept of representative democracy. Initially, many Latin American nations established democratic governments backed by constitutions modeled largely on that of the United States. Latin American constitutions generally attempted to define citizenship, protect individual rights, and identify the political electorate. In the immediate instability following independence, however, democratic development was often difficult and elusive.

Most Latin American nations saw political ideologies divide along conservative and liberal lines in the first half of the 19th century (see CONSERVATISM; LIBERALISM). Many of the conservative movements wanted to continue the political traditions of strong executive power and a centralized governing structure that had existed prior to independence. Mexican conservatives several times even attempted to reinstate a monarchical government. Liberal groups ostensibly stood for the representative governments and the individual rights and freedoms associated with democracy. Despite those claims, in practice, most liberal leaders demonstrated little concern for establishing a popular electorate. Ideological conflicts kept liberals and conservatives at odds with each other, and many nations experienced a series of rebellions and *pronunciamentos*, or declarations of government overthrow, as conservatives overthrew liberals and liberals in turn worked to destabilize conservative governments. Most nations went through multiple constitutions as civil wars and MILITARY insurrections led to persistent changes in government.

The quest for democracy in 19th-century Latin America was further complicated by the emergence of dictatorial CAUDILLOS throughout the region. As internal infighting and the threat of external intervention threatened new governments, powerful and charismatic leaders assumed control of national and local governments. Whether liberal or conservative, most caudillos privileged order and stability over individual rights and, indeed, often suspended individual rights in the interest of imposing order on volatile environments. The dictators often resorted to censorship, intimidation, and violence to suppress opposition and exert their authority. Their methods thwarted democratic development in Latin America in the first half of the 19th century.

In the late decades of the 19th century, powerful groups of liberal leaders known as LIBERAL OLIGARCHIES

consolidated power in many Latin American countries. Liberal oligarchies were made up of wealthy, politically influential men who had for the most part been affiliated with the earlier liberal political movements. But, just as the earlier liberal parties had failed to impose meaningful democratic reform, liberal oligarchies also neglected the political rights of most people. The governments of the late 19th century were often swayed by the philosophy of POSITIVISM. Citing positivist logic, they argued that rural peasants and the urban poor were developmentally behind the rest of the populace and, thus, were not ready for full democracy. Late 19th-century suffrage was generally limited to the property-owning and educated elite. Some countries, such as ARGENTINA and URUGUAY, welcomed large numbers of European immigrants late in the century. This influx of immigrant workers created additional confusion in establishing citizenship and democratic processes.

By the end of the 19th century, Latin American nations had experienced varying degrees of democratization. MEXICO ended the century in the midst of the 34-year dictatorship of PORFIRIO DÍAZ. Political democracy developed there only after the bloody 1910 revolution. The Brazilian monarchy collapsed in 1889 in favor of a republican form of government, but elections remained closed to large numbers of people for several decades. The CHILEAN CIVIL WAR of 1891 overthrew the dictator JOSÉ MANUEL BALMACEDA and ushered in a period of democratic reform in that country. By the early decades of the 20th century, populist movements had emerged in Argentina, Uruguay, CHILE, and other nations to promote democratic and social reform.

See also ENLIGHTENMENT (Vol. II).

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**Deodoro da Fonseca, Manuel** (b. 1827–d. 1892) *president of Brazil* Manuel Deodoro da Fonseca was a MILITARY officer who led the coup against PEDRO II in 1889 that effectively brought an end to monarchical rule in BRAZIL and ushered in the era of the OLD REPUBLIC. He was elected the nation's first president but was forced to resign because of conflict within the new government.

Deodoro was born on August 5, 1827, in the state of Alagoas in northeastern Brazil. He was a career military man and fought in the WAR OF THE TRIPLE ALLIANCE in the 1860s. He entered politics and became the governor of the COFFEE-producing state of SÃO PAULO in the 1880s.

In that position, Deodoro was swayed by positivist intellectuals within the military establishment and members of São Paulo's recently formed Republican Party to move away from his earlier conservative political leanings (see **POSITIVISM**). Deodoro joined republican and positivist leaders in opposing **SLAVERY** and in promoting a move toward republicanism in the political system. He publicly opposed the increasingly autocratic policies of Pedro II. In 1889, Deodoro led a military coup that successfully overthrew the emperor and declared the Republic of Brazil. He was named provisional president and helped to frame the new government over the coming years.

Deodoro called for a constitutional assembly to draft a new governing document and oversaw the promulgation of the **CONSTITUTION OF 1891**. In February of that year, he was officially elected president and spent the next several months trying to curtail the political infighting that began to surface. He attempted to dissolve Congress and rule by decree. His despotic policies provoked several insurrections, and in November 1891, Deodoro was forced to resign. He was replaced by his vice president, Floriano Peixoto (b. 1839–d. 1895). Deodoro died less than one year later in **RIO DE JANEIRO**.

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**Dessalines, Jean-Jacques (Jacques I)** (b. 1758–d. 1806) *leader of Haitian Revolution and first ruler of independent Haiti* Jean-Jacques Dessalines, the first leader of the newly independent **HAITI**, was born a slave at Grande Rivière du Nord in 1758. Although he had no formal **EDUCATION**, Dessalines was a natural **MILITARY** leader and an adept political strategist. He fought for the abolition of **SLAVERY** under Toussaint Louverture and later led a united Haitian front to defeat and gain independence from France.

In 1802, Napoléon sent General Charles-Victor-Emmanuel Leclerc on an expeditionary force to Saint Domingue (the French colony that became independent Haiti) with the intention of reinstating direct French rule and slavery. Coastal towns were quickly taken during the massive invasion. Nevertheless, at the battle at Crête-à-Pierrot, which took place in March 1802, the Haitians shocked the French with their military prowess and their ability to hold out under siege for 20 days. That battle was credited to Dessalines. Although the French eventually took the fort, their losses were twice as high as those of the Haitians. “Crête-à-Pierrot” became the Haitian battle cry for the rest of the war.

The struggle raged on, with **HENRI CHRISTOPHE** and Louverture negotiating a ceasefire later that year. Dessalines then defected to the French and was promoted to the rank of general in the south, where he fought against the Haitian rebels. After Louverture was

tricked, arrested, and deported, Dessalines, fearing that Napoléon would reinstate slavery as he had in the nearby island of Guadeloupe, determinedly and successfully resumed the fight against the French. French forces were also weakened by yellow fever, which claimed the life of General Leclerc in November 1802. Leclerc's successor, the count of Rochambeau, directed exceedingly bloody tactics against the Haitian rebels. The final year of the Haitian Revolution is recorded as “a war of racial extermination on both sides.”

On May 18, 1803, Dessalines and the mulatto **ALEXANDRE PÉTION** (who had been fighting with Leclerc) met in secret. During this meeting, Dessalines, leader of the black forces, convinced Pétion, who was commanding the mulatto forces, to unite against the French. This united force defeated Rochambeau at the Battle of Vertières on November 18, 1803.

After Haitian independence was proclaimed on January 1, 1804, most remaining French colonists were slaughtered, regardless of their age, gender, or profession. In response, the Vatican promptly broke off relations with Haiti, while the larger international community ignored and/or isolated Haiti until the latter half of the century.

Dessalines proclaimed himself emperor of Haiti as Jacques I in a coronation ceremony on October 6, 1805. He ruled under the imperial **CONSTITUTION OF 1805**. In an attempt to generate capital, he reinstated Toussaint's **FERMAGE** system, a forced-**LABOR** system that bound laborers to the land, allowing them minimal profit and providing basic necessities for free. Although the system did improve the **ECONOMY**, laborers' lives were highly regulated, and punishment for disobedience was severe. Dessalines's rule was criticized for his strictness and tendency to govern “with an iron fist.”

Dessalines's land policies and financial tactics also concerned his people. The state absorbed a large amount of land as a result of irregularities in land titles left over from the colonial era, but Dessalines's government resorted to favoritism and cronyism in redistributing the land. Dessalines also spent to excess, leaving little in the treasury for military salaries and provisions. It is believed that he was aware of the problems but made no attempt to resolve them. Adding to the general unrest, Dessalines led three failed attempts to secure the Spanish colony of **SANTO DOMINGO**, which occupied the eastern part of the island.

Conspiracies smoldered and finally came to head on October 17, 1806, when Dessalines was shot at Pont-Rouge. He had been riding south with his troops to subdue a revolt. Tradition tells that his body was hacked to pieces and left to rot. A woman named Défilée, a sutler of Dessalines's army, carried the remains to a nearby cemetery. It is said that she herself was driven mad by the brutality of war. Pétion, who was suspected of ordering Dessalines's assassination, paid for his burial. Dessalines was succeeded by Christophe in the north and Pétion in the south.

See also **HISPANIOLA (Vol. II)**; **SANTO DOMINGO (Vol. II)**.

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**Díaz, Porfirio** (b. 1830–d. 1915) *president of Mexico* José de la Cruz Porfirio Díaz was a military hero, LIBERAL PARTY leader, and president of MEXICO. His politics eventually shifted from the Liberal mantra of "no reelection" to a more autocratic approach to achieving order. During the period from the beginning of his first presidency in 1876 to the end of his last administration in 1911—known as the PORFIRIATO—Díaz became



Photograph of Porfirio Díaz, president of Mexico from 1876 to 1911 (*Library of Congress*)

increasingly dictatorial. He was eventually ousted by the Mexican Revolution of 1910.

Porfirio Díaz was born on September 15, 1830, in the city of Oaxaca to a modest mestizo family. Following the death of his father, Díaz went to work at a young age to help support the family. At the age of 13, his mother sent him to study for the priesthood, but instead, he joined one of the local militias that had formed to challenge the U.S. invasion in 1846 and found a MILITARY career more to his liking. In 1849, he began studying law under the tutelage and influence of such Liberal thinkers as BENITO JUÁREZ.

Díaz's legal career was disrupted by the Liberal stance against ANTONIO LÓPEZ DE SANTA ANNA'S Conservative dictatorship, and Díaz aided in bringing down what was the CAUDILLO's last foray as the nation's leader in 1853. Díaz joined Juárez and other Liberal opponents in challenging Santa Anna's regime, and when the dictator finally fell in 1855, Díaz received a local political post in Oaxaca as a reward. He soon found himself called to action once again as a military leader on the side of the Liberals in the WAR OF REFORM and the subsequent FRENCH INTERVENTION. It was Díaz who led the Mexican forces to victory against the invading French army in the famous Battle of Puebla on May 5, 1862—a battle which has long since been commemorated in CINCO DE MAYO celebrations. Díaz continued to contribute significantly to the eventual victory over the French army.

After ousting the French in 1867, Liberal leader Juárez encouraged his military supporters to lay down their arms and return to civilian life. Díaz retired to his family farm but ran in the 1871 elections against Juárez, who was seeking a fourth term. Upon Juárez's victory, Díaz accused the president of fixing the elections and led the unsuccessful Plan de Noria in an attempt to overthrow his one-time ally. Although the 1871 revolt failed, when presidential incumbent SEBASTIÁN LERDO DE TEJADA won reelection in 1876 through alleged fraud, Díaz initiated the Plan de Tuxtepec and this time succeeded in taking the presidency for himself.

The success of Díaz's revolt in 1876 ushered in the period of Mexican history known as the Porfiriato. Although Díaz stepped down from the presidency between 1880 and 1884 in favor of his loyal military general MANUEL GONZÁLEZ, he continued to exert enormous influence behind the scenes. When González's term ended amid corruption and financial crisis, Díaz used the situation to justify running for president again, despite having earlier defended the "no reelection" clause of the CONSTITUTION OF 1857.

After Díaz's successful second election, he proceeded to rule the nation uninterrupted until 1911. He had built his career by allying himself with Liberal leaders and promoting their politics. Nevertheless, after 1884, he increasingly moved away from promoting individual liberty and electoral transparency in favor of "order and progress" as espoused in the 19th-century philosophy of POSITIVISM.

Díaz surrounded himself with like-minded intellectuals, known in Mexico as the *CIENTÍFICOS*, and used a combined strategy of coercion and cooptation to bring order and stability so that the nation could modernize.

In the last decades of the 19th century, Díaz oversaw substantial economic developments that were facilitated by his policies encouraging INDUSTRIALIZATION and the development of TRANSPORTATION and communication infrastructures. During his administration, numerous manufacturing sectors expanded, especially textiles, MINING, and steel. He welcomed foreign investment, particularly from the United States, and finalized a restructuring of Mexico's foreign debt to the United States and other nations. Those economic policies significantly improved diplomatic relations, and many elite and the growing middle class looked to those "modern" nations as the embodiment of high culture. Foreign but especially French foods, fashion, and other trends became the standard to which Mexicans should aspire. The widowed Díaz himself reflected these cultural values when he married Carmen Romero Rubio, who educated him in French culture and general social etiquette; under her influence, Díaz began dressing and acting as a cultured and sophisticated statesman.

Advances and modernization under Díaz came at a cost. The dictator cracked down on lawlessness by expanding and fortifying the *RURALES*, a rural security force established by Juárez. The *rurales* kept order in the countryside through increasingly oppressive means, while Porfirian policies restricted free speech. Political opposition was stymied as Díaz justified his tyranny as the best way to maintain order in the interest of progress. His virtually unchallenged dictatorship began to falter as economic troubles emerged in 1906. These were punctuated by political challenges from the Partido Liberal Mexicano (Mexican Liberal Party) and growing LABOR unrest throughout the country. Díaz's claim that he would not seek to be reelected president in a 1908 interview with U.S. journalist James Creelman sparked hope among would-be political opponents. But, when the dictator rescinded that promise and jailed potential presidential opponent Francisco Madero in 1910, conditions were ripe for a major revolt.

It was precisely that jailed opponent who led the revolt that brought down the 34-year dictatorship. Madero escaped from jail, declared Díaz's electoral victory a fraud, and called for a massive uprising in his Plan de San Luis Potosí in November 1910. That call to arms set off a series of revolts that began the Mexican Revolution, and on May 25, 1911, Díaz resigned the presidency and fled into exile. The deposed dictator died in Paris on July 2, 1915.

See also CREELMAN, JAMES (Vol. IV); MEXICAN REVOLUTION (Vol. IV); MADERO, FRANCISCO (Vol. IV).

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**Domingue, Michel** (1877) *president of Haiti* Michel Domingue was the black commander-in-chief of the Haitian army in 1874. Seeking a "black figurehead president" to execute the will of the mulatto legislature, the Council of the Secretaries of State, operating as the executive power of Haiti, facilitated his election on June 11, 1874. Domingue was elected for a term of eight years but served only two before vacating office.

Domingue's first action in office was to appoint his relative, Septimus Rameau, whom he believed capable of governing, as vice president of the Council of the Secretaries by decree on September 10, 1874. Rameau immediately drew up a dictatorial constitution, which temporarily disempowered the mulatto elite. He also resumed negotiations with General Ignacio María González, leader of the DOMINICAN REPUBLIC, to end the bloodshed on the border and recognize the Dominican Republic as a new state. On November 9, 1874, a treaty of amity, commerce, and navigation was signed. It fully recognized the independence of the Dominican Republic.

In 1875, a fraudulent loan believed to be secretly instigated by Rameau was floated in Paris and connected to three prominent MILITARY officials. The debt was to be paid by the people of the Haitian republic. The three men implicated in the affair were arrested, and two were killed. News of this incident sparked a riot, and Rameau was murdered in the streets. Having received word of the riot, Domingue set sail to Jamaica with his family. Domingue was succeeded by Boisrond Canal in 1876 and died in 1877.

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**Dominican Republic** The Dominican Republic occupies the eastern two-thirds of the island of Hispaniola. Present-day Dominican Republic encompasses nearly 30,000 square miles (77,700 km<sup>2</sup>) of territory. With both mountainous and tropic terrain, the cultivation of SUGAR, COFFEE, and TOBACCO and the MINING of nickel form the basis of its ECONOMY.

The Dominican Republic shares Hispaniola with neighboring HAITI, and the histories of the two nations

have long been intertwined. The island was the first Spanish stronghold in the Americas during the age of exploration and conquest. Hispaniola became home to the first permanent European settlement in the Americas when the city of Isabella was founded in 1493. After the founding of the capital city and *audiencia*, the colony was referred to as SANTO DOMINGO. The city of Santo Domingo later became the national capital.

Spanish LABOR requirements and European diseases had a devastating effect on the indigenous Taino population, who were almost completely killed off within two decades after the arrival of the Spanish. The demise of the native population caused a labor shortage, and the colonists began importing African slaves in the early 16th century. As the Spanish turned their attention to the conquest of the mainland, Santo Domingo became a plantation-based economy fueled by slave labor.

### HAITI AND INDEPENDENCE

Throughout most of the colonial period, the Spanish Crown neglected Santo Domingo, and as a result French pirates and other settlers began occupying the western portion of the island in the early 17th century. In 1697, the Spanish officially ceded control of the western third of the island to the French, who named it Saint Domingue. The French encouraged the development of plantation AGRICULTURE and imported large numbers of slaves from Africa as laborers. Saint Domingue became one of the wealthiest colonial economies in the Americas, while Santo Domingo continued to suffer from Spanish neglect (see CARIBBEAN, FRENCH). Inspired by ideals of the French Revolution, a group of slaves and free blacks rebelled in Saint Domingue in 1791, and the revolt quickly spread to the rest of the island. In 1795, the Spanish had ceded control of Santo Domingo to the French in the Treaty of Basilea, but the slave revolt had escalated into a full-scale war for independence. Rebel leader François Dominique Toussaint Louverture (1801–03) took control of the movement and declared an end to SLAVERY throughout the island. After several more years of bloody warfare against the French MILITARY, Toussaint's successor, JEAN-JACQUES DESSALINES, secured independence for the western portion of the island, establishing the nation now known as Haiti in 1804.

The French retained control of the eastern portion of the island and returned that territory to the Spanish in 1809. The Spanish reestablished slavery and engaged in regular raids into Haitian territory in search of blacks to press into labor. The Spanish also maintained close ties with the French, and Haitian leaders worried that their former colonial masters would use Santo Domingo as a base to reconquer the western portion of the island. In 1822, Haitian president JEAN-PIERRE BOYER invaded Santo Domingo; the entire island remained under Haitian control until 1844. This era is known as the HAITIAN OCCUPATION OF SANTO DOMINGO. During that 22-year period, Boyer worked to rid the island of Spanish colonial influ-

ence. He suppressed the power of the CATHOLIC CHURCH and chased out the traditional colonial elite. The Haitian leader ended slavery and attempted to impose a system of forced wage labor on the eastern portion of the island, similar to one that had failed in earlier years. Dominicans for the most part viewed the Haitian occupation as a time of tyranny. Haitian soldiers frequently raided local homes and stores, fueling the growing opposition to Haitian rule.

### CREATION OF THE REPUBLIC

An anti-Haitian resistance movement struggled at first but eventually coalesced in the 1830s when Juan Pablo Duarte (b. 1813–d. 1876) joined forces with Matías Ramón Mella (b. 1816–d. 1864) and Francisco del Rosario Sánchez (b. 1817–d. 1861) to form LA TRINITARIA. The secret movement took its name partially as a tribute to the Holy Trinity and as a symbol of its defense of the Catholic Church against Haitian cultural attacks. Between 1838 and 1843, La Trinitaria attracted followers until it was well positioned to challenge Haitian authority. In 1843, the movement's leaders joined forces with a similar anti-Boyer movement in Haiti led by CHARLES RIVIÈRE-HÉRARD. With a coordinated effort, simultaneous revolts erupted in Haiti and Santo Domingo. Within a few months, Boyer was forced to flee. La Trinitaria leaders at first believed they had succeeded in ousting the Haitians from the eastern portion of the island, but Rivière-Hérard betrayed his alliance with the Dominican rebels and claimed control of the island. Although La Trinitaria leaders now fled into exile, the resistance movement persisted. In 1844, insurgents led one final, successful revolt against the Haitian military. Leaders of this movement declared independence and formally established the Dominican Republic.

After the 1844 revolt, Duarte and the other original Trinitaria leaders returned to the island and formed a governing junta. They called for the formation of a constitutional congress and began drafting the nation's first governing document. Modeled largely on the U.S. Constitution, the Dominican Republic's CONSTITUTION OF 1844 included a basic Bill of Rights and outlined provisions to ensure the separation of church and state. It was signed and put into effect at Benemérita de San Cristóbal on November 6.

Even though Duarte had widespread support, he faced serious challenges as Rivière-Hérard continued to threaten to invade. This constant menace from Haiti convinced many local Dominican leaders that a more aggressive security policy was required in order to protect the new nation from its neighbor. Within a few months, a new powerful Dominican general emerged and a long era of CAUDILLO rule began on the island. PEDRO SANTANA drove out Duarte and the other Trinitaria leaders in 1844 and took power for himself. Santana believed that a Haitian invasion posed the greatest threat to the stability and security of the new nation. The military leader cited

concern for national security as the reason for stifling the fledgling movement toward DEMOCRACY. Santana forced through Article 210 of the new constitution, which gave him wide-reaching dictatorial powers. With the continuing threat of invasion—this time by Haitian leader FAUSTIN SOULOUQUE—the autocratic leader further tightened his rule. Late changes to the constitution allowed him to extend his rule while suspending individual liberties and persecuting political opponents under the pretext of protecting the nation.

### FOREIGN INTERVENTION

One rival caudillo rose to challenge Santana in the following decades. BUENAVENTURA BÁEZ had participated in the revolt against the Haitian occupation and initially operated as a close ally of Santana. Báez became president for the first time in 1849, and shortly thereafter, a rift developed between the two powerful military men. For more than two decades, power alternated between Báez and Santana, with each claiming to be more capable of protecting the Dominican Republic from Haiti. Supporters of the two leaders eventually formed competing militant factions, and the nation struggled through years of instability and infighting.

The 20 years of caudillo rule by Báez and Santana was also characterized by regular negotiations with foreign powers, such as the United States, Spain, and France. Both leaders repeatedly attempted to secure national interests by placing the Dominican Republic under the protection of a foreign power. Those negotiations ranged from annexation of the island by the United States to recolonization by the Spanish. In 1861, Santana finalized an accord that invited the Spanish to take over the Dominican Republic as a protectorate in the interest of sheltering the eastern portion of the island from its belligerent neighbor.

As Spanish troops descended on the island, scattered opposition forces rose in revolt. Santana initially led pro-Spanish forces against the insurgencies and succeeded in quelling the early revolts. Unrest over the Spanish occupation, however, was soon complicated by political infighting. Supporters once loyal to Báez joined the anti-Spanish rebellions as Santana attempted to bring the various insurrections under control. By 1863, disjointed skirmishes had evolved into a full-scale war against Spanish occupation. JOSÉ ANTONIO SALCEDO consolidated the insurgency under one central leadership and issued a formal declaration of independence on September 14, 1863, launching the WAR OF RESTORATION. Within a few months, Salcedo's forces captured Santana and the once-powerful caudillo died while in rebel custody. Salcedo mounted increasingly aggressive challenges to the Spanish, and the Restoration Army quickly gained momentum.

Despite its obvious successes, the nationalist movement struggled through internal dissent. Salcedo wanted to invite Báez back into a leadership position, while other

members of the Restoration Army cautioned against Báez's friendly stance toward the United States. The rift among Restoration forces eventually led to the overthrow of Salcedo in 1864, but those internal divisions did not stifle the anti-Spanish movement. Nationalist forces consolidated their control over the island and drove the Spanish out in the early months of 1865. Restoration leaders drafted a new constitution and attempted to institute a democratic political system.

### THE SECOND REPUBLIC

The end of the War of Restoration marks the beginning of the period known as the SECOND REPUBLIC. Dominican leaders began the era of renewed independence with hopes of establishing a strong democratic tradition, but political rivalries surfaced once again. Several provisional governments crumbled within the first few years as Báez returned and challenged Restoration leader GREGORIO LUPERÓN. Báez supporters consolidated under the Red Party, while Luperón led the Blue Party and political factionalism intensified. Báez eventually seized power in 1868 and renewed his attempts to annex the Dominican Republic to the United States. Even though he continued to face serious local challenges from the Blue Party, Báez negotiated an annexation treaty with U.S. president Ulysses Grant that narrowly missed ratification in the Senate. Luperón's supporters finally ousted Báez in 1878, although the military leader assumed control of the country for a brief period in 1879.

Luperón had earned a reputation as a staunch defender of democracy, and his Blue Party victory over Báez raised hopes that the nation's turbulent history was coming to an end. But, a competition for power began among Blue Party leaders, and escalating political rivalries again gave rise to an era of dictatorship. ULISES HEUREAUX was a one-time supporter of Luperón who held important government positions under the Blue Party provisional governments. He became president in 1882 and at first appeared to support Luperón's democratic initiatives. Heureaux stepped down after serving his two-year term only to continue to manipulate politics from behind the scenes. He rose to power again in 1886 after seemingly fraudulent elections and used his intricate network of political connections to secure constitutional changes that allowed him to remain in office.

As Heureaux consolidated control, he silenced his opposition by limiting basic liberties such as freedom of speech. He also established a special security force to maintain order through repression, if necessary. Heureaux ordered his former ally, Luperón, into exile and imprisoned other dissenters. By 1888, he had strengthened his tyrannical hold over Dominican politics.

Heureaux's dictatorship was characterized by a strengthening of ties with the United States. His economic policies invited large amounts of U.S. investment into the region and expanded TRADE in terms favorable to U.S. interests. Large U.S.-owned sugar-producing



An 1871 drawing of residents of Azua gathering water at the Via River in the Dominican Republic (*Library of Congress*)

operations opened on the southern half of the island, and by the turn of the century, sugar had replaced tobacco as the mainstay of the Dominican economy. Heureaux did oversee some development of infrastructure but did so by borrowing large sums of money from abroad. Many loans also financed his lavish lifestyle, and within a short time, the Dominican Republic faced a serious financial crisis. Opposition mounted as the dictator's policies drove the nation further into financial ruin. In 1899, Heureaux was shot by conspirators. His death brought an end to another long era of dictatorship, but Heureaux's policies set the stage for conflict between the Dominican Republic and the United States in the 20th century.

See also DOMINICAN REPUBLIC (Vol. IV); HISPANIOLA (Vols. I, II); SANTO DOMINGO (Vols. II, IV).

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**draconianos** The *draconianos* made up a minority faction within COLOMBIA'S LIBERAL PARTY in the mid- to late 19th century, which included many liberal leaders and MILITARY men from the independence generation. They opposed the radical liberal politics of the dominant faction, the GÓLGOTAS. The *draconiano* old-guard of liberalism was led by one-time independence leader and president José María Obando (1831–32, 1853–54).

*Draconianos* got their name from the *gólgotas*, who had brought the Liberal Party to power in 1849. The

*gólgotas* were pushing for an abolition of the death penalty, a move that Obando and the rest of his faction opposed. It was their “draconian” position on that issue that prompted radical Liberals to call them “*draconianos*.” Most of the latter were either active or former members of the military who viewed the *gólgota* faction as a pretentious group of intellectuals and aristocrats who ignored the reality of the nation’s circumstances in favor of idealistic theories of LIBERALISM. *Draconianos* feared that the rapid pace of change and drastic nature of reforms that the *gólgotas* were pursuing would weaken the nation.

The party rose to power in an era known as the Liberal Revolution (1849–54) and succeeded in implementing a number of radical reforms. Laws giving the government new authority over the CATHOLIC CHURCH raised the ire of Conservatives and traditionally minded Liberals. Economic policies promoting free and open TRADE antagonized the urban artisan faction of the Liberal Party. Eventually, *draconianos* and urban artisans joined forces to rebel against the *gólgota* faction of the party. Infighting within the Liberal Party allowed the Conservatives to take power briefly in the 1850s and eventually led to a civil war. By the 1860s, radical Liberals had stamped out most of the opposition and dominated Colombian politics until the 1880s.

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**drugs** Drugs are natural or chemically altered substances that are used to cure or prevent disease. The term also applies to psychotropic substances that can trigger substantial behavioral and psychological changes and that can become addictive. Historically, the indigenous people of Latin America have relied on a number of natural remedies to treat a variety of ailments. Other substances native to Latin America, such as TOBACCO, mushrooms, cacti, and COCA, have a long history of practical functions as well as uses in religious and spiritual rituals. In the 19th century, worldwide attitudes toward drugs changed significantly, and natural substances in Latin America attracted the attention of scientists in Europe. By the end of the century, Latin American drugs had been integrated into scientific MEDICINE. In addition, psychotropic substances became popular in the emerging recreational drug culture. The changes in drug practices that took place in the 19th century laid the foundation for the illegal drug TRADE that developed around the world in the 20th century.



Recreational drug use was not widespread in 19th-century Latin America, but alcohol consumption was common. This photo from circa 1884 shows the outside of a pulque shop in Tacubaya, Mexico. (Library of Congress)



During the colonial period, Spanish officials first attempted to ban but then began to regulate and tax mind-altering substances. Church leaders were particularly concerned with the coca leaf, which had ritualistic uses in pre-Columbian religious ceremonies. Once the stimulant effects of the plant became known to HACIENDA and mine owners, Spanish leaders eventually permitted and even encouraged its use among slaves and draft laborers, marking a shift away from the earlier ritualistic use by indigenous nobility. Nevertheless, a spiritualistic association with the coca leaf persisted. The marijuana, or cannabis, plant was introduced to the Americas during the colonial period. It became particularly important in the British colonies of North America and in the northern Spanish colonies of present-day MEXICO. Some strains of the cannabis plant produced hemp, a fiber used in paper, rope, textiles, and a variety of other products.

Coca and cannabis plants were widely used in the 19th century for medicinal purposes in the Americas. While the cultivation and use of marijuana was common throughout the world, the use of coca-based medications was limited primarily to the Andean regions of South America. Coca leaves had a short shelf-life, so transport was difficult. The leaves became less potent and took on a strange flavor in a short period of time. Therefore, coca leaves in their natural form were not widely used in European medicine. By the late 19th century, however, researchers in Germany were experimenting with the coca plant. In 1855, Friedrich Gaedcke, a German scientist, isolated the active alkaloid in coca that gives the plant its psychotropic effects. By 1860, another German researcher, Albert Niemann, had formulated a chemical purification process that allowed small and more potent amounts of the alkaloid to be extracted and then used in other medications. Niemann called the substance “cocaine,” and within a few years, drug companies in Europe and the United States were producing a variety of over-the-counter medications whose main active ingredient was cocaine.

Cocaine-based medicines were used first as pain relievers, but the drugs’ side effects of appetite suppression and mood elevation made them popular for other general uses. A market for patent medicines emerged in the United States and Europe in the last half of the

19th century as doctors and traveling salesmen marketed a variety of tonics and “cure-all” medicines to treat ailments ranging from fatigue and digestive problems to general aches and pains. The ingredients of patent medicines were guarded as “secret formulas,” but most of the tonics contained some cocaine. Cigarettes and beverages containing cocaine also became popular. Vin Mariani was a French wine containing coca extracts that provided a stimulant effect. In response to the temperance movement in the United States, beverage makers developed Coca-Cola as a nonalcoholic stimulant; the original recipe called for small amounts of cocaine extract.

As legal and unregulated use of cocaine and other drugs increased worldwide in the late decades of the 19th century, medical professionals, social reformers, and government leaders grew concerned at the potentially addictive properties of various medicinal drugs. Recreational drug use accelerated at the same time, and many began associating drug use with crime and poverty. Some migrants moving from Mexico into the U.S. Southwest were stigmatized for smoking marijuana. By the turn of the century, leaders in the United States and Europe were coming under increasing pressure to regulate psychotropic substances. Some state and local governments began passing legislation that established some drugs as “controlled substances.” A major turning point came with the passage of the Harrison Narcotics Act of 1914, which attempted to regulate the distribution and use of a number of drugs—including cocaine and opiates—in the United States. That law was followed by other decrees in later years targeting marijuana and other substances.

See also ALCOHOL (Vol. I); COCA (Vols. I, II); DRUGS (Vols. II, IV); DRUG TRADE IN MEXICO (Vol. IV); MEDICINE (Vol. I).

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**Dutch Guiana** See SURINAME.

**Dutch West Indies** See CARIBBEAN, DUTCH.

# E

**Easterners** See THIRTY-THREE IMMORTALS.

**Echeverría, Esteban** (b. 1805–d. 1851) *Argentine writer and political critic* Esteban Echeverría was a prominent writer in ARGENTINA whose style strongly reflected the movement of ROMANTICISM in 19th-century Latin America. Through his writings, Echeverría challenged the dictatorship of JUAN MANUEL DE ROSAS.

Echeverría was born in BUENOS AIRES on September 2, 1805. As a young man, he began studying the arts and eventually relocated to Paris, where he developed his own literary style. Echeverría was influenced by European romanticism, which celebrated nature in ART and LITERATURE. He and other Latin American writers infused the movement with the patriotism that was emerging in newly independent Latin American nations. He returned to Buenos Aires in 1830 and promoted the literary style by forming literary salons and participating in intellectual groups. He published several romantic poetic works, including *Los consuelos* in 1834 and *Rimas* in 1837.

The Rosas dictatorship ordered the closure of one of Echeverría's literary salons, so in 1838, the writer formed the Asociación de Mayo in secret to continue his romantic writings, and he began forming a resistance movement to the caudillo's tyrannical rule. Echeverría associated with prominent UNITARIOS who opposed Rosas and his political alliance with the FEDERALES. In 1840, Rosas's anti-unitario campaign forced Echeverría to flee to neighboring Montevideo, Uruguay.

Echeverría lived in exile in Montevideo until his death in 1851. During the final years of his life, the writer continued to devote himself to producing literary works in the style of romanticism. He also used his literature

to challenge the Rosas dictatorship by publishing works that were considered highly propagandistic. One of Echeverría's most famous writings was the short story "El matadero" (The slaughterhouse), which was a scathing indictment of Rosas. It was not published until after his death.

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**economy** Most Latin American economies went through a major transformation in the 19th century. They evolved from the closed mercantilist system of the colonial period to open and relatively unrestricted markets closely tied to global TRADE networks. Abrupt changes in trade regulations accompanied independence and provided room for economic growth but also created volatility amid the sweeping political and social changes that were occurring at the same time. Generally, Latin American economic and political leaders worked to specialize economic activity according to the natural resources of each region. Throughout most of the 19th century, nations produced and exported raw materials from the agricultural and MINING sectors. They imported finished manufactured goods from industrializing nations such as the United States and those in western Europe.

### COLONIAL ECONOMIES

The colonial economic structure in Latin America was based on the system of mercantilism, under which the production of raw materials was tightly controlled by

Crown policies in Spain and Portugal. Under mercantilism, Spanish colonies extracted large amounts of SILVER and other precious metals in the mining-rich regions of MEXICO and PERU. Other Spanish colonies specialized in agricultural goods, such as cattle and hides in the PAMPAS. Some plantation AGRICULTURE emerged in tropical and coastal regions to provide commodity products such as COFFEE, TOBACCO, and SUGAR. The internal economies of the Spanish colonies subsisted mainly through large, self-sufficient HACIENDAS that specialized in agricultural and mining output. Plantation agriculture—designated for export rather than domestic consumption—came to dominate much of BRAZIL's economic activity. Brazilian plantations specialized in commodity production, and sugar emerged as the main export product during the colonial period. As a result of trade and Crown policies that favored the development of raw material production, Latin American economies remained relatively underdeveloped throughout the colonial period. Even as western European countries began experimenting with modernization and INDUSTRIALIZATION, Latin American economic systems remained in a state of relative infancy.

Merchant trade had developed by the end of the colonial period, and the opportunity to expand trade networks globally compelled many creole elite to push for economic reforms. In the 18th century, the Bourbon monarchs in Spain began lifting some of the traditional trade restrictions that had defined the colonial economic structure. Similar reforms were implemented in BRAZIL by the Portuguese marquês de Pombal. The Bourbon and Pombaline Reforms opened new ports for trade, eased restrictions on trade with other European nations, and allowed for more intracolony trade. Even after decades of reform, however, the peninsular (Iberian-born) elite still controlled much of the economic activity in the colonies, and the CATHOLIC CHURCH had control over most real estate and banking activities. Free trade and general economic development increasingly became part of the independence debate that surfaced throughout the colonies in the late 18th and early 19th centuries. The Spanish mainland colonies fought violent wars for independence between 1810 and 1825, while severing colonial ties with Portugal was a more conciliatory affair in Brazil in 1822. For the first half of the 19th century, new governments struggled to reverse the ineffective economic structures they had inherited.

### THE IMPACT OF INDEPENDENCE

The wars for independence had a devastating impact on the economies of many new nations in Latin America. More than a decade of fighting had destroyed much of the meager infrastructure that had existed in the colonial period. The silver mining industries of Mexico and the Andean regions of South America suffered the most as mine shafts were abandoned and flooded during the lengthy conflicts. Government leaders hoped to bolster political institutions and the national treasuries by reviv-

ing mining operations, but repairs were costly and the political situation in the newly formed nations remained highly unstable. Rebellions, MILITARY overthrows, and civil wars were regular occurrences. Investors were disinclined to put money into dilapidated mining industries in countries with volatile political systems.

Further complicating matters was the lack of a viable TRANSPORTATION infrastructure. Inland colonial trade had been relatively small and local and had required only primitive roadways for mule transport and human porters. Tightly controlled mercantilist trade during the colonial period also meant that there were few developed coastal ports. Latin American governments had few resources to devote to making necessary infrastructure improvements in the first half of the 19th century. As a result, most economies experienced only negligible growth prior to 1850, and some even declined.

The Spanish Caribbean stood in a stark contrast to this overall trend. CUBA and PUERTO RICO remained under Spanish control until 1898 and became the bulwarks of Spain's colonial economy in the 19th century. Economic growth in the Spanish Caribbean colonies was aided by Haitian independence and the simultaneous abolition of SLAVERY. The former French colony, whose economy was founded on plantation slavery, had been one of the leading sugar producers prior to the 19th century. After abolition in HAITI, sugar production on the island declined, while Cuba and Puerto Rico—where slavery still thrived—stepped in to replace Haiti as a world supplier of sugar.

### FREE TRADE

Many of the Latin American elite who had supported the independence movements did so in the hopes that severing ties with Spain and Portugal would open up previously restricted trade networks. In the early decades of the 19th century, most Latin American governments began to adopt more open trade models. LAISSEZ-FAIRE economics called for nations to engage in relatively open and unfettered trade and to specialize in producing goods according to their COMPARATIVE ADVANTAGE. Throughout the 19th century, most Latin American nations adopted the spirit of laissez-faire and produced agricultural goods and mining products for export to western Europe and the United States. Those areas, which had already experienced the onset of the industrial revolution, exported finished goods to Latin America. First, British merchants and, later, U.S. and French merchants took advantage of the more open trade policies to sell manufactured goods to ARGENTINA, Brazil, and other newly independent countries. At first, foreign merchants imported primarily consumer goods, but in the last half of the 19th century, Latin American nations were importing heavy industrial goods as well.

One notable exception to the general trend toward laissez-faire was PARAGUAY, where CAUDILLO leader JOSÉ GASPAR RODRÍGUEZ DE FRANCIA maintained a closed eco-

conomic system in an attempt to protect the new nation from outside threats in the early decades after independence. Francia's policies allowed Paraguay to develop some basic industries and brought a considerable degree of economic development compared to its neighbors. BOLIVIA also maintained a more closed economic system in the first half of the 19th century. In all of Latin America, the political instability created by internal power struggles and foreign invasions in the aftermath of independence posed serious challenges as struggling governments attempted to encourage economic growth.

### ECONOMIC EXPANSION

In the last half of the 19th century, the political environment in Latin America began to stabilize as liberal oligarchies consolidated control in many countries (see LIBERAL OLIGARCHY). More consistent and reliable government institutions paved the way for dramatic economic growth. Latin American leaders had watched as the industrializing nations of western Europe and the United States made dramatic gains in the early decades of the century, and many believed that Latin America had fallen behind. Government leaders introduced policies intended to create a favorable investment climate in Latin America for foreign interests, believing that attracting foreign investment was the most effective and expeditious way of promoting modernization and progress.

As a first step toward promoting economic development and bringing progress, Latin American governments looked to railroad transportation as a way to develop the necessary infrastructure to facilitate trade. In the 1850s, the first mainland rail lines opened in CHILE and Argentina, while the first railway connecting MEXICO CITY and Veracruz did not open until 1873. In the final decades of the 19th century, rail transport expanded throughout Latin America as thousands of miles of new lines were built, financed largely by European and U.S. investors. The expansion of rail lines allowed for more cost-effective shipments of large quantities of goods, most of which were destined for coastal ports to be exported to the industrial sectors of Great Britain and the United States. Money also flowed in to renovate existing port facilities and to build new ones to support the growing export market. Government leaders improved overland roads and bridges, and by the turn of the century, telegraph lines and other communications infrastructure connected major production centers, urban areas, and coastal ports.

Foreign investments also provided the necessary capital to revive old industries and develop new ones throughout Latin America. Mining operations in Peru and Mexico recovered substantially during the 19th century, although the output of silver and other materials never again reached the levels seen in the colonial period. The Bolivian economy struggled for most of the 19th century, but the discovery of rich veins of tin deposits high in the Andes brought a period of prosperity in the final decades of the century.

The Chilean economy thrived as COPPER mining expanded, facilitated by new highways and railroads snaking throughout the country. The early stabilization of copper mining in Chile provided a degree of economic progress rivaled by no other Latin American country. Economic growth accompanied by relative political stability made Chile a regional powerhouse, and that role was reinforced when rich deposits of nitrates were discovered in the disputed territory along the Chilean-Bolivian border. The boundary conflict eventually escalated into the WAR OF THE PACIFIC in which the Chilean military fought a Bolivian-Peruvian alliance from 1879 to 1884. Chile's resounding victory in the war forced Bolivia and Peru to cede parts of the lucrative nitrate region to their southern neighbor. Nitrate and mining income became the basis for the Chilean economy by the end of the century.

Many mining enterprises in 19th-century Latin America were owned by local elite. In Chile, an influential mining oligarchy rose to prominence in the last half of the century. In other countries—such as Mexico, Peru, and Bolivia—foreign investors owned the largest share of the mining industry. British and U.S. industrialists took advantage of a friendly investment environment designed to attract foreign money into local industries. Foreign investments facilitated an impressive expansion in mining production, but the majority of mining profits left Latin America rather than being reinvested in projects that would ensure long-term, local economic growth.

### COMMERCIAL AGRICULTURE

Agricultural production, which had long been a foundation of Latin American economies, also expanded in the last half of the 19th century. New transportation and communications infrastructure allowed for large-scale production and transport of agricultural commodities. The small-scale, local agrarian systems of the colonial period had been limited by primitive roadways and the use of animal and cart transportation. Those local networks gave way to commercial agriculture by the late 19th century as railroads and new highways allowed for larger and more cost-effective shipment.

Government policies facilitated the transition to commercial agriculture in many Latin American nations. Liberal leaders believed that the landholding systems left over from the colonial period prohibited economic growth. At the beginning of the 19th century, corporate institutions such as the Catholic Church and indigenous communities owned the majority of Latin America's arable land. Liberal theorists posited that such institutions did not put that land to its most productive use. Instead, they envisioned nations built on a large network of independent farmers. Liberal leaders in Mexico, COLOMBIA, and elsewhere passed laws calling for the confiscation and sale of corporate landholdings. Throughout the last half of the 19th century, land ownership shifted from the hands of the church and



The economies of many Latin American nations relied heavily on mining and the production of other raw materials in the 19th century. This 1863 photograph shows the Nopal silver mine operation in Mexico. (Hulton Archive/Getty Images)

indigenous communities to private individuals. But, the beneficiaries of land reforms were not small farmers, as many liberal leaders had envisioned. Instead, land was increasingly concentrated into the hands of a few rural elite in a system known as *LATIFUNDIO*. Large landed estates became the basis for commercial agriculture throughout Latin America. As in the mining industry, land owners in the agricultural sector were often the local elite, but in some areas, foreigners purchased large tracts of land and established large-scale agricultural production. By the turn of the century, foreign-owned agrarian production dominated the economies of the nations of CENTRAL AMERICA and Colombia. MINOR COOPER KEITH, a U.S. businessman, purchased large agricultural estates and invested in the cultivation of tropical fruits. Keith, like other foreigners, also invested money in the construction of railroads, which gave him reliable transportation to support his commercial agricultural enterprises. Keith was one of the founding executives of the United Fruit Company, which formed at the turn of the century and eventually controlled a significant portion of the export economies of COSTA RICA, Colombia, and GUATEMALA.

The Mexican agricultural sector also saw a marked increase in foreign ownership at the end of the century.

British and U.S. investors controlled large haciendas and produced a variety of goods for the export market. In northern Mexico, the influential TERRAZAS FAMILY formed an alliance with U.S. diplomat and businessman Enrique Creel through the marriage of one of the Terrazas daughters. The family controlled millions of acres of land by the turn of the century. Extensive foreign ownership of arable land was one of the factors leading to the Mexican Revolution in 1910. Foreign involvement in land ownership also led to a number of violent conflicts in Central America in the 20th century.

### INDUSTRIALIZATION

By the end of the 19th century, many liberal governments in Latin America were also promoting industrialization programs in an attempt to bolster national economies. Most new industries were devoted to the production of consumer goods, in contrast to industrialization strategies in the United States and western Europe that prioritized heavy industries. Government leaders were largely influenced by positivist theories, which originated in French philosophical circles and argued that societies must go through stages of deterministic progress. Adherents of POSITIVISM in Latin America saw industrialization as a way to promote progress and modernity.

Much of the industrial development of the late 19th century was financed by foreign interests, although local elite in many countries participated in the industrial sector as well. Specific industries varied from one country to the next, but most tended to be in consumer goods such as textiles and foodstuffs, which were often marketed to growing urban centers or to export markets. Rubber cultivation took off in the Brazilian Amazon, and the nation's planter class continued to cultivate large quantities of coffee for export. Argentina's strong cattle-ranching industry allowed for the development of meatpacking plants. That industry expanded significantly at the turn of the century after refrigeration and freezing technologies allowed for the shipment of Argentine meat to the European market. Mexico also experienced a dramatic increase in industrialization as heavy industries such as cement, oil, and steel emerged alongside food processing and textile factories.

Industrialization brought new challenges for Latin American economies. Some nations actively recruited large numbers of European immigrants to fill the ranks of urban labor. Argentina, Brazil, and URUGUAY experienced the greatest success with their immigration policies. In all countries, industrialization led to the rapid growth of cities. Large populations of poor urban workers emerged in the cities, creating pressure on government services. Urban workers became an important part of the political shifts that took place in the 20th century.

By the end of the 19th century, the economies of Latin American countries had moved away from the closed and controlled system of mercantilism. Instead, they were based on export-oriented production, often of commodity products and raw materials. The export orientation of Latin American economies tied those countries closely to global markets and eventually made them vulnerable to fluctuations in those markets in the 20th century. Laissez-faire economic structures and export-oriented economies in Latin America were dismantled after the onset of the Great Depression.

See also BOURBON REFORMS (Vol. II); ECONOMY (Vols. I, II, IV); PLANTATIONS (Vol. II).

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**Ecuador** Events in 19th-century Ecuador were in large measure defined by the country's topography. In the absence of modern TRANSPORTATION systems, Ecuador's rugged terrain created an exaggerated sense of regionalism and hampered the quest for a national identity. So deep was the rivalry between the coast and the highlands and their respective capital cities, QUITO and GUAYAQUIL, that one historian described the country's 19th-century history as a "tale of two cities." This view oversimplified the situation, for in reality, Ecuador had four or more regions, each with a distinctive identity.

Two mountain ranges, the eastern and western cordilleras, defined the northern and central highlands. In between ran a corridor of fertile basins that the German scientist and traveler Alexander von Humboldt called the "Avenue of the Volcanoes." The coast, largely a warm, humid plain with some hills, was more sparsely populated and dedicated to the production of CACAO. Ecuador barely exercised sovereignty over its two other distinctive regions, the Galápagos Islands (used primarily as a penal colony) and the Oriente, or jungle, inhabited by hunter-and-gatherer indigenous peoples. These regions today are the source of much of Ecuador's wealth, from tourism and petroleum, respectively.

The people of the north and central highlands mainly were herders and producers of food crops, held traditional religious values, and included an indigenous majority not anxious to integrate into larger Ecuadorean society. Farther south, highlanders cultivated medicinal plants and made straw hats (misnamed Panama hats) and held moderate, liberal views. Most distinct of all, the coastal region had a vibrant ECONOMY and produced tropical export products and cacao, which became Ecuador's principal crop by the end of the century. The population there held much more secular attitudes and included very few indigenous people. The three regions competed for resources throughout the century, with the coast ultimately winning that battle. Consequently, many undertakings that would ordinarily have contributed to national unity were scrapped in favor of regional development projects, even in the 20th century.

## INDEPENDENCE

Ecuadoreans take pride in the fact that Quito's creole elite, led by the marquis of Selva Alegre, was the first group in Latin America to declare independence from Spain, on August 10, 1809 (now Ecuador's independence day). The attempt, however, was quickly suppressed by the Spanish army. A second attempt, about a year later, was also suppressed and led to the death or exile of much of the central highland elite. Recent

views of the independence movement suggest that the elite wanted greater representation in the new transcontinental Spanish state and autonomy rather than outright independence.

Ecuador ultimately achieved independence largely as the result of external forces. On October 9, 1820 (a secondary independence day holiday), the city of Guayaquil declared its freedom from Spain after the failure of the autonomy movement and quickly received assistance from Simón Bolívar. Because Bolívar himself remained primarily occupied with the struggle for independence in COLOMBIA, his lieutenant, the Venezuelan general ANTONIO JOSÉ DE SUCRE, liberated Ecuador at the Battle of Pichincha on May 24, 1822. Although adopted as an Ecuadorean national hero, Sucre was only one of a series of foreigners who dominated the MILITARY and the political scene, particularly during the epoch of GRAN COLOMBIA (1819–30), the union of VENEZUELA, Colombia, PANAMA, and Ecuador. Ecuador broke away from Gran Colombia and established a separate republic in 1830.

### PROMINENT RULERS

After independence, foreigners continued to exert a great deal of influence in Ecuador. Between 1830 and 1845, two individuals, the conservative JUAN JOSÉ FLORES and his more liberal rival, VICENTE ROCAFUERTE, alternated in the presidential chair. Both dreamed of nation-building projects featuring roads and EDUCATION, but a lack of funds hampered progress. This period saw considerable political upheaval as a result of disagreements between Liberals and Conservatives, regional disputes, and the poor state of the republic's finances. For example, Ecuador often defaulted on its Gran Colombian loan repayments, and bureaucratic and military salaries ate up scarce revenues.

The *marcista* (March) revolution of 1845 brought more chaos but some change. Led by coastal elites and military men, the *marcistas*, dominated by General José María Urbina (b. 1808–d. 1891), over the next decade abolished Afro-Ecuadorean SLAVERY and the tribute (a head tax on NATIVE AMERICANS) and reformed some debt peonage laws. While they occurred largely as a result of a humanitarian impulse, it was the need to improve government finances, especially increased tariff revenues, that made the reforms possible. They were a mixed blessing for indigenous people, who became equal citizens under the law but now had new obligations. Though most elite highland legislators voted in favor of the measures, they felt that their political power was threatened, and they rebelled against Urbina's successor, Francisco Robles García (b. 1811–d. 1893), in 1859, in the midst of a crisis with Peru.

From 1861 to 1875, GABRIEL GARCÍA MORENO dominated the nation's history. Believing that a reformed CATHOLIC CHURCH could form the basis of a state-building project, García Moreno set about creating a uniquely "Catholic nation," particularly after he centralized the government in 1869. During his first term as president

(1861–65), he had sought a concordat with the Vatican that enabled him to reform or expel corrupt clergy, bring service-oriented orders of brothers and nuns from Europe to Ecuador, and adopt the ultramontane philosophy of Pope Pius IX. During his second term (1869–75), García Moreno improved public education, focusing on primary schools so that young Ecuadoreans would be indoctrinated with Catholic values, and embarked on a morality campaign to curb, in particular, excessive drinking and extramarital sex. He also built roads and the first segment of the national railroad using mainly Amerindian LABOR, while expanding and diversifying the economy.

García Moreno's conservative ideas of state formation, some much modified, would dominate in Ecuador until 1895. After a six-year military dictatorship, some of his former associates, known as the Progressives, governed Ecuador until 1895 (see PROGRESSIVE PARTY). While eschewing García Moreno's most repressive tactics, the Progressives sought to advance the nation's material progress and further modernization. They continued to expand the system of public education in schools taught by French orders such as the Christian Brothers, construct roads, and modernize cities. The Progressive era also marked the first time in Ecuadorean history that the presidency changed hands (twice) as a result of elections rather than civil war.

The Progressive era ended with the LIBERAL REVOLUTION, which brought Eloy Alfaro Delgado (1895–1901, 1906–11) to office. Determined to reduce the power of the church, Alfaro's government passed a spate of anticlerical legislation eliminating *FUEROS*, tithes, and seizing some church-owned lands, policies that echoed the LIBERALISM seen elsewhere in Latin America. In addition, the Liberal Party completed Ecuador's first railroad and presided over the continuing modernization of Guayaquil, including resolving the endemic health issues that had left it with the reputation of "pest hole of the Pacific." Other cities and regions were also modernized, with new transportation systems allowing for the easier movement of both goods and people.

### SOCIOECONOMIC AND DEMOGRAPHIC CHANGES

In 19th-century Ecuador, the plethora of rebellions and rulers accomplished little toward creating a sense of national identity. The socioeconomic changes that occurred in the period mattered more than who was on the political stage. Most important, there was a shift in influence and power from the landlords of the north and central sierra, who had dominated Ecuadorean politics since the 17th century, to the cacao planters, coastal merchants, and bankers, who replaced them as the dominant political and economic force, especially after the 1870s. As Ecuador became more reliant for export earnings on a single product, cacao, those who controlled that product gained influence. By 1895, cacao dominated the



Ecuador's National Theater was opened in Quito in 1886 at a time when many Latin American nations were trying to convey an image of modernity and sophistication. (RJ Lerich/Shutterstock)

economy, and coastal interests took over those of the government in a revolution that year. At the same time, the construction of roads and railroads helped improve the moribund economy of the highlands.

These socioeconomic changes were accompanied by some important demographic shifts. After independence, the bulk of the Ecuadorean population lived in the central-north, and Quito was by far Ecuador's largest city. By the end of the 19th century, however, many people had left the highlands for the coast, seeking better-paying jobs on the cacao plantations or in the growing port of Guayaquil.

### GENDER AND SOCIAL CLASS

The way indigenous people interacted with the dominant white society was an important part of the search for a national identity. While the abolition of native tribute in 1857 made the indigenous people of Ecuador equal citizens in the eyes of the law, Amerindians lost many of the protections they had previously enjoyed, particularly during the conservative-dominated era, up until 1895. Although governments during that period tended to view the Amerindians as weak and defenseless, the indigenous quickly learned to navigate the new system to protect their land and identity. In addition, the abolition of Afro-Ecuadorean slavery in 1853, and the mitigation of some of the most oppressive elements of debt peonage in 1854

and 1918, furthered at least indigenous men's pursuit of equality.

The liberal era produced some modest changes in the status of women in Ecuador. Although patriarchy still dominated philosophically, the Liberals favored civil marriage and divorce as measures to weaken the church. Additionally, married women were granted some control over their dowries. With increased urbanization, middle-class women began working outside the home before marriage. While in some quarters concern was expressed about these women defying the conventions of patriarchy, poor indigenous and mestizo women had worked outside the home since colonial times. Also, during this period, some feminists discussed the possibility of gaining the vote for women, although the liberal legislature failed to pass the suffrage statute in 1910. Nevertheless, in 1929, Ecuador became the first Latin American nation in which women won the vote.

See also BOLÍVAR, SIMÓN (Vol. II); ECUADOR (Vols. I, IV); NEW GRANADA, VICEROYALTY OF (Vol. II).

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**education** Education became an important part of the nation-building process in Latin America during the 19th century. Newly established governments recognized that providing an educational system would give the state greater influence over the population and strengthen the notions of republicanism that they were trying to promote. Between the independence era of the 1810s and the end of the century, Latin American governments took steps to shift the administration of primary and higher education away from the control of the CATHOLIC CHURCH and place it in the hands of the state. These changes were part of the larger liberal nation-building process that occurred throughout the 19th century.

During the colonial period, education in Latin America was controlled primarily by the Catholic Church, and most educational opportunities were limited to the wealthy elite. Young people received instruction at schools run by members of the clergy and learned basic reading and writing skills as well as religious doctrine. Boys and girls were generally educated separately. In addition to literacy, boys were exposed to mathematics and philosophy, while girls’ education focused more on domestic tasks. The church also ran most institutions of higher education. MEXICO CITY and LIMA became home to the first universities in the Americas in the 1550s, and there were roughly 25 universities throughout the Spanish colonies by the end of the colonial period. University education was intended to be limited to creole men from elite, pure-blood families, although there were some notable exceptions.

Through the Inquisition, the Catholic Church censored writings its leaders deemed threatening or sacrilegious. Despite religious leaders’ attempts to prevent the dissemination of such materials in the colonies, the church was unable to enforce complete censorship, and many impious writings became available, especially in the late colonial period. Of particular concern were the writings of European Enlightenment philosophers and French revolutionaries. New ways of thinking suggested

that human knowledge could be acquired through systematic reasoning. European philosophers rejected the superstitions and networks of authority that had defined medieval societies. Under these latter systems of knowledge, many beliefs about the world were based on religious teachings that had not been tested in a secular context. Many Enlightenment thinkers rejected those long-standing systems and, instead, insisted that knowledge be based on rational thought and empirical testing.

Concepts of empiricism and reasoning combined with other factors to inspire independence throughout the Latin American colonies in the early decades of the 19th century. By the 1820s, all Spanish colonies on the mainland and the Portuguese colony of BRAZIL had achieved independence. New governments emerged to reestablish political and social order. The new concepts of knowledge introduced by Enlightenment thinkers influenced liberal leaders who rose to power in a number of newly independent nations. Liberals advocated applying reasoning and rationalism to government systems and worked to remove traditional power brokers from positions of authority. Liberal policies specifically targeted the Catholic Church. New governments often feared that in practice church leaders held more authority than political leaders and worked to dismantle what they perceived as long-standing superstitions among the people that bolstered church authority. The need to challenge church power informed liberal policies toward education. Many leaders believed the national government needed to have greater control over the education of its citizens as a way to build stronger nations after independence. Since the Catholic Church had controlled most of the colonial education system, liberal attempts to secularize education often met with considerable resistance.

Some new nations were more successful at instituting immediate changes in national education in the 19th century. CARLOS ANTONIO LÓPEZ reformed Paraguay’s education system and built schools. His nation boasted the highest literacy rates in all of Latin America by the mid-19th century. Free and obligatory state-run public education was the goal of many liberal regimes, but real educational reform started first at the university level. CHILE was one of the first countries to establish a successful national university after independence. The CONSTITUTION OF 1833 included a legal mechanism for the creation of the UNIVERSITY OF CHILE, and in 1841, educator and philosopher ANDRÉS BELLO began drafting a law to create the university. The school was intended to replace religious institutions of learning with a secular center of higher education. Liberal leaders believed that by providing a broad general foundation of humanistic training, they could create responsible citizens and potential leaders for the new nation. The University of Chile opened in 1843, and its functions expanded considerably throughout the 19th century.

Argentine leaders also experimented with secularizing higher education from a very early date. Future presi-

dent BERNARDINO RIVADAVIA founded the UNIVERSITY OF BUENOS AIRES in 1821 in an attempt to promote liberal reform immediately after independence. As the nation's first non-Catholic center for higher education, the University of Buenos Aires benefited from generous government funding in its early years. Nevertheless, ideological conflict between ARGENTINA's two main political parties—the liberal *UNITARIOS* and the more conservative *FEDERALES*—had an impact on the administration of the university. The university remained open during the dictatorship of federalist leader JUAN MANUEL DE ROSAS (1829–32, 1835–52), but it lost the government support it needed to grow. Enrollment declined, and the university languished until the consolidation of liberal rule in the 1850s. Eventually, the University of Buenos Aires recovered and grew to become one of the premier universities in Latin America. It was converted from a provincial school to a national university in 1881.

The examples set in the early decades of the 19th century by liberals in Chile and Argentina were later followed in other regions as liberal leaders aggressively pursued secularization. Nations under liberal leadership began introducing the concept of public education by the 1850s as a way of further limiting the power of the Catholic Church and shaping responsible citizens. Mexico's CONSTITUTION OF 1857, which represented the liberal era of LA REFORMA, secularized education. That measure, along with others that curtailed the power of the Catholic Church, set off a major civil war known as the WAR OF REFORM. Chilean liberals built hundreds of public schools in the 1850s as part of a campaign to secularize society.

Argentine presidents BARTOLOMÉ MITRE and DOMINGO F. SARMIENTO were known for substantive educational reform policies. Both leaders were educators as well as politicians and firmly believed in the liberal concept that educated citizens make responsible citizens. Under their leadership in the 1860s to mid-1870s, normal schools opened up throughout the country to train schoolteachers and expand opportunities for primary education. Sarmiento, in particular, targeted young WOMEN for teacher training. This opened up new opportunities for many women, who in prior decades had been limited to domestic work and had only limited access to education. Even while enrollment in state-run primary schools increased in places such as Chile and Argentina, however, the liberal vision of providing free and compulsory primary education as part of a nation-building process failed to reach most Latin Americans until well into the 20th century.

By the late decades of the 19th century, many Latin American leaders were incorporating the underlying precepts of Auguste Comte's theories of POSITIVISM into government policies. Positivism suggested that all fact-based knowledge must be tied to observation and experience. Adherents of positivism eschewed metaphysical considerations in favor of experimentation according to the scientific method. In Mexico, GABINO BARREDA spear-

headed efforts to reform the nation's educational system along secular, scientific, and positivist lines starting in the late 1860s. Barreda founded the National Preparatory School, which in turn trained many of the CIENTÍFICOS, or positivist advisers to dictator PORFIRIO DÍAZ. Barreda and other leaders of the National Preparatory School moved Mexico's educational and social foundations toward a more scientific orientation.

Positivism influenced educational programs throughout Latin America and the world in the late 19th century as national leaders pursued progress and modernization. Educators shifted their attention to mathematics and the sciences and often applied scientific observations to society. In many Latin American countries, the turn toward positivism exacerbated the racial and ethnic divide that had defined those societies for centuries. Many intellectuals and political leaders turned to science to explain why rural and poor sectors of the population had failed to achieve the same kind of progress as the educated elite. Some intellectuals suggested that the indigenous and colored population were biologically inferior and less capable of learning. Dictators such as Díaz in Mexico used a lack of education among the poor and NATIVE AMERICANS to justify autocratic rule. Díaz argued that the illiterate and uneducated masses were not ready for the responsibilities of DEMOCRACY.

Despite attempts to secularize and expand education systems throughout the 19th century, educational opportunities in most nations remained limited to the middle-class and elite sectors in urban areas. Control of Latin American education largely shifted away from the church to the state, as liberal leaders had envisioned, but widespread universal and free public education was not a reality in most regions until well into the 20th century.

See also EDUCATION (Vols. I, II, IV); ENLIGHTENMENT (Vol. II).

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**Egaña, Mariano** (b. 1793–d. 1846) *Chilean politician and legal scholar* Mariano Egaña Fabres was a prominent political leader in CHILE in the early years after independence. As the principal author of Chile's CONSTITUTION OF 1833, his influence and legacy are evident throughout the nation's 19th-century history.

Egaña was born in SANTIAGO DE CHILE in 1793. He studied law at the colonial predecessor to the UNIVERSITY OF CHILE, the Royal University of San Felipe. As a young man, Egaña supported the cause of independence and took leadership positions in Chile's ruling junta. He went on to participate in the newly formed national government in 1813–14. His services were rewarded after independence was secured: He was named minister of the interior in 1823. He also served as diplomatic emissary for the Chilean government in London from 1824 to 1829.

One of Egaña's most notable contributions to the new nation was his extensive participation in the writing of a new constitution to replace the CONSTITUTION OF 1828. Egaña's ideas on political authority and government structure put Chile on a path toward progress and stability. The Constitution of 1833 remained in place for the rest of the century.

In later years, the government of President José Joaquín Prieto (1831–41) put Egaña in charge of diplomatic communication between Chile and the PERU-BOLIVIA CONFEDERATION in 1836. Egaña was heavily involved in negotiating a successful end to the war for Chile. In the 1840s, he served as a senator. Egaña died in office on June 24, 1846.

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**ejido** *Ejido* was the type of land tenure in indigenous communities in MEXICO and CENTRAL AMERICA during the 19th century. Under the *ejido* system, Amerindian villages owned, managed, and worked land communally. The system was formally put in place during the colonial period as a hybrid version of Aztec and Spanish land tenure systems. Communal control of land was one of the issues liberal reformers attempted to change in the 19th century in an effort to modernize the nation's economic sectors and create what they believed would be a stronger nation (see ECONOMY; LIBERALISM).

During the colonial period, agricultural lands surrounding indigenous communities were placed under the *ejido* system of control and LABOR (see AGRICULTURE). Amerindian villages legally owned the property. In some communities, individual families worked specific fields to provide food for themselves and the rest of the community. Those families passed usage of individual plots through generations. Other communities employed a system where community lands were worked in common. After independence, this system endured, and many villages could trace the communal ownership of local lands back to their pre-Columbian ancestors. Many also had colonial documentation indicating that the community retained ownership of the property. Other communities had no formal documentation, but their legal rights to

the land received de facto recognition by the colonial administration. Some Amerindian village lands were held in trust by the church. At the end of the colonial period, the CATHOLIC CHURCH was the largest single landowner in Mexico, followed by Amerindian *ejidos*.

During the era of LA REFORMA (1855–58), Mexican Liberal leaders turned their attention to the large property holdings owned by corporate entities, specifically the Catholic Church. Intellectuals such as BENITO JUÁREZ (1858–72) and MIGUEL LERDO DE TEJADA believed that the nation's traditional system of land tenure was holding back national development and keeping the country in a weakened state. Liberals argued that strong individuals must be the basis of a strong society, and therefore, the rights and well-being of individuals must be a priority. They borrowed the ideas posited by Thomas Jefferson in the United States that owning private property would make individuals competent and reliable citizens with an interest in making responsible decisions that would benefit both themselves and the entire nation. Collective ownership of land did not instill that sense of national duty. Instead, Mexican Liberals reasoned, individuals who rented real estate or who worked property in a collective manner felt beholden to the community over the general good of the nation. Liberal leaders intended to change those feelings of loyalty by creating a nation of private property owners.

In 1856, as a cabinet minister, Lerdo de Tejada authored legislation that made it illegal for any corporations, groups, or communities to own excess property. Institutions such as the Catholic Church, local and state governments, and *ejidos* were required to divest themselves of all land that was not essential for daily operations. The law inflamed church leaders and members of *ejido* communities. Resistance to the Lerdo Law and other reforms introduced at the same time led to the WAR OF REFORM. The civil war, followed shortly by the FRENCH INTERVENTION, prevented extensive implementation of the land reform law, but with the restoration of Liberal rule under Juárez in 1867, Liberals continued to press Amerindian communities to sell off *ejido* properties. Those efforts accelerated during the PORFIRIATO as PORFIRIO DÍAZ amended land reform laws to encourage land surveyors to confiscate *ejidos* from NATIVE AMERICANS, claiming them as vacant lands.

The reform policies that dispersed *ejido* lands in the 19th century resulted in the concentration of land in large HACIENDAS owned by wealthy Mexicans and foreigners. It created a system of exploitation and inequality that eventually contributed to the outbreak of revolution in 1910.

See also AGRICULTURE (Vols. I, II); AZTECS (Vol. I); HACIENDA (Vol. II); MEXICAN REVOLUTION (Vol. IV).

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**El Salvador** El Salvador is the smallest country of CENTRAL AMERICA—8,098 square miles (20,974 km<sup>2</sup>)—and the only one that lacks a Caribbean coast. Located on the Pacific Ocean, El Salvador is bordered by GUATEMALA to the north, HONDURAS to the east, and the Gulf of Fonseca to the south.

El Salvador lacks mineral wealth, thus its economic development has been based primarily on AGRICULTURE. From colonial times to the 20th century, CACAO, followed by indigo, and then COFFEE were its most important products. During the colonial period, the Spanish Crown bestowed upon select individuals the right to control economic productivity and people on large tracts of land known as *encomiendas* that, over time, became privately owned estates, or HACIENDAS. By the time El Salvador achieved independence in 1821, a landed elite controlled the country's ECONOMY and politics at the expense of a large peasant class that was bound to the land.

El Salvador joined its Central American neighbors in declaring independence from Spain on September 15, 1821, but then had to contend with its annexation by the newly formed Mexican Empire, which wished to maintain its historic control over the Captaincy General of Guatemala. As a self-protection measure, El Salvador proposed its annexation by the United States. While the latter hesitated, General Vicente Filísola (b. 1789–d. 1850) led a combined Mexican-Guatemalan army that forced El Salvador to capitulate to Mexican demands in 1823, just as the empire itself collapsed. Central America, including El Salvador, declared its independence from Mexico on July 1, 1823, and a year later formed the UNITED PROVINCES OF CENTRAL AMERICA.

The liberal-conservative political struggle that characterized postindependence Latin America was also felt in the new Central American federation, which had a short-lived and turbulent history (1824–39). During that time, El Salvador was dominated by the liberal faction and thus supported the presidency of FRANCISCO MORAZÁN. El Salvador served as Morazán's last bastion in 1840 before he was defeated by the Guatemalan RAFAEL CARRERA. El Salvador officially declared its independence from the United Provinces of Central America in 1841, three years after COSTA RICA, Honduras, and NICARAGUA did so.

The plight of the peasants continued after independence and led to a violent rebellion in 1833 in Nonualco in central El Salvador. After independence, the peasants continued to be pushed off their communal lands (*Ejididos*) by the expanding HACIENDAS, on which they were then forced to LABOR. When the government increased their taxes in 1832, the peasants were stirred to rebellion by Anastasio Aquino (b. 1792–d. 1833). Aquino, a worker on an indigo plantation, recruited some 3,000 men into a ragtag army in January 1833. They terrorized landowners and destroyed farms and villages along the Comalapa and Lempa Rivers. The government finally

suppressed the rebellion in July 1833, and Aquino lost his life to a firing squad on the 23rd of that month. The peasants' situation did not improve and indeed served as the basis for an uprising led by Agustín Farabundo Martí a century later and for the guerrilla movement that bore his name during the wars that plagued Central America in the 1980s.

Like its Central American neighbors, in the 1840s, El Salvador came under conservative rule. Challenge to conservative authority began with the return home of General GERARDO BARRIOS after the suppression of U.S. filibusterer WILLIAM WALKER in Nicaragua in 1857. After serving as provisional president in 1858 and 1859–60, Barrios assumed the presidency in his own right in 1861. He introduced many of the liberal reforms that were contained in the 1886 constitution, such as universal suffrage for literate male adults, one-term presidencies with no immediate reelection, and the right to free expression without fear of reprisal. The constitution remained in effect until 1939 when General Maximiliano Hernández Martínez altered the constitution so he could stay in power. During that same time period, political power rested in the hands of the Salvadoran elite, the so-called "Fourteen Families" that included the Araujo, Meléndez, Montenegro, and Quiñónez Molina groups.

Beginning in 1850, coffee production increased rapidly and within a decade replaced indigo as the nation's primary agricultural export. This had important consequences for El Salvador's economic development. The government increasingly expropriated Amerindian communal lands, passing the legal title to the landed elite for expanded coffee production. By the century's end, coffee provided the national government with nearly 60 percent of its revenues. During the same time period, the rural poor became increasingly tied to coffee plantations, with little recourse for change. Illiterate peasants could not seek change through the electoral process, and with no industrial base, the types of work available to them were extremely limited.

Just as El Salvador's economic prosperity was dependent on the demands of the global market, the development of the country's infrastructure in the late 19th century depended on external capital. Foreign investors financed the construction of docks and port facilities and roads and railroads to and from the ports. North American and French companies benefited from this arrangement by building the infrastructure with funds loaned to the Salvadoran government by foreign banks and bondholders. As the 20th century dawned, in El Salvador political power remained in the hands of the elite, the socioeconomic gap between the elite and peasant had drastically widened, and the government was deeply in debt to external bankers.

See also EL SALVADOR (Vols. I, II, IV); MARTÍ, AGUSTÍN FARABUNDO (Vol. IV); HERNÁNDEZ MARTÍNEZ, MAXIMILIANO (Vol. IV).

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**Encilhamento** Encilhamento refers to the fiscal policies put in place during the presidency of MANUEL DEODORO DA FONSECA (1889–91), immediately after the establishment of the OLD REPUBLIC OF BRAZIL. In an effort to stimulate economic activity, the government passed legislation that eventually led to inflation and speculation between 1889 and 1891. Unsound financial policies provoked an economic crisis in the 1890s and challenged the stability of the new republican government.

The Brazilian republic had emerged in 1888 with the backing of an influential group of positivist intellectuals and politicians, many of whom believed that the country needed to modernize its economic systems in the interest of “order and progress” (see POSITIVISM). National leaders hoped to achieve economic progress by encouraging INDUSTRIALIZATION but needed to attract money and investments into new industrial sectors. Deodoro’s minister of finance hoped to attract investors by expanding the nation’s credit market. Part of his strategy involved allowing banks to print large amounts of money, backed by government bonds instead of GOLD. That strategy gave a short-term boost to the ECONOMY as investors took advantage of expanded credit and money poured into new companies. The long-term consequences of those fiscal policies, however, were disastrous. The economy was quickly beset by high inflation, and it eventually became evident that many new companies were merely part of a speculative bubble. The financial crash that resulted in 1891 was only the beginning of nearly a decade of economic decline and instability in the nation.

The Encilhamento challenged the authority of the government of the new republic. The supporters of the old monarchist tradition, in particular, argued that the order and stability promised by positivist republicans was an illusion and that the long-standing imperial institutions of earlier decades were more suitable for Brazil’s needs. Regional rebellions sprang up throughout the country, and republican politicians constantly feared a resurgence of monarchism. One of the most serious challenges developed in Rio Grande do Sul in 1893. Unrest in that region eventually led President Floriano Vieira Peixoto (1891–94) to form a strategic political alliance with the COFFEE planter elite of SÃO PAULO. That alliance brought paulista PRUDENTE DE MORAIS to power as the first civilian president in 1894 and became the basis for

the strong economic and political alliance known as *café com leite* that continued into the 20th century.

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**estancia** *Estancia* is generally translated as “farm” or “ranch.” In Latin America, the word refers to a large agricultural estate used primarily for cattle raising. *Estancias* were important to Latin American economies at the end of the colonial period, and they produced a large portion of the agricultural output (see AGRICULTURE). *Estancias* are most closely associated with the Southern Cone regions of South America, particularly the PAMPAS OF ARGENTINA and URUGUAY. Like other landed estates, *estancias* were usually large and thus contributed to the concentration of land ownership in the hands of a few wealthy individuals, known as LATIFUNDIO.

*Estancias* operated in a similar fashion to HACIENDAS and plantations in other regions of Latin America. Owners held authoritarian and patrimonial control over the workers on their estates, although *estancias* required fewer workers than other types of agricultural estates. Furthermore, the unconfined nature of cattle grazing in the early decades of the 19th century meant that workers on South American *estancias* generally worked in a less restrictive environment. GAUCHOS, or cowboys of the Pampas, were the ranch hands most closely associated with raising cattle. Other peons performed more menial tasks.

The function of *estancias* continuously evolved over the course of the 19th century, particularly in Argentina. Laws put in place almost immediately after independence moved agricultural lands from public to private control. Argentine governments such as that of JUAN MANUEL DE ROSAS saw *estancias* as a way of encouraging private citizens to settle the Pampas and to form a buffer between the NATIVE AMERICANS of the unsettled frontier and the rest of the country.

By the middle of the 19th century, European immigrants had introduced sheep ranching in the Argentine Pampas. Sheep *estancias* appeared throughout the countryside, and wool production became an important part of the Argentine ECONOMY. Sheep ranching also led to the introduction of fencing and other forms of confinement on both sheep and cattle *estancias* by the end of the century.

See also CATTLE (Vol. II); ESTANCIA (Vol. II); GAUCHO (Vol. II); PLANTATIONS (Vol. II); RANCHING (Vol. II); SHEEP (Vol. II).

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# F

**Facundo** See QUIROGA, JUAN FACUNDO; SARMIENTO, DOMINGO F.

**family** At its most basic level, family is defined as a kinship group or social network of people united through marriage, ancestry, or some other common bond. In many societies, the family makes up the basic unit of social organization, and definitions of family have evolved historically as a reflection of its importance. Latin America has long been a family-oriented society, and notions of familial roles were handed down from Iberian traditions throughout the colonial period. Economic activities, power networks, wealth, and even some local politics were tied to the family unit, and those colonial traditions left an important cultural legacy. In the 19th century, attitudes toward family began to change, with new government policies that reflected the liberal emphasis on individualism becoming prominent after independence.

Colonial families and society functioned as patriarchal institutions with ultimate authority residing in the male head of each household. The patriarch served a number of economic and social functions. The family reputation was the basis for the elusive concept of honor, which could be damaged through the scandalous behavior of any member of the family. The male head of household was responsible for protecting the family honor and avenging any affront to the family name. WOMEN were the most vulnerable to damaging the family honor, and colonial laws offered lenience to men who resorted to violence as a means to restore it. Marriages often began as consensual unions that were only later formalized through the marriage sacrament

in the CATHOLIC CHURCH. The practice of entering into informal unions created the potential for conflict and loss of honor, particularly if the union resulted in illegitimate children and was never formalized. The Spanish and Portuguese Crowns recognized the legal authority of the patriarch over all members of his household, and this was generally upheld by the church, especially in the late colonial period. The concept of *patria potestad* stipulated that wives and children under the age of 25 were legally under the jurisdiction of the head of household, usually the father. In practice, parents held enormous influence over their children even past that age.

The family also served as a foundational economic unit, and the male authority figure legally controlled all family assets, including all property owned in common with his wife. Family units generally extended beyond the nuclear family, often in the interest of building a stronger economic network. Those networks included nieces, nephews, grandchildren, and even godchildren. In slave societies such as BRAZIL and on some large landed estates, dependents within the household—who could be slaves, servants, and others—were often considered part of the extended family. Colonial laws recognized those economic networks and protected children in large families with inheritance laws that required the equal division of family assets.

After independence, the power of the Crown was overturned, and the authority of the church was increasingly called into question. Movements for independence were motivated partly by new Enlightenment ideas of LIBERALISM and individualism that ran contrary to the traditional power structures that had defined the colonial period. The dismantling of Crown and church authority left a power vacuum so that in the decades immediately

following independence the family remained the foremost social and economic unit. Nevertheless, liberal trends brought about enormous changes in state attitudes toward family networks and family law.

Liberal leaders viewed most colonial traditions as backward and sought to institute reforms that would modernize Latin American society. Liberal initiatives triggered a conservative backlash in most countries that persisted throughout the first half of the 19th century. By the 1870s, many Latin American nations had come under the control of liberal oligarchic regimes that were able to enforce reform laws that transformed the relationship between church, state, and family (see LIBERAL OLIGARCHY). The first step taken by most liberal regimes was to try to weaken the power and influence of the Catholic Church. For example, since marriages, baptisms, and last rites had been formalized as Catholic sacraments in the colonial period, the church had emerged as the primary recorder of vital statistics. Under liberal reforms, civil marriages were introduced, and a civil registry was created to record births, marriages, and deaths.

Liberal reforms were followed in many areas by the adoption of civil codes, which were laws that regulated family relations and other private matters. The liberal emphasis on individuals is evident in many of the laws that went into effect in the late decades of the 19th century. Civil codes changed the family laws that had carried over from the colonial period by lowering the age of majority—generally from 25 to 21—and freed children from *patria potestad* when they reached that age. Single children gained “sovereignty” after the age of 21, although special circumstances applied in some areas to women under the age of 30. The changes in family law signified a weakening of familial patriarchy and a strengthening of the power of the state. Civil codes further eroded patriarchs’ legal jurisdiction over dependents and members of extended families. Many Latin American governments also gave mothers legal control over children under the age of majority, a right that had been restricted to men under colonial law.

While civil codes generally diminished parental control over adult children, many of the new laws had the opposite effect on women. Single women benefited from legal protections and could fully escape parental authority at the age of 30, and civil codes increasingly recognized the legitimacy of female heads of household. But, married women still found themselves limited by many of the same legal structures that had defined the colonial period.

The changes in family laws that occurred in the late 19th century were not fully enforced in some areas. Furthermore, family traditions among the elite and economic necessity among the poor meant that the day-to-day practices within families varied according to individual circumstances. Nevertheless, the codification of family laws marked an important shift toward a more liberal and individualistic approach to social organization

in Latin America. The patriarchal family survived into the 20th century, but the process of nation-state formation and the weakening of colonial power structures fundamentally altered the patriarchal family structure.

See also FAMILY (Vols. I, II, IV).

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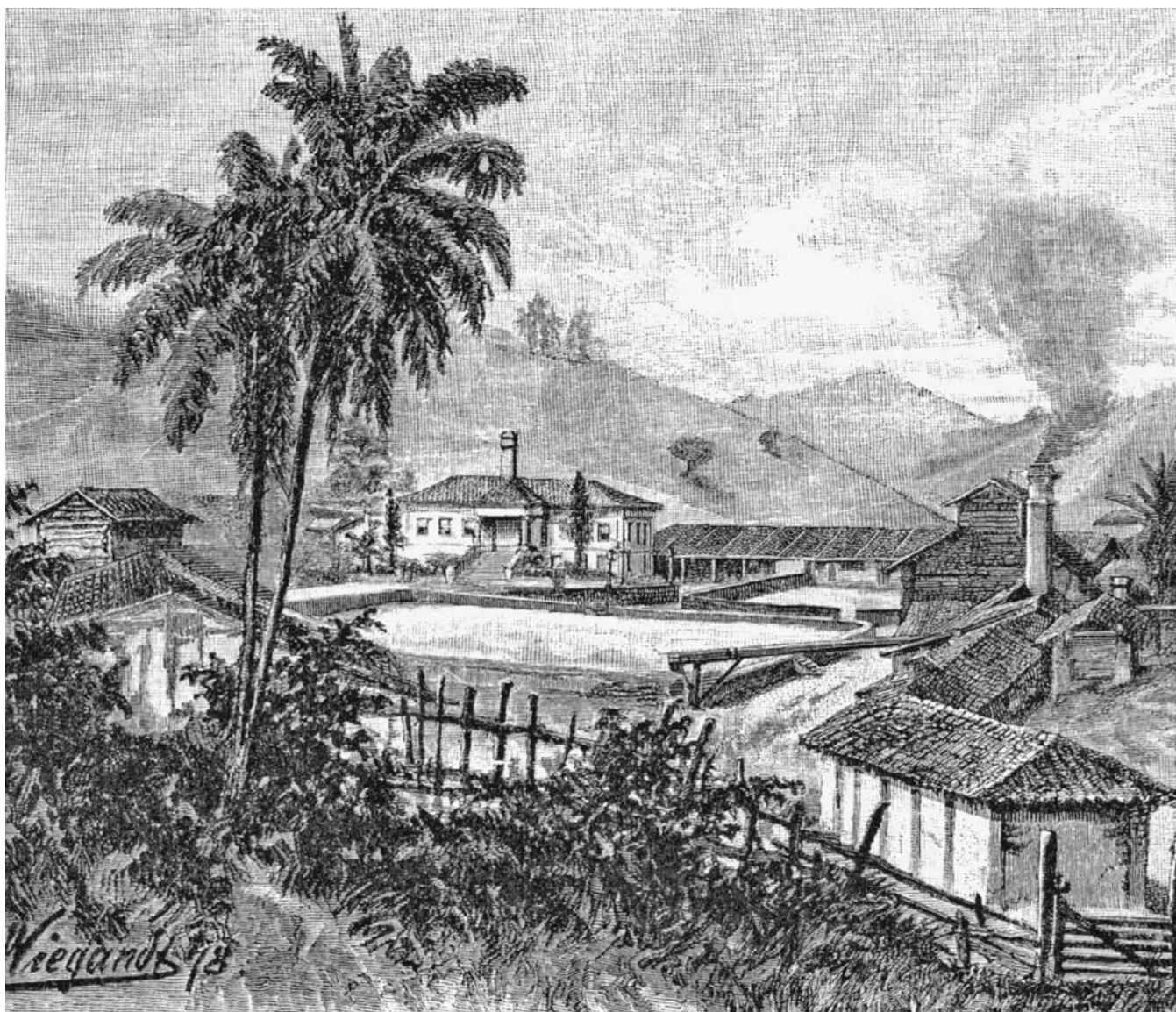
**Faustin I** See SOULOUQUE, FAUSTIN.

**fazenda/fazendeiro** *Fazendeiro* is the Portuguese term for the planter class in BRAZIL during the colonial period and the 19th century. *Fazendeiros* traditionally wielded enormous political and economic power, and they helped to shape Brazil’s experience after independence in important ways. *Fazendeiros* generally relied on a constant supply of slave LABOR and successfully resisted demands for the abolition of SLAVERY throughout the 19th century.

*Fazendas* were large plantations devoted to producing agricultural products for export. Brazil’s colonial economy was closely tied to SUGAR production in the northeastern states of Bahia and Pernambuco. The *fazendeiro* class in those regions became highly influential as Brazil’s sugar production accelerated following the independence of HAITI and the abolition of slavery on the sugar-producing Caribbean island. The planter class of Brazil held firm control over the national legislature throughout most of the first half of the 19th century. Even as Brazil came under enormous pressure from the British and others to bring an end to slavery, few serious debates around the subject took place in Brazil before 1850. The British ended its slave TRADE in 1807 and attempted to enforce a ban on slave imports into Brazil, but the demand for labor and the influence of powerful *fazendeiros* ensured that a black market continued.

In the latter half of the 19th century, COFFEE began replacing sugar as the mainstay of Brazil’s agricultural production, and the sugar planters of the northeast were replaced by coffee planters of the south as the source of economic and political influence (see AGRICULTURE). Coffee *fazendeiros* were less reliant on slave labor and encouraged government policies to recruit European immigration. As the power of the sugar planter class faded, a strong abolitionist movement emerged in Brazil. Lawmakers passed the LAW OF THE FREE WOMB in 1871 as a way of gradually phasing out slavery. Complete abolition finally came about in 1888 (see SLAVERY, ABOLITION IN BRAZIL OF).

See also FAZENDA/FAZENDEIRO (Vol. II); PLANTATIONS (Vol. II).



Sketch of a coffee plantation, or *fazenda*, in southern Brazil (From *Brazil, the Amazons and the Coast: Illustrated from Sketches by J. Wells Champney and Others*, by Herbert H. Smith. New York: Charles Scribner's Sons, 1879, p. 513)

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**federales (Federalist Party)** The *federales* in ARGENTINA consisted of provincial elite and local *caudillos* who aimed to establish a system of government that did not favor the interests of *porteños*, or residents of BUENOS AIRES. In particular, *federales* demanded protectionist economic policies to safeguard interior industries from foreign competition. In the early years following independence in Argentina, *federales* often found themselves at odds with *UNITARIOS*, the intellectual and economic elite of the capital city, who were seeking

to impose a strongly centralist form of government that benefited Buenos Aires (see CENTRALISM; FEDERALISM).

In the decades after independence, *federales* and *unitarios* confronted each other, sometimes violently, over establishing a centralist or more federalist form of government. The origin of the conflict between Buenos Aires and the interior dated back to the late decades of the colonial period, when the Spanish Crown reorganized the Southern Cone into the Viceroyalty of Río de la Plata, with Buenos Aires as its capital. The city quickly grew in importance as commerce and politics that had once been directed toward the interior now faced the coast. As the independence movements gained momentum, leaders in Buenos Aires found themselves at odds with provincial elite over important issues such as external TRADE and new political institutions.



*Federales* and *unitarios* fought a brief civil war over the CONSTITUTION OF 1819, which favored the interest of Buenos Aires over those of the provinces. Similar conflict erupted in 1826 with the drafting of a new constitution, which was influenced by *unitario* president BERNARDINO RIVADAVIA. Provincial challenges brought down the Rivadavia government in 1827, and two years later, *federales* consolidated their control under the caudillo leadership of JUAN MANUEL DE ROSAS, JUAN FACUNDO QUIROGA, and Estanislao López (b. 1786–d. 1838). Of the three strongmen, Rosas emerged as the dominant figure and controlled national politics throughout his tenure as governor of Buenos Aires. With the backing of the *federales*, Rosas embarked on a campaign to persecute *unitario* leaders. Many members of the opposition fled into exile as the dictator unleashed the MAZORCA security detail on the country to force compliance on his opposition.

Despite Rosas's self-proclaimed alignment with the *federales*, over time, his policies seemed to contradict much of what the provincial elite wanted from the government. *Federales* had long opposed attempts by Buenos Aires leaders to regulate internal TRADE and decried policies that did not share customs revenues raised in the port city with the interior regions. Rosas quietly continued many of these policies and used force to quiet dissent throughout his administration.

The dominance of the *federales* came to an end when Rosas was overthrown in 1852 by a coalition of opponents led by JUSTO JOSÉ DE URQUIZA. Over the next decade, participation of *federales* in Argentine politics waned, and by the 1860s, they were no longer a meaningful political force in the country.

See also RÍO DE LA PLATA, VICEROYALTY OF (Vol. II).

### Further reading:

David Rock. "State-Building and Political Systems in Nineteenth-Century Argentina and Uruguay." *Past and Present*, no. 167 (May 2000): 176–202.

**federalism** Federalism generally describes a system of government under which authority is divided between a central government and local or regional entities. Under a federalist system, a constitution or other defining document stipulates which powers will reside with the national government and which are the prerogatives of state or provincial governments. In 19th-century Latin America, proponents of federalism advocated greater autonomy and political powers for state governments in the decades after independence. The opposite of federalism was CENTRALISM, under which supporters wanted strong central governments.

European intellectuals began considering the notion of decentralized governing power in the context of religious authority as early as the 17th century. Enlightenment philosophers incorporated federalist ideas as they considered new social orders and government sys-

tems in the 18th century. Many writers were inspired by the emerging philosophy of LIBERALISM and argued that so-called interlocking federal arrangements would help to guarantee individual freedoms and fight the tyranny of traditional systems of monarchy. The idea of federalism became more prominent after the publication in the United States of a series of articles by James Madison, Alexander Hamilton, and John Jay in 1787 and 1788 that argued in favor of ratifying the U.S. Constitution. After independence, many newly formed nations in Latin America looked to the U.S. Constitution as a model for creating a postcolonial government framework. The role of federalism quickly entered the political debate as Latin American leaders created governments and wrote constitutions.

The nature of the Spanish colonial administration contributed to the emergence of a federalist movement in the early decades after independence. In theory, the colonial political system was highly centralized around an authoritarian Spanish monarch who was represented by viceroys in the Americas. Those colonial officials were chosen by and reported directly to the monarch. Viceroys governed large administrative units called viceroyalties. By the end of the colonial period there were four viceroyalties in the Spanish colonies, which were subdivided into judicial districts known as *audiencias*. The Viceroyalty of New Spain encompassed all of present-day MEXICO, as well as CENTRAL AMERICA and the Caribbean. Its administrative center was in MEXICO CITY. The Viceroyalty of Peru, with its seat at LIMA, included all of Spanish South America at the beginning of the colonial period, but bureaucratic restructuring in the 18th century split the continent into three administrative units based largely around *audiencia* boundaries. At the end of the colonial period, the Viceroyalty of New Granada was made up of present-day COLOMBIA, ECUADOR, and PANAMA, with its administrative center at BOGOTÁ. The Viceroyalty of Río de la Plata included ARGENTINA, PARAGUAY, URUGUAY, and BOLIVIA. It was administered from BUENOS AIRES.

Even with the restructuring of the viceroyalties, geographic obstacles and a lack of adequate TRANSPORTATION infrastructure fostered a strong sense of regionalism and separate notions of identity throughout the Spanish colonies. Residents of CENTRAL AMERICA had little association with Mexico City and almost no contact with the northern regions of the viceroyalty. The Andes Mountains separated parts of Bolivia from the rest of the Viceroyalty of Río de la Plata. Even with a colonial political legacy based on centralized monarchical power, regional identities were deeply rooted throughout Latin America at the onset of independence. Further complicating the situation was the more informal system of local authority that had emerged during the colonial period and had allowed a network of locally based power to evolve. At the regional and municipal level, strong power figures emerged to oversee day-to-day operations in the colonies. Many of these colonial officials ruled under the

doctrine of *“obedezco pero no cumplo”* (I obey, but I do not execute). That catchphrase encompassed the notion that many of the Crown dictates from Spain and Portugal were not feasible at the local level in the colonies. Many laws were passed in Europe by officials who had never been to the Americas and did not understand the complexities of enforcing cumbersome legislation. As a result, the Crown often turned a blind eye when local officials ignored imperial laws, giving legitimacy to the *“obedezco pero no cumplo”* mindset. When jurisdictional conflicts arose among local leaders, the monarch in Europe always held final authority over the colonial political system. Although colonial administration appeared highly centralized, in reality a type of regional power hierarchy already existed in the Americas prior to independence.

After the Spanish colonies fought the wars of independence in the early decades of the 19th century, separate regional identities, geographic isolation, and the informal system of local power brokering all contributed to debates over how to structure the political system of the new nations. Many initially attempted to maintain the boundaries of colonial viceroalties. The provinces that made up the Viceroyalty of New Granada formed the Republic of GRAN COLOMBIA in 1819. Gran Colombia was created by independence leader Simón Bolívar, who envisioned uniting all of South America under one confederation with a federalist balance of local and national power. Initially, the new nation of Mexico encompassed all of present-day Mexico, plus much of the U.S. Southwest and Central America.

Early attempts at establishing large confederations began to unravel after just a few years. Local creole elite formed a separatist movement in Guatemala City in 1823 and established the UNITED PROVINCES OF CENTRAL AMERICA made up of the present-day nations of GUATEMALA, NICARAGUA, EL SALVADOR, HONDURAS, and COSTA RICA. In Gran Colombia, a desire for autonomy and greater self-government in CARACAS threatened the unity of the federation. Gran Colombia eventually splintered into the nations of Colombia, Ecuador, and VENEZUELA in 1831. The Viceroyalty of Río de la Plata had formed the United Provinces of the Río de la Plata in 1819, but conflict emerged almost immediately over how to divide political authority between Buenos Aires and the provinces. Federalist proponents in Uruguay, and rural Argentina began pushing to separate from Buenos Aires in 1815. The United Provinces eventually dissolved into Argentina, Paraguay, Uruguay, and Bolivia in the 1820s.

As the former viceroalties subdivided in the decades following independence, leaders in the new nations struggled to ensure stability and security. Many political elite saw the breakup of former viceroalties as a threat to their security. Their solution was to enforce a centralized national government that was strong enough to prevent further disintegration of the former colonies. At the same time, other leaders and intellectuals were articulat-

ing new political ideologies that demanded a departure from traditional colonial models. Those individuals saw centralized political authority as part of the repressive and tyrannical system of monarchy that they wanted to leave behind. From the beginning, political leaders in new nations clashed over how much autonomy to allow provincial entities and how much power to grant the national government. In most areas, the disputes over federalism and centralism became part of a larger political dispute between liberalism and CONSERVATISM.

After independence, Latin American elite debated the basic political philosophies they should adopt in laying the framework for new government. In some areas, those debates evolved into violent clashes and even full-scale war over the merits of liberalism or conservatism. The extent to which provincial autonomy should be part of the new governing model became part of the debate. In most Latin American nations, liberals advocated a federalist structure that would require the national government to share some power with states or provinces. Liberals believed that centralized authority abetted authoritarianism, despotism, and monarchy. Liberal constitutions promulgated in the early decades after independence often set up relatively weak central governments and gave considerable power to state and local governments. Mexico's CONSTITUTION OF 1824 was designed to limit the authority of the central government and prevent conservative interests from reinstating a monarch. Venezuela's first constitution, approved in 1830, reflected a similar distrust of a strong central government.

Latin American conservatives tended to advocate a strong central government, believing an abrupt departure from the political structure of the colonial past would breed unrest and instability. Many early conservatives preferred to see a continuation of the monarchical system or a government structure where a strong executive held extraordinary powers. Conservative leaders rejected liberal constitutions, fearing that provincial autonomy would lead to the breakup of territory, weakening the nation. One notable exception to this trend was in Argentina, where liberals in Buenos Aires pushed for a more centralized government based in the capital city in the interest of maintaining control of foreign trade and customs regulations. Many provincial elites in Argentina sided with conservative interests in trying to limit the power of Buenos Aires in favor of provincial autonomy.

The eager adoption of federalism created conflict in many areas of Latin America in the early decades after independence. Conservative interests rose up in some countries to overthrow liberal governments and replace federalist-inspired constitutions with a more centralized political structure. Mexico's Constitution of 1824 was embraced by many of the frontier provinces but provoked a rebellion by the centrist elite in 1833. The conservative government of ANTONIO LÓPEZ DE SANTA ANNA abolished the federalist structure in 1835, provoking a

series of local uprisings against the national government. Secessionist movements rose up in the frontier regions of Texas and the Yucatán. Federalism and regional autonomy inspired the TEXAS REVOLUTION of 1836, in which the former Mexican province defeated the national army and won its independence. Yucatán followed suit, declaring its own independence movement in 1838. Sporadic fighting between federalists in the Yucatán and the central government in Mexico City continued for 10 years before the CASTE WAR OF THE YUCATÁN compelled the Yucatán state government to recognize Mexican sovereignty over the region once again.

The federalist desire for regional autonomy was the root of numerous armed conflicts throughout Latin America in the first half of the 19th century. As a result of those conflicts, large regions broke away from previously recognized central government structures, and boundaries for new Latin American countries began to take shape. By 1840, the United Provinces of Central America had split according to boundaries that roughly correspond to the nations of present-day Central America. Secessionist forces began pushing for PANAMANIAN INDEPENDENCE from Colombia as early as the 1830s, but that movement did not succeed until 1903. By mid-century, most Latin American leaders realized that the fragile structure of postindependence governments could not withstand the pressures of excessive provincial independence. Even liberal leaders began to back away from their preference for federalism in the last half of the 19th century. During the era of LIBERAL OLIGARCHY, national leaders often strengthened the power of the central government. Nonetheless, the conflict between federalism and centralism continued.

See also *AUDIENCIA* (Vols. I, II); *VICEROY/VICEROYALTY* (Vols. I, II).

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**Federal War** (1858–1863) The Federal War was the civil war that took place in VENEZUELA between the LIBERAL PARTY and the CONSERVATIVE PARTY from 1858 to 1863. It is also known in Spanish as the Guerra Larga (Long War), Guerra de los Cinco Años (Five Years' War), and Revolución Federal (Federal Revolution).

Hostilities erupted when members of the temporary alliance between the two factions overthrew the dictatorship of José Tadeo Monagas (1847–51, 1855–58) but could not find a replacement candidate who was agreeable to both sides. After Conservative leader Julián Castro (1858–59) emerged as president in 1858, Liberals rose in revolt, citing the need to defend FEDERALISM. Under the leadership of future president General Juan Crisóstomo Falcón (1864–68), the Liberal Party enlisted the help of numerous regional CAUDILLOS, who saw the war as

an opportunity to entrench the provincial autonomy they had been defending since the republic's break from GRAN COLOMBIA in 1830. General Ezequiel Zamora, known as “General del Pueblo Soberano” (General of the Sovereign People) and with a reputation as a defender of social justice in the Venezuelan countryside, joined the movement as chief of western operations. The war was primarily a grab for power, but Liberals claimed to be defending an array of causes, including social equality, the abolition of SLAVERY, the reversal of land tenure abuses, and a general decentralization of authority. After General Zamora was killed in 1860, leadership of the liberal movement splintered, and the causes broadcast by the party began to vary widely.

Throughout its five-year duration, most of the fighting in the Federal War consisted of small and isolated guerrilla-style attacks. One major confrontation occurred in December 1859 at the Battle of Santa Inés, during which the conservative army attempted an assault on forces under General Zamora in his home territory in the state of Barinas. Zamora repelled the attack, his crucial victory devastating the Conservative army. Subsequent campaigns brought the federalist army ever closer to CARACAS, but Zamora was killed in a battle in the city of San Carlos in October 1860.

Liberals suffered a series of setbacks after Zamora's death. The federalist army lost a series of important battles, while Conservatives rallied some support by bringing former president JOSÉ ANTONIO PÁEZ back to power. Eventually, Falcón took the controversial step of dividing the federalist army into three main bodies, but it was fractures within the Conservative Party that ultimately gave the Liberals an advantage. In the early months of 1862, Falcón's forces enjoyed important victories in battles in Peruche, El Corubo, and Mapararí. One year later, in April 1863, Conservative leaders were forced to surrender in the Treaty of Coche, and in 1864, Falcón became president of the republic.

The Federal War cost 150,000 to 200,000 lives during five years of brutal fighting, but the conflict resolved few of Venezuela's deeply rooted problems. The Falcón administration oversaw the promulgation of an ardently federalist constitution in 1864, but his rule came to an early end when the Revolución Azul (Blue Revolution) overthrew him in 1867.

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Robert P. Matthews. *Rural Outlaws in Nineteenth-Century Venezuela: Antecedent to the Federalist War* (New York: New York University Press, 1973).

**fermage** *Fermage* is the term used to describe governor-for-life Toussaint Louverture's (1801–03) forced-

LABOR system of newly emancipated slaves on the island of Hispaniola (see SLAVERY). As specified in the Constitution of 1801, the state took over abandoned plantations, leased them out, and “bound” laborers to certain plantations. A quarter of the revenue was paid to the workers, who were also fed, housed, and clothed. The tenant took a fixed share of the profits and the government the remainder. Strict penalties were administered to those who did not comply. During Toussaint’s rule, the system succeeded in generating capital and reinstating a productive agricultural export ECONOMY (see AGRICULTURE).

Both JEAN-JACQUES DESSALINES (1804–06) and HENRI CHRISTOPHE (1807–20) resorted to the same system of *fermage*. In ALEXANDRE PÉTION’S (1806–18) republic in the south, *fermage* died out as large land plots were broken apart and sold. In Christophe’s kingdom in the north, *fermage* was extremely successful, with the export of agricultural products earning almost as much as during the colonial period.

JEAN-PIERRE BOYER, Pétion’s successor, unsuccessfully attempted to revive the *fermage* system. He took the plan one step further with his CODE RURAL of 1826, which exempted towns and cities but required rural people to be either laborers or MILITARY servicemen. The law was overseen by HAITI’S army. The plan failed due to Pétion’s land distribution policies and the military’s inability to enforce the code.

See also HISPANIOLA (Vol. II).

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**Fernández de Lizardi, José Joaquín** (b. 1776–d. 1827) *Mexican journalist and novelist* José Joaquín Fernández de Lizardi was a Mexican writer and journalist who penned *El periquillo Sarniento* (*The Itching Parrot* or *The Mangy Parrot*) beginning in 1816. The work is widely considered to be Latin America’s first novel (see LITERATURE).

Lizardi was born on November 15, 1776, to a FAMILY of modest means in MEXICO CITY. He began studying theology but soon left his studies for a career as a minor-level regional judge. In 1810, he surrendered without altercation to independence forces and was jailed by the royalist army as a traitor. Upon his release, he relocated his family back to Mexico City and began working full time as a writer. Inspired by the liberal movement in Spain that advocated freedom of speech, Lizardi founded one of the nation’s first private newspapers, *El Pensador Mexicano* (The Mexican thinker). He used it as a forum for expressing his Enlightenment-inspired critiques of the political

and social system. In 1813, he was jailed for a brief period after criticizing the viceregal government. After Ferdinand VII retook the throne in Spain and restored autocratic rule, his criticisms became more subdued.

After 1814, Lizardi turned away from journalism and toward literature to express his social message. *The Mangy Parrot* began as a serialized account of the inefficiencies and corruption of the Spanish system. After the first three installments, censors blocked any further publications, and Lizardi was again imprisoned. In 1820, he was able to return to writing after the Riego Revolt reinstated Spain’s liberal Constitution of 1812, and he founded the Public Society for Reading.

After Mexico achieved independence from Spain in 1821, Lizardi continued to write on social and political issues. But, his politics did not fall neatly into either emerging dominant ideology, and he ran into problems with the constantly changing political leadership of the new nation. Lizardi died of tuberculosis on April 27, 1827. The completed *el periquillo Sarniento* was not published until 1830–31.

See also ENLIGHTENMENT (Vol. II).

#### Further reading:

Nancy J. Vogeley. *Lizardi and the Birth of the Novel in Spanish America* (Gainesville: University of Florida Press, 2001).

**Firmin, Anténor (Joseph–Anténor Firmin)** (b. 1850–d. 1911) *Haitian writer, political activist, and anthropologist* Anténor Firmin was born in Cap Haitien in 1850. As a young man, he worked in teaching and, later, in law and politics, and as a diplomat. He was active in liberal Haitian politics, known as the Parti Libéral (Liberal Party).

Firmin began the journal called *Le messager du Nord* in Cap Haitien (see LITERATURE). In 1885, he published his best-known article, “De l’égalité des races humaines” (Of the equality of the human races), which was a counter to the nefarious racism of the time as presented by the French writer Arthur de Gobineau in his “Essaie sur l’inégalité des races humaines” (Essay on the inequality of the human races). Firmin responded to de Gobineau by disproving the “scientific method,” a theory believed to prove white superiority. Firmin argued that the systems of thought that suggest such racial conclusions are based on “hierarchical mythic and superstitious misinformation.” His counter argument was so well received in the intellectual community that support for the “scientific method” as a means of proving the superiority of whites over blacks was thrown into question, causing a vigorous and substantive debate.

Firmin also proposed progressive political ideas for HAITI’S government. He believed that the executive power should not control the state, that class divisions should be eliminated, and that the peasantry should be integrated into the wider Haitian society.

Firmin died in Haiti in 1911.

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**First Republic** See OLD REPUBLIC.

**Five Years' War** See FEDERAL WAR.

**Flores, Juan José** (b. ca. 1800–d. 1864) *general and first president of Ecuador* General Juan José Flores, one of the Liberator Simón Bolívar's "faithful friends," was one of many Venezuelans who contributed to ECUADOR's independence and then settled permanently in the country in the 1820s. Marrying the daughter of one of QUITO's most illustrious families brought Flores wealth and access to high society. His role at the Battle of Tarquí in 1829, which temporarily held off Peruvian expansionist plans along Ecuador's southern border, made him a national hero and the logical person to lead the new republic when it broke away from GRAN COLOMBIA in 1830.

Flores held conservative values and flirted with monarchy throughout much of his career. As president (1830–35, 1839–45), he attempted to build a road from Quito to GUAYAQUIL and construct schools, but his government was plagued by revenue shortfalls. In 1843, he attempted to rewrite the constitution (see CHARTER OF SLAVERY) and create a more centralized, monarchical-like government, which resulted in his defeat and exile in 1845.

Flores spent the next 15 years engaged in various schemes to return to power with European assistance. These caused him to be reviled in Ecuador and his principal biographer to dub him the "King of the Night."

In 1860, Flores resuscitated his career and his reputation when GABRIEL GARCÍA MORENO made him commander-in-chief of the Conservative forces in the ongoing civil war. After leading the army to victory, Flores became an integral part of the new regime, regaining his confiscated properties and acting as García Moreno's principal adviser during his first term. Flores suffered his most humiliating MILITARY loss against COLOMBIA in 1863 at the Battle of Cuaspud. Nevertheless, he remained García Moreno's steadiest general until his death in 1864.

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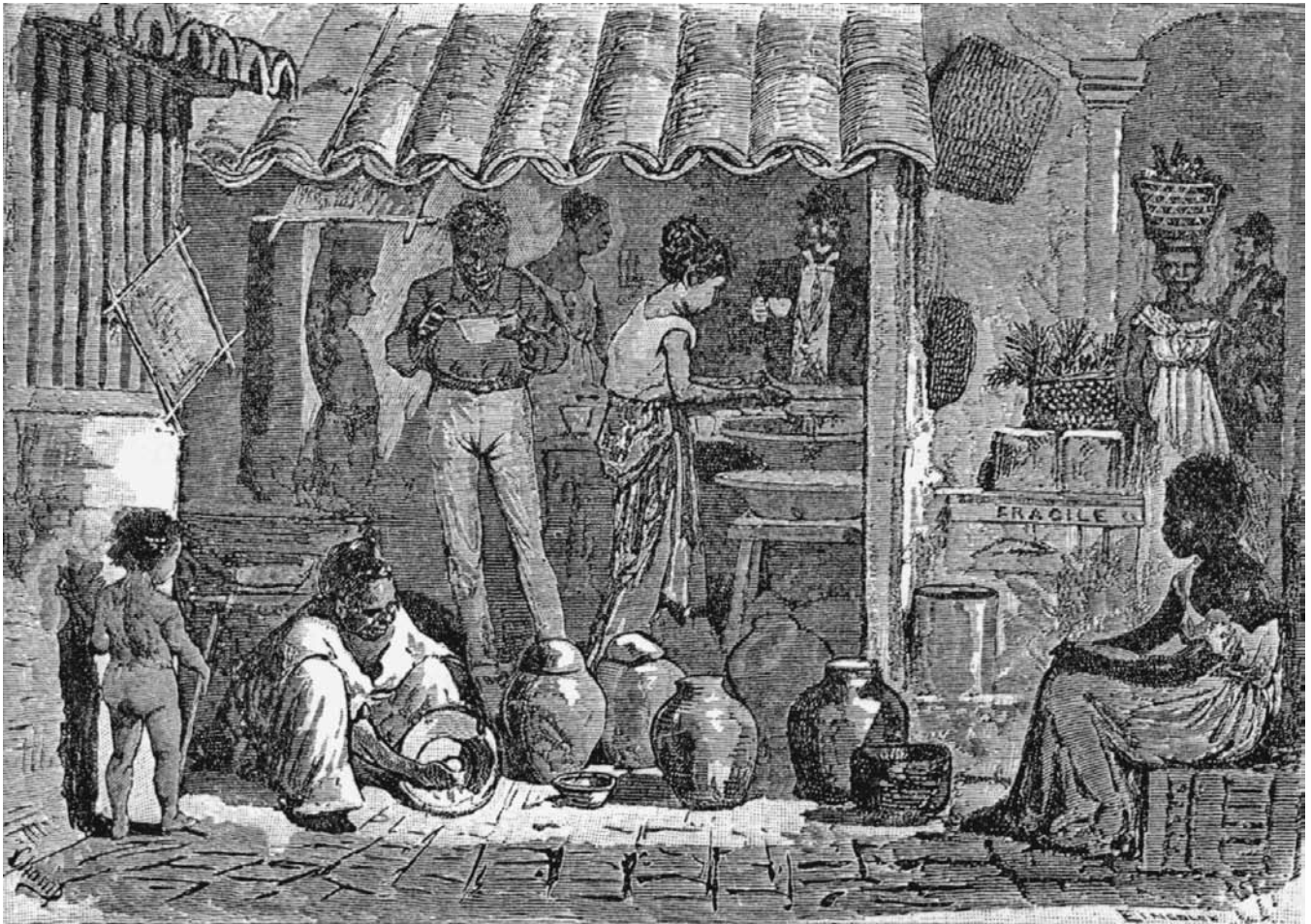
Mark J. Van Aken. *King of the Night: Juan José Flores of Ecuador, 1824–1864* (Berkeley: University of California Press, 1989).

**food** Food played a number of roles in the development of 19th-century Latin America. Aside from its basic function of providing sustenance to the local population, many nations in Latin America specialized in the production of agricultural products for export, thus food production became an important means of earning an income. Food was also used by many people as a symbolic marker of identity, with certain cuisines defining the elite and others defining the wider population. Regionalism and nationalism also surfaced in reference to cuisine, especially in the later decades of the 19th century.

The cultural importance of food in Latin America dates back to the pre-Columbian era, when indigenous civilizations imbued the harvest with religious and social meaning. To Mesoamerican people, corn, or MAIZE, signified life. The Aztecs and Maya performed religious rituals to give thanks for a good harvest to a sophisticated network of deities and to ensure fertile agricultural seasons to come. The South American Inca civilization built an expansive empire and ensured that an adequate food supply was available through an intricate network of roads and political alliances. European colonization introduced new dietary practices and crops to Latin America. The Latin American colonies became major suppliers of commodity foodstuffs such as SUGAR and COFFEE between the 16th and 19th centuries.

The importance of agricultural production in Latin America continued after independence. In the 19th century, the global ECONOMY shifted toward a LAISSEZ-FAIRE economic model, which favored relatively free TRADE and economic specialization based on COMPARATIVE ADVANTAGE. Latin American nations had a comparative advantage in the production of a variety of agricultural foodstuffs. Initially, the region produced large amounts of coffee and sugar, but by the end of the century, products such as grains, fruit, and even some meats were being exported. Aided by liberal land reform policies, large HACIENDAS and plantations expanded, while small farmers found it impossible to compete. Foreign interests purchased large tracts of land in the Caribbean, MEXICO, and CENTRAL AMERICA, while national rural oligarchies tended to dominate the economies of ARGENTINA and BRAZIL. The expansion of AGRICULTURE in the late 19th century helped to fuel exponential growth in the economies of most Latin American countries. The benefits of economic progress, however, were not evenly shared; national and foreign elite became wealthy, while rural peasants lost access to land and sank further into poverty.

As Latin American nations were increasingly integrated into the world economy in the 19th century, food became even more tied to national, regional, and ethnic identity. By the end of the century, the Mexican elite often displayed their wealth and status by hosting lavish parties and serving gourmet French cuisine. They displayed their contempt for the supposed backwardness of the indigenous population, who preferred corn tortillas



Sketch of an *assai* stand selling *assai* berries and other local foods in Brazil (From *Brazil, the Amazons and the Coast*: Illustrated from Sketches by J. Wells Champney and Others, by Herbert H. Smith. New York: Charles Scribner's Sons, 1879, p. 44)

over WHEAT bread. South American beef played a similar role in expressing identity. Brazilian and Argentine elite preferred freshly prepared steak, and Argentine GAUCHOS were known for their grilled *asado*, while salted meat known as *feijoada* was the dietary staple of Brazilian slaves.

See also AGRICULTURE (Vols. I, II, IV); FOOD (Vol. I); HACIENDA (Vol. II); PLANTATIONS (Vol. II).

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**Francia, José Gaspar Rodríguez de (Doctor Francia)** (b. 1766–d. 1840) *independence leader and dictator of Paraguay* José Gaspar Rodríguez de Francia was a theologian and legal scholar who used Enlightenment philosophies as inspiration to lead PARAGUAY into the independence movement in the early 19th century. He became the dictator of the newly formed nation and used that position to take power away from the elite and

defend the interests of ordinary citizens. As “el Supremo Dictador” (the supreme dictator), Francia ruled fairly and honestly but with an iron fist. His autocratic style brought security, stability, and progress to Paraguay in its first decades as an independent nation.

Francia was born in Asunción on January 6, 1766, to a Brazilian father and a local aristocratic mother. He initially studied theology in Córdoba but later returned to Asunción and obtained a degree in law. Francia earned a reputation as an avid follower of Enlightenment philosophers and as a defender of the poor. He eventually entered politics, holding various positions on the Asunción *cabildo*, or town council. In 1811, Francia served as a member of Paraguay’s ruling junta after the province declared independence from Spain. He later played a vital role in negotiating a treaty with BUENOS AIRES leaders that effectively guaranteed Paraguay’s independence from the United Provinces of the Río de la Plata.

Francia resigned from the ruling junta in protest over the policies some of the elite members of the junta were trying to implement. Over the next several years, he worked to build a support base among elite and common-people alike. By 1813, Paraguay faced threats from both

BRAZIL and the United Provinces. Leaders in Asunción invited Francia to help lead the new nation in the face of those threats. Francia guided the Paraguayan congress in rejecting ARGENTINA's attempts at reunification, and the legislative body rewarded him by electing him co-consul in 1814. Two years later, that same congress elected Francia dictator for life.

During his 26-year rule, Francia transformed Paraguay from the backwater frontier colony it had been under Spanish rule into a thriving and economically self-sufficient independent nation. As a dictator, Francia is often depicted as a tyrant, but he was not a simple despot ruling with arbitrary cruelty. Instead, Francia's personality was marked by an ardent sense of nationalism that often influenced the way he ran the country. Seeing other Southern Cone nations descend into violence and instability in the 1820s, Francia attempted to protect Paraguay from the volatility that plagued its neighbors by closing off the nation. He maintained a policy of strict neutrality in the constantly simmering power struggle between Argentina and Brazil and dealt with those nations only as necessary to ensure a limited TRADE in vital goods. Francia's isolationism and xenophobia are often cited as crucial factors in maintaining stability in Paraguay during an era when instability plagued other newly independent Latin American nations.

Francia borrowed ideas from the European Enlightenment and the French Revolution as the foundation for the society he was trying to build. Although he was a political despot, his social policies introduced a radical version of LIBERALISM to the new nation. Francia firmly believed in breaking the power of the traditional elite and empowering the commonpeople. He instituted land reform policies that aimed to eliminate private property—particularly property owned by the traditional elite—in favor of communal landholdings dedicated to the common good. Francia's most aggressive reform measures targeted the CATHOLIC CHURCH. He was one of the first Latin American leaders to abolish the religious *FUEROS*, or privileges and parallel court system, and to take steps to secularize society. He confiscated property once owned by the church and other landed aristocrats. Francia redistributed large amounts of land to small farmers and encouraged the nation's agriculturalists to diversify their production away from traditional export crops such as TOBACCO and yerba maté (see AGRICULTURE). Within a decade, Paraguay had become self-sufficient in a variety of foodstuffs. By the end of his regime, Francia had also introduced basic manufacturing in industries such as textiles and shipbuilding. Generally, peasants and other common folk benefited substantially from Francia's economic and social policies.

Despite the apparent advancements made under his regime, Francia nonetheless was an oppressive dictator, and progress came at the price of individual freedoms. Francia lived in constant fear of conspiracy, and his paranoia was not necessarily unfounded. In 1823, he discov-

ered a plot by the old elite to overthrow his government. Francia responded by arresting and either executing or exiling hundreds of perceived enemies. The dictator used such conspiracies as justification for suppressing free speech and detaining suspected traitors without trial. Many political prisoners were tortured, while others simply disappeared. Francia allowed few individuals into his small circle of advisers and made nearly every decision—large and small—himself. The dictator further attempted to dismantle the elite's power by encouraging the practice of intermarriage. He urged the proliferation of the mestizo race by forbidding people of European descent to marry other Europeans.

Francia's strict control over all aspects of Paraguay's political, economic, and social development may have saved the country from potential instability during his 26-year dictatorship, but it also set up a weak national framework around the strong rule of one man. Francia ruled as supreme dictator until his death on September 20, 1840. He left no successor, and the nation descended into chaos in the days following his death. After months of political turmoil and several coups, CARLOS ANTONIO LÓPEZ was finally chosen as Francia's successor.

The novel *Yo el supremo* (*I, the Supreme*), published in 1974 by Paraguayan writer Augusto Roa Bastos, is based on the life of Francia. Regarded as one of Paraguay's great literary works, *Yo el supremo* is a denunciation of autocratic rule (see LITERATURE).

See also ENLIGHTENMENT (Vol. II).

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**Frelinghuysen-Zavala Treaty** (1884) Signed in Washington, D.C., between U.S. secretary of state Frederick T. Frelinghuysen (b. 1817–d. 1885) and NICARAGUA's minister to the United States, Joaquín Zavala (b. 1835–d. 1906), the agreement granted the United States the right to construct a transisthmian canal through Nicaragua, to be jointly administered, in return for a U.S. guarantee of Nicaragua's sovereignty. Although the French Canal Company's effort to construct a canal at PANAMA failed in 1881, in the United States, the public was aroused to the possibility of a transisthmian canal under U.S. control. During the same time period, Central American leaders, particularly Guatemalan president JUSTO RUFINO BARRIOS, anticipated significant development and wealth from such a canal. Barrios even boasted that he would guarantee Nicaragua's passage of the treaty. Reluctantly, Nicaragua signed. The Nicaraguans feared Barrios had ulterior motives, including the establishment of a Central American union under his leadership.

The U.S. Senate, unwilling to be drawn into CENTRAL AMERICA's political affairs, rejected the treaty. The United States remained committed to the ideal of a canal under its control while remaining free of involvement in regional issues (see TRANSITIMIAN INTERESTS).

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**French Guiana** French Guiana is a former French colony along the northeastern coast of South America. It is bordered to the south and east by BRAZIL and to the west by SURINAME. French Guiana encompasses less than 34,000 square miles (88,060 km<sup>2</sup>), and today, the former colony is an overseas *département* of France.

The territory that makes up French Guiana was originally explored by the Spanish in the early 16th century, but other European powers began establishing permanent settlements there. Throughout much of the 17th century, the French, Portuguese, British, and Dutch competed for control of the northeastern coastal region of South America. By the 18th century, the French had secured their claim over the region, and the colony became known as Cayenne, after the principal city and capital. A small plantation ECONOMY emerged, and the colony became home to approximately 10,000 slaves who produced cotton, dyes, and other local products. Inhabitants of the small French outpost led a relatively quiet existence until the outbreak of the French Revolution in 1789. The political upheaval in the empire had a lasting impact on the South American colony. Cayenne became a popular destination for political exiles in the 1790s. In later decades, the French established a network of penal colonies in the tropical territory. Conditions in the penal colonies were notoriously bad. One of the worst was the Devil's Island colony on one of the small Îles du Salut (Safety Islands) just off the coast. French Guiana's penal colonies remained in use until the 1950s.

The French Revolution also provoked a major slave rebellion in the FRENCH CARIBBEAN colony of Saint Domingue in 1791. The revolt quickly escalated into a full-scale movement for independence, and French officials tried to control the unrest by abolishing SLAVERY in all of the French Empire in 1794. The emancipation decree changed the legal status of African slaves in French Guiana to "apprentice," but that move toward full emancipation lasted for only six years. In 1802, the French reinstated slavery throughout the colonies, and "appren-

tics" in French Guiana legally became slaves once again. Although slavery continued, the French Revolution did have an impact on the social and economic development of the colony. Haitian independence secured the abolition of slavery and brought about a decline in the once-prosperous SUGAR industry on the island of Hispaniola. The worldwide demand for sugar remained high, and other tropical regions of the Americas stepped in to fill the void in production left by HAITI. Sugar production increased in French Guiana, and by the 1840s, the slave population in the colony had almost doubled. But, in the early decades of the 19th century, sugar planters in French Guiana had failed to modernize or diversify production. As a result, when slavery was finally abolished in 1848, the economy was ill prepared to adjust to a free-market and free-LABOR system. After abolition, many former slaves abandoned the plantations, and the small but viable agricultural export sector that was the basis of the French Guianese economy fell into decline.

Like other French colonies, French Guiana was affected by the political developments in France throughout the 19th century. As a result of the Napoléonic Wars in the early decades of the century, French possessions in the Americas were taken over by the British. They eventually reverted back to French control, but the colonial atmosphere began to change. The French Revolution had introduced ideas such as liberalism, equality, and republicanism, and during the brief period of emancipation following the 1790s uprisings in Saint Domingue, expectations rose among the slave and colored population of French colonies. Conservative interests in France resurfaced in the early decades of the 19th century, and republican and monarchist forces challenged each other over the coming decades in the mother country. French revolutionaries were quashed with the rise of Napoléon Bonaparte in 1804, and advocates of republicanism endured several decades of monarchical rule before leading another revolution in 1848 and creating the Second Republic. That brief period of liberal rule brought about the final abolition of slavery and introduced universal male suffrage to the French colonies for the first time. But, republicanism was short lived, and Napoléon III abrogated many of those reforms in 1852. He also expanded French Guiana's function as a penal colony, and shiploads of prisoners arrived in the small territory over the coming decades. It was only after the establishment of the Third Republic in the 1870s that the inhabitants of French colonial possessions received full citizenship rights, which included the right to vote (for adult males) and political representation in the French Parliament.

The economy of French Guiana fell into decline after the abolition of slavery and remained in a state of underdevelopment for the rest of the 19th century. French planters resented the abolition of slavery and blamed the wage-labor system for the decline of the sugar economy. Racial tensions ran high in the late 19th century and were made worse after the discovery of GOLD



deposits in the Guianese interior in the 1850s. For the rest of the century, white settlers, many of them former plantation owners, invested in gold MINING. They formed the General Gold Mining Company and divided interior lands among various partners. Gold mining strained social relations, as the former planter elite continued to control economic resources. Interior expeditions also encroached on territories that had traditionally been occupied by small groups of indigenous and maroon communities.

After 1946, French Guiana became a *département* of France, and today has equal status with other mainland provinces.

See also FRENCH GUIANA (Vol. II); PLANTATIONS (Vol. II).

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**French intervention** (1862–1867) The French intervention in MEXICO was the five-year period from 1862 to 1867 when the French army occupied Mexico in an attempt to build a French empire in the Americas. French emperor Napoléon III installed Austrian archduke Maximilian of Habsburg (b. 1832–d. 1867) as emperor of Mexico. Eventually, Liberal forces under President BENITO JUÁREZ (1858–82) forced the French army to withdraw and executed Maximilian and his supporters.

The French intervention in Mexico began under the pretext of debt collection, with the cooperation of the French and the British. Under the Convention of London, Queen Victoria of Great Britain, Queen Isabella II of Spain, and Emperor Napoléon III of France collaborated to occupy major ports along the Gulf of Mexico and seize customs house revenues. Spanish troops arrived in December 1861, followed by British and French fleets in January 1862. Spanish and British troops soon withdrew, but Napoléon, encouraged by disgruntled Mexican Conservatives, prepared for a large-scale occupation. The United States, embroiled in civil war, was unable to fulfill the pledge contained in the MONROE DOCTRINE of 1823 to defend any nation in the Americas against European invasion. Emboldened by his Conservative Mexican accomplices, Napoléon saw an opportunity to build a French empire around the idea of a “Latin league” that included Mediterranean areas of Europe and former Spanish and Portuguese holdings in the Americas. This Napoléonic vision gave origin to the term *Latin America*.

French troops took control of major port cities along Mexico’s Gulf coast in spring 1862, and in April, the army began marching toward MEXICO CITY. Many of Mexico’s poorly defended towns and cities fell easily to the superior French MILITARY, but Napoléon’s troops encountered

resistance where they least expected. In PUEBLA, a city known for its strong ties to the CATHOLIC CHURCH and conservative politics, Mexican forces under the leadership of General Ignacio Zaragoza and Brigadier General (and future president) PORFIRIO DÍAZ put up a strong stand and drove the French army back. The anniversary of the unexpected and patriotic victory, May 5, or CINCO DE MAYO, is celebrated as a national holiday in Mexico and among Mexican communities in the United States and elsewhere.

Although Zaragoza temporarily succeeded in repelling French forces at Puebla, Napoléon quickly sent reinforcements, and within a year, the French army had taken Puebla and other surrounding cities. By June 1863, Juárez and his administration were forced to flee the capital, and French forces easily took Mexico City. Juárez and his Liberal cadre continued to organize opposition while in hiding in San Luis Potosí, Chihuahua, and El Paso del Norte, while Napoléon and his Conservative Mexican allies attempted to consolidate power by offering Austrian archduke Ferdinand Maximilian Joseph von Habsburg the throne of Mexico in the Convention of Miramar. Maximilian and his young wife, Charlotte of Belgium, known in Mexico as Carlota, allowed themselves to be persuaded by Conservative politicians that in a plebiscite, Mexicans had voted overwhelmingly in favor of Maximilian’s rule. The couple arrived in Mexico in May 1864 expecting a welcome befitting of a beloved royal family but instead found a hostile nation in ruins after years of warfare.

Maximilian and Carlota did their best to build support and assimilate in their adopted country. They paid homage to the Virgin of Guadalupe, learned Spanish, and worked to adopt local customs. The couple moved into Chapultepec Castle and began designing a court with all the trappings of European royalty but incorporating Mexican culture. They changed Mexico’s coat of arms to include both a royal crown and the traditional Mexican eagle. All royal decorations, such as official china and the royal carriage, bore a seal with an interlocking *MM* symbolizing Maximilian and Mexico as one. But, perhaps Maximilian’s most significant gestures were those policies that pandered to Juárez’s supporters. A liberal at heart, Maximilian granted amnesty to political prisoners and refused to reverse the liberal Reform Laws of the 1850s (see LA REFORMA). He alienated Conservative supporters by forcing the CATHOLIC CHURCH to loan money to his financially strapped regime and by attempting to bring Liberals into his inner circle of advisers.

For their part, Liberals were generally not swayed by Maximilian’s attempts at conciliation, and the Juárez faction continued to challenge the new emperor. Despite some crucial victories late in 1864, Maximilian and Carlota’s regime was never self-sustaining, and the royal couple continually relied on support from Napoléon and the French army. In October 1865, Maximilian aimed to capitalize on recent victories against Juárez and issued a



During the French intervention, Austrian archduke Maximilian of Habsburg and his bride, Carlota, attempted to integrate themselves into Mexican culture. This seal from circa 1864 features cameo portraits of Maximilian and Carlota, Benito Juárez, Ramón Méndez, and Miguel Miramón. The coat of arms above the *M* is an attempt to merge the identities of Maximilian and Mexico and was typical of the emperor's attempts to legitimize his authority. (*Library of Congress*)

decree that all opposition forces would be executed within 24 hours of capture. The decree only strengthened Liberal resolve and sealed Maximilian's fate once Juárez's troops retook the country. Furthermore, the end of the American Civil War in 1865 had freed up hundreds of thousands of armed and battle-ready U.S. Army soldiers, who were now prepared to help defend Mexico and uphold the Monroe Doctrine. Throughout 1865, the U.S. government aided Juárez's resistance by sending arms and other forms of military aid. U.S. leaders also applied unyielding diplomatic pressure on Napoléon to abandon his aspirations to build an empire in the Americas. By November 1866, Napoléon began withdrawing his troops, leaving Maximilian virtually defenseless.

The beleaguered emperor and a close circle of Conservative allies mounted a last stand against Juárez's

rapidly advancing army. Carlota went to Europe to plead with Napoléon and Pope Pius IX, but neither was willing to continue supporting what had obviously turned into a failed endeavor. Overwrought, Carlota suffered a mental breakdown and retreated to a family-owned castle in Belgium.

Maximilian was forced to abandon Mexico City as Juárez's forces advanced. He was captured in Querétaro on May 15, 1867, and tried on 13 counts of crimes against the Mexican nation. Juárez ignored numerous requests by foreign dignitaries to spare Maximilian's life, and when the court handed down the death penalty, Maximilian was shot by firing squad on June 19, 1867. The end of the French intervention erased the last vestiges of Conservative political power. Juárez returned to the presidency and, in an era known as the "Restored Republic," implemented many of the liberal policies of the 1850s that had been interrupted by civil war and foreign invasion.

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#### French West Indies See CARIBBEAN, FRENCH.

**fuero** The special privileges granted by the Crown to members of the CATHOLIC CHURCH, the MILITARY, and other corporate groups in Latin America during the colonial period were called *fueros*. The term *fuero* is often also used to refer to the separate, parallel court systems that existed for clergy and members of the military. It can also refer more broadly to the special entitlements enjoyed by the elite.

The granting of *fueros* was a practice that dates back to the medieval period in Spain. It was carried over the Americas as an important part of social and political authority in the Spanish Empire. According to tradition, certain groups were granted special status as a corporation by the Crown. The church and the military were the two largest and most powerful corporations, but other groups enjoyed the special status as well. Members of the nobility enjoyed a type of corporate privilege, as did leaders of *cabildos*, or town councils. By the end of the colonial period, members of the merchant guilds could also claim some corporate privileges.

The specific *fueros* enjoyed by members of the privileged classes in Latin America varied according to their size, influence, and function. Each group enjoyed varying degrees of self-government, as evidenced by the separate

ecclesiastical and military court systems. Members of the church and military accused of a crime were tried in the church and military courts, which were generally more lenient than the civil courts. Furthermore, members of some corporations were not subjected to the onerous taxes that were imposed in the Spanish colonies. They also generally had enormous social prestige, their status often giving them political sway in local affairs.

*Fueros* complicated the already-complex social hierarchy that existed in colonial Latin America. Jealousies and jurisdictional disputes often were settled only by the monarch, who was the one overarching authority holding the system of privileges together. When the wars for independence in Latin America removed the monarch and the system of absolute rule, the intricate social network surrounding corporate privileges was thrown into chaos. *Fueros* and other remnants of the colonial era were increasingly challenged by the liberal elite, who often pushed for aggressive social reform,

including a dismantling of the *fueros* and other corporate privileges. Conservative leaders, many of whom descended from powerful corporate groups, challenged liberal ideals and insisted that subverting the long-standing system of authority and privilege would undermine social stability. Conflict between liberals and conservatives led to widespread violence throughout Latin America in the 19th century. MEXICO and COLOMBIA fought violent civil wars as liberal reformers attempted to suspend corporate privileges. Similar unrest surfaced in other regions, as liberal constitutions in the last half of the 19th century systematically eliminated most corporate protections.

See also *FUERO* (Vol. II).

**Further reading:**

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# G

**Gadsden Purchase** (1853) The Gadsden Purchase was negotiated in the Mesilla Valley Treaty (also known as the Gadsden Treaty) in 1853 between the United States and MEXICO. Under the agreement, Mexico ceded the Mesilla Valley territory, a 30,000-square-mile (77,700-km<sup>2</sup>) area along its northern border to the United States, in exchange for \$10 million.

The Gadsden Purchase came just five years after the Treaty of Guadalupe Hidalgo had ended the U.S.-MEXICAN WAR and resulted in the transfer of approximately half of Mexico's territory to its northern neighbor. That treaty had only nebulously defined the new border between the two nations. On the U.S. side, the boundary issue soon became part of a larger endeavor to develop a route for a southern railroad. In the aftermath of the war, boundary disputes arose between the two nations, and boundary commissions began haggling over the details. The Treaty of Guadalupe Hidalgo had also guaranteed protection (or restitution) by the United States for any damages inflicted on Mexican citizens by Amerindians in the ceded territory. It became clear that the United States was unable to enforce the provisions of the treaty that dealt with NATIVE AMERICANS, and Mexican claims for damages escalated into the millions. Other issues arose as well: National treasures and other valuables were found to have disappeared from Mexico after U.S. troops were withdrawn; property and citizenship disputes arose for Mexicans living in the ceded territory; and filibustering expeditions along the border increased.

Rather than going to war again to settle these disputes, U.S. president Franklin Pierce sent James Gadsden to Mexico to negotiate a new agreement with the goal of acquiring more territory. Pierce and Gadsden were well aware that Mexico was experiencing

a major political and economic crisis under the increasingly autocratic leadership of ANTONIO LÓPEZ DE SANTA ANNA. Using a combination of deceit, persuasion, and remuneration, Gadsden obtained a settlement of boundary claims, a suitable route for a southern railroad, and a remittance of the U.S. obligation to protect Mexicans from Amerindian incursions.

As a result of the Gadsden Purchase, the southernmost portions of what today are the states of Arizona and New Mexico came under U.S. control. In Mexico, the loss of yet another expanse of national territory to its northern neighbor produced even greater resentment toward the United States and further destabilized Santa Anna's regime. Shortly after the Gadsden Treaty was signed, Liberal opponents declared the REVOLUTION OF AYUTLA and within a year had overthrown Santa Anna for the final time.

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**Gálvez, José Felipe Mariano** (b. ca. 1794–d. 1862) *head of Guatemalan state* Abandoned after birth at a church doorstep in Guatemala City, José Felipe Mariano Gálvez was adopted by the wealthy family of Gertrudis Gálvez. He received all of his EDUCATION in Guatemala City schools, earning a doctorate of law in 1819. Following CENTRAL AMERICA's independence in 1821, Gálvez favored annexation to MEXICO and after the collapse of the Mexican Empire in 1823 supported the establishment of the UNITED PROVINCES



OF CENTRAL AMERICA. Gálvez joined the federation's MILITARY under the Honduran FRANCISCO MORAZÁN. Elected head of GUATEMALA in 1831, Gálvez improved public education and separated it from church authority. He also founded the National Museum and the National Library. Gálvez promoted civil rights and freedom of the press and instituted the LIVINGSTON CODES, a set of legal reforms originally written for the

Louisiana territory in the United States. Gálvez also established a general head tax.

Gálvez's liberal reforms drew strong opposition from conservative groups, including the church. In 1838, the United Provinces of Central America began to crumble, and Gálvez faced a number of insurrections throughout Guatemala. Eventually the provinces of Antigua, Chiquimula, and Salama withdrew their recognition of

the Gálvez government, leaving it defenseless against RAFAEL CARRERA's indigenous army. Carrera entered Guatemala City, forcing Gálvez to relinquish control of the government and flee to Mexico. There, Gálvez practiced law until his death on March 28, 1862. In 1925, his remains were returned for burial in Guatemala City, and in 1966, the Universidad de Mariano Gálvez opened in the same city.

#### Further reading:

Miriam Williford. "The Reform Program of Dr. Mariano Gálvez." Ph.D. dissertation, Tulane University, 1963.

**Gamarra, Agustín** (b. 1785–d. 1841) *president of Peru* Agustín Gamarra was a MILITARY leader during the wars of independence and was twice selected to be president of PERU. He was known for his desire to reunite Peru and BOLIVIA and worked to that end during his presidencies (1829–33, 1839–41). Gamarra also oversaw the beginning of the GUANO AGE and the expansion of Peru's ECONOMY.

Gamarra was born in 1785 in central Peru. He built a successful military career, fighting almost from the beginning with the independence forces in Peru and Bolivia. He served under the command of future Bolivian president ANDRÉS DE SANTA CRUZ. The two shared a common aspiration to unite the two regions into one large and powerful nation after independence. Gamarra led the Peruvian invasion of Bolivia in 1827 that forced the resignation of independence leader and Bolivian president ANTONIO JOSÉ DE SUCRE. When Santa Cruz took power in Bolivia in 1829, the two leaders concluded to create a unified confederation. However, when Gamarra's presidency expired in 1833, political opponents within Peru temporarily impeded Santa Cruz's efforts to create the PERU-BOLIVIA CONFEDERATION. The Bolivian dictator succeeded in creating the short-lived confederation three years later, but Gamarra rejected the limits on Peruvian authority under the proposed political structure.

In 1839, Gamarra participated alongside Chilean forces in the pivotal Battle of Jungay, in which Santa Cruz was defeated and which led to the dismantling of the Peru-Bolivia Confederation. Shortly thereafter, Peru's Congress elected Gamarra president for a second time. During his second presidency, Gamarra charged his finance minister and future president RAMÓN CASTILLA with developing the nation's guano deposits. Gamarra also continued to press for a strategy to annex Bolivia and in 1841 led an invasion force into the neighboring country. He was killed on November 18, 1841, in the Battle of Ingavi.

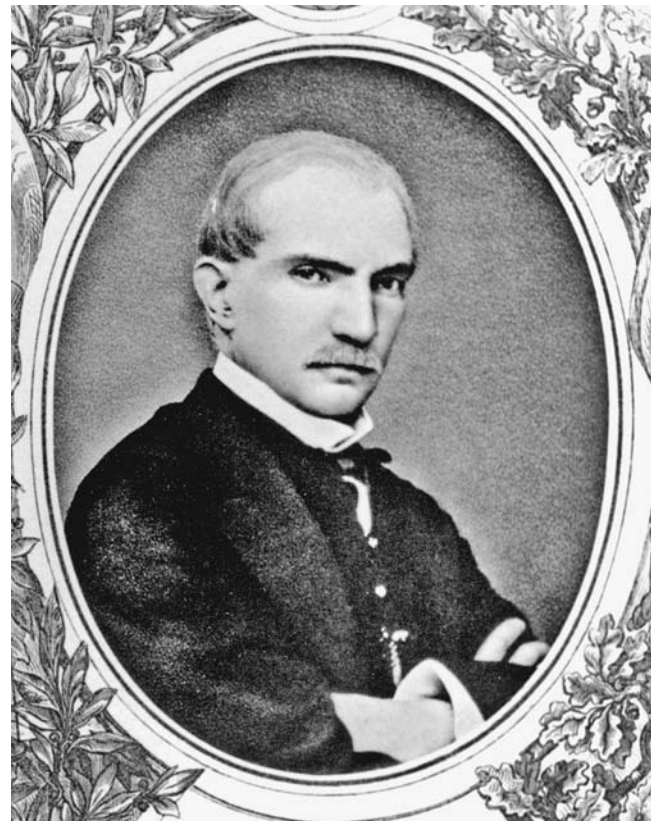
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**García Moreno, Gabriel** (b. 1821–d. 1875) *Ecuadorian Conservative political leader and two-term president* Born to a poor but elite religious family, Gabriel García Moreno was sent to QUITO for his secondary and university EDUCATION. Originally intending to become a priest, he ultimately decided to pursue a career in law and politics. While at university, he befriended the sons of many elite families from the highlands. In 1845, he married his best friend's sister and determined "not to write about history, but to make it." For the next 14 years, he protested against any and all of ECUADOR's governments, spending years in exile in PERU and Europe.

Ongoing diplomatic battles with Peru provided him the opportunity to lead fellow Conservatives in Ecuador against their neighbor. In 1859, Peruvian president RAMÓN CASTILLA blockaded the harbor at GUAYAQUIL, and García Moreno and his friends entered into one of the 19th century's hardest fought civil wars as regional interests divided over how best to deal with the Peruvian threat. Later that year, Ecuador divided into four factions as the tendency toward regionalism reasserted itself. While Guayaquil's commander sought an alliance with Peru, García Moreno



Portrait of Gabriel García Moreno, president of Ecuador on two occasions between 1861 and 1875 (*Library of Congress*)

dallied with France, leading enemies to brand him a monarchist and a traitor. Eventually, García Moreno asked former president JUAN JOSÉ FLORES to return to Ecuador to help lead the Conservative army, and the two defeated their regional rivals by September 1860.

Although the next 15 years have been described as the “age of García Moreno,” and he clearly was a major political player at this time, García Moreno was constrained by a federalist system until 1869. Regional interests had led to a decentralized constitution, which gave great power to the municipalities and hamstrung the president. Headstrong and quick tempered, García Moreno wasted much of his first term (1861–65) fighting two wars against COLOMBIA, in which Ecuador was fortunate to lose no territory. García Moreno left the presidency in 1865, only to find that his would-be puppets preferred to act independently. Consequently, for much of the time between 1865 and 1869, he found himself either in opposition to the government or on diplomatic assignments abroad designed to remove him from the scene of the action.

During his second presidential term (1869–75), García Moreno earned his reputation as the Conservative founder of the modern Ecuadorean state. While in CHILE in 1866, he had studied that country’s constitution, which featured a strong, centralized government in which presidential authority dominated. Not only did the president appoint governors and local officials, but he selected the members of the Supreme Court. Chile’s document became the model for Ecuador’s Constitution of 1869, which added many pro-Catholic features. Not only did the church retain all its traditional powers, but being a Roman Catholic was required to become a citizen of Ecuador.

Building on the foundations of his first term, García Moreno hoped to create a conservative “Catholic nation.” In the 1860s, he had entered into a concordat with Pope Pius IX that accorded the church great privileges, retaining its traditional *FUERO* and guaranteeing its right to own property. Yet the concordat, the only concrete achievement of García Moreno’s first term, also greatly strengthened the state. Not only did the government gain a larger portion of tithe revenues for itself, but the church was required to create new dioceses and parishes, giving it more influence outside the three major cities. In addition, the concordat required the church and state to cooperate to ferret out corrupt clergy and allowed Ecuador to contract with European religious orders to provide social services and education.

García Moreno argued that members of foreign service orders were better educated and more pedagogically progressive than Ecuadorean monks and nuns, and schools in every province were staffed with them. French monastic orders such as the Christian Brothers and Sisters of the Sacred Heart taught boys and girls at the elementary school level. Jesuits provided quality secondary schools, usually in provincial capitals. Not only did the number of children attending school dramatically increase during the

García Moreno era, a trend that would continue throughout the remainder of the century, but the quality of education improved. García Moreno also opened a polytechnic university, as well as a fine arts academy, a music conservatory, and a school of obstetrics. His efforts were designed to educate all members of society, including WOMEN and NATIVE AMERICANS, who had been traditionally excluded. Expanding education would allow him to inculcate the population with certain values so that eventually Ecuador would enjoy a Catholic society in keeping with its conservative traditions. García Moreno also criminalized excessive drinking and extramarital sex, hoping to force adults to serve as “good examples” for youth.

García Moreno was more than a stereotypical Latin American conservative seeking to restore the colonial ideal of a strong state working in partnership with a powerful church. He also believed in modernization and progress. As a result, he embarked on a host of road-building projects to unify the country and provide for a more vigorous economy. Only the road from Quito to Guayaquil was completed during his presidency, but García Moreno initiated construction on the first railroad, encouraged a diversified economy of tropical agriculture and forest products, and modernized cities, especially Quito.

Given his extreme religious views and his suppression of those who opposed him, García Moreno evoked vehement opposition among Liberals. Tagging him a monarchist and tyrant, Liberals such as JUAN MONTALVO foresaw the coming of a “perpetual dictatorship” when Moreno was constitutionally reelected in 1875. In August that year, liberal youths and a disgruntled retired military officer brutally hacked García Moreno to death on the balcony of the government palace. García Moreno left as his legacy an ideal for nation building focused on conservative principles coupled with modernization that would inspire governments in Ecuador until the LIBERAL REVOLUTION of 1895.

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**gaucho** *Gaucha* was a term used to describe the rural population in ARGENTINA and the surrounding areas of the Southern Cone in the late colonial period and into the 19th century. Gauchos tended to work as cattle herders and are considered a close equivalent to the cowboys of the U.S. western frontier.

Historically, gauchos were itinerant and tended to be loners. The image of the quintessential gaucho is one of a strong and rugged frontiersman who exuded masculinity and mystery. The gaucho was considered to be connected culturally to the land and to the lifestyle of the interior. Because of the stereotypical imagery associated with gauchos, they quickly became a symbol of national pride and regional greatness. Gauchos were known for their distinc-



Three Argentine gauchos dressed in the typical attire of the 19th-century cowboy of the Pampas. (*Library of Congress*)

tive lifestyle. They dressed in baggy trousers, or *bombachas*, and heavy ponchos. They generally carried a knife known as a *facón* and *boleadoras* (a type of lasso) to help herd cattle.

Gauchos played an important role in the formation of new nations in the Southern Cone. Many of them used their skills as horsemen to make up large contingents of cavalry in the wars for independence and in many of the regional conflicts that followed. As local strongmen, *caudillos* often recruited gauchos to serve in their private militias. Though he relied on their cooperation at times, the dictator JUAN MANUEL DE ROSAS saw their independent spirit as a threat and imposed measures to bring them more firmly under government control.

As the cattle and ranching industries grew in importance in Southern Cone economies during the 19th century, demand for the gauchos' skills grew. The cattlemen played an important role in the national ECONOMY, but they also became less free roaming, with many attaching themselves to large ranches. In the late decades of the 19th century, Argentine leaders encouraged modernization and INDUSTRIALIZATION instead of small-scale AGRICULTURE. President DOMINGO F. SARMIENTO was seen as being openly hostile to the gauchos. The epic poem *Martín Fierro*—a classic in Argentine LITERATURE—was written by José Hernández in 1872 as an indictment of Sarmiento's antigaucho policies (see MARTÍN FIERRO).

See also GAUCHO (Vol. II).

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Richard W. Slatta. *Gauchos and the Vanishing Frontier* (Lincoln: University of Nebraska Press, 1992).

**Geffrard, Fabre-Nicholas** (b. 1806–d. 1878) *president of Haiti* Fabre-Nicholas Geffrard was born in Anse-à-Veau on September 23, 1806. He was a high-ranking

officer in the Haitian army under FAUSTIN SOULOUQUE (1847–59).

Geffrard disassociated himself from the dictatorial regime of Soulouque. After earning the trust of the people, he proclaimed himself leader of the republic in Gonaïves, causing Soulouque to abdicate his rule.

As president (1859–67), Geffrard was a *griffe* (of black and mulatto ancestry) who reinstated order and tranquility after the upheaval and terror of Soulouque's term in office. Geffrard is known for creating a new constitution, based on ALEXANDRE PÉTION'S 1816 document, which primarily improved TRANSPORTATION and EDUCATION.

Geffrard helped restore ties with the Vatican, which had been strained since the revolutionary period. By signing a concordat with the Vatican in 1860, Geffrard expanded the domain of the CATHOLIC CHURCH in HAITI. The agreement contributed to the development of parochial schools, led by predominantly foreign-born clergy members.

Discontent among the elite and the rural *piquets* (rural peasants who were descendents of slaves) eventually forced Geffrard out of office in favor of the mulatto general Sylvain Salnave (1867–69). Geffrard died in 1878 in Jamaica.

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Murdo J. MacLeod. "The Soulouque Regime in Haiti—1847–59: A Reevaluation." *Caribbean Studies* 10, no. 3 (1969): n.p.

**gold** Gold is a precious metal historically used to make currency, religious relics, jewelry, and other luxury items. Prehistoric cultures in both Europe and the Americas viewed gold as a valuable substance, and its presence in the Americas was a major motivating factor for Spanish conquistadores during the era of conquest. The potential for gold and SILVER MINING in part dictated settlement patterns in the Spanish colonies in the early years of the colonial period. The apparent absence of gold in BRAZIL delayed Portuguese interest in establishing settlements there.

The extraction of gold and other metals for bullion made the Spanish Crown extremely wealthy during three centuries of colonial rule in Latin America. After the discovery of large gold deposits in Minas Gerais in 1690, the Portuguese Crown profited from its Brazilian colony. New gold mining activity also caused a population shift as large numbers of Brazilians moved to the mountainous southern region of the colony. While the mining of precious metals provided enormous profits for the Spanish and Portuguese Crowns, however, it bred an exploitative LABOR system in many areas. Indigenous workers



performed back-breaking labor in the Spanish mines, while black slaves worked in the gold mining regions of Brazil (see **SLAVERY**). Gold, silver, and other minerals were mined under Crown monopolies in the highly regulated mercantilist **ECONOMY** of the colonial period.

The wars of independence that plagued the Spanish colonies in the early decades of the 19th century brought a precipitous decline in the output of precious metals. A decade or more of warfare took its toll on most regional economies as mines were abandoned and infrastructure was destroyed. In Brazil, which achieved independence without the protracted warfare that had plagued other areas, the store of gold had largely been depleted by the turn of the century. As a result, the output of precious metals after independence never reached colonial levels. New technological advancements in the late 19th century helped to revive the mining of both gold and silver, however. The introduction of dynamite in the late 19th century allowed miners to bore more efficiently into the ground where gold deposits were found. The use of sodium cyanide

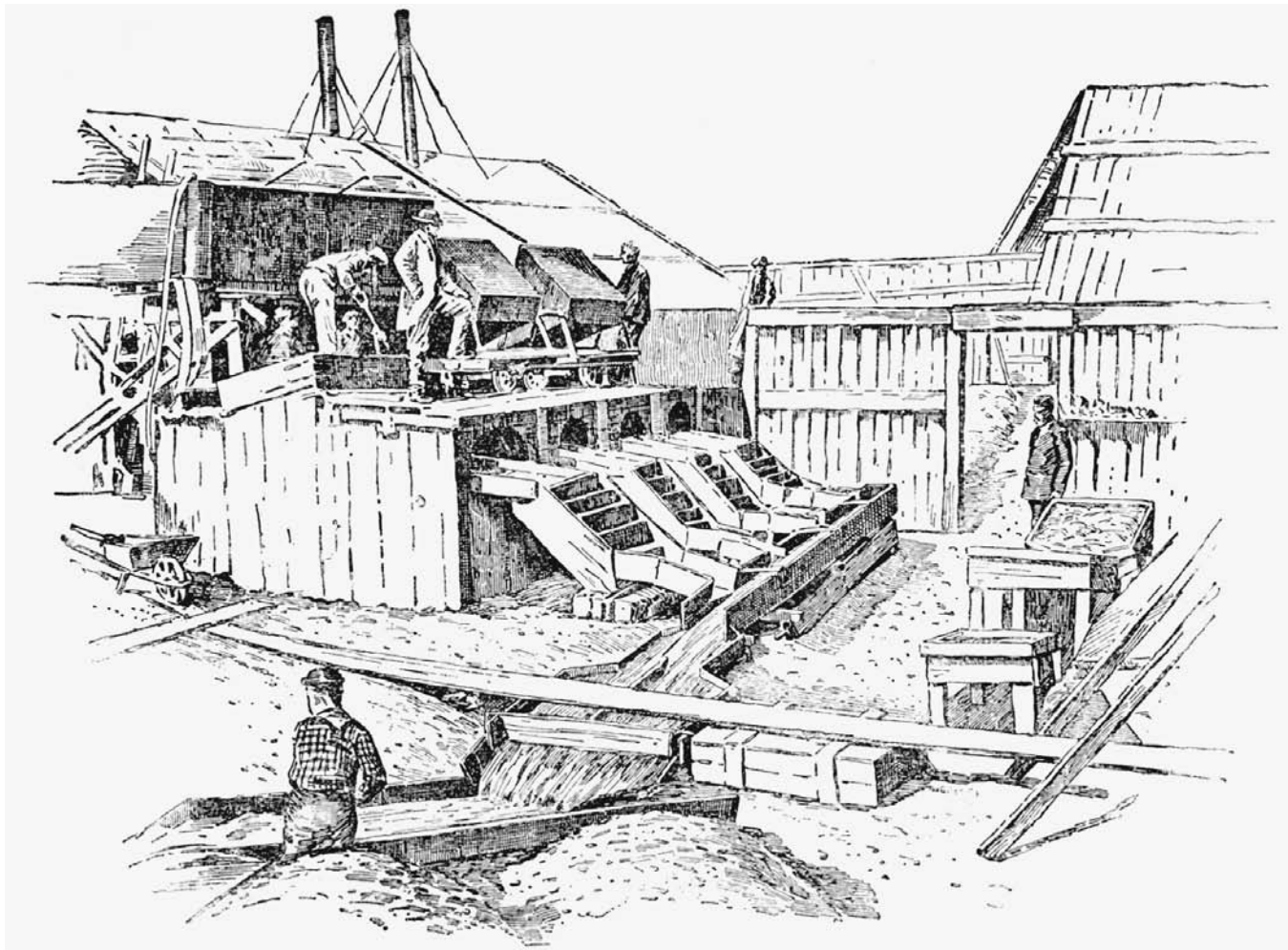
in extracting and cleaning the gold allowed miners to process ore of lesser quality. Periodically, new gold deposits were discovered in previously secluded and unsettled regions of the mountains or far-reaching frontiers. Foreign investment helped fund improvements in the mining industry, and gold extraction had made a modest recovery in areas such as **MEXICO** and **CHILE** by the end of the 19th century.

Rich gold veins were discovered in the California territory in 1849. That region had been part of the northern Mexican frontier since the colonial period and had been ceded to the United States after Mexico's defeat in the **U.S.-MEXICAN WAR** only a few months earlier. Large numbers of Latin Americans, particularly Mexicans, migrated north to join prospectors from all over the United States in the California gold rush (see **MIGRATION**).

See also **GOLD** (Vols. I, II).

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Sketch of a Brazilian gold-washing apparatus (From *The Gold Diggings of Cape Horn: A Study of Life in Tierra del Fuego and Patagonia*, by John R. Spears. New York: G. P. Putnam's Sons, 1895, p. 14)

**gólgotas** *Gólgotas* were a faction within the Colombian LIBERAL PARTY. They dominated Liberal politics in the mid- to late 19th century. *Gólgotas* advocated a radical form of LIBERALISM, and their aggressive reform led not only to a backlash by the opposing CONSERVATIVE PARTY but also to heated infighting within the liberal movement.

The *gólgota* faction was made up of young, idealistic, educated Liberals who came mainly from a wealthy and/or elite background. One such idealist, José María Samper (b. 1831–d. 1888), gave the group its name when he delivered a speech comparing its cause with that of the “martyr of Golgotha,” in other words, Jesus Christ. Overall, the group believed that strict adherence to orthodox liberalism would solve the new nation’s problems. *Gólgotas* were inspired by European liberal movements and other organized democratic societies that were set up at the same time.

COLOMBIA’S Liberal Party came to power in an era known as the Liberal Revolution, from 1849 to 1854. During that time, the *gólgota* faction dominated the party and pursued policies that upheld a progressive concept of individual liberties. Those policies, written into the liberal CONSTITUTION OF 1853, included a wide variety of liberal reform measures such as the abolition of SLAVERY, the nullification of the church *FUERO* (parallel court system), and the establishment of universal male suffrage. *Gólgotas* also imposed a federalist system of states’ rights and maintained a persistent LAISSEZ-FAIRE economic policy of free and open TRADE.

Such staunch adherence to doctrinaire liberalism incited opposition from competing factions within the Liberal Party. *DRACONIANOS* considered the *gólgota* policies too radical, while an influential artisan group resented open economic policies. Discord among Liberal factions culminated in a revolt that briefly brought the Conservative Party back to power. But, in 1863, the *gólgota*-dominated Liberal Party toppled the Conservative government once again and introduced the even more liberal Constitution of 1863. That document severely limited the power of the national government and defined Colombian politics until the rise of CONSERVATISM under RAFAEL NÚÑEZ.

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**Gómez, Máximo** (b. 1836–d. 1905) *Cuban independence leader* Máximo Gómez was the MILITARY leader of the revolutionary forces during the Cuban independence movement in the TEN YEARS’ WAR, 1868–78. He later played a prominent role in the movement for independence in the 1890s that culminated in the WAR OF 1898.

Gómez was born in Baní, DOMINICAN REPUBLIC, on November 18, 1836. He joined the Spanish military at a young age and fought Haitian incursions into the Spanish section of the island. He left the Dominican Republic in 1836 and relocated to CUBA as part of the Spanish army.

By the time the Ten Years’ War erupted in 1868, Gómez had grown disillusioned with the Spanish administration and the institution of SLAVERY in Cuba. He joined insurrection leader CARLOS MANUEL DE CÉSPEDES and supported the movement for independence. Gómez’s tactical skills made him a natural leader on the battlefield, and by 1873, he had taken over command of the revolutionary movement. Nevertheless, by 1878, the war had stalled, and Gómez began negotiating with Spanish general Arsenio Martínez Campos. Martínez Campos proposed the TREATY OF ZANJÓN, which offered amnesty to the insurgents and freed slaves in the independence army. The treaty did not guarantee Cuban independence, and Gómez and other leaders rejected the agreement. Unrest continued in the coming decades as Gómez fled into exile.

In 1895, Gómez joined JOSÉ MARTÍ and ANTONIO MACEO in another movement for independence. That rebellion eventually led to U.S. intervention in the War of 1898 and secured Cuban independence. Gómez turned down an opportunity to become president and instead retired from public service. He died in 1905.

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**Gómez Farías, Valentín** (b. 1781–d. 1858) *liberal politician and president of Mexico* Valentín Gómez Farías was a leader of the liberal political movement in MEXICO in the 19th century and served as president in the 1830s and 1840s. His attempt to enact reforms curbing the power and influence of the church, army, and aristocracy incited a rebellion that compelled ANTONIO LÓPEZ DE SANTA ANNA to join forces with Conservative leaders and impose a highly centralized government.

Gómez Farías was born on February 14, 1781, in Guadalajara. He was educated in MEDICINE and was influenced by the scientific focus of Enlightenment principles. In 1833, he was elected as vice president alongside Santa Anna. When Santa Anna retired to his HACIENDA and left the presidential duties in the hands of Gómez Farías, the Liberal politician immediately set about enacting aggressive liberal reforms that targeted primarily church and MILITARY interests. He reduced the size of the military and eliminated special *FUEROS*. He passed legislation restricting the political participation of the clergy, outlawing the mandatory tithe, and confiscating some church assets. Finally, he took control over EDUCATION away from the CATHOLIC CHURCH and closed down the University of Mexico.

These reforms represented the first bold attempt to force the tenets of LIBERALISM onto Mexican society and produced a powerful backlash among church and military leaders and other antiliberal forces. Conservatives rebelled under the cause of “*Religión y fueros*” (religion and

privileges) and called for the overthrow of Gómez Farías's administration. Although he had devoted his early career to promoting liberal politics, Santa Anna responded to the national crisis by coming out of retirement and fighting, this time on the side of the Conservatives. Gómez Farías was forced to flee to New Orleans, while the new Conservative administration of Santa Anna replaced the CONSTITUTION OF 1824 with his SIETE LEYES and formed a centralized and authoritarian government.

Gómez Farías returned to office briefly once more in 1846 during the chaos of the U.S.-MEXICAN WAR. He died in MEXICO CITY on July 8, 1858.

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**González, Manuel** (b. 1833–d. 1893) *president of Mexico* Manuel González was a political and MILITARY leader in MEXICO who was president of the nation from 1880 to 1884. His presidency was both preceded and succeeded by that of PORFIRIO DÍAZ and is considered the interregnum of the long period of rule known as the PORFIRIATO.

González was born on June 18, 1833, in Matamoros, Tamaulipas, into an agricultural FAMILY. He received a basic EDUCATION and worked for a short time as an apprentice to a family member. At the age of 14, he joined the Mexican military to fight against the U.S. invasion, and he continued his military career in the coming years. He fought on the side of the Conservatives during the REVOLUTION OF AYUTLA and the subsequent WAR OF THE REFORM. Nevertheless, when the French invaded in 1862, González offered his services to the resistance movement of BENITO JUÁREZ and fought under the leadership of Porfirio Díaz.

González rose through the ranks of the military and gained the trust of Díaz as a loyal general. As a Díaz supporter, González aided in the defeat of SEBASTIÁN LERDO DE TEJADA in the Plan de Tuxtepec, thus placing Díaz in power in 1876. González was elected president after Díaz stepped down after one four-year term, as required by the CONSTITUTION OF 1857. During his administration, he oversaw railroad development, and the first line between MEXICO CITY and El Paso was completed. González also created the Mexican National Bank, attempted to improve the nation's diplomacy and debt system with foreign countries, and put the nation officially on the metric system. Nevertheless, the end of his presidency saw a return of financial problems and corruption.

It was precisely those problems that allowed Díaz to return to office in 1884 despite constitutional restrictions and his own "no reelection" position. After leaving the presidential office, González served as governor of Guanajuato until his death in 1893.

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Don M. Coerver. *The Porfirian Interregnum: The Presidency of Manuel González of Mexico, 1880–1884* (Fort Worth: Texas Christian University Press, 1979).

**González Prada, Manuel** (b. 1848–d. 1918) *Peruvian politician, intellectual, and literary figure* Manuel González Prada was one of PERU's most prominent literary figures in the late 19th century. He was an early proponent of a radical form of LIBERALISM and in his later years was exposed to the influences of POSITIVISM in Europe. He used his literary skills to advance his deeply held political beliefs.

González Prada was born in LIMA on January 6, 1848. As a young man, he studied theology but quickly abandoned that discipline for the more alluring study of LITERATURE and poetry. Many of his early writings already demonstrated antagonism toward the CATHOLIC CHURCH, the MILITARY, and other institutions. González Prada fought in the WAR OF THE PACIFIC (1879–84). After Peru's defeat, the bitter poet traveled to Europe, where he was exposed to positivist and anarchist movements. On his return to Peru, he made strong appeals for reform in his increasingly radical writings. González Prada despised the legacy of restrictions the Spanish had placed on Peruvian society and called for greater awareness of the nation's racial and ethnic makeup in the context of national identity. In an era when many Latin American leaders were trying to "redeem" the Amerindian population, González Prada blamed society as a whole for the problems of NATIVE AMERICANS in works such as the essay "Nuestros indios" (Our Indians), published in 1904.

González Prada is best known for his collections of essays *Páginas libres* (*Free Pages*) and *Horas de lucha* (*Hard Times*), published in 1894 and 1908, respectively. His writings introduced the Latin American modernist style, which was later emulated by numerous literary figures (see MODERNISM). González Prada died on July 22, 1918, in Lima.

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**Gran Colombia** Gran Colombia was republic established in South America by Simón Bolívar as the wars for independence were concluding. Gran Colombia was the Liberator's attempt at creating one unified nation made up of the former colonies in Latin America. Bolívar intended it to be the foundation for a United States of South America. *Colombia* was a name commonly used to refer to the Americas prior to independence, and Bolívar selected the name for the new republic in the spirit of unity and the common colonial heritage of the region. Formally known as the Republic of Colombia, Gran Colombia was

in existence from 1819 to 1830. The republic encompassed the current countries of VENEZUELA, ECUADOR, COLOMBIA, and PANAMA as well as parts of PERU, BRAZIL, COSTA RICA, and GUYANA. Gran Colombia was weakened by internal divisions and infighting, and eventually, those problems caused it to break apart.

Independence leaders Francisco de Miranda and Simón Bolívar had long envisioned a unified American nation made up of all former Spanish and Portuguese colonies. They and others initiated a liberation movement in Venezuela in 1810, but for many years, it suffered various setbacks. As Bolívar succeeded in driving Spanish royalist forces out of crucial strongholds in Venezuela after 1816, he launched plans to establish the republic. He convened the Congress of Angostura in February 1819, at which delegates began drafting a constitution and debating progressive measures such as agrarian reform and the abolition of SLAVERY. Bolívar was elected president in August of that year, with FRANCISCO DE PAULA SANTANDER as vice president. Citing the need for strong-handed leadership in time of war, the congress also granted Bolívar near-dictatorial powers. The conflict over a strong, centralized government versus local autonomy eventually contributed to the decline of Gran Colombia.

While the congress worked on the new constitution, Bolívar continued to fight to rid neighboring regions of Spanish royalist forces and secure independence in those areas. His victory at the Battle of Boyocá ousted the royalist presence from New Granada. Leaders there had declared independence in 1810 and had since struggled against the Spanish royalist army. New Granada included the present-day countries of Colombia and Panama. Bolívar brought together the leaders of New Granada and Venezuela and formally created the Republic of Colombia.

In 1821, the Congress of Cúcuta finalized a constitution defining the political and legal structures of Gran Colombia. The document was approved on August 30, and in the interest of strengthening the coalition to win further wars of independence, it called for a highly centralized form of government. Geographically, the constitution divided Gran Colombia into three departments. Cudinarmarca, with its capital at BOGOTÁ, included the former region of New Granada. The Republic of Venezuela, with its capital at CARACAS, made up the second department. A third region consisting of present-day Ecuador was still under Spanish control, but upon its liberation in 1822, it became the third department of QUITO. Bolívar remained president and retained many of his dictatorial powers. Nevertheless, when Bolívar left to continue fighting wars of independence in Peru and BOLIVIA, authority passed to Vice President Santander.

Notably, the Constitution of 1821 included numerous progressive reform measures, including freedom of the press and full equality of all male citizens. It called for the gradual elimination of slavery through a “free birth” law and the abolition of the *mita*, the forced indigenous LABOR system. In keeping with the liberal politics of its framers, the document also stipulated measures for eliminating

communal landholdings by indigenous communities and provided for the confiscation of church properties. In Bolívar’s absence, Santander oversaw the implementation of many of these measures and attempted to administer the transition to the new government. He tried to stabilize the new republic’s ECONOMY by stimulating agricultural recovery after more than a decade of war (see AGRICULTURE). Santander also secured foreign loans and began attracting foreign investors to the region. Despite his efforts, however, the economy languished, and Gran Colombia was soon forced to default on foreign loans.

Despite a somewhat bleak beginning, Bolívar and Santander were both reelected in 1826. But, discontent had been festering over some of the reforms, such as Santander’s attempts to secularize EDUCATION. More important, regional resentment began to emerge. Much of the discord was rooted in ideological differences between CENTRALISM and FEDERALISM, but to some degree, the discontent was also tied to logistics. With such a large territory and relatively underdeveloped infrastructure, it was difficult for political and economic leaders to travel and communicate from one region to the next. Caracas and Bogotá were separated by more than 600 miles (966 km) of mountainous terrain. With the central seat of government authority in Bogotá, the Venezuelan elite felt isolated from the inner workings of the national government. Animosity also surfaced in Ecuador, where leaders felt the smallest of the three regions was generally overlooked by the government. Local craftsmen and manufacturers appealed to leaders in Bogotá for economic protection in TRADE policies, but in the spirit of LAISSEZ-FAIRE ECONOMIC LIBERALISM, leaders favored free trade over protectionism.

In April 1826, MILITARY COMMANDER JOSÉ ANTONIO PÁEZ rose in revolt against the government in Bogotá. Bolívar, who had been finalizing his BOLIVARIAN CONSTITUTION in Bolivia and Peru, returned to Venezuela to negotiate with Páez. After pacifying the revolt, Bolívar attempted to introduce the Bolivarian Constitution in Gran Colombia. Most leaders, including Santander, found the document to be unworkable. They also considered many of its measures, such as the appointment of a president for life, to be counter to the liberal, republican ideals that most of them favored. As conflict brewed within Gran Colombia, the fledgling republic also found itself challenged from abroad. A territorial dispute with Peru erupted into the Gran Colombia–Peru War from 1828 to 1829, further destabilizing the fragile government in Bogotá. When supporters of Bolívar moved to establish a monarchy after the Liberator’s tenure, Páez once again led Venezuela in rebellion in 1829. Liberal leaders emerged in the various regions in opposition to Bolívar, and Ecuador withdrew from Gran Colombia in 1830. By 1831, the republic had broken apart into Venezuela, Ecuador, and the Republic of New Granada (present-day Colombia and Panama).

See also ANGOSTURA, CONGRESS OF (Vol. II); BOLÍVAR, SIMÓN (Vol. II); MIRANDA, FRANCISCO DE (Vol. II); MITA (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II).

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**Grau Seminario, Miguel** (b. 1834–d. 1879)

*Peruvian naval admiral* Miguel Grau Seminario was the admiral of PERU's naval forces in the WAR OF THE PACIFIC (1879–84). He commanded the *Huáscar*, Peru's famous ironclad warship that saw battle in numerous conflicts, such as the Spanish attack in 1866. Grau was known for his bravery and cunning in battle, as well as for his well-mannered disposition. His heroic leadership in the War of the Pacific stalled the Chilean advance for several months.

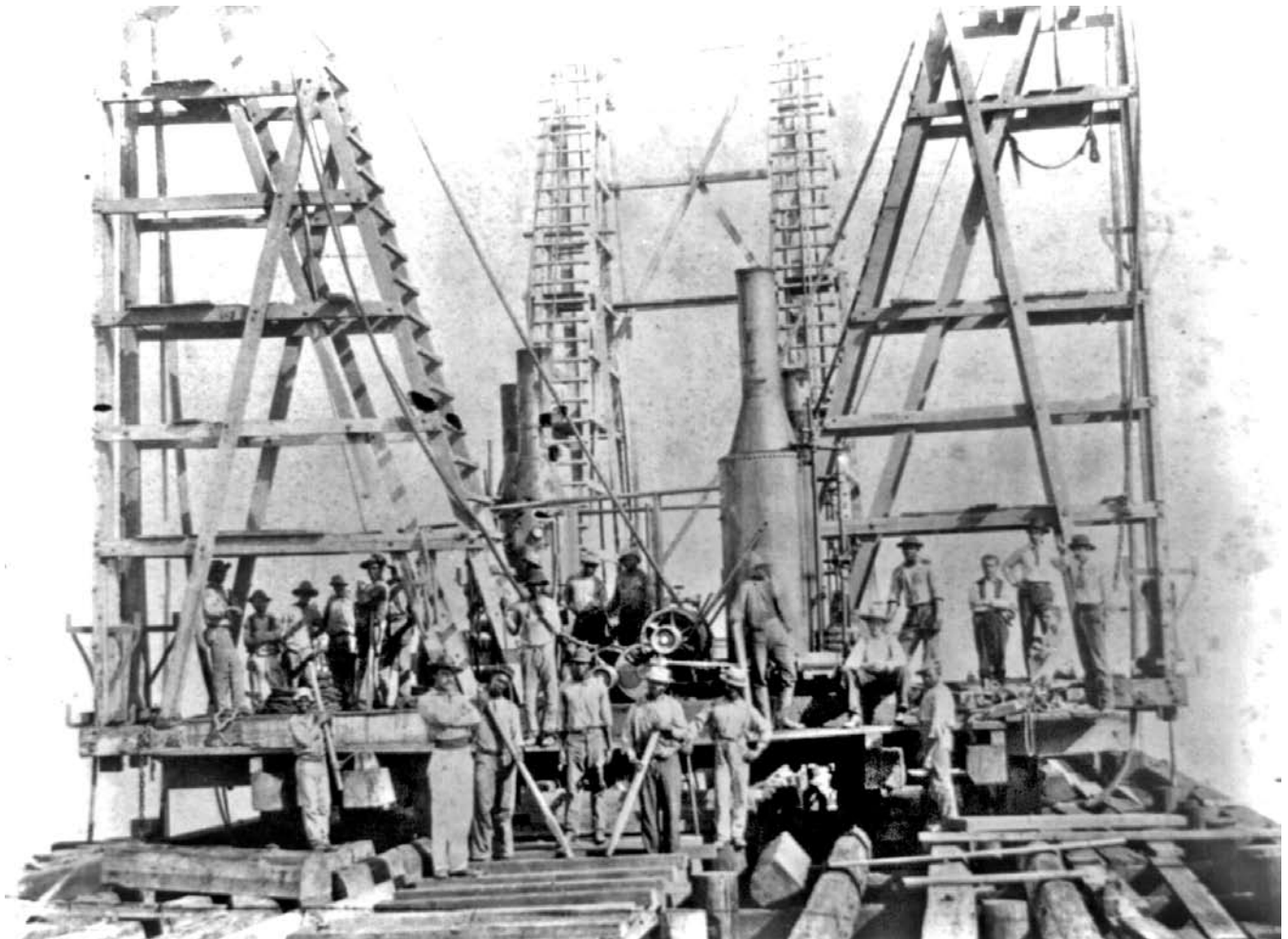
Grau Seminario was born on July 27, 1834. As a child, he worked on numerous merchant ships, and as a young man, he entered the Peruvian naval service. He took command of the *Huáscar* in 1868 and served in that position until he was elected congressional deputy in 1876. In 1879, Grau returned to his naval command with the outbreak of the War of the Pacific. Once again at the helm

of the *Huáscar*, Grau guided Peru's most important naval vessel in hit-and-run attacks against the Chilean forces for more than six months. The naval commander led his forces in liberating the port city of Iquique from a Chilean blockade and went on to wreak havoc on Chile's navy until fall 1879. On October 8, Grau's crew was roundly defeated by Chilean forces at the Battle of Angamos. Grau Seminario was killed in that battle, and his famous ship was captured by the Chilean navy. The naval commander was celebrated as a national hero for his bravery and MILITARY successes in the War of the Pacific.

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**Greytown Affair** (1854) Greytown, a small town at the mouth of the San Juan River on the Caribbean coast of NICARAGUA, received its name in 1841 when the British proclaimed its protectorate over the MOSQUITO COAST. A TRADE depot that dated to the Spanish colo-



This photograph from the 1880s shows a dredge-clearing channel in the Greytown harbor, in an attempt to build a canal across Nicaragua. (*Library of Congress*)

nial period, Greytown took on new significance as the United States and Great Britain became interested in a transisthmian transit route focused on the San Juan River, which had long been considered one of the most viable options in crossing the isthmus route (see TRANS-ISTHMIAN INTERESTS).

In 1850, Ephraim G. Squier negotiated a contract that gave Cornelius Vanderbilt's ACCESSORY TRANSIT COMPANY the right to construct a transisthmian connection using the San Juan River, Lake Nicaragua, and a road to the Pacific coast town of Rivas. To service his company's interests on the Caribbean side, Vanderbilt received a concession from British authorities to construct the town of Puntarenas, just north of Greytown, but serviced by the same bay area. Owing to the success of Vanderbilt's project, by 1853, Greytown was in economic decline. The British sought to impose high harbor and port fees on the Accessory Transit Company's ships using Greytown harbor. Violence followed Vanderbilt's refusal to pay such fees, and buildings in both towns were damaged. In July 1854, the U.S. government sent the USS *Cyane* to force the British to pay for the damage to Vanderbilt's properties. When the British refused, the *Cyane's* captain, George I. Hollins, acting on his own, ordered the bombardment of Greytown. The town was leveled and never recovered. A year later, the whole incident faded into the background as the Accessory Transit Company's route lost its popularity to the Panama Railroad Company, which crossed the isthmus at PANAMA, and WILLIAM WALKER arrived in Nicaragua in 1856 with visions of establishing his own rule over CENTRAL AMERICA.

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**Grito de Ipiranga (1822)** The Grito de Ipiranga was the Brazilian declaration of independence made by PEDRO I on September 7, 1822.

BRAZIL had risen from colonial status upon the Portuguese Court's relocation to RIO DE JANEIRO in 1807. Regent and future king John VI (r. 1816–26) made Brazil a kingdom in 1815 and continued to rule the Portuguese Empire from the Americas until a liberal revolt compelled him to return in Lisbon in 1821. John left his son Pedro to administer Brazil, but the regent found himself surrounded by advisers who increasingly promoted a complete break from Portugal. The Portuguese Cortês feared that Pedro would yield to calls for independence and demanded the prince regent return to Lisbon in 1822. At the same time, the Cortês attempted to repeal many of the freedoms Brazil enjoyed as a newly conferred kingdom. Backed by the powerful Brazilian elite, Pedro rejected Portugal's attempts to return Brazil to its former colonial status and declared independence.

Ipiranga was a small river running through SÃO PAULO, and it was from its banks that Pedro made his famous declaration. According to patriotic tales, Pedro



The Ipiranga Museum opened in São Paulo in 1895 to commemorate the 1822 declaration of independence by Dom Pedro I. (*Library of Congress*)

unsheathed his sword and uttered a few powerful words to sever Brazil's ties with Portugal. Three months later, he was crowned Pedro I, first sovereign of the EMPIRE OF BRAZIL. Pedro's reign lasted only until 1831, when he was forced to abdicate in favor of his five-year-old son, PEDRO II (r. 1831–89). Nevertheless, the memory of the Grito de Ipiranga remained. The event is memorialized today with a monument and a museum in São Paulo. The much-disputed Brazilian national anthem, officially approved in 1922, pays homage to Ipiranga in its opening lines.

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**Grito de Lares** (1868) Organized by revolutionary Puerto Rican nationalists, the Grito de Lares was an armed rebellion against the Spanish control of PUERTO RICO launched on the night of September 23, 1868. The chief planner of this MILITARY uprising was RAMÓN EMETERIO BETANCES, a Puerto Rican physician in political exile communicating with fellow revolutionaries on the mainland to plan the revolt.

The revolt was originally to take place on September 28, but following the capture of several rebel conspirators and the confiscation of incriminating documents from their homes, the attack was quickly moved up to September 23 before key members of the rebellion could be arrested. That night, around 400 poorly armed men gathered at the farmhouse of revolutionary leader Manuel Rojas, just outside of the town of Lares.

At midnight, they assaulted and easily captured Lares, where they arrested Spanish leaders, declared the establishment of the Republic of Puerto Rico, and declared a provisional government. However, the rebellion did not gain the support it needed from the local populace or from abroad in order to defeat the Spanish troops on the island. On the outskirts of the town of San Sebastián de Pepino, the Spanish army killed or captured the majority of the rebel army in less than 24 hours after the uprising began.

Many of the captured rebels eventually were given amnesty or sent into exile, and an armed uprising against Spanish control of Puerto Rico was never again attempted. Failing to incite popular revolt among the civilian populace of the island, the Grito de Lares maintained symbolic importance to the Puerto Rican independence movement, its only long-term consequence. Numerous proindependence Puerto Rican politicians have made the journey to the mountain town of Lares to pay homage to its revolutionary history, and September 24 is now a holiday in Puerto Rico.

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**Grito de Yara** (1868) The Grito de Yara was the rallying cry issued by CARLOS MANUEL DE CÉSPEDES in 1868. It marked the beginning of the TEN YEARS' WAR, CUBA's first major independence struggle against Spain.

Céspedes was a small plantation owner in the eastern provinces of Cuba. He had grown disillusioned with Cuba's colonial status in the Spanish Empire and led a conspiracy of local plantation owners to incite a revolution and push for the island's independence. The rebellion began on October 10, 1868, with the Grito de Yara. In his *grito*, Céspedes freed his slaves and called all Cubans to battle. The following day, Céspedes issued a formal proclamation that listed numerous grievances against the Spanish government and demanded independence. The list of complaints included a lack of political equality among Cuban creoles and the Spanish elite and unfair taxation. Céspedes also protested various violations of individual liberties, such as freedom of the press, freedom of speech, and freedom of assembly.

Céspedes's Grito de Yara laid the foundation for the demands made by the independence movement and provided the basis for a revolutionary government in the following years. Céspedes and his supporters wrote a constitution and set about instituting the reforms that had been part of their original battle cry. Even though the Ten Years' War failed to bring independence to Cuba immediately, October 10 has become a Cuban national holiday commemorating the Grito de Yara and the beginning of the war for independence.

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**Guadalupe Hidalgo, Treaty of** See U.S.-MEXICAN WAR.

**Guadeloupe** See CARIBBEAN, FRENCH.

**guano age** (1843–1879) The guano age was a period of rapid economic growth in PERU between 1843 and 1879 fueled by the newly developed guano industry. The economic prosperity created during the guano age provided the basis for several decades of relative peace and stability, and guano profits funded the expansion of infrastructure and other public works. Despite the overall potential for economic growth during the guano age, the benefits from the lucrative industry were spread unequally. Furthermore, Peruvian leaders failed to invest

the nation's wealth in projects that would sustain long-term development, and the country's ECONOMY slumped once the guano boom was over.

By definition, guano is seabird and/or bat excrement, which is rich in nitrogen, phosphorus, and other elements. During the colonial period, large deposits of guano found on the shores of Peru's coastal islands were used as fertilizer in South America's large agricultural sector (see AGRICULTURE). In the late 18th and early 19th centuries, European scientist Alexander von Humboldt (b. 1767–d. 1835) traveled throughout the South American continent studying nature and writing his observations. Humboldt's studies introduced the European agricultural sector to the possibilities of guano fertilizer, and demand for the substance began to grow. Guano fertilizers could increase crop yields substantially and as European agriculturalists were looking for ways to feed the ever-increasing industrial LABOR force, guano merchants looked to Peru for a steady supply.

Peruvian president RAMÓN CASTILLA was primarily responsible for negotiating guano contracts with British investors in the early 1840s. As finance minister under AGUSTÍN GAMARRA and then as president, Castilla set up a system of guano TRADE whereby British companies cultivated the fertilizer, and the Peruvian government kept a percentage of the revenues. The money earned during the guano age filled Peru's treasury, and Castilla used the proceeds to build schools and expand the nation's railroads. He devoted a sizable percentage of revenues to stabilizing Peru's economy and reducing the national debt. Guano profits also allowed the CAUDILLO to bolster his own popularity and become an enormously influential politician. With the national treasury no longer destitute, Castilla did away with the Amerindian tribute tax. In 1854, he pushed through legislation abolishing SLAVERY and used guano profits to compensate former slave owners for the loss of their "assets."

Castilla's policies seemed to put Peru on a track to economic and social stability, but a closer examination reveals that poor planning and unsound policies often created new problems for the nation. Many of the public works projects funded by guano profits were mismanaged and ultimately cost much more than they should have. Furthermore, the Peruvian government's blanket free trade policies allowed guano traders to prosper at the expense of the nation's merchants and craftspeople. Finally, in 1864, Spain attempted to seize one of the guano-producing islands, which led to a three-year war between the two nations that was ultimately won by Peru.

By the end of the 19th century, Peru's guano deposits had been dangerously depleted, causing a precipitous drop in exports. At the same time, artificial substances replaced guano in fertilizers. Peru suffered a severe economic downturn as demand for guano diminished and total output stalled. As the nation's economy worsened, treasury head and future president NICOLÁS DE PIÉROLA

brokered a deal with French investors, effectively turning over control of Peru's guano production. Piérola's policies contributed to the growing sense of dissatisfaction that led to the formation of the probusiness CIVILISTA PARTY.

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**Guardia Gutiérrez, Tomás Miguel** (b. 1831–d. 1882) *president of Costa Rica* Tomás Miguel Guardia Gutiérrez was a two-term president of COSTA RICA who accelerated liberal reforms. He was born into a prominent cattle ranching family in Guanacaste Province. Guardia joined the national army and rose to the rank of colonel, a position he used to engineer a coup that ousted President Jesús de Jiménez Zamora (b. 1823–d. 1897) on April 27, 1870. Guardia's support came not from the elite COFFEE barons who had dominated Costa Rican politics since the country's independence from Spain in 1821 but from small farmers and other groups of more modest means. The latter were concerned about the economic and political influence of the coffee-growing elite. The influence of the most prominent coffee-growing families, such as the Montealegres and Moras, was terminated with the ousting of Zamora.

Guardia ruled the country through a puppet government and directed the writing of a new constitution in 1871, a document that remained in effect until 1949. Guardia won the 1872 presidential election but was constitutionally restricted from seeking reelection in 1876. His successor, Bruno Carranza Ramírez (b. 1830–d. 1897), served only four months, however, before Guardia engineered another coup on September 11, 1877. Guardia remained in office until his death by natural causes on July 6, 1882.

Guardia ruled as a dictator. While he outlawed political associations and public political debate, he nevertheless reflected the LIBERALISM that swept across Latin America in the late 19th century. He directed the government seizure of idle land on large estates for distribution to farmworkers and instituted taxes on personal wealth and possessions. He oversaw the construction of public schools and modern sanitation facilities in urban areas and abolished capital punishment. At great cost to the government, Guardia administered the construction of the Atlantic railroad that further boosted sugar and coffee exports. The debt incurred for construction of the Atlantic railroad became Guardia's greatest legacy.



**Further reading:**

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**Guardia Rural** See *RURALES*.

**Guatemala** Totalling 42,092 square miles (109,018 km<sup>2</sup>), Guatemala is the northernmost nation in CENTRAL AMERICA. It is bounded to the north by MEXICO, to the southeast by HONDURAS and EL SALVADOR, to the east by BELIZE and the Gulf of Honduras, and to the south by the Pacific Ocean. Its high mountainous regions provide excellent land for agricultural pursuits, particularly COFFEE growing, while the hot and humid plains in the east are home to the banana industry (see AGRICULTURE). Both products have dominated Guatemala's ECONOMY into the 21st century.

First Antigua and then Guatemala City served as the capital of the captaincy general for Central America during Spanish colonial times. The Spanish administrative presence in the region contributed to a strongly conservative political philosophy. Influenced by the rhetoric of the French Enlightenment in the mid- and late 18th century, Guatemala City became a seedbed for liberal political thought. Controversy between conservatives and liberals erupted in 1821. The liberals supported independence, first in joining the Mexican Empire and subsequently, in 1824, the UNITED PROVINCES OF CENTRAL AMERICA. In contrast, the conservatives remained loyal to Spain. After independence, conservatives favored maintaining colonial political, economic, and social structures. Liberal philosophy prevailed in both instances.

The ideological controversy was the basis for a three-year civil war, from 1826 to 1829. Led by MANUEL JOSÉ ARCE, the conservatives sought to regain and then secure their control of the Guatemalan government. The liberal president of Honduras, FRANCISCO MORAZÁN, led an army against Arce, ousting him in 1829 and installing the liberal newspaper editor Pedro Molina (b. 1777–d. 1854) as provisional president. Molina was followed by another liberal, JOSÉ FELIPE MARIANO GÁLVEZ, in 1831, who served until ousted by a conservative counter-revolt in 1838, the same year that the United Provinces of Central America disintegrated. During his tenure, Gálvez introduced several liberal reforms, including the building of roads and schools, legalizing rights of illegitimate and legitimate children, and passing the controversial LIVINGSTON CODES, which mimicked the U.S. and British legal systems. Among other provisions, the codes abolished the death penalty and provided for trial by jury.

The Livingston Codes triggered a conservative backlash that had been simmering throughout the Gálvez administration. A cholera epidemic gripped Guatemala in 1838. While it concerned urban dwellers, it frightened rural

indigenous groups who were already protesting against Gálvez's reforms, particularly the restrictions placed on the CATHOLIC CHURCH. José Rafael Carrera, a 23-year-old ladino (or mestizo) resident of Mataquesuintla, used the epidemic to mobilize the NATIVE AMERICANS into a guerrilla insurgent movement that brought down Gálvez on February 1, 1839. Carrera's victory earned him the support of the conservative Catholic clergy, the conservative landowning elite, and the uneducated Amerindian populace. While Carrera remained the power behind the scenes, he imposed Mariano Rivera Paz (1839–44) as head of the Guatemalan government. Rivera Paz presided over a period of strong conservative reaction to earlier liberal reforms until 1844, when Carrera took over the presidency until he was forced out in 1848. Carrera returned to the presidency in 1851 and, three years later, on October 21, 1854, declared himself president for life, a declaration approved by the conservative elite and the clergy, who later played a significant role in Carrera's dictatorial regime.

Throughout his administration, Carrera encouraged the agro-export economy and paid greater attention to the national infrastructure than any of his predecessors. Coffee replaced cochineal as Guatemala's primary export and by 1865 accounted for 50 percent of all exports. Even so, Carrera prevented large-scale acquisition of Amerindian lands by coffee growers. In regional matters, Carrera intervened directly in El Salvador and Honduras to maintain governments friendly to Guatemalan interests. In 1856–57, he sent troops into NICARAGUA to join the Central American coalition that ousted WILLIAM WALKER from that country. At the time of Carrera's death in 1865, Guatemala's elite enjoyed prosperity and stability under a dictatorial government.

Although Carrera exiled most of his liberal opponents, the simmering opposition continued and surfaced in 1865 when General Vicente Cerna (b. 1810–d. 1885) succeeded him. The Cerna administration proved to be nothing more than a transition to liberal rule. In 1871, leading liberal spokesman Miguel García Granados (b. 1809–d. 1878) joined with General JUSTO RUFINO BARRIOS to defeat the government army at the Battle of San Lucas Sacatepéquez on June 29, 1871. Two days later, Barrios was named provisional president, and two years later, in 1873, he was elected president. He was the first of a long line of liberal dictators who governed Guatemala until the mid-20th century.

In the political arena, Barrios instituted sweeping changes. The Catholic Church found its tithes abolished and property expropriated, and the number of priests in the country was reduced. Marriage and divorce came under civil law, and the government replaced the church as the keeper of vital statistics. Barrios also began the modernization of Guatemala City and Quetzaltenango. While he boasted about expansion in EDUCATION, only the urban middle and upper classes benefited from this, at the expense of rural villagers. To encourage expanded

production and exportation of coffee, Barrios supported infrastructure projects, such as the construction of roads, railroads, and port facilities financed by foreign capital. The government permitted coffee planters to encroach on indigenous lands. The confiscation of land by elites made Amerindian LABOR available for plantation work. Finally, in 1879, Barrios directed the writing of a new constitution, which permitted his reelection the next year.

Barrios intervened in Honduran and Salvadoran political affairs and settled differences with MEXICO by giving up Guatemalan claims to Chiapas State but renewed the Guatemalan demand for the annexation of present-day BELIZE. Barrios's effort to reestablish a Central American union met with failure; it also resulted in his death, when a Salvadoran army defeated the Guatemalans in the Battle of Chalchuapa on April 2, 1885.

The Guatemalan "coffee elite" from the western highlands picked General Manuel Lisandro Barillas (b. 1845–d. 1907) as the "Reformer" Barrios's successor. In 1892, Barrios's nephew José María Reina Barrios (b. 1854–d. 1898) assumed the presidency until his assassination in 1898. Both emphasized the nation's continued economic development and witnessed large-scale German immigration into the country and the spread of the U.S. banana interests in mainly the Caribbean region. Another liberal from Quetzaltenango, Manuel Estrada

Cabrera, became president in 1898 and commenced a 22-year reign in Guatemala.

See also ESTRADA CABRERA, MANUEL (Vol. IV); GUATEMALA (Vols. I, II, IV).

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**Guayaquil** Located in present-day ECUADOR, the port city of Guayaquil was founded in 1538. The city gained prominence as Spain's principal shipyard on the Pacific coast and the occasional site of pirate attacks. Beginning in the 18th century, the region around Guayaquil began exporting CACAO, from which chocolate is made, and this product became the source of Guayaquil's wealth in the 19th century.

During the age of independence, Guayaquil hosted the historic meeting between the two great liberators,



Port scene of Guayaquil, Ecuador's main seaport (Library of Congress)

Simón Bolívar and José de San Martín, after which San Martín retired into exile and Bolívar saw the independence movement in South America to completion. After independence, Guayaquil and its environs gained the reputation of being the Liberal Party's base and the locus for Liberal rebellions against Conservative regimes from the highlands. Guayaquil and its surrounding provinces provided José Eloy Alfaro Delgado with recruits for his LIBERAL REVOLUTION of 1895.

By the late 19th century, Guayaquil emerged as Ecuador's most important city. Attracted by the possibility of more lucrative employment, indigenous people from the highlands crowded into Guayaquil, swelling its population and straining its ability to provide social services. Although some of the trappings of modernization, such as gas streetlights, brightened Guayaquil, for many years it lacked a potable water supply and did not have sufficient schools for the growing population. All-too-frequent fires consumed entire neighborhoods, and until the 20th century, respiratory and enteric illnesses killed thousands. Infectious diseases such as yellow fever took a tremendous toll until U.S. officials helped clean up what had become known as the "pest hole of the Pacific." Funding for sanitation improvements came from increased tax revenues from cacao exports, and locals complained that too many resources were siphoned off to support the wasteful national government in QUITO.

See also ALFARO DELGADO, JOSÉ ELOY (Vol. IV); BOLÍVAR, SIMÓN (Vol. II); SAN MARTÍN, JOSÉ DE (Vol. II).

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**Guerra Grande** (1838–1851) Guerra Grande was the civil war fought in URUGUAY between the BLANCO PARTY and the COLORADO PARTY from 1838 to 1851. The destructive war destabilized the newly independent nation and brought foreign intervention by BRAZIL, ARGENTINA, France, and Great Britain. The war resulted in near dominance by the Colorado Party and a close alliance between Uruguay and Brazil for much of the rest of the 19th century.

The Guerra Grande began as political factionalism developed among former independence allies MANUEL ORIBE, president from 1835 to 1838, and JOSÉ FRUCTUOSO RIVERA, president in 1830–34 and 1839–43. Rivera split with Oribe during the latter's presidency and eventually overthrew Oribe's administration. Political rivalries escalated into war as Oribe's rural and agricultural supporters formed the *blancos* and Rivera's urban intellectual supporters formed the *colorados*. The war immediately attracted the attention of foreign leaders. Argentine dictator JUAN MANUEL DE ROSAS supported the *blancos*, while the Colorado Party won the support of France, Great

Britain, and Brazil. The French initially intervened by sending a naval blockade to the Río de la Plata. In 1842, Argentine forces aided the *blancos* in defeating the *colorados* at the Battle of Arroyo Grande, and Rivera fled to Brazil in exile. After 1842, Great Britain and Brazil both intervened on behalf of the *colorados*, while Oribe laid siege to Montevideo for eight years.

By 1850, it appeared that the *blancos*—backed by Rosas—would win the conflict, but JUSTO JOSÉ DE URQUIZA began a rebellion against Rosas, who was forced to withdraw his support in Uruguay. The *colorados*—aided now by Brazil—took control of Montevideo and ended the long civil war. An 1851 peace treaty declared neither side the winner, although the *colorados* dominated Uruguay's political scene for most of the rest of the century.

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**Guerrero, Vicente** (b. 1782–d. 1831) *independence leader and president of Mexico* Vicente Guerrero was a mixed-race *casta* who became a leader in MEXICO's war of independence and eventually second president of the federal republic of Mexico.

Guerrero was born on August 10, 1782, in a village near Acapulco. His family was of meager means, and Guerrero was uneducated, working as a mule driver and a gunsmith. When the independence movement erupted in 1810, he joined the insurgents, serving as a lieutenant under José María Morelos y Pavón. Guerrero quickly proved himself an able MILITARY leader. Guerrero is credited with keeping the independence movement alive after Miguel Hidalgo y Costilla and then Morelos were captured and executed. His army kept constant pressure on the colonial government through small insurgent strikes in Oaxaca. He rejected government offers of a pardon and land in exchange for laying down his arms.

In 1820, Spanish army officer AGUSTÍN DE ITURBIDE was sent to launch an offensive against Guerrero but instead requested a meeting to propose a compromise. After a series of negotiations, Guerrero and Iturbide produced the Plan of Iguala, which proclaimed Mexico's independence under a traditional system of monarchy. The two leaders combined forces and created the Army of the Three Guarantees. Iturbide was later named emperor Agustín I, but when he proved ineffective, Guerrero joined ANTONIO LÓPEZ DE SANTA ANNA and other military leaders in the PLAN DE CASA MATA, which eventually ousted Iturbide in February 1823.

Guerrero found himself at the head of the Yorkish Rite Masonic Lodge in the 1820s and in that position supported fellow independence hero and liberal GUADALUPE VICTORIA as the first president of the republic (1824–29). In 1828, Guerrero ran for president and lost

to a conservative candidate, but he and his supporters led a rebellion that placed Guerrero in office in 1829. He promoted policies to improve the lot of the poor, including abolishing SLAVERY. He also led the country through an attempted invasion by the Spanish in 1829. Shortly after putting down that uprising, Guerrero was deposed by his conservative vice president, Anastasio Bustamante. He was captured by forces loyal to Bustamante and executed on February 14, 1831.

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**Guyana (British Guiana)** Guyana is a former British colony along the northeastern coast of South America. It encompasses roughly 80,000 square miles (207,200 km<sup>2</sup>) and is bordered by SURINAME to the east, BRAZIL to the south and west, and VENEZUELA to the west. Its tropical climate made it ideal for plantation AGRICULTURE, and SUGAR cultivation thrived for many centuries.

Guyana was first colonized by the Dutch in the 17th century (see CARIBBEAN, DUTCH). Although a relatively large indigenous population inhabited the region, Dutch settlers were unable to use the local population as a reliable LABOR SOURCE. Many NATIVE AMERICANS fled into the interior as plantation agriculture emerged along the coast. Sugar soon became the main agricultural product, and planters brought in large numbers of African slaves to perform the necessary manual labor on plantations. Like other areas with large slave populations, the Guyanese faced a number of serious revolts, which were put down violently. Escaped slaves often sought refuge in the colony's vast and dense jungle interior. By the 19th century, maroon communities had developed into large self-sufficient villages of former slaves. Attempts by the Dutch to encourage white settlers to migrate to Guyana resulted in large numbers of British moving into the region in the late 18th century. Conflicts between the British settlers and the Dutch colonial administration were common, as planters resisted tax laws and made numerous attempts to create institutions of self-government. A diplomatic dispute that erupted between the British and the Dutch after the outbreak of the French Revolution eventually resulted in the Dutch ceding control of Guyana to the British in 1814.

The British abolished SLAVERY throughout the colonies in 1838, and former slaves quickly abandoned Guyanese plantations. Some former slaves attempted to make the transition to small farming, while large-scale planters faced a serious labor shortage. In an attempt to meet the growing labor needs, colonial officials implemented a system of indentured servitude and relocated thousands of workers from the British East Indies colonies. As a result of those labor policies, Guyana's

population experienced a profound transformation in the last half of the 19th century. Large numbers of Afro-Guyanese found themselves competing with the expanding Indo-Guyanese sector, which eventually grew to make up approximately half of the colony's population. The two ethnic groups have a long history of conflict and animosity.

In the last half of the 19th century, British colonial officials attempted to consolidate Crown control over the region (see CARIBBEAN, BRITISH). A series of political reforms culminated in the 1891 Constitutional Ordinance, which diminished some local autonomy and tied the colony more closely to the British system. Investors began promoting economic modernization, and the region's first railroads opened in the 1840s. In later decades, Crown policies to encourage economic development resulted in an expansion of MINING. Survey expeditions to mark Guyana's boundary resulted in a border dispute with neighboring Venezuela. That conflict was only resolved in 1899 after a long series of outside arbitrations.

Guyana remained a British colony until the 1960s. It remains a part of the British Commonwealth today.

See also GUYANA (Vols. I, II, IV).

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**Guzmán Blanco, Antonio** (b. 1829–d. 1899) *caudillo and president of Venezuela* Antonio Guzmán Blanco was born on February 28, 1829, in CARACAS, VENEZUELA. Son of prominent journalist and LIBERAL PARTY leader Antonio Leocadio Guzmán (b. 1801–d. 1884) and Carlota Blanco Jerez de Aristiguieta of the Caracas elite, Guzmán Blanco pursued studies in law and politics in the nation's finest schools. He began a career in public service in 1848, when he went to work in the office of the Ministry of Foreign Relations. While working in this post and pursuing his law degree, Guzmán Blanco became romantically involved with the niece of then president José Tadeo Monagas (1847–51, 1855–58). Disapproving of the relationship, the president appointed Guzmán Blanco to a diplomatic post in the United States.

The young politician returned to Venezuela in 1858 but soon after was caught up in the turmoil of the FEDERAL WAR. The struggling government of Julián Castro (1858–59) expelled him from the country on suspicion of conspiring to overthrow the provisional president. Guzmán Blanco took refuge in the Caribbean and allied with fellow Liberals Ezequiel Zamora and Juan Crisóstomo Falcón (1864–68) to lead the revolution. After a five-year civil war,

the Liberal coalition secured a Conservative surrender in the Treaty of Coche. General Falcón became president, and Guzmán Blanco became vice president in 1864. In that post, he carried out important diplomatic missions in Europe over the next two years.

The Liberal leaders also promulgated a new constitution that provided considerable provincial autonomy under a federalist system. The document included numerous social reforms intended to appeal to the general populace, which had largely supported the Liberals in the Federal War. Recalcitrant regional CAUDILLOS, now with constitutional autonomy, constantly challenged the federalist government, as did the old guard supporters of the Managas brothers. The latter group led a revolt in 1867 known as the Revolución Azul (Blue Revolution) to overthrow President Falcón. Forced into exile once again, Guzmán Blanco joined forces with his father to challenge the *azules*. Together, father and son enlisted the support of numerous powerful regional caudillos, and in April 1870, Guzmán Blanco successfully led the April Revolution to overthrow the *azules* and take Caracas. The Liberal leader began a dictatorship that continued virtually uninterrupted for 18 years, referred to as the *guzmanato*.

During his first administration, known as the *septenio* (seven years), from 1870 to 1877, Guzmán Blanco built a reputation as a strong-armed leader and defender of liberal ideals. He eliminated many traditional privileges held by the CATHOLIC CHURCH, such as the ability to own private property and the parallel court system. He also established laws allowing civil marriage, removing yet another social control from the hands of the church. Guzmán Blanco deviated from his earlier federalist platform by consolidating power in order to eliminate the threat of regional caudillos and reduced the number of states from 20 to nine. He stabilized the nation's ECONOMY by issuing a common national currency and attracting foreign investors. Bolstering the nation's finances allowed him to implement a number of social

reforms, and he started by legislating free and obligatory primary EDUCATION. A healthy national treasury also provided funding to improve the nation's TRANSPORTATION infrastructure. Guzmán Blanco oversaw the expansion of major roadways, the development of an effective port system, and the construction of the first railroad. His administration was associated with modernization and progress as he worked to beautify major cities by building national monuments and public buildings in grand style. These accomplishments earned him the title the "Illustrious American," and he cultivated his image through a combination of personality politics and intimidation.

Guzmán Blanco's second term of five years, from 1879 to 1884, is known as *el quinquenio*. It began when he overthrew the administration of Francisco Linares Alcántara (1878–79) in the Revolución Reivindicadora (Vindicating Revolution). This conflict demonstrated once again that Guzmán Blanco would resort to force of arms to ensure that his political visions were followed. His final term, from 1886 to 1888, is known as *el bienio* or *la aclamación* and was characterized by the same combination of charisma, tyranny, and persuasion to continue his liberal modernization agenda. During the *guzmanato*, Guzmán Blanco achieved some semblance of national unity and progress but frequently at the expense of civil liberties. He is also criticized for the personal fortune he amassed in shady financial deals involving the national treasury.

In 1888, a coup overthrew Guzmán Blanco's administration while he was traveling in Europe. The caudillo retired to Paris and died there on July 28, 1899.

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# H

**hacienda** An hacienda is a large landed estate devoted primarily to AGRICULTURE in Latin America. Haciendas were an important form of agrarian production and land ownership dating back to the colonial period. Haciendas sometimes emerged around MINING activities and early industrial plants to provide foodstuffs and other agricultural supplies to the workforce. The hacienda system caused a variety of problems, such as income inequality and an imbalance in the concentration of land ownership.

Many haciendas were enormous, encompassing 25,000 acres (10,117 ha) or more, but smaller haciendas were also common. Initially, nearly all haciendas operated as self-sufficient units of production. Generally, they had their own chapel, jail, retail store, and housing for workers. During the colonial period, haciendas were owned mainly by the nobility and the CATHOLIC CHURCH. The church acquired property through endowment and bequeathal and by the end of the colonial era was the largest landowner in Latin America.

The extensive landholdings of the Catholic Church became the target of a number of liberal reforms throughout Latin America in the 19th century. Postindependence leaders in MEXICO, COLOMBIA, and BOLIVIA passed laws requiring the church to divest itself of all properties not required for immediate church business. Liberal leaders intended to break up church-owned haciendas and sell smaller plots of land to individual farmers. Many liberal intellectuals envisioned creating new nations with an economic system based on the agricultural output of small farmers, but these visions failed to take into account that most NATIVE AMERICANS did not understand the concept of private property, while the elite saw liberal land reform as a way to increase their large landholdings even further.

Instead of creating nations of small farmers, 19th-century liberal land reforms exacerbated the trend of land concentration in the hands of a few in a system known as *LATIFUNDIO*. By the end of the 19th century, most of Latin America's arable land was owned by local elite or foreign agribusinesses.

The owner of an hacienda, known as the *hacendado*, traditionally held a type of patrimonial control over the entire estate. Below the *hacendado*, a variety of supervisors and overseers managed a large workforce made up of poor peasants. During the colonial period, forced LABOR drafts supplied the labor for large haciendas. By the 19th century, many haciendas operated under a labor system of debt peonage. Workers frequently entered into contracts that were designed to force them into debt and long-term servitude. Contracts generally stipulated that workers were to be paid in credits that could be redeemed only at the overpriced hacienda store. Oppressive working conditions on haciendas combined with the disproportionate concentration of land and wealth provoked numerous calls for reform in the 20th century. Land disputes were a driving force behind the outbreak of the Mexican Revolution in 1910. Conflict over land issues continued in most of the region throughout the 20th century.

See also CREDIT (Vol. II); DEBT PEONAGE (Vol. II); HACIENDA (Vol. II); MEXICAN REVOLUTION (Vol. IV).

#### **Further reading:**

Raymond Buve, *Haciendas in Central Mexico from Late Colonial Times to the Revolution: Labour Conditions, Hacienda Management, and Its Relation to the State* (Amsterdam: Centre for Latin American Research and Documentation, 1984).

**Haiti** At the close of the 18th century, Haiti was in the final phases of the Haitian Revolution, which had begun in 1791. By 1797, the French held power in Saint Domingue (as Haiti was known before independence) in name only, and **SLAVERY** in the colony had been abolished (see **CARIBBEAN, FRENCH**). The colony's leader, Toussaint Louverture (1801–03), having proclaimed himself governor-for-life, alarmed and offended the French ruler Napoléon Bonaparte by promulgating his own constitution without France's approval. In response, in late 1801 Napoléon sent an expeditionary force led by General Charles Leclerc to reinstate direct French rule. The Haitian rebels resisted, but when the French negotiated for peace, one by one they surrendered. The Haitian military officers then joined the French army.

Nevertheless, when Toussaint Louverture was tricked, arrested, and deported to France, where he was imprisoned and later died, the Haitian rebels rose up once again. Mulattoes under **ALEXANDRE PÉTION** (1806–18) and blacks under **JEAN-JACQUES DESSALINES** (1804–06), fearing that Napoléon would reinstate slavery (as he did in nearby Guadeloupe), joined forces and defeated the French at the Battle of Vertières on November 18, 1803.

Independence from France was proclaimed on January 1, 1804, with Dessalines as the new governor-for-life, making Haiti the first free black republic in the world and the second country (after the United States) to gain independence in the Western Hemisphere. This feat generated both positive and negative attention in the international community. As much as the Haitian Revolution symbolized hope for those in bondage, it shocked and instilled terror in nations still actively using the slave system.

The years of war upset the highly lucrative colonial agricultural system. While many of the plantations that had been worked by slaves were destroyed, the newly acquired colonial plots of land were irregularly distributed under the new Haitian government. Freed slaves were not interested in undertaking the intensive physical **LABOR** required to generate the volume of crops necessary for profit either on plantations or the smaller plots of land.

Regional racial divisions between northern “black” Haiti and southern “mulatto” Haiti were strong. In the north, where the most fertile farmlands lay, the French had used African slaves primarily as disposable farm labor on **SUGAR** plantations. The work was extremely difficult, and the death toll was high. For this reason, African slaves were continually imported in high numbers to these plantations. The ratio of black to white immediately preceding the revolution is estimated at 10 to 1.

The French colonial plantations in the south were smaller owing to the terrain. The colonists had compensated for this by cultivating crops that required less space and labor, such as **COFFEE** and indigo. These plantations, therefore, had smaller slave populations and a lower slave mortality rate. Additionally, slave owners and slaves

often cohabitated or lived in much closer proximity than in the north. The result was an abundance of mulatto offspring as Frenchmen engaged in sexual relations with their female slaves. Mulatto children were often claimed by their French fathers, as permitted by French law (**Code Noir**), and thus received better treatment than they might have otherwise. They were commonly freed by their fathers and educated in France, and many were Catholic. They also often inherited their father's property, with some becoming wealthier than whites and slave owners themselves. Although mulattoes were unhappy with the restrictions placed on them by France and the racism they experienced as people of “mixed race,” they nonetheless desired to be closer to the French and strove to emulate European culture and habits.

During the revolution, the Haitian population, both the black majority and the mulatto minority, had unified to overthrow the French. However, once independence was declared, racial and class tensions reignited under Dessalines.

Since the 19th century, blacks have made up the majority of the Haitian population. During the 19th century and still today most Haitians speak Creole and are members of the poor, uneducated, and agrarian peasantry. Most have tended to follow **VODOU** and/or other African traditions, whereas the French-speaking mulattoes have generally identified with the rich, educated, governing elite controlling the cities and commerce and adhering strongly to European ideology and **RELIGION**.

Because Haiti had been under colonial rule since 1492, when Christopher Columbus claimed Hispaniola for Spain, the new Haitian government was patterned after the European model. This perpetuated hierarchical and elitist attitudes, which further exacerbated differences of class, race, and gender.

Many of the 19th-century leaders of the Republic of Haiti were corrupt. Some were repressive and prone to violence, excess, and tyranny, while others expropriated land and other national assets. Not a few were career **MILITARY** officers who became national leaders. The tendency of Haitian presidents to use the military as police and/or paramilitary forces against the populace and/or political opponents began in the 19th century and set a precedent that has negatively affected successive regimes.

## INDEPENDENCE

As the Republic of Haiti's first leader, Dessalines ruled as a dictator. Immediately after independence was proclaimed, he unleashed a bloody fury on the remaining French colonists, who were, by and large, either thrown out of the country or killed, regardless of age, gender, or occupation. Agricultural productivity was nonexistent at this time. In an attempt to re-create an **ECONOMY** based on **AGRICULTURE**, Dessalines reinstated Toussaint's plantation system, **FERMAGE**, which bound workers to a specific workplace. Similar to slavery, severe penalties were imposed on runaways and those who harbored them.

Dessalines used the military to help govern the nation. In 1804, he crowned himself emperor of Haiti. Despite his stated intentions, Dessalines was corrupt, spending lavishly and tapping the country's natural resources for personal gain. Additionally, land expropriated from the French colonists was unfairly distributed. Despite having been born a slave and suffered racism most of his life, Dessalines harbored racist attitudes and his corrupt practices soon alienated mulattoes in the south, including his former ally Pétion. Although many mulattoes resented Dessalines for racial reasons, the more educated among them considered the emperor and his aides and officers offensively ignorant. Furthermore, brutality toward whites during and immediately after the revolution shocked foreign governments and resulted in further isolation of the new nation. Dessalines was eventually assassinated by political rivals on October 17, 1806, at Larnage (now known as Pont-Rouge).

Following Dessalines's death, the black HENRI CHRISTOPHE (1807–20) and the mulatto Pétion engaged in a leadership conflict. While Christophe was popular in the north, the southern mulatto elite wanted power and refused to accept the idea of a black leader. In an attempt to resolve the issue, a constituent assembly, composed of *anciens libres* (pre-revolution freedmen) and army officers, assembled for the task of creating a new government. A constitution was drafted, establishing a weak presidency and a strong legislature. Christophe was chosen as president and Pétion as head of the legislature. This arrangement was the earliest instance of what is known in Haiti as *la politique de doublure*, in which a weak black leader serves under mulatto elitist rule.

Christophe refused to be a simple figurehead, and the mulatto legislature voted to impeach him. Pétion was elected president in March 1806. The outraged Christophe organized forces and marched on the capital, Port-au-Prince. A fully armed Pétion resisted but did not defeat Christophe, who then withdrew to the north of the Artibonite River and established his own territory. The same year, Christophe declared his territory a kingdom and crowned himself King Henri I of Haiti. The southern half of the country remained under Pétion's rule, and Haiti remained divided until Christophe's death in 1820.

King Henri, a man of grandeur, was also known as the "builder king." He had magnificent buildings erected at great expense, including the fortress Citadel Laferrière, and a luxurious royal palace, Sans Souci. Life under him was also less cruel and economically more profitable. He slightly relaxed forced labor laws. Although laborers remained bound to their plantations, their hours were more flexible, and their wages were increased to one-fourth of the harvest. Christophe also showed concern for children's education and made minimal provisions for public education of elite children during his regime.

### PÉTION AND BOYER

In the southern territory of Haiti, where Pétion ruled as president-for-life, the large-scale plantation system

fell away as a result of Pétion's land distribution policies. Pétion distributed state-owned land to individuals in small tracts. He then extended the land-grant plan to other beneficiaries, which further lowered the price of state land until it was affordable for all. Although this enabled peasants to own land and provide food for their families, subsistence farming ultimately proved detrimental to the economy.

At this time in their history, the vast majority of Haitians in both the north and the south were subsistence farmers living in areas isolated from the government and the army. They traded in markets for essentials, buying and selling products at a fraction of their international cost. The government was centralized in the towns and large cities, such as Port-au-Prince and Cap-Haïtien. The towns were controlled by small, property-owning elites. Pétion's land policies further reinforced these divisions in the south, resulting in a rural population that remained socially, economically, and politically separated from the "official Haiti." Although the south did not prosper under Pétion, the appeal of personal autonomy lured laborers from Christophe's kingdom. As a result, there were frequent defections to the south.

Pétion issued two constitutions during his rule. The 1806 constitution resembled the U.S. Constitution. However, Pétion found the "rigors of democracy too onerous to enforce" and replaced the elected presidency with the office of president-for-life in 1816. Although his policies were not intended to discriminate against blacks, he remained politically loyal to the mulatto elite, who often benefited financially from his decisions. Additionally, Pétion's efforts at fairer land distribution and the promotion of blacks into governmental positions failed, with political control remaining firmly with the mulatto elite throughout his rule.

Pétion was referred to as "Papa Bon Coeur" (Papa Good Heart) by the people of Haiti. He died in 1818 without a named successor. King Henri attempted reconciliation after Pétion's death, but again, southern mulattoes did not want a black leader. Instead, the Senate elected Pétion's secretary and commander of the presidential guard, the mulatto general JEAN-PIERRE BOYER (1818–43), as president. In the meantime, Christophe suffered a stroke and lost control of his main source of power, the army. Fearing that he would be taken prisoner by approaching rebels, he committed suicide on October 8, 1820. Later that month, Boyer claimed the north, uniting Haiti into a single nation.

Boyer's primary concern during his regime was national security. Concerned that the Spanish would return to reclaim the newly independent SANTO DOMINGO, or "Spanish" Haiti, he invaded, conquered, and held the entire island in 1822 (see HAITIAN OCCUPATION OF SANTO DOMINGO). Likewise, Boyer was concerned about the return of French colonial rule and slavery. He wanted Haiti to be recognized as an independent nation. For years, France had refused to settle outstanding claims



from the revolution, but in 1825, France's king Charles X made Boyer a highly unusual offer. He proposed that Haiti pay France 150 million francs within five years, and when that payment had been made in full, independence would be recognized. The offer was made while 14 French warships sat in Port-au-Prince harbor, supported by some 500 guns. Boyer, certain that anything short of agreement would reopen hostilities, signed the treaty on July 11, 1825, crippling the Haitian economy. In 1838, two more treaties were signed. The first recognized Haiti's independence, and the second laid out a more reasonable financial arrangement for the indemnity, lowering the moneys to 60 million francs to be paid in full within 30 years. Nevertheless, the damage to Haiti's finances was irreversible.

Haiti also faced diminished productivity as a result of Pétion's economic policies. In an attempt to generate income to repay the debt to France, Boyer reinstated the basic plan of *fermage* that Toussaint, Dessalines, and Christophe had used. Then, to further increase production, he introduced the CODE RURAL, or Rural Code, in 1826. This took the forced labor system to an extreme in that it not only bound cultivators to their land and placed production quotas on them but exempted towns and cities and enlisted the Haitian army as overseers of the law. Boyer's plan failed because the plantations had been broken into smaller tracts under Pétion, and the smaller farms were unable to support the large-scale agricultural production necessary for an export industry. Furthermore, the Haitian army had deteriorated since the revolution and was incapable of enforcing the law.

In the late 1830s, political opposition to Boyer mounted. An organization called the Society of the Rights of Man and the Citizen, led by Hérard Dumesle, a mulatto poet and liberal political activist, criticized Boyer for corruption, nepotism, and suppression of free speech. The group also brought to light concerns about Haiti's economy and its dependence on imported goods, as well as the elite's adherence to French culture, which contributed to the lack of a national identity. When Dumesle and his legislative allies demanded an end to Boyer's rule, they were expelled from government. Violence ensued, ending with rebel forces led by Dumesle's cousin, CHARLES RIVIÈRE-HÉRARD (1843–44), marching toward the capital with the intention of removing Boyer from office by military coup. When Boyer learned that his army had joined the revolt, he fled to Jamaica and later settled in France.

A constituent assembly gathered to write a constitution that took into account the liberal views of the Society of the Rights of Man and the Citizen. Three months later, the CONSTITUTION OF 1843 was promulgated, and Rivière-Hérard became the next president.

### POLITICAL INSTABILITY

The period between 1843 and 1915 marked a particularly chaotic era in Haitian history. During this time, there

were 22 heads of state. Of these, one served his prescribed term, three died in office, one was blown up with his palace, one is believed to have been poisoned, one was hacked to pieces by a mob, and one resigned. The remaining 14 were forced from office by revolution. The length of the term served by these 22 leaders ranged from three months to 12 years. The distribution of economic and political power in Haiti remained in the hands of a small, corrupt, mainly mulatto elite. However, a small but wealthy community of Germans living in Haiti at this time began supplying capital for the revolutions.

The cycle of revolution tended to follow a pattern. The different factions of the elite would sponsor a president, then while under the protection of the current government, the group in power would deplete the national assets. Finally, a different faction of elite, funded by German sources, would raise an army, march on Port-au-Prince, and drive the current government into exile. This cycle continued until the U.S. occupation of Haiti in 1915.

Class and race divisions were further ingrained as a result of the practices of corrupt governments. Rivière-Hérard did not remain in office for long as his inability to suppress rebels weakened his power. First, he lost the city of Santo Domingo in the Dominican revolt of 1844 under Juan Pablo Duarte. Then, discontented rural blacks, or *piquets* and *cacos*, organized under the black former army officer, Louis Jean-Jacques Accau. Through violent means, they demanded an end to mulatto rule and the election of a black president. Their demands were eventually met when Rivière-Hérard was ousted, bringing to power Philippe Guerrier, an aged black officer. Guerrier's placement in office by a mulatto power marked the return of *politique de doublure*. This political "installment" procedure began a series of short-lived black leaders who were chosen to appease rural blacks.

Despite the series of ineffectual leaders, several stronger personalities did come into power. The first of these was FAUSTIN SOULOUQUE (1847–59), a black general, who appeared at first to be a weak and malleable "puppet" for the mulatto elite that elected him. However, once in office, Soulouque proved himself a realistic, pragmatic, and excellent, if ruthless, politician. He curbed the power of the military, created the *zinglins*, a secret police force, and killed his mulatto opponents. In August 26, 1849, he proclaimed himself Emperor Faustin I and was crowned on April 18, 1852. Faustin's foreign policy was centered on preventing foreign intrusion into Haitian politics and sovereignty. As a result, he spent a considerable amount of his administration's energy trying to secure Santo Domingo. He made three attempts to invade the eastern portion of the island, and all three efforts failed. By 1856, Faustin's power was in decline. Under Soulouque, or Faustin I, there were no visible improvements in Haiti, and his rule had been brutal and repressive. He was overthrown and forced into exile by the mulatto FABRE-NICHOLAS GEFFRARD (1859–67) on December 22, 1858.

Geffrard restored order and tranquillity after the turmoil of Soulouque's time in office. Geffrard is known for creating a new constitution based on Pétion's 1816 document, which improved mainly TRANSPORTATION and education. Geffrard also restored ties with the CATHOLIC CHURCH by signing a concordat with the Vatican in 1860. This agreement permitted the development of parochial schools, which were to be led by predominantly foreign-born members of the clergy.

Discontent among both elite mulattoes and rural blacks forced Geffrard out of office in favor of General Sylvain Salnave (1867–69), a mulatto. Although Salnave was popular for a time among both blacks and mulattoes, the revolt that put him into office upset the country to such an extent that another rebellion of rural blacks then forced him from office. He was captured at the Dominican border, where he was tried and executed on January 15, 1870.

The last notable president of the late 19th century was the black LYSIUS SALOMON (1879–88). A member of the National Party (Parti National), Salomon was a reformer as well as an effective leader. In two terms, he managed to revive agriculture, improve education, attract foreign investments, develop a national bank, and connect Haiti to the rest of the world through the telegraph. Salomon maintained the support of the general populace until the end of his term and contained several mulatto plots against him. He was therefore in power much longer than any other ruler. After years of conflict with the Liberal Party (Parti Libéral) and other elitist forces/factions, he was forced to cede power in 1888. From the time of Salomon's fall until 1915, Haitian politics remained unstable.

The United States became increasingly interested in Haiti because it was predominantly German capital that funded the revolutions, which increased foreign power on the island. Although the German population was small (approximately 200 by 1910), it controlled 80 percent of the Haitian economy and government. Furthermore, the Germans owned and operated utilities, a tramway in Port-au-Prince, and a railroad in the north. To U.S. officials, the German influence in Haiti appeared to be in violation of the MONROE DOCTRINE of 1823, which forbade European colonization in newly independent Latin American nations.

With the increase in tensions with Germany as World War I drew near, the increasingly aggressive military force displayed by Germans throughout the Caribbean also worried the U.S. administration. The Germans came into direct conflict with the United States over their intention to locate a coaling station at Môle Saint-Nicolas. American interest in Môle Saint-Nicolas stemmed from the prospect of a transoceanic canal that was to be built in either PANAMA or NICARAGUA, which prompted the United States to secure naval stations in Haiti and elsewhere in the Caribbean (see TRANSISTHMIAN INTERESTS). When the United States attempted

to secure Môle Saint-Nicolas, Haiti refused to cede the territory.

See also HAITI (Vol. IV); HISPANIOLA (Vols. I, II).

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### Haitian occupation of Santo Domingo

Between 1822 and 1844, the newly independent government of HAITI controlled SANTO DOMINGO (present-day DOMINICAN REPUBLIC) on the eastern two-thirds of the island of Hispaniola. Santo Domingo had long been a Spanish colony, although the territory was briefly ceded to the French in the Treaty of Basilea in 1795. When the Spanish reclaimed control of Santo Domingo, they reinstated SLAVERY and sent regular slave-raiding expeditions into neighboring Haiti. Fearing a joint Spanish-French attempt to recolonize the struggling nation, Haitian president JEAN-PIERRE BOYER sent an invading force and occupied Santo Domingo for the next 22 years.

The Haitian occupation was characterized by tyranny and abuse. In an attempt to rid the island of colonial traditions, Boyer closed Spanish universities and worked to stamp out all remnants of Spanish culture. He expelled the Spanish elite and confiscated their landholdings, which were distributed to Haitian leaders. The president also feared the influence the CATHOLIC CHURCH had held over Spain's colonial possessions. He severed ties with the Vatican, confiscated church property, and exiled church leaders suspected of maintaining foreign loyalties. Ardent Catholics in Santo Domingo viewed these policies as an affront to their spiritual well-being, and resentment toward the Haitian leadership began to mount. The poorly paid Haitian army, known for its corruption and mistreatment of the Haitian peasantry, carried that reputation into Santo Domingo. Soldiers often raided the stores of local merchants in an effort to feed themselves and keep themselves supplied with necessary materials. Dominicans perceived the MILITARY's pillaging as arbitrary acts of banditry and violence, further fueling anti-Haitian sentiments.

Despite the growing animosity between Haitians and Dominicans, Boyer did attempt to effect much-needed improvements in Santo Domingo. Perhaps his most successful achievement was the abolition of slavery. Nevertheless, ending the institution created new complications as Boyer struggled to ensure an adequate LABOR force for the island's plantation ECONOMY. In the 1820s, the Haitian president had instituted a controversial CODE RURAL in Haiti, which aimed to force laborers to work on specific plantations. The thinly disguised system of "wage slavery" failed miserably, and Haiti's thriving plantation export economy quickly deteriorated into a meager subsistence economy. Nevertheless, Boyer attempted to enforce the same labor system in the eastern portion of the island. As the Spanish landholding elite fled the island and the former slave population shifted to subsistence AGRICULTURE, Santo Domingo's economy languished, and the entire population sank further into poverty.

In the 1830s, a resistance movement emerged in Santo Domingo. Led by Juan Pablo Duarte, LA TRINITARIA took shape and challenged Haitian authority over the eastern portion of the island. Duarte had been educated in Europe and was influenced by nationalism and LIBERALISM. He aimed to overthrow Boyer and create a new governing system based on liberal ideals. Duarte joined forces with Ramón Mella and Francisco del Rosario Sánchez to lead the movement. Despite its secretive nature, its leaders attracted many supporters between 1838 and 1843. It was particularly attractive to intellectuals, students, and other young activists. After five years of planning, Duarte formed an alliance with an anti-Boyer Haitian group led by CHARLES RIVIÈRE-HÉRARD. The Haitian dissidents denounced the corruption and government inefficiencies that had surfaced after the island was devastated by a major earthquake the previous year. Rivière-Hérard and Duarte's groups initiated simultaneous rebellions in 1843 and eventually drove Boyer into exile.

Although La Trinitaria succeeded in ridding Santo Domingo of the unwanted dictator, the Haitian occupation continued. Rivière-Hérard turned on his Dominican allies, arresting Mella while Duarte fled to South America and then Curaçao. A new resistance movement emerged once again in Santo Domingo, also taking the name La Trinitaria. By 1844, the anti-Haitian opposition leaders in Santo Domingo had organized a new initiative, and on February 27, they ousted the last of the Haitian occupying forces. They declared independence for the nation, which they now referred to as the Dominican Republic.

Duarte returned to the island to participate in a newly formed ruling junta along with fellow Trinitaria leaders Mella and Sánchez, but their victory was short lived. Rivière-Hérard remained a constant menace from neighboring Haiti. Some influential Dominicans rejected Duarte's push for DEMOCRACY, instead insisting that more authoritarian measures were necessary to repel the Haitian threat. By the end of 1844, General PEDRO SANTANA had seized control of the Dominican govern-

ment. Duarte and his Trinitaria accomplices were imprisoned and later exiled. The Haitian occupation had come to an end, but an era of despotism and CAUDILLO rule took root in the new nation and would endure for the rest of the 19th century.

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**Havana** Havana is the capital city of CUBA. It is located on the northern coast of the island and has historically played an important role as an economic, defensive, and administrative center for the nation.

Havana is one of the oldest Spanish settlements in the Americas and was the original administrative center for Spanish conquest and colonization in the 16th century. The city was founded by Diego Velázquez in 1515 and became the base of operations for mainland expeditions into present-day MEXICO. Havana's location at a natural harbor led to the city's becoming a principal port for shipping between Spain and the Americas throughout the colonial period. The Spanish fleet set sail from Havana, and the port's strategic role in colonial TRADE was supported by a series of MILITARY garrisons stationed in Havana to defend Spanish economic interests in the Caribbean. Havana was invaded by the British in 1762, and the failure of the city's defenses led to a series of military reforms in the Spanish colonies in the late decades of the 18th century.

Cuba's ECONOMY grew throughout the colonial period around plantation AGRICULTURE and trade. The island had a large slave population by the early 19th century, and concern over the potential for a large-scale slave rebellion—such as had occurred in Saint Domingue decades earlier—compelled the Cuban elite to withhold their support for independence (see HAITI; SLAVERY). Even as other Spanish colonies rose in revolt after Napoléon Bonaparte's invasion of Spain, Cuba maintained loyalty to the imperial system in exchange for a loosening of trade restrictions. Havana's importance grew substantially in the 19th century as the Caribbean region developed close trading ties to the United States. SUGAR production expanded in Cuba, and the United States became the main export market for Cuban agricultural commodities. Many elite planters spent little time on their rural plantations, preferring instead to maintain permanent residences in Havana. The city's strategic location made it a natural exit point for Cuban exports. British investors financed railroad projects, and the island's first railroad, connecting Havana with the interior city of Güines, opened in 1838.

Havana became an important setting in the final chapter of Cuba's colonial experience as independence

insurgencies culminated in a major rebellion in the 1890s. U.S. investors watched the insurrection closely and concern mounted for the safety of U.S. interests on the island. President William McKinley sent the USS *Maine* to stand guard in Havana Harbor in January 1898. Less than a month later, a mysterious explosion sank the battleship, prompting the United States to declare war against Spain (see WAR OF 1898). By September, U.S. troops had taken Havana, and that occupation lasted until Spain had surrendered and guaranteed Cuban independence. Havana became the capital of the independent nation, and throughout the 20th century, the city continued to grow and develop. U.S. influence was evident as tourism and trade became the basis for the city's economy.

See also HAVANA (Vols. II, IV); VELÁZQUEZ DE CUELLAR, DIEGO (Vol. I).

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**Hay-Pauncefote Treaty** See TRANSISTHMIAN INTERESTS.

**Hernández, José** See MARTÍN FIERRO.

**Heureaux, Ulises** (b. 1845–d. 1899) *president of the Dominican Republic* Ulises Heureaux was a MILITARY leader and supporter of GREGORIO LUPERÓN during the WAR OF RESTORATION. In the 1880s, he drove Luperón into exile and emerged as an autocratic dictator. He enacted policies that destabilized the island's ECONOMY and eventually led to intervention by the United States.

Heureaux was born in Puerto Plata in the CIBAO region in 1845. He participated in the rebellion to oust the Spanish from the DOMINICAN REPUBLIC in the 1860s and became one of the top military commanders under Luperón. As Restoration leaders consolidated their control, Heureaux held high-level government positions, and in 1882, he became president for the first time. When his term ended in 1884, Heureaux stepped down but attempted to control the political system from behind the scenes. After several years, he forced Luperón into exile and took power once again.

Heureaux consolidated his control over the Dominican Republic during the next 12 years and ruled in an increasingly dictatorial fashion. He amended the constitution to legitimize his authoritarian control and silenced political opponents through repression. Heureaux oversaw the Dominican Republic's transition from a TOBACCO-based to a SUGAR-based economy in the last decades of the 19th century. His unwise economic policies increasingly placed the Dominican Republic

under U.S. dominance; Heureaux drove the nation into debt and surrendered many Dominican national resources to U.S. interests. Opposition to Heureaux began to mount as political enemies opposed his tyrannical rule and unsound management of the economy. Ramón Cáceres Vásquez organized a conspiracy and assassinated Heureaux on July 26, 1899.

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**Hise, Elijah** (b. 1802–d. 1867) *U.S. diplomat in Central America* Elijah Hise was a Pennsylvania native, who spent most of his life in Kentucky, where he practiced law. He served in the state legislature and later in the U.S. Congress in Washington, D.C. From March 31, 1848, to June 21, 1849, Hise served as U.S. chargé d'affaires in Guatemala City. He was the first State Department representative to be assigned to CENTRAL AMERICA since 1839. In the meantime, the British had expanded their interests throughout Central America, including the MOSQUITO COAST. Alarmed by this, Hise recommended that the United States eject the British from the region under the terms of the MONROE DOCTRINE. Although Secretary of State James Buchanan (b. 1791–d. 1868) rejected this suggestion, Hise went on to negotiate a treaty with NICARAGUA that challenged the British presence on the Mosquito Coast. Signed in June 1849, the treaty granted a private U.S. company (subsequently Cornelius Vanderbilt's ACCESSORY TRANSIT COMPANY) exclusive rights to construct a canal, railroad, and transit roads across Nicaragua. It also granted access to all public lands necessary for the project, and it gave the United States the right to fortify the route. Furthermore, the treaty guaranteed free passage of people and goods without restrictions or payment of tariffs or taxes. In return, the United States was to support Nicaragua in the exercise of its sovereignty over all its territory, which was a clear reference to the Mosquito Coast. Hise returned home with treaty in hand, but President Zachary Taylor did not submit it for congressional approval. The significance of the proposed Hise Treaty rests with the concessions it provided to the United States. Those concessions served as a harbinger of future U.S. pursuits for a transisthmian canal (see TRANSISTHMIAN INTERESTS).

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**Hispaniola** See DOMINICAN REPUBLIC; HAITI.

**Honduras** Encompassing 43,277 square miles (112,087 km<sup>2</sup>), Honduras is bordered to the north and the east by the Caribbean Sea, to the northwest by GUATEMALA, the southwest by EL SALVADOR and the Gulf of Fonseca, and directly to the south by NICARAGUA. It is a country plagued by poor TRANSPORTATION systems so that the commercial north coast, the eastern Olancho region, the southern plains surrounding Choluteca, and the northern and western mountainous sectors developed largely in isolation of each other.

Approximately 150,000 people resided in Honduras when it declared its independence in 1824 and joined the UNITED PROVINCES OF CENTRAL AMERICA. In addition to the geographic divisions that plagued the country, Honduras was mired in the liberal-conservative political controversy seen also in its Central American neighbors and other Latin American nations following independence from Spain (see CONSERVATISM; LIBERALISM). In Honduras, the rivalry between the old colonial and conservative capital at Comayagua and the newer and more liberal city of Tegucigalpa continued for more than 200 years. Little of note occurred within Honduras during the life of the United Provinces, between 1824 and 1838, and in fact, Honduras was among the first nations to withdraw from the federation in 1838. Nevertheless, two of its leaders, José Cecilio del Valle (b. 1780–d. 1834) and FRANCISCO MORAZÁN, served as presidents of the federation.

Until the 1870s, Honduras experienced domestic political turmoil and endured foreign interventions from both its neighbors and abroad. From 1840 to 1871, conservative presidents such as Francisco Ferrera (1840–47), Juan Lindo Zelaya (1847–52), Santos Guardialo (1855–62), and José María Medina (1864–71) dominated the Honduran political system. They pursued traditional conservative policies, such as centralized government, and they privileged the CATHOLIC CHURCH. Unlike its Central American neighbors at this time, Honduras was further weakened by its failure to develop a commercial and agricultural class. The Honduran elites remained poorer than their Central American counterparts and could not mobilize the rural peasants to engage in export AGRICULTURE, hence they had no substantial interests to protect. For 50 years following its independence from Spain, Honduras became a launching pad for or a partner in regional conflicts between the 1840s and 1860s, mostly between Guatemala and El Salvador and Nicaragua and El Salvador.

In the 19th century, foreign powers developed interests in Honduras. In 1834, the British laid claim to the Bay Islands located off the Honduran Caribbean coast, and a decade later, British warships bombarded the ports of Cortés and Trujillo to collect unpaid debts. In the 1850s, British loans paid for the construction of a rail-

road from Puerto Cortés to San Pedro Sula, but it did not facilitate north coast economic development. British bankers made further loans to the Honduran government for the construction of a trans-Honduran railroad, which never materialized. Subsequent Honduran governments incurred \$125 million in debt but saw only 90 miles of rail track in return. The debt was the subject of an international controversy in the early 20th century.

U.S. interests in CENTRAL AMERICA were awakened in the 1840s as U.S. leaders sought to limit British influence in the region. In 1849, U.S. diplomat EPHRAIM GEORGE SQUIER arranged for Honduras to cede Tigre Island in the Gulf of Fonseca to the United States. Tigre Island had for long been considered the western terminus of the proposed trans-Honduran railroad or the anticipated trans-isthmian canal through Nicaragua. As tensions increased between U.S. and British diplomats in Honduras, cooler heads prevailed in Washington, D.C., and London, which resulted in the 1850 Clayton-Bulwer Treaty, whose provisions prevented both the British and the North Americans from seeking new territorial possessions throughout Central America. The most renowned foreign interloper was WILLIAM WALKER, a North American who arrived in Nicaragua in 1855 with plans to unite Central America under his leadership. In response, the Central Americans united to expel Walker from the region in 1856, but the determined filibusterer twice returned. On his third return in 1860, British forces captured him at Trujillo. They turned him over to Honduran soldiers, and he was executed on September 12, 1860.

As elsewhere in Central America, during the 1870s and 1880s, liberals came to the Honduran presidency. MARCO AURELIO SOTO was first in 1876, followed by Louis Bográn (1883–91) and Policarpo Bonilla (1894–99). The Constitution of 1880 proclaimed the new, liberal ideology. It declared that the state would do everything possible to stimulate progress in agriculture, industry, and TRADE and would build railroads and highways. Lacking financial resources, an entrepreneurial class, and the rudiments of basic industry, foreign companies and businessmen received lucrative contracts that enabled them to import duty-free into Honduras not only the materials and tools to conduct their business but also liquor, furniture, and clothing to satisfy their personal needs and those of their managers and families.

By the end of the 19th century, the Honduran government had constructed a telegraph system that connected most of the country with the capital at Tegucigalpa and a dirt highway to connect the capital with the port of Amapala on the Gulf of Fonseca. Foreigners, however, profited most in Honduras. A total of 276 MINING companies operated in the country by 1900, but the U.S.-based Rosario Mining Company accounted for 45 percent of total Honduran exports. In addition to import exclusions, the company paid no export duties or municipal or state taxes. And without LABOR laws or labor unions to protect them, Honduran miners were poorly paid, had no

benefits, and worked in difficult conditions. The veins of Rosario's SILVER mines dissipated during the 1890s, to be replaced in economic importance by bananas.

Bananas appeared along the Honduran Caribbean coast in 1870. Initially, local growers cultivated the crop and sold their produce to exporters shipping to the United States. Before the century was out, however, two U.S. companies had come to dominate the operation, from cultivation to the marketplace: the Vacarro Brothers, later known as the Standard Steamship and Fruit Company, and the Cuyamel Company, which later became part of the United Fruit Company.

At the beginning of the 20th century, Honduras remained an economically underdeveloped country administered by the elite at the expense of middle and lower socioeconomic groups.

See also HONDURAS (Vols. I, II, IV).

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**Hostos, Eugenio María de** See *PILGRIMAGE OF BAYOÁN, THE*.

**Huáscar** See GRAU SEMINARIO, MIGUEL.



**Iglesias Law** See LA REFORMA.

**industrialization** Latin American economies did not experience the onset of the industrial revolution in the late 18th century when those economic transformations were occurring in western Europe and the United States. Improvements in TRANSPORTATION and manufacturing propelled the emergence of an industrial sector first in Great Britain, and those economic trends then spread to other parts of the world. But, Latin America was still under the colonial administration of the Spanish and Portuguese in the late 18th century. A modest version of industrialization took hold in some areas of the region only at the end of the 19th century.

The colonial economic system in Latin America was based on the concept of mercantilism. Under this model, colonies produced raw materials for TRADE with the mother country. Generally, finished goods and luxury items were imported directly from the mother country. The Crown held tight control over all aspects of the ECONOMY. The colonies were not allowed to trade with other nations, and imperial trade was limited to certain regulated ports. Colonial trade, transportation, and finance networks were set up to support the mercantilist structure, and under the highly regulated system, local entrepreneurs were not allowed to experiment with new enterprises. While other areas of the world entered the industrial revolution, Latin American economies remained in a state of infancy, producing raw materials through MINING and AGRICULTURE, with only small, local, artisan-based manufacturing.

Most of Latin America had achieved independence by the 1820s, and new national governments dismantled

the old mercantilist system in favor of relatively free and unencumbered trade under the LAISSEZ-FAIRE economic model. The 19th century saw a dramatic increase in trade between Latin America and the rest of the world, particularly between Britain and South America and the United States and MEXICO, CENTRAL AMERICA, and the Caribbean. But, throughout most of the century, Latin American nations still exported raw materials and imported manufactured goods. Their leaders operated under the principle of COMPARATIVE ADVANTAGE, which stated that countries should specialize in products that they produce relatively well compared to other countries. Latin American nations held a comparative advantage in agriculture and mining, and the products of those sectors came to dominate economic production. Europe and the United States provided finished, manufactured goods to Latin American markets. This system created a trade imbalance as Latin American countries were constantly importing goods that were more expensive than the products they exported. Business leaders did not show much interest in developing the region's industrial potential in the first half of the 19th century. Most countries were plagued by near-constant political unrest, with civil wars, boundary disputes, and even foreign invasions being common. Political instability and a general lack of security meant that the transportation and communications infrastructure necessary for a viable industrial sector did not develop, and investors viewed Latin America as a risky place to put their money.

It was not until the late decades of the 19th century, which saw the rise of liberal oligarchic regimes, that some Latin American nations began to industrialize (see LIBERAL OLIGARCHY). Liberal oligarchies were generally powerful groups of the political and economic elite who

consolidated power after decades of conflict and infighting. Their exact nature varied from one country to the next, but nearly all shared a common interest in bringing modernization and progress to their nations. Liberal leaders worked to develop the infrastructure that would allow economic growth. In BRAZIL, ARGENTINA, CHILE, Mexico, and elsewhere, foreign investors were brought in and oversaw the construction of thousands of miles of railroads to connect urban centers with ports. Telephone and telegraph lines were installed, and electric power became available in some of the major cities.

Improvements in infrastructure allowed for an expansion of trade in commodity agricultural and mining products, as well as for the development of an industrial sector. Many Latin American governments were inspired by the positivist philosophy of Auguste Comte, who suggested that all societies must go through phases of deterministic progress (see POSITIVISM). Latin American leaders often associated progress with industrial development, and governments began encouraging the manufacture of consumer goods and even some heavy industry in the late 19th century. Some of those sectors began modestly as basic processing centers for the raw materials that Latin American economies were already producing. Additionally, many industries relied on large investments from foreign entrepreneurs so that European and U.S. interests gained a controlling share of new economic enterprises. FOOD-processing plants opened near major urban areas, and textile factories began to replace some of the small businesses run by local artisans. Argentina saw a rise in meatpacking plants, particularly after the advent of refrigerated transportation. Brazilian abolitionists used the notion of modernization and industrialization to push for an end to SLAVERY, which had long been a main source of LABOR for plantation agriculture (see SLAVERY, ABOLITION IN BRAZIL OF). Slavery was abolished in 1888, and in the late decades of the 19th century, Brazil saw an expansion of food processing and textile manufacturing. Exploration and development in the Amazon region propelled the development of a rubber industry, and rubber production had grown substantially by the end of the century.

Mexico experienced a dramatic industrial transformation in the late 19th century, fueled by government policies during the PORFIRIATO to develop infrastructure and attract foreign investors. Mexico's industrialization also began with consumer goods such as textiles and foods but included some heavy industry such as cement, oil, and steel operations. By the turn of the century, many of those industries were controlled and/or owned by foreign interests. Most Latin American nations also attempted to build a skilled industrial labor force by attracting European immigrants. Argentina and Brazil experienced a drastic increase in immigration, primarily from southern Europe, during the era of industrialization.

Industrialization in Latin America produced numerous consequences in the late decades of the 19th century.

In some areas, it came about as a result of foreign involvement in the economy. The presence of foreign industrialists helped to set the stage for populist and nationalist movements in the 20th century. Industrialization was also accompanied by rapid urbanization in BUENOS AIRES, Monterrey, MEXICO CITY, RIO DE JANEIRO, and elsewhere. The sudden growth of cities created new challenges for Latin American governments that found a growing sector of urban poor in need of housing, EDUCATION, and social services. Industrialization contributed to a widening of the socioeconomic gap between rich and poor in the late 19th century. Many of those problems led to social and political reform efforts in the early 20th century.

See also INDUSTRY (Vol. IV).

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**Iturbide, Agustín de (Emperor Agustín I)** (b. 1783–d. 1824) *military leader and emperor of Mexico* Agustín de Iturbide was the first leader of MEXICO after independence. He began his career in the Spanish MILITARY and eventually fought for both sides in Mexico's war of independence. Iturbide ruled the newly independent nation as emperor from 1821 to 1823.

Iturbide was born into a Spanish family in Valladolid on the Yucatán Peninsula. He capitalized on the social standing that accompanied his status as creole and began a career in the Spanish army. When the struggle for independence broke out in 1810, Iturbide led Spanish forces in fighting the rebellion and quickly climbed through the officers' ranks. Spanish forces successfully challenged the early independence movement, the leadership of which passed from Miguel Hidalgo y Costilla to José María Morelos y Pavón and finally to VICENTE GUERRERO and GUADALUPE VICTORIA.

By 1820, Iturbide held the rank of colonel. As he began a new offensive against the rebel army, political changes were under way in Spain that influenced his position on independence. A military coup led by Spanish officer Rafael Riego was resolved when King Ferdinand VII implemented the liberal Constitution of 1812 and agreed not to send reinforcements to fight against independence insurgencies throughout the Spanish colonies. Realizing that additional military support would not be coming from Spain and, more important, seeing the Spanish adopt a political system of which he did not approve, Iturbide began conferring with the insurgent forces to resolve the independence conflict on his terms.

After a series of careful negotiations, Iturbide and Guerrero brokered the Plan de Iguala on February 25, 1821, to secure Mexican independence. Also known as



the Treaty of the Three Guarantees, the plan praised the Spanish colonial legacy for having provided a solid foundation for Mexico as an independent nation. In doing so, the treaty deviated significantly from the previous position of the insurgents, who had advocated a complete break from Spain. Iturbide viewed the conservative politics of the Spanish monarchy as the best system for Mexico and feared the liberal stance the Spanish government was being forced to take on the heels of the Riego Revolt. Iturbide, therefore, included provisions in the Plan de Iguala that would establish a constitutional monarchy in Mexico, preferably under the leadership of Ferdinand VII or another European monarch. The treaty also safeguarded the CATHOLIC CHURCH as the guardian of Mexico's official RELIGION and guaranteed equality for all male creoles.

Iturbide's plan paved the way for independence and established the Army of the Three Guarantees to validate the compromise. The plan quickly won the approval of Mexican conservatives who had repudiated the anti-Spanish tone and seemingly radical ideas of the insurgency. It also gained acceptance among liberals by establishing Mexico as a sovereign and independent nation. When Ferdinand VII and other European monarchs rejected the crown of Mexico, a conservative congress named Iturbide Emperor Agustín I. He was crowned in a grandiose and stately ceremony on July 21, 1822.

For several months, the Mexican Congress established formal protocols to bolster the image and legitimacy of the monarch. But, amid the pomp and circumstance, the new nation found itself in precarious financial problems after years of warfare. Mexico fell into severe economic

decline, and many turned their frustrations against the emperor. Agustín I responded by censoring the press and jailing political adversaries and, in the face of mounting opposition, even took the drastic measure of dissolving Congress in October 1822.

Agustín's mismanagement of the nation and strong-armed tactics against his enemies crystallized forces against him. In December 1822, a coalition led by military commander ANTONIO LÓPEZ DE SANTA ANNA issued the Plan de Veracruz, which declared revolt against the emperor and established Mexico as a republic. A short time later, other military officers issued the PLAN DE CASA MATA and consolidated their efforts with those of Santa Anna. Under increasing pressure from leaders of his own military, Iturbide relinquished his throne and retreated into exile in Europe. Although he was tried for treason, his life was spared so long as he never returned to Mexico.

While in exile in 1824, Iturbide learned of a plot by the Spanish to invade and retake Mexico as a colony. Believing he would be welcomed as a hero, Iturbide returned to Mexico to warn Congress and help defend the newly formed republic. Instead, he was arrested in the state of Tamaulipas and executed by firing squad on July 19, 1824.

See also CONSTITUTION OF 1812 (Vol. II); FERDINAND VII (Vol. II); HIDALGO Y COSTILLA, MIGUEL (Vol. II); MORELOS Y PAVÓN, JOSÉ MARÍA (Vol. II); RIEGO REVOLT (Vol. II).

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**Jamaica** See CARIBBEAN, BRITISH.

**Janvier, Louis-Joseph** (b. 1855–d. 1911) *Haitian writer and intellectual* Louis-Joseph Janvier was born in Port-au-Prince in 1855. In 1877, he went to Paris to study MEDICINE, politics, and law. He attended regular gatherings (salons) of prominent French writers, poets, and intellectuals. His affiliation with ingénues, such as the French symbolist poet Stéphane Mallarmé, largely influenced Janvier’s romantic and highly evocative literary style (see LITERATURE; ROMANTICISM).

Janvier became an active voice countering current racist notions about blacks, specifically Haitians. Among his more notable essays are “Haïti aux Haïtiens” (“Haiti for the Haitians”), “L’Égalité des races” (“Equality of Races”), “Les Antinationaux” (The anti-nationals), and “Les Constitutions d’Haïti” (“The Constitutions of Haiti”). Janvier’s work is paradoxical in that while he defends the black race and independence of HAITI, he also portrays an image of Haitian peasants as a “black France” and describes Haitians as like the French, only with “fizzy-hair,” above all preferring “French prose, Haitian coffee and the philosophical doctrines of the French Revolution as the best stimulants of the Haitian brain.”

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**Juárez, Benito** (b. 1806–d. 1872) *liberal leader and president of Mexico* Benito Pablo Juárez García was a

lawyer, judge, and politician who helped create and implement liberal reform in MEXICO in the 19th century. As the nation was embroiled in civil war and the FRENCH INTERVENTION, Juárez held the office of president off and on from 1858 until his death in 1872.

Juárez was born into a Zapotec Indian family in San Pablo Guelatao in Oaxaca on March 21, 1806. He grew up speaking only his native dialect. His parents died when he was very young, and Juárez lived with an uncle and worked for him herding sheep. At the age of 12, he went to Oaxaca City to live with his sister and began studying for the priesthood. He later abandoned his religious aspirations and began studying law at the local Institute of Arts and Sciences. He became involved in local politics in the 1830s, serving as a member of the town council and as a deputy in the federal Congress. After receiving his law degree in 1834, he became a judge and, eventually, governor of Oaxaca in 1847.

While involved in local and state politics, Juárez made a name for himself as an advocate of the liberal side of the ideological debate that gripped the nation in the 19th century (see CONSERVATISM; LIBERALISM). When ANTONIO LÓPEZ DE SANTA ANNA returned to power as a Conservative despot in 1853, Juárez was among the Liberal leaders who fled into exile in New Orleans. From there, he helped lay the plans for the REVOLUTION OF AYUTLA, which ousted Santa Anna in 1855 (see LIBERAL PARTY, MEXICO). Upon returning to Mexico, Juárez participated in the Liberal provisional government and helped design the aggressive reform measures articulated in the Lerdo Law, Iglesias Law, and the Juárez Law—the latter named for him—that became the basis for the period known as LA REFORMA (1855–58). Those reforms, which collectively represented the largest and most



A photographic portrait of Benito Juárez, liberal leader and president of Mexico between 1858 and 1872 (*Library of Congress*)

aggressive challenge to CATHOLIC CHURCH authority the country had seen, became part of the CONSTITUTION OF 1857. As the constitution was promulgated, Juárez was named chief justice of the Supreme Court, making him second in line for the presidency behind President IGNACIO COMONFORT.

In response to the Constitution of 1857, Conservative foes rebelled under the Plan de Tacubaya, and Juárez was arrested along with several of his Liberal allies (see CONSERVATIVE PARTY, MEXICO). He was released in January 1858, and as Comonfort had fled into exile, Juárez legally assumed the presidency according to the chain of command established in the constitution, even though Conservative leader Félix Zuloaga had claimed it for himself. Juárez took leadership of the Liberal side of the emerging civil war. The WAR OF REFORM turned into a bloody and devastating conflict that tore the nation apart for three years. Juárez and the Liberals initially found themselves in a nearly constant state of retreat, but Juárez eventually led the Liberals to victory in 1861.

Juárez and the Liberals had little time to celebrate their victory over the Conservatives, as the president had to deal with a devastated ECONOMY and national infrastructure. Foreign debt that had accumulated during earlier crises had gone unpaid, and Conservative leaders

had acquired even more debt from foreign creditors. In December 1861, Great Britain, Spain, and France joined forces to blockade the port of Veracruz and seized customs revenues to offset Mexico's debt obligations. After negotiations with Juárez's government, the British and Spanish withdrew, but the French remained. Napoléon III aimed to build a worldwide empire that included the former Spanish colonies of the Americas, and Mexico's fragile state made it an easy target to start that empire. French forces occupied Mexico, beginning a period of conflict known as the French intervention. As French troops marched toward MEXICO CITY, local MILITARY units resisted the onslaught, and forces at PUEBLA managed to repel the French army briefly at the Battle of Puebla on May 5, 1862. This victory is the basis for the Mexican holiday CINCO DE MAYO.

Although the Mexican army won some important early victories, French forces soon recovered and marched into the capital. Once again, Juárez was forced to flee and lead his nation in a war while on the run. French forces took Mexico City, and Napoléon installed Austrian archduke Maximilian of Habsburg as emperor of Mexico. Maximilian and his young wife, Charlotte, known in Mexico as Carlota, arrived to find the nation at war and the national forces of Juárez constantly gaining ground. After five more years, Juárez—aided by diplomatic pressure and military supplies from the United States—compelled Napoléon to withdraw French forces in 1867. Maximilian was captured and executed, along with Mexican Conservatives who had supported his regime.

Finally, in 1867, the war-weary president returned to Mexico City to put the national government back together. He won an easy victory in the presidential election that year, but his administration faced serious problems. Juárez began centralizing power in his own hands in an attempt to provide stability and recovery, but his increasingly autocratic approach angered many former allies. To replenish the treasury, Juárez aggressively implemented land policies that had been established under Liberal reforms. Large estates that had been church property and communal *EJIDOS* that had sustained indigenous villages were auctioned off to the Liberal elite, exacerbating the concentration of land in the hands of a few wealthy individuals.

Juárez also had to deal with revolts by both peasants and his former military allies in reaction to his political and economic policies. When he won the presidency again in 1871 in an election that many considered fraudulent, his former military commander PORFIRIO DÍAZ led an unsuccessful uprising in his Plan de Noria to try to force him to step down. Even though the revolt did not succeed, it did indicate that Juárez's image as a hero and defender of the people was in question.

Juárez did not fulfill his final term as president. He died in Mexico City in 1872 and was succeeded by SEBASTIÁN LERDO DE TEJADA.

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**Juárez Law** See LA REFORMA.

**Junta de Información (Junta de Información de Ultramar, Junta Informativa de Reformas)** The Junta de Información was a commission formed by the Spanish government in 1865 to examine the reform demands of its colonies CUBA and PUERTO RICO. Delegates from the colonies appealed for changes in slave laws and proposed a variety of economic and political reforms. The junta failed to bring any meaningful changes, however, and in 1868, a major revolt against Spanish rule erupted in Cuba and led to the TEN YEARS' WAR. The same year, a small insurrection developed in Puerto Rico following the GRITO DE LARES. Although both movements were eventually put down by the Spanish MILITARY, it was clear that the demand for reform in the two colonies was gaining momentum.

Throughout the 19th century, Cuba and Puerto Rico remained under Spanish control, although the mainland colonies achieved independence in the 1820s. Both islands boasted a booming SUGAR ECONOMY, fueled largely by a ready supply of slave LABOR, and many among the elite advocated maintaining colonial status as a way to protect their wealth. Economic and political conditions were changing by the middle of the century, however, as many colonists began to question the status quo. Liberal tensions had also been mounting in Spain, and in 1865, the government seemed ready to listen to colonists' grievances.

The Spanish government proposed the Junta de Información to examine possible reforms in Cuba and

Puerto Rico. Both colonies sent delegates to represent their interests in the junta, and proceedings began on October 30, 1866. During several months of deliberations, the commission heard a number of proposals from colonial delegates. Among the most salient issues were economic and TRADE policies. Delegates asked for reciprocal free trade between the colonies and Spain, which would require doing away with the import and export fees that had long been a lucrative source of income for the Spanish government. The commission also considered lessening trade restrictions with nations outside the Spanish Empire and revisited tax structures.

Colonial delegates made more sweeping proposals with respect to the administration of the colonies. Cubans and Puerto Ricans wanted political reforms that would place the islands on a more equal status with Spain. Delegates wanted colonists to have the same rights as citizens of Spain, as guaranteed in that country's liberal constitution. They also requested various administrative changes that would give local governments more autonomy. A final set of proposals dealt with SLAVERY. A cadre of Puerto Rican delegates went so far as to propose complete abolition, but the junta did not seriously consider this option. Most reform scenarios dealing with slavery advocated a more gradual shift away from the institution.

Despite its ambitious aims, the Junta de Información failed to adopt any significant reforms during its brief tenure. It adjourned on April 27, 1867, and colonial delegates returned to their respective islands disappointed. Shortly after the junta was disbanded, local revolts broke out in both Puerto Rico and Cuba as colonists began to push for complete independence.

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# K

**Keith, Minor Cooper** (b. 1848–d. 1929) *U.S. railroad builder and businessman in Costa Rica and the Caribbean* A grade-school-educated native of Brooklyn, New York, Minor Cooper Keith established a successful cattle ranching business on South Padre Island, Texas, before being lured to COSTA RICA at age 22 by his brother Henry to participate in the construction of a railroad from San José to Puerto Limón. The contract originally belonged to their uncle, Henry Meiggs (b. 1811–d. 1877), a railroad tycoon in South America. In late 1871, the Keith brothers began railways in San José and Limón, with plans to connect somewhere en route. By 1873, confronted with a shortage of funds and difficult mountainous terrain, they halted construction, and the Costa Rican government canceled the contract. Nevertheless, Minor Keith, an established businessman in Limón, negotiated a new agreement with the government, allowing him to renew construction in 1875. Finally, on December 7, 1890, the first train made the 97-mile (156-km) trip from San José to Puerto Limón.

In addition to the treacherous mountain terrain and swampy Atlantic lowlands, Keith faced a LABOR problem in a country of 146,000 people. An uncounted number of West Indian laborers were brought to Costa Rica to work on the project, and afterward, they remained in the country to work on the banana plantations along the Caribbean coast. Over time, the West Indians significantly altered Costa Rican demographics and politics.

In negotiating the railroad contract, Keith acquired 800,000 acres (323,749 ha) of land that paralleled the rail line and on which he established banana plantations. He

also constructed port facilities at Limón and seagoing vessels that were used to carry Costa Rican bananas and COFFEE to the United States and Europe. He moved beyond Costa Rica into banana ventures in COLOMBIA and PANAMA and in 1899 joined with Andrew W. Preston (b. 1846–d. 1924), owner of the Boston Fruit Company, to form the United Fruit Company, which subsequently became the largest banana producer in all CENTRAL AMERICA.

Keith founded the International Railways of Central America (IRCA), which he envisioned as connecting Central America, from GUATEMALA to Panama, but for lack of funding and with the opening of the Panama Canal in 1914, this dream went unrealized. The IRCA did, however, connect EL SALVADOR's coffee fields with the Atlantic markets through the Guatemalan port at Livingston. Keith's other ventures included the construction of railroads in BRAZIL and cultivating SUGAR in CUBA.

Keith married Cristina Castro Fernández, the daughter of Costa Rican president José María Castro Madriz (b. 1818–d. 1892). This won him many infrastructure contracts in Costa Rican cities.

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**labor** Labor systems evolved in 19th-century Latin America generally in concert with changes in economic production. Latin American economies developed during the colonial period as a result of exploitative labor systems, and new nations inherited those labor systems after achieving independence in the 1820s. Labor systems changed over the course of the 19th century, but the general condition of exploitation remained.

European conquistadores initially attempted to enslave the indigenous populations they encountered in the Americas in the 15th and 16th centuries. Due to church and Crown regulations, the outright enslavement of NATIVE AMERICANS was eventually banned, but Portuguese settlers continued to capture and enslave the indigenous of BRAZIL for most of the colonial period. Spanish settlers created parallel forced labor systems aimed solely at drafting Amerindian workers for MINING and agricultural operations (see AGRICULTURE). The *mita* in PERU and the *repartimiento* in MEXICO forced indigenous villages to provide a minimum quota of workers, and those systems remained in place until independence leaders abolished them in the early 19th century. The wars for independence had sent mining industries into decline, and they were not revived in many areas until the last half of the 19th century. While mine owners no longer resorted to draft labor, mine workers nonetheless suffered deplorable conditions for meager pay. In some areas, workers' collectives began to emerge by the end of the century as a predecessor to 20th-century labor unions. An attempted strike at the Cananea Consolidated Copper Company in Sonora, Mexico, was put down violently by the PORFIRIO DÍAZ regime in 1906. Collective action began to intensify in CHILE and other regions of South America that had experienced high rates of European immigration.

African SLAVERY was introduced in Latin America at the beginning of the colonial period as Crown policies evolved forbidding the enslavement of Native Americans. Slave labor became the basis of the large plantation ECONOMY in Brazil, and slavery was also common in many coastal plantation regions of the Spanish colonies. After independence, governments in mainland Spanish America abolished slavery, although a de facto form of slavery continued for many black workers for several decades. In Brazil, slavery continued and strengthened throughout most of the 19th century. African slavery also expanded substantially in CUBA and PUERTO RICO, which remained as Spanish colonies in the Caribbean until 1898. Much of that expansion was due to the growth of SUGAR cultivation in Brazil and the Spanish Caribbean. The French colony of Saint Domingue (present-day HAITI) had been a leading sugar producer until its independence movement commenced in 1791. The independence movement started as a rebellion by slaves, free blacks, and mulattoes against the white European elite. The postindependence governments in Haiti struggled to stabilize the new nation's political and social systems. Slavery was abolished, and economic turmoil led to a collapse of the Haitian sugar industry. Brazilian, Cuban, and Puerto Rican plantations quickly filled the void.

Despite enormous pressure from the British to end the transatlantic slave TRADE after 1807, planters in Brazil and the Spanish Caribbean continued to import African slaves until the 1850s. An estimated 600,000 Africans were taken to Cuba in the 19th century, and more than 1.5 million went to Brazil. Many of these new arrivals were smuggled to the Americas as part of a large black market after government regulations began curbing the slave trade. Slavery thrived in Brazil and in the Spanish

Caribbean throughout the first half of the 19th century, and as a result, commodity production of plantation products such as sugar, COFFEE, and TOBACCO expanded in those economies. Working conditions on plantations remained as oppressive as ever, with extremely high levels of infant mortality and a low life expectancy.

Latin American slavery was also characterized by relatively high rates of manumission. Plantation owners were more likely to grant slaves their freedom or allow slaves to purchase their freedom than in other slaveholding regions, such as the U.S. South. Slave labor on plantations was often supplemented by a large free black and mulatto population. Former slaves generally held more skilled positions in the workforce and received only a nominal wage. By the 1850s, pressure was mounting for Brazil and the Spanish Caribbean to abolish slavery. Spain passed the MORET LAW on July 4, 1870, which freed all slaves born after that date and all slaves over the age of 65. The Brazilian government passed the similar LAW OF THE FREE WOMB in 1871. Full abolition was finally achieved in the Spanish colonies in 1886 and in Brazil in 1888 (see SLAVERY, ABOLITION IN BRAZIL OF).

Other forms of forced or semi-forced labor began replacing African slavery as governments phased out that practice in the last half of the 19th century. Chinese indentured servants, or “coolies,” were brought in to work on plantations in the Caribbean and in South American mines. Chinese workers were also used to build the Panama Canal in the early decades of the 20th century. Some Chinese laborers entered into indentured servitude voluntarily, while others were coerced. The labor system was often characterized by the same types of cruelty and abuse that had been a part of slavery.

Other systems of coerced labor involved relocating rebellious indigenous groups to forced labor camps or to plantations. The Yucatán Peninsula in Mexico was in a state of near-constant rebellion throughout the last half of the 19th century as Maya groups defied national government authority and attempted to secede. The Díaz government arranged for captured Amerindians to be sent to the Caribbean to work on plantations. The Mexican state of Sonora was also beset by violence as the Yaqui tribe resisted government authority. Many of those Amerindians were relocated to the Yucatán Peninsula, where they were forced to work on henequen plantations.

Most Latin American nations implemented policies to modernize their social and economic systems in the last half of the 19th century. For some of the larger countries, such as Mexico, Brazil, and ARGENTINA, economic modernization meant pursuing basic INDUSTRIALIZATION. Many leaders believed their nations had fallen behind the rest of the world, and some argued that they must recruit a more skilled workforce to allow them to catch up. Many nations actively attempted to attract European immigrants to fill the ranks of a modern workforce, but the success of those policies varied widely. Mexico had struggled through decades of political instability, civil

wars, and foreign invasions, and most potential immigrants saw better opportunities elsewhere. CHILE also attempted to recruit foreign workers, but the country's location on the eastern coast of South America added to the time, distance, and expense required to travel there.

Brazil and URUGUAY experienced more success in recruiting immigrant workers in the last half of the 19th century. After 1880, more than 100,000 European immigrants per year arrived in Uruguay. They generally settled in urban areas and went to work in new industries. Brazil had a long history of attracting Portuguese migrants, and attempts to build a skilled workforce led to an increase of Italian and Spanish immigration as well. Many of those new workers settled in urban areas and became a part of the growing industrial workforce. Immigrants also went to work as artisans and merchants and in other roles that eventually became the foundation of the nation's growing middle class. Some immigrant workers found employment on Brazil's coffee plantations as replacements for African slaves once abolition went into effect. Over time, some European immigrant families managed to acquire their own land and became part of the 20th-century agricultural sector. The Brazilian government specifically attempted to attract German immigrants as part of a colonization program to settle regions of Rio Grande do Sul, Bahia, and Pernambuco.

Argentine immigration policies achieved the greatest success in the late 19th century. As in Brazil, the government of Argentina hoped to settle large expanses of the countryside through colonization programs. Male European migrants initially worked as seasonal laborers in the agricultural sector, but eventually, entire families immigrated (see MIGRATION). Some families acquired land and became small farmers, while others remained as hired laborers on large estates. Many more immigrant families settled in cities—including BUENOS AIRES, Córdoba, and Rosario—where new industries created a demand for wage laborers. By the turn of the century, immigrant laborers made up a significant portion of the Argentine working class. They brought with them new ideas about workers' rights and collective organizations. A working-class consciousness began in those urban immigrant communities and became the basis for 20th-century labor movements.

See also LABOR (Vols. I, IV); MITA (Vol. II); REPAR-TIMIENTO (Vol. II).

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### Ladder Conspiracy (Conspiración de la Escalera)

The Ladder Conspiracy was a ruthless government reprisal intended to suppress an attempted slave uprising in CUBA in 1844. In the crackdown, hundreds of slaves and free blacks were executed, and thousands more were arrested and tortured on suspicion of supporting an abolitionist conspiracy. Many of those detained were tied to ladders and flogged. Among those persecuted were influential intellectuals and other members of the black middle class.

Cuba was one of Spain's few remaining colonies in the 19th century. The island had developed a thriving ECONOMY based on the cultivation of SUGAR, which relied on a ready supply of slave LABOR. Despite an 1817 treaty between Spain and Britain abolishing the transatlantic slave TRADE, Cuba's slave population exploded due to illegal trade that kept the island supplied. As the slave and free population grew, pressure from abolitionist forces at home and abroad also increased. The Cuban planter class lived in constant fear that a slave revolt could lead to abolition and Cuban independence, as it had in HAITI. Officials had foiled attempts to incite slave rebellions in 1826, 1837, and 1843, and government reprisals became increasingly violent over those years.

The movement that provoked the Ladder Conspiracy originated in 1844 in the western province of Matanzas. The Matanzas Military Commission discovered evidence of an abolitionist plot and began arresting slaves and free blacks by the hundreds. Some mulattoes and creoles also fell victim to the Ladder Conspiracy. Cuban poet PLÁCIDO was executed as a suspected conspirator after spending several months in jail. After the conspiracy, many middle-class blacks in Cuba began to question the role of SLAVERY on the island.

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**laissez-faire** Laissez-faire is an economic philosophy that was common throughout the world in the 19th century. Derived from the French for “to leave alone,” the laissez-faire approach to economic development advocated little to no direct government involvement in finance and TRADE. Laissez-faire economics of the 19th century were characterized by relatively free and open trade based on COMPARATIVE ADVANTAGE. Laissez-faire also rejected burdensome taxes and government monopolies. The theory favored the well-being of individuals

as the basis of a successful society. Adherents believed that competition and free market forces would encourage economic growth and lead naturally to a stronger ECONOMY. Laissez-faire was the preferred economic theory of liberal leaders in 19th-century Latin America. Governments throughout the region dismantled many of the trade restrictions that had characterized the colonial period, but some government control over the economy still remained.

Laissez-faire economic theory was introduced in the 18th century by French economists known as physiocrats. French merchants, in particular, opposed the tightly controlled economic policies of the mercantilist system. Scottish economist Adam Smith popularized the notion of free trade and open competition when he published his landmark book, *Wealth of Nations*, in 1776. Laissez-faire economics quickly took root as the preferred economic doctrine among liberal thinkers in the early decades of the 19th century. As Latin American liberals began to challenge the political and social status quo of the Spanish and Portuguese colonial systems, laissez-faire also took root in that region.

The earliest theories of laissez-faire economics in Latin America took aim at the traditional mercantilist structure of colonial economy. For centuries, the Spanish and Portuguese Crowns had attempted to administer the colonial economies through tightly controlled trade and royal monopolies. Under the Spanish system of mercantilism, the colonies existed for the well-being of the mother country. Spanish laws placed restrictions on the type and amount of economic activity allowed in the colonies in an attempt to maximize profits and tax income. Manufacturing was limited so that the colonies would become both the markets for goods manufactured in Spain and the sources of raw materials to make those goods. In order to enforce its trade laws, the Spanish Crown allowed only limited shipping to and from select ports in Spain and the Americas. In addition to highly regulated trade policies, Spanish mercantilism involved extracting large amounts of bullion from the SILVER and GOLD mines of MEXICO and South America. Portuguese mercantilism in colonial BRAZIL employed similar measures to limit trade and benefit the mother country.

Mercantilism was a generally inefficient economic system, and its cumbersome structure produced a number of weaknesses in the colonial economies. In many areas, Crown regulations were not enforceable. Other European powers constantly attempted to make incursions into the colonial markets, and a black market of smuggled and contraband goods thrived throughout the colonies. Furthermore, laws restricting colonial trade and manufacturing kept the colonial economies in a state of infancy, while European powers prepared for the onset of the industrial revolution.

As many European nations began to experiment with laissez-faire economic policies in the 18th century, some liberal-oriented advisers pushed the Spanish and



Portuguese Crowns to consider lifting trade restrictions. Fiscal reports often emphasized the backwardness and inefficiencies of the Latin American economies. Colonial merchants also began to push for liberalized trade policies, believing that the mercantilist policies were preventing economic growth and limiting their ability to make profits. These pressures, combined with a growing desire to make the colonies run more efficiently, compelled the Spanish and Portuguese monarchies to institute a series of reforms in the last half of the 18th century. Bourbon and Pombaline Reforms were instituted in the Spanish and Portuguese Empires, respectively. Many of those reforms were aimed at easing trade restrictions and opening up the colonial economies, but they were also piecemeal and inconsistent. By the end of the century, many members of the merchant elite felt that their economic needs were not being met under the colonial system, and the desire to move toward a more open, laissez-faire economy led many of them to support the independence movements of the early 19th centuries.

After the wars of independence, most Latin American economies turned to policies based on the principles of the laissez-faire model. Liberal politicians incorporated less restrictive trade policies into their platforms, and even most conservatives leaders did not advocate maintaining an economic model based on colonial mercantilism. Finished goods from primarily Great Britain immediately flooded local markets in South America and Mexico. British goods were accompanied by loans and investments in the declining MINING industries. Latin American countries' new links to Great Britain set the stage for trade and economic exchanges with other industrializing powers in the last half of the century. The Netherlands, France, Germany, and the United States joined Britain as providers of finished goods to Latin America.

As Latin American economies became increasingly tied to those of western Europe and the United States, laissez-faire theories in the region came to favor the notion of foreign trade based on comparative advantage. The idea of comparative advantage was articulated by laissez-faire advocate David Ricardo in 1817. According to the theory, nations should produce and export the product or products they make well, relative to other countries. In the 19th century, Latin American nations had a comparative advantage in producing raw materials such as FOOD and gold and silver. However, the colonial economies based on AGRICULTURE and MINING did not allow for the development of industrial and manufacturing sectors. As a result, under liberal laissez-faire measures, Latin American economies continued to favor the production of raw materials for export and lacked diversity. Since western Europe and the United States held a comparative advantage in finished goods, Latin America continued to be a market for foreign-produced manufactured products.

The spirit of laissez-faire economics persisted throughout the 19th century. As the political and security

situation stabilized in the last half of the century, economic development fueled by a growth in exports took root throughout the region. Latin American governments, controlled by the elite cadre that made up the LIBERAL OLIGARCHY, embraced laissez-faire policies as a way to ensure progress. Economic expansion, though, was accompanied by increasing foreign involvement in the local mining and agricultural sectors. Foreign funds financed advancements in mining technology in CHILE, PERU, and Mexico, and the mining industry in those countries became increasingly reliant on foreign markets. U.S. and European agricultural investors also began acquiring landholdings throughout Latin America. Foreign investors also helped to finance the new infrastructure that was necessary for economic growth. Railroads, ports, and communication lines proliferated throughout the region (see TRANSPORTATION).

The positivist regimes of the late 19th century abandoned some of their strict reliance on laissez-faire theory but worked to attract even more foreign involvement into their economies (see POSITIVISM). Positivist leaders in Mexico, Brazil, and elsewhere believed that foreign investment was the best way to ensure continued economic growth and development. Exports did indeed increase dramatically in the late 19th century, but increasing foreign investment brought new problems. Many positivist regimes often favored foreign owners of industry over local workers, and a widening gap between rich and poor was evident by the turn of the century.

The emphasis on laissez-faire economics had diminished throughout Latin America by the early decades of the 20th century, but it was not until the economic crash brought about by the Great Depression in 1929 that the idea of free trade fell from favor. A modified version of laissez-faire economics has made a resurgence in recent decades as neoliberal Latin American governments have reconsidered free trade and the role of Latin America in global markets.

See also BOURBON REFORMS (Vol. II).

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**Lastarria, José Victorino** (b.1817–d.1888) *Chilean writer, intellectual, and liberal politician* José Victorino Lastarria was a prominent literary figure and political leader in CHILE in the mid-19th century. He belonged to a distinguished literary group called the Generation of 1842 and gained a reputation for promoting liberal politics.

Lastarria was born on March 23, 1817, in the rural town of Rancagua. As a young man, he received government sponsorship to study at the liberal Liceo de Chile in SANTIAGO DE CHILE. Armed insurrection brought Conservatives to power in 1829, however, and the government of General Joaquín Prieto (1831–41) closed the school down. Having gained a thirst for liberal doctrine, Lastarria enrolled in the Instituto Nacional in 1831, where he pursued a curriculum based on philosophy and the humanities. In later years, he became a professor at the Instituto while pursuing a law degree.

Throughout his career, Lastarria devoted himself to promoting the liberal ideology through his writings. His themes expanded to include an examination of POSITIVISM in later years. He founded the Sociedad Literaria (Literary Society), members of which became known as the Generation of 1842. In 1843, Lastarria joined the inaugural faculty at the newly established UNIVERSITY OF CHILE. At the same time, he built a political career, intermittently serving as both a congressional deputy and a senator, as well as in various cabinet positions, over the next several decades.

Lastarria and his cohorts in the Generation of 1842 believed that LITERATURE should help create and maintain a sense of national identity, a notion that is reflected in many of his writings. He also believed in free, state-run primary EDUCATION. Lastarria's influence on Chilean culture and politics was visible throughout the 19th century.

Lastarria died of pneumonia in Santiago on June 14, 1888.

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**latifundio** *Latifundio* refers to the concentration of landholdings in the hands of a few wealthy individuals. It emerged out of the HACIENDA structure of land control that was common in Latin America during the colonial period. After independence, Latin American governments implemented a variety of land reform policies that ultimately led to a greater concentration of land ownership among a few. By the end of the 19th century, most arable land in Latin America was owned by a small group of local and foreign elite.

The tradition of *latifundio* dates back to ancient Rome, when members of the nobility and other elite controlled large landed estates that were worked by peasants or slaves. During the 16th century, the Spanish Crown put in place a system of land and LABOR dispersal known as *encomiendas* to reward minor nobles and conquistadores

for their contributions to the conquest. The *encomienda* system was largely eliminated by the beginning of the 17th century, but large *ESTANCIAS*, plantations, and haciendas quickly replaced the earlier system. *Estancias* were large tracts devoted mainly to cattle and sheep ranching and were most common in the PAMPAS of ARGENTINA and URUGUAY. Plantations were large agricultural estates that produced commodity cash crops for export or for sale in local markets. Haciendas were large, self-sufficient estates devoted primarily to AGRICULTURE, although haciendas were also prominent in MINING regions and housed some processing and smelting functions. Throughout all regions of Latin America, the CATHOLIC CHURCH acquired large expanses of land during the colonial period as wealthy parishioners provided endowments to accompany a family member's admission into a convent or monastery. Other devout colonists bequeathed property and other forms of wealth to the church, which emerged as the largest landowner in many parts of Latin America.

Political and economic instability immediately after independence compelled some large landowners to sell off their estates, causing the size of landholdings to decline in the short term. By mid-century, however, a variety of factors had moved land ownership trends back toward *latifundio*. In some areas, natural geographic barriers and a lack of public infrastructure made large, self-sufficient haciendas the logical choice for agricultural production. In others, liberal political factions put in place new land policies. Liberal theories advocated private property ownership as a mechanism for building strong nations and privileged the role of small farmers. Policies centered on dismantling the large property holdings of certain institutions but not on reversing the trend of *latifundio* in general. Haciendas and other large estates owned by wealthy individuals were not included in land reform laws; rather, liberal leaders focused their energies on breaking up the large estates owned by the church, since the church as an institution defied the notion of private property ownership by individuals. In MEXICO and COLOMBIA, Liberal policies also applied to the system of communal control of property by indigenous communities that had existed since precolonial times (see *EJIDO*).

The liberals' intention was to make smaller plots of land available for purchase by individual families, but in reality, most people could not afford to purchase the lands freed up by the new laws. Furthermore, rural NATIVE AMERICANS did not fully understand the concept of private property, since local lands had been administered communally for centuries. Instead the elite, many of whom already held large landholdings, purchased the large estates that had once belonged to the church and the communal properties that had been controlled by the indigenous. The large landed estates that had characterized rural land ownership in the colonial period became enormous estates in the 19th century.

In the late decades of the 19th century, liberal leaders consolidated their power further as liberal oligarchies

emerged across Latin America (see LIBERAL OLIGARCHY). Liberal oligarchies favored modernization and efficiency, and *latifundio* fit the economic models they envisioned. By the end of the 19th century, haciendas had evolved from the self-sufficient, semi-isolated estates of the colonial period into agribusinesses making profits by producing commodity products for export. While many large estates of the late 19th century were owned by the local elite, foreign ownership of agricultural land also increased substantially. The few peasant farmers who had managed to acquire smaller tracts of land soon discovered that the family farm could not compete with the colossal estates of *latifundio*. Most rural peasants became menial laborers on the enormous haciendas and other landed estates under a system of debt peonage.

The strengthening of *latifundio* coincided with the consolidation of export-oriented economies in Latin America at the end of the century. National and foreign elite owned the majority of arable land and used it to cultivate products such as COFFEE, SUGAR, fruit, and grain for export. The existence of *latifundio* created a volatile system of income disparity, and the focus on commodity exports placed Latin American economies in a vulnerable position in the world economy. In Mexico, the asymmetrical system of land ownership fueled the social hostilities that culminated in the 1910 Mexican Revolution. Elsewhere in the region, the precarious reliance on commodity exports hurt many economies with the onset of the Great Depression after 1929, because the economic downturn brought a precipitous decline in commodity prices. Numerous Latin American countries struggled to alter the deeply ingrained system of *latifundio* during the 20th century, but land ownership remains a source of intense conflict in many areas.

See also AGRICULTURE (Vols. I, II, IV); DEBT PEONAGE (Vol. II); ENCOMIENDA (Vols. I, II); ESTANCLIA (Vol. II); HACIENDA (Vol. II); MEXICAN REVOLUTION (Vol. IV); PLANTATIONS (Vol. II).

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**Lavalleja, Juan Antonio** (b. 1784–d. 1853) *independence hero and political leader in Uruguay* Juan Antonio Lavalleja led the movement for the independence of present-day URUGUAY from its occupation by Brazilian forces from 1825 to 1828. He spent the rest of his life defending the interests of ranchers and agriculturalists in the countryside against the urban-centered power of Montevideo.

Lavalleja was born on June 24, 1784, in Villa de la Concepción de las Minas. He worked as a rancher until the beginning of the independence movement and

then became a lieutenant under José Gervasio Artigas. Together, the two GAUCHOS led the movement to separate Uruguay—then known as the BANDA ORIENTAL—from the Río de la Plata government in BUENOS AIRES. Lavalleja was given command of the port city of Colonia, and in 1818, he led local forces in defending the Banda Oriental from an invasion by BRAZIL. He was captured and imprisoned but upon his release in 1821 formed an alliance with FRUCTUOSO RIVERA and organized an aggressive resistance movement of the THIRTY-THREE IMMORTALS. The insurrection soon received support from Argentine president BERNARDINO RIVADAVIA and escalated into the CISPLATINE WAR in 1825. The war dragged on for three years until mediation by British agents resulted in the Treaty of Montevideo, which secured complete independence for the newly named Eastern Republic of Uruguay.

Lavalleja ran for president in 1830 but lost to Rivera, causing a split between the two former allies. Lavalleja engaged in several campaigns against the Rivera government and eventually was forced to flee into exile in ARGENTINA. During the GUERRA GRANDE, he accompanied the forces of the BLANCO PARTY under MANUEL ORIBE. At the conclusion of that war, Lavalleja was selected to serve as a member of the governing triumvirate in 1853. He died while in office on October 2, 1853.

See also ARTIGAS, JOSÉ GERVASIO (Vol. II); UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**Law of the Free Womb (Rio Branco Law)** (1871) The Law of the Free Womb was the first major legislation in BRAZIL designed to bring about a gradual abolition of SLAVERY. The law was passed in 1871 by the Brazilian legislature and by Emperor PEDRO II. It provided freedom to all children born of slave mothers from the date it went into effect. At the same time, other laws were passed to ameliorate the conditions of slavery. They included provisions for keeping slave families together and regulating market prices to allow slaves fair access to purchasing freedom. These laws came in response to the abolitionist pressures that had been building in Brazil in the last half of the 19th century.

Prior to the Law of the Free Womb, slave or free status for children born in Brazil was determined by the status of the mother. The institution of slavery had thrived in Brazil since the 17th century, and Brazil's slave population had grown to more than 1.5 million in the 19th century. Other nations had outlawed slavery in earlier decades, and the abolitionist movement had taken hold around the world. The British government formally ended the transatlantic slave TRADE in 1807, and most former Spanish colonies had outlawed slavery by the 1850s. Brazil finally ended the external slave trade

in the 1850s, but the demands of its plantation economy ensured that forced labor remained a foundation of the nation's labor system. The Brazilian Liberal Party made abolition one of its political platforms, arguing that the forced labor system was both immoral and prevented economic modernization. As abolitionist pressure mounted, the Brazilian emperor began to articulate an argument in favor of emancipation. Ironically, it was a legislature led by the Conservative Party that eventually passed the Law of the Free Womb. The law ensured that slavery would be phased out over time, since external sources of slaves had been eliminated in earlier decades.

The Law of the Free Womb marked a major victory for abolitionists, but by the end of the 1870s, they were challenging its effectiveness. Joaquim Nabuco, a legislator and writer who had played an important role in creating the law, argued that it was bringing about abolition too gradually and pointed out that children of slave mothers lived in a state of virtual slavery, regardless of their legal status. He also criticized the government's continued protection of slavery and believed the practice was keeping the Brazilian economy and Brazilian society in a state of backwardness. In 1880, Nabuco founded the Brazilian Anti-Slavery Society, which pressured the government particularly through its publications. Nabuco authored a number of antislavery books and essays. Pressure by Nabuco and others like him eventually began to pay off. In the 1880s, several states passed laws abolishing slavery. The Brazilian government eventually followed with a decree freeing all slaves in Brazil in 1888 (see *SLAVERY, ABOLITION IN BRAZIL OF*).

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**Lerdo de Tejada, Miguel** (b. 1812–d. 1861) *Mexican liberal politician* Miguel Lerdo de Tejada was a Mexican writer and liberal politician who played a prominent role in the era of *LA REFORMA*. He is most famous for his *Ley Lerdo*, or *Lerdo Law*, which attempted to curb the wealth and influence of the *CATHOLIC CHURCH* and reform landholding practices in *MEXICO* in the 1850s.

Lerdo de Tejada was born on July 16, 1812, in Veracruz into a well-to-do creole family. From an early age, he pursued a career in public service, holding various municipal posts in *MEXICO CITY*. In the 1850s, he published *Historia de Veracruz* and *Historia del comercio del exterior de México*. After the Liberal Party ousted the Conservative government of Antonio López de Santa Anna in 1855, Lerdo held several ministry positions and actively pushed an agenda aimed at moving Mexican society toward secular liberalism and away from many of the conservative and traditional practices that had dominated since independence.

Lerdo is most famous for writing and helping push through the *Lerdo Law*. This legislation changed property-holding practices in Mexico by requiring all private property to be titled to individuals. Groups or corporate entities, such as the church or local governments, that had traditionally held large landholdings had to surrender any nonessential real estate to the government to be auctioned to private individuals. Lerdo intended to convert Mexico into a nation of private property owners, modeled largely on the U.S. concept of the Jeffersonian yeoman farmer. His reform law also divested Amerindian communities of the *ejido* properties that had been owned and worked collectively for centuries. The *Lerdo Law* and other reform laws sparked a Conservative backlash that escalated into a civil war known as the *WAR OF REFORM* (1858–61).

Lerdo de Tejada died shortly after the conclusion of the *War of Reform* in *Mexico City* on March 22, 1861.

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**Lerdo de Tejada, Sebastián** (b. 1823–d. 1889) *liberal leader and president of Mexico* Sebastián Lerdo de Tejada was a lawyer and magistrate in *MEXICO* who served in various government posts during the era of *LA REFORMA* in the 1850s and the *FRENCH INTERVENTION* in the 1860s. He served as president following the death of Benito Juárez in 1872 until he was overthrown by Porfirio Díaz in 1876.

Lerdo de Tejada was born in Jalapa on April 24, 1823, to a Spanish father and a creole mother. He studied law and followed a career both in the judicial system and as a legal scholar and professor. During the 1850s, he served in the Ministry of Foreign Relations and actively fought against U.S. attempts to expand further into Mexico. Although his brother, famed Liberal leader Miguel Lerdo de Tejada, became actively involved in crafting liberal reform legislation in the era of *La Reforma*, Sebastián maintained a low profile in an era of contentious politics.

After the *WAR OF REFORM*, Lerdo's politics seem to have molded firmly in the Liberal camp, and he became a loyal supporter of Juárez. He accompanied the president when his administration escaped *MEXICO CITY* during the French intervention of 1862, providing legal and logistical advice. When Juárez returned to power in 1867, Lerdo served as minister of foreign relations and as a main adviser to the president. He ran unsuccessfully in the 1872 election, but when Juárez died of a heart attack on July 19, 1872, Lerdo assumed the role of president. Lerdo oversaw numerous policies to stabilize the nation's security and finances during his presidency. He also continued to pursue many of the liberal reforms initiated under Juárez.

Lerdo attempted to run for reelection in 1876 but was overthrown by Díaz in the Plan de Tuxtepec. Lerdo de Tejada died in April 1889 in New York City.

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**Lerdo Law** See LA REFORMA.

**Letelier Madariaga, Valentín** (b. 1852–d. 1919) *Chilean intellectual, diplomat, and educational reformer* Valentín Letelier Madariaga was the Chilean intellectual most involved in educational reform in the final decades of the 19th century. He is largely responsible for introducing social theories and teaching strategies based on POSITIVISM into CHILE's educational system.

Letelier Madariaga was born in Linares on December 16, 1852. The son of a successful agribusinessman, Letelier received an early EDUCATION. His thirst for knowledge brought him to SANTIAGO DE CHILE in 1867 to study at the Instituto Nacional and later at the UNIVERSITY OF CHILE. While studying law at the university, Letelier was exposed to the positivist theories of French philosopher Auguste Comte (1798–1857) that were gaining in popularity throughout Latin America and around the world.

Letelier joined the literary society formed by JOSÉ VICTORINO LASTARRIA. His association with other intellectuals affirmed many of his philosophical inclinations and provided a forum for engaging more actively with the positivist doctrine. Letelier built a career as a writer and educator and served on the faculty of the University of Chile. At the same time, he wrote for numerous journals and periodicals (see LITERATURE). Letelier became peripherally involved in politics, which earned him the post of the first secretary to the new German legation in Berlin. He held that post for four years.

In the final decades of the 19th century, Letelier dedicated himself to educational reform and writing. He pushed for improving the system of teacher training and was a strong advocate of WOMEN's education. All the while, Letelier promoted the incorporation of positivism into national curriculums.

Letelier became rector of the University of Chile in the early decades of the 20th century. He died of a heart attack on June 19, 1919.

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**Liberal Conservative Party (Partido Liberal Conservador)** The Liberal Conservative Party of PUERTO RICO was formed in 1870 by José R. Fernández, Pablo Ubarri y Capetillo, and Francisco Paula Acuña as a response to the formation of the LIBERAL REFORMIST PARTY months earlier. The Liberal Conservative Party members were known as "traditionalists," and many were born in Spain and strictly followed the political doctrine sent down by the Spanish government to Puerto Rico.

Following the removal of Spanish queen Isabella II (b. 1830–d. 1904) from her throne in 1868, a new liberal Spanish government and constitution were created. This had repercussions for Puerto Rico, allowing for the formation of new political parties on the island. Both the Liberal Conservative Party and the Liberal Reformist Party were formed in 1870 but with very different views on the best course of action for Puerto Rico's future. Liberal Conservatives wanted to maintain the status quo and retain all the privileges for Spanish-born peninsulars regarding political and MILITARY appointments, social status, and legal rights, while Liberal Reformists wanted to do away with these privileges and enact sweeping political reforms at the municipal level.

Following the death of conservative Spanish prime minister Antonio Cánovas del Castillo (b. 1828–d. 1897) at the hands of Spanish terrorists in August 1897, the new liberal Spanish prime minister, Práxedes Mateo Sagasta (b. 1825–d. 1903), granted autonomy to Puerto Rico. This action dashed the Liberal Conservatives' hopes of maintaining the social and political conditions on the island that had existed throughout the colonial period.

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**liberalism** Broadly defined, liberalism is a system of political, economic, and social theories that became prominent in the recently independent nations of Latin America in the 19th century. Early notions of liberalism originated centuries earlier in Europe, and those incipient forms of the philosophy evolved in the intellectual circles of Enlightenment thought.

Liberalism is difficult to define since the philosophy encompasses many complex aspects of society. Individual movements, governments, and nations have tended to adapt the theory to fit local circumstances. Nevertheless, 19th-century liberal movements throughout the world shared some common characteristics. At its most basic level, liberalism promoted the role of the individual in society. Liberal thinkers advocated a shift away from what they perceived to be the stagnant and backward political, economic, and social systems of the past. Liberal leaders

were often challenged by conservatives who wanted to preserve traditional systems (see CONSERVATISM).

Some of the most sophisticated manifestations of liberalism appeared in the North American colonies' Declaration of Independence in 1776 and in the fervor of the French Revolution in 1789. Both the American and French Revolutions strongly reflected Enlightenment thought. The organizing principles of both movements—equality, liberty, and self-determination—had been championed in the writings of philosophers such as John Locke, Thomas Paine, Voltaire, Thomas Hobbes, and Jean-Jacques Rousseau. Enlightenment thinkers encouraged a new way of viewing social relations that favored rationalism and empiricism over blind faith and superstition. They insisted that humans were capable of scientific reasoning and that society should challenge and question traditional notions by testing observations. They therefore believed that people were capable of changing and improving society.

The rise of liberal thought in 19th-century Latin America was closely tied to Enlightenment currents in Europe and in the Americas. Despite efforts by the Spanish Crown and the CATHOLIC CHURCH to censor the essays and books of Enlightenment philosophers, educated Latin Americans had relatively easy access to their writings in the last half of the 18th century. And though those writings alone did not trigger revolutions in the Spanish colonies, liberal ideas did inspire a number of liberation leaders in North and South America once the wars for independence were under way.

After Napoléon Bonaparte invaded the Iberian Peninsula in 1808, Enlightenment-inspired liberal leaders emerged in Spain and in the Americas to challenge long-held colonial traditions. Napoléon placed the Spanish monarch under house arrest, and the absence of the Spanish king provided an opportunity for liberal-minded thinkers to begin challenging the status quo. Liberal ideas found expression as resistance juntas formed to oppose Napoléon and participants began discussing how to improve the existing political, economic, and social systems. Liberal colonists and Spaniards alike expressed doubts about the political system based on monarchy, the mercantilist structure of the ECONOMY, and the societal inequalities that had defined the colonial period. In 1812, members of the main resistance junta in Cádiz wrote a constitution calling for a complete restructuring of the Spanish Empire. The document called for a limited constitutional monarchy and protection of individual rights. Spain's Constitution of 1812 is considered to be the first canon of 19th-century liberalism in Latin America. And although Spain's king, Ferdinand VII, abrogated the constitution when he returned to power in 1814, numerous liberal leaders in newly liberated Latin American nations used the document as a model for writing their first constitutions.

The liberal philosophical tenets that surfaced in Latin America during the era of independence matured

into full-scale political movements over the course of the 19th century. Liberal leaders in Latin America argued that in order for their new nations to succeed, they must divest themselves of backward-looking colonial traditions and embrace the progressiveness championed by liberal thought. The specifics of movements varied from one country to the next, but some similar characteristics can be identified.

### POLITICAL LIBERALISM

Latin American liberals opposed the traditional colonial political system of monarchy, and most wanted to move away from highly centralized rule by an absolute sovereign. Based on Enlightenment notions, liberals generally upheld the idea that the power to govern came from the people. The traditional governing principle of the divine right of kings—the idea that a monarch's right to rule came from God—that prevailed during the colonial period was therefore challenged by liberal tenets after independence. Liberalism's influence throughout Latin America could be seen in numerous constitutions that included provisions calling for a separation between church and state and some form of representative government. Early liberal governments also reflected a fear of strong authoritarian rule. Many of the first constitutions called for a sophisticated system of checks and balances and granted extensive powers to legislative bodies in the hopes of preventing a kinglike figure from seizing power and reestablishing colonial political traditions.

Although liberal theories promoted a progressive system of self-government, in practice many liberal leaders in 19th-century Latin America did not favor complete political DEMOCRACY. Most were members of the elite and were more concerned with safeguarding their own political power than with enforcing a system of true political equality. Furthermore, white elites often mistrusted the colored populace and feared that granting full political rights to large populations of NATIVE AMERICANS and former slaves would create an inefficient and unstable environment. Therefore, liberals championed the cause of democracy and political inclusion in their rhetoric but in practice sought to limit the political participation of the poor and uneducated. Likewise, WOMEN were not included in early liberal discussions of political participation. Liberal constitutions in the early 19th century often struck a fine balance of calling for equality and freedom while restricting the electorate.

Because political liberalism aimed to dismantle highly centralized government, many early liberal constitutions also called for a federalist system that would grant more autonomy and power to smaller geographic entities such as provinces and states (see CENTRALISM). As a result, FEDERALISM generally accompanied liberalism in newly formed Latin American governments in the early 19th century. Liberal leaders often railed against the centralist model under absolute monarchy that had bolstered imperial and viceregal capitals as the hub of political,

economic, and cultural activity. Provincial elite, who made up a large segment of the liberal leadership, urged a shift away from the older colonial model, and many early liberal governments attempted to accommodate provincial concerns by severely limiting the authority of the central administration and granting extraordinary powers to state and provincial leaders. Other federalist tendencies were tied to issues such as territorial security or TRADE and commercial networks.

The federalist preference created problems for some Latin American governments. Provincial autonomy contributed to a greater sense of local identity over nationalism in the early years after independence. Many areas, such as the UNITED PROVINCES OF CENTRAL AMERICA and the United Provinces of the Río de la Plata, split into smaller nations in the early decades of the 19th century as a result of regional separatist movements. In the last half of the 19th century, liberal leaders often abandoned their insistence on provincial autonomy in favor of a more unified sense of national identity.

### SOCIAL LIBERALISM

Nineteenth-century liberal ideology promoted the role of the individual as the foundation of society. Liberals rejected the colonial tradition that had privileged institutions and corporations such as the Catholic Church, the nobility, and the MILITARY over the individual. Conservatives, who wished to preserve those systems, tended to be those who had benefited from them. Postindependence liberal leaders aimed to dissolve the rigid system of social hierarchy and corporate privilege that had defined earlier centuries.

Latin American liberals' social agenda targeted the hierarchical structure of society most aggressively. Much of the liberal platform across the region aimed to dismantle the economic power and social influence of members of prominent corporations, as well as the exclusive privileges enjoyed by the church, the military, and the nobility. Those privileges, or *FUEROS*, included exemption from taxation and access to a separate court system. Postindependence leaders believed that by forming republican governments and writing constitutions they could reshape the faulty social system to favor the individual over the group.

The Catholic Church, as the largest and most commanding of the colonial corporations, became the main target of liberal reform. Liberal leaders throughout Latin America envisioned building nations of responsible, civic-minded citizens and modeled those visions on the recent experiences of the United States. Liberals argued that the very nature of corporate privilege favored institutions over individual citizens and that in order for their new nations to succeed, this incongruity in social preference had to change. Liberals advocated policies that would place individuals at the center of society, while at the same time curbing the special rights traditionally enjoyed by the church, military, and nobility. Liberal laws

throughout the 19th century attempted to abolish corporate *fueros*. Additionally, the nobility had long enjoyed the right to entail the family estate through primogeniture, meaning that the family property could be passed down to only one person (generally the eldest son) rather than being divided among all descendants. That right also came under attack in new liberal laws.

While liberal ideology claimed to safeguard the basic rights of all individuals, liberal leaders often enforced it selectively. Liberal constitutions almost always included a Bill of Rights or some other statement of individual rights and freedoms that laid out basic concepts of freedom and equality. Specifically, liberals pushed for freedom of speech and freedom of the press. Most liberal platforms also included some measure to abolish SLAVERY in areas where it still existed. But even though liberals defended the theory of social equality, in practice, their attitudes toward the larger populace did not always differ significantly from those of conservatives. Women were generally left out of liberal reforms. Furthermore, liberals and conservatives both tended to view the indigenous, mestizo, and black populations as inherently inferior. By the late 19th century, liberal regimes in ARGENTINA, CHILE, and elsewhere had embraced educational reform as a way to lift up the wider, illiterate population (see EDUCATION). Nevertheless, in practice the liberals' emphasis on social equality and individual freedoms applied only to the upper stratum of society.

### ECONOMIC LIBERALISM

The economic arm of liberalism also reflected the new emphasis on the role of the individual, but more than this, it advocated a complete transformation of the global economy. As in other areas, liberals in Latin America sought to move the economic system away from the traditions of the colonial past, which, they considered, had two fundamental flaws. First, the colonial economy was tightly controlled by the Spanish and Portuguese Crowns under a mercantilist design. Mercantilism set up a closed system of trade enforced by Crown monopolies and other restrictions. Second, liberals argued that at the local level the mercantilist economy was designed to benefit a privileged elite. Those who had benefited from the hierarchical social structure during the colonial period were often the same people who benefited from the traditional economic system. Liberal leaders sought economic reforms in the 19th century to reverse both aspects of the economic legacy of the colonial period.

To overturn the mercantilist system, postindependence leaders in Latin America generally adopted LAISSEZ-FAIRE economic policies. *Laissez-faire* means "to leave alone," and the term reflects the attitude new governments took toward trade and economic relations with the rest of the world. Economic liberalism was characterized by a near-complete dismantling of the trade restrictions and government regulations that had defined mercantil-

ism. Instead, Latin American governments tended to open their markets to trade with other Latin American nations and western Europe. Under the laissez-faire structure, Latin American countries emphasized production in products in which they held a COMPARATIVE ADVANTAGE. This meant that they specialized increasingly in the products of AGRICULTURE, namely FOOD, and MINING. Latin America produced raw materials for export to Great Britain in the early 19th century and to other European nations and the United States later in the century. One exception to this trend was PARAGUAY, where the CAUDILLO and dictator JOSÉ GASPAR RODRÍGUEZ DE FRANCIA (1814–40) attempted to isolate the nation from the rest of the world and succeeded in developing an incipient industrial economy in the first half of the 19th century (see INDUSTRIALIZATION).

Liberals also believed that the economic livelihood of individuals on the local level was directly tied to political participation. Inspired by the notion of Jeffersonian agrarianism proposed by U.S. leader Thomas Jefferson, liberals in Latin America equated land ownership with responsible citizenship. According to Jefferson, private property ownership gave individual citizens a vested interest in making good political decisions. If a citizen owned a small plot of land, he would feel a sense of responsibility to vote for leaders and policies to benefit his economic well-being. Jefferson advocated creating a nation of small farmers who would make up the backbone of the democratic system. Latin American liberals agreed with the spirit of the Jeffersonian philosophy and used those arguments to justify land reform policies that targeted church-held property. Liberals argued that large landholdings owned by the church and other institutions would be put to better use as farmland for a nation of property owners. Landholdings administered communally by indigenous villages (*Ejidós*) often also fell under liberal reform. Instead of creating nations of small farmers, liberal land reform often allowed the land-owning elite to buy up property, exacerbating the trend of *LATIFUNDIO*.

The emergence of liberal theories did not go unchallenged in Latin America. Throughout the 19th century, deeply entrenched conservative interests contested the intentions and consequences of liberal reform. Countries such as MEXICO, COLOMBIA, and ECUADOR fought numerous civil wars as liberals and conservatives vied for power. Liberal-conservative conflicts resulted in decades of violence and instability in Latin America as new nations struggled to position themselves after centuries of colonial rule. In many countries, formal liberal parties emerged to articulate the political platform. By the end of the 19th century, the liberal cause overcame the conservative challenge, and in many countries rule became consolidated under powerful liberal oligarchies (see LIBERAL OLIGARCHY).

See also CONSTITUTION OF 1812 (Vol. II); ENLIGHTENMENT (Vol. II).

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**liberal oligarchy** *Liberal oligarchy* is a term that describes the coalitions of powerful liberal leaders that emerged throughout Latin America in the late 19th century and consolidated their influence over national politics. *Oligarchy* literally means “rule by the few” and refers to a political system where power rests with a small elite. The period from 1880 to the early 20th century is often referred to as the era of liberal oligarchy in Latin America.

Liberal oligarchies took shape in different ways throughout the region, depending on the political circumstances, economic base, and social structure of individual nations. Nevertheless, liberal oligarchies shared certain characteristics that contributed to the formation of national identities and a common sense of purpose in the late 19th century. They promoted economic and cultural modernization and supported policies designed to bring this about. Many of those policies created a close and at times precarious connection with foreign interests. Liberal oligarchies generally wanted to make their Latin American nations more like the industrializing and modernizing countries of western Europe.

Liberal oligarchies arose from the liberal political movements that characterized the period from the 1840s to the 1870s. Many liberals had coalesced into formal political parties, providing an institutional framework from which oligarchies could emerge. Political parties often began as instruments of opposition against conservative political movements, but as the political system matured, parties evolved into sophisticated establishments with an internal hierarchy and power structure. As liberal parties defeated conservative movements and consolidated their control over national governments, an elite group of individuals often rose to prominence.

Nineteenth-century LIBERALISM advocated free TRADE and economic specialization according to the theories of LAISSEZ-FAIRE ECONOMICS and COMPARATIVE ADVANTAGE. Liberal oligarchies promoted relatively free trade and the production of export commodities as the foundation of national economies. By the end of the century, Latin



American economies lagged behind because of decades of civil war and political instability. Liberal oligarchies therefore welcomed foreign investment as a way to help their struggling national economies recover. British investors became involved throughout Latin America and were particularly active in Southern Cone countries such as ARGENTINA and URUGUAY. The British presence could also be seen CHILE, BRAZIL, and MEXICO. U.S. investors dominated the economies of CENTRAL AMERICA and the Caribbean, and U.S. interests also played a large role in Mexico.

Along with the local liberal elite, foreign business owners invested in the production of the export commodities that dominated Latin American economies in the 19th century. Foreign ownership of land increased significantly in the late decades of the century. Liberal land reform policies required institutions such as the CATHOLIC CHURCH and indigenous communities to relinquish all nonessential property as part of a strategy to encourage private property ownership. Since the church was the largest landowner at the beginning of the 19th century, followed by Amerindian communities, these policies resulted in millions of acres of arable land being made available for purchase. Land reform policies were introduced in areas such as Mexico and COLOMBIA as early as the 1850s, but early attempts at dismantling institutional landholdings created conflict and civil war between liberals and conservatives.

Liberal parties and their oligarchic successors often found themselves at odds with the Catholic Church and other conservative interests. Reforms that targeted the economic power of the church created conflict, as did policies aimed at diminishing the cultural influence of the church. Throughout the colonial period, the Catholic Church had performed numerous social functions, such as overseeing cemeteries, orphanages, and hospitals. The church also kept records of vital statistics such as births, marriages, and deaths through its registry of sacraments. Liberal reformers believed that the church's role as social administrator weakened national governments. Mid-century liberal reforms often included the creation of a civil registry for tracking vital statistics as well as government institutions to manage other social needs.

After consolidating their authority, liberal oligarchies were able to pursue land reform and other social changes in earnest. As the property of church and Amerindian communities was expropriated, the liberal elite and wealthy foreigners were often the ones who rushed in to purchase the large tracts of land (see *EJIDO*). U.S. investors purchased millions of acres throughout Central America and began the large-scale cultivation of fruit. U.S. and British interests also took advantage of land auctions in Mexico, Argentina, and BRAZIL. In those countries, a local elite also benefited from liberal land policies, and HACIENDAS, ESTANCIAS, and plantations owned by wealthy Latin Americans expanded. All of these trends contributed to the system of *LATIFUNDIO*, ownership of large expanses

of land concentrated in the hands of a few. In Brazil, *latifundio* favored the COFFEE oligarchy. The rural elite of SÃO PAULO rose to prominence after the establishment of a republic in 1889. That ruling elite implemented trade policies favorable to their own economic interests, and the São Paulo coffee oligarchy held power until the onset of the Great Depression in 1930. In Mexico, U.S. and foreign interests dominated the agricultural ECONOMY during the administrations of PORFIRIO DÍAZ, himself a product of a liberal oligarchy (see AGRICULTURE). The enormous landholdings of the TERRAZAS FAMILY in Mexico offer one example of how *latifundio* flourished under the policies of the liberal oligarchy.

Liberal oligarchies also welcomed foreign involvement in other areas of the economy. Foreign money poured into the Chilean and Mexican MINING industries in the late 19th century. Countries such as Argentina, Uruguay, and Mexico began to develop incipient manufacturing industries in textiles, FOOD processing, and other basic goods, and foreign investors owned large parts of these industries as well (see INDUSTRIALIZATION). As basic manufacturing and the export of commodity goods increased, governments saw the need to improve basic infrastructure. Financed by foreign interests, railroads and communication lines spread across the region to connect interior regions with new and renovated ports. Liberal oligarchies pointed to the increased economic activity and the improvements in national infrastructure to argue that their model of development was achieving success.

The economic policies of liberal oligarchies reflected a preference for modernity, and that preference applied to society as well. Liberal leaders of the late 19th century were inspired by POSITIVISM and scientific reasoning. In many countries, positivist ideas manifested in social programs aimed at improving society as a whole. Leaders began to view issues like public health and crime from a more clinical and scientific perspective. In Argentina and Mexico, liberal oligarchies imposed new health measures intended to combat the spread of communicable diseases. Liberal campaigns often targeted the poor, including prostitutes and street children, as the immediate cause of public health problems, without accounting for the larger structural inequalities that contributed to widespread poverty.

Many liberal oligarchies promoted EDUCATION as a way to elevate the population and usher in modernity. Chilean liberals actively sought to improve the nation's education system by inviting input from scholars from all over the world on how to create an efficient national education system. MANUEL BULNES, Manuel Montt, and ANDRÉS BELLO founded the UNIVERSITY OF CHILE in 1843 and set up programs to promote modern education. Future Argentine presidents BARTOLOMÉ MITRE and DOMINGO F. SARMIENTO contributed to Chilean education reform in the 1840s. They later ruled during the period of liberal oligarchy in Argentina and applied similar educational models to their own country.

Liberal oligarchies intended to bring modernization and progress to Latin America, and many of the economic policies did succeed in expanding the economy through the exportation of raw materials and other commodity products. The oligarchies also oversaw improvements in infrastructure and education. Despite their successes, however, the policies of liberal oligarchies continued the economic trends of commodity specialization that had started during the colonial period. In some countries, social policies served only to widen the gap between rich and poor. Liberal oligarchies remained influential throughout much of Latin America until the Great Depression revealed the inherent weaknesses in the economic and social models they had put in place.

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**Liberal Party, Brazil** The Liberal Party in BRAZIL generally refers to the reformist elite who worked throughout the 19th century to move the independent nation of Brazil away from constitutional monarchy and toward a republican form of government. Liberals worked to decentralize the government and break from Brazil's colonial past. They generally sought economic and social modernization, eventually pushing for the abolition of SLAVERY and a transition to open-market LABOR and TRADE.

Liberal inclinations were evident as soon as Brazil officially severed ties with Portugal with the GRITO DE IPIRANGA—or declaration of independence—made by PEDRO I in 1822 (see BRAZIL, EMPIRE OF). Liberal leaders—often referred to as radicals—made up a significant portion of the constituent assembly that gathered to write a new constitution in 1823. Their liberal leanings compelled Pedro I to disband that convention for fear that the new governing system would limit his powers. The CONSTITUTION OF 1824 was eventually promulgated after careful oversight by the monarch. Devoid of any real liberal influence, the document and the governing system it created became the basis for escalating conflict in Brazil over the coming decades. In 1831, Pedro I abdicated the throne in favor of his five-year-old son PEDRO II. For the next 10 years, a series of surrogate rulers ran the government in an era known as the REGENCY. The liberal position coalesced during this time, particularly after Diogo Antônio Feijó was named regent in 1835. Feijó is generally considered to be one of the founders of the Liberal Party, and his politics were representative of the movement's positions. Liberals backed an 1834 amendment to the constitution that effectively weakened

the power of the monarch and strengthened the legislative authority of the provinces.

The Regency ended when Pedro II took the throne as emperor in 1840 at the age of 14. The young ruler appeared to understand the potential for conflict among the political factions that had emerged. Even though they shared some similarities, the two political parties often stood in opposition to each other. The Liberal Party generally supported the interests of the rural elite in areas benefiting from economic expansion, such as the COFFEE-growing region of SÃO PAULO and the cattle-ranching region of Minas Gerais. The CONSERVATIVE PARTY—whose members constantly sought to recentralize power and strengthen the position of the monarch—found support among the formerly powerful SUGAR planters of the northeast.

In the last half of the 19th century, the Liberal and Conservative Parties alternated power in the national legislative body, with much of the power shifting orchestrated by Pedro II himself. The emperor's political maneuverings created a unique environment where Conservatives and Liberals generally complemented each other, even as they criticized each other's policies. For example, Liberals were the strongest advocates of abolition, but it was a Conservative government that passed important antislavery legislation, such as the banning of the transatlantic slave trade, the LAW OF THE FREE WOMB, and eventually complete abolition (see SLAVERY, ABOLITION IN BRAZIL OF).

By the 1870s, the Republican Party had emerged in São Paulo. Its members were influenced by POSITIVISM, and they advocated a complete break from monarchy in favor of a republican form of government. Republicans also took up many of the political positions that had been advocated by Liberals, including modernization, EDUCATION, and general reform. The republican movement gained speed in the final decades of the 19th century. In 1889, the emperor was overthrown, and the Republic of Brazil was founded (see OLD REPUBLIC).

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**Liberal Party, Chile** CHILE's Liberal Party formed in the 19th century as an opposition group to the traditional ruling elite and backers of the nation's first leader and independence hero, Bernardo O'Higgins. Liberals did not establish a formal political party until the 1850s, and liberal-minded politicians were suppressed by the more powerful conservative movement until the 1860s. Nevertheless, liberal intellectuals and local politicians had a substantial impact on Chilean culture and politics throughout the 19th century.

After O'Higgins resigned from office, his supporters coalesced into a conservative movement; the traditional-minded leaders were dubbed *pelucones*, or “big wigs,” by the up-and-coming liberal *pipiolo*s, or “novices.” Liberals managed to secure enough support to push through the CONSTITUTION OF 1828, but conservatives rebelled when the government tried to implement the document. A brief armed conflict between the two groups in 1829 brought conservatives to power, and the powerful *pelucones* remained in power for the next three decades. They created the CONSTITUTION OF 1833, which called for a strong central government and provided the executive with extraordinary powers to stifle political opposition. The conservative system outlined in the constitution provided a foundation for social and political stability, which in turn allowed for economic growth. Such stability often came at the sacrifice of the individual liberties that liberals tried to defend.

Throughout the 1830s and 1840s, liberal leaders worked to challenge the central government, and they succeeded in promoting some of the liberal agenda. Under conservative president Manuel Bulnes (1841–51), a rich liberal intellectual culture thrived and seemingly liberal reforms, such as improvements in EDUCATION, were undertaken. Despite the air of LIBERALISM, however, Bulnes resorted to oppression when necessary, for example, shutting down the recently formed liberal Society for Equality in 1850 after members criticized his administration. His successor, Manuel Montt (1851–61), moved even closer to a liberal platform and eventually provoked a rift within the conservative movement.

In the 1850s, *pelucones* fractured into the anti-Montt CONSERVATIVE PARTY and the pro-Montt National Party. Many liberal leaders began forming alliances with the anti-Montt defectors, and a coalition known as the Liberal-Conservative Fusion emerged and quickly won a majority in the national Congress. That alliance, however, also incited a backlash by staunch liberals, who broke off and formed their own Radical Party. Throughout the 1860s, the divided parties jockeyed for control of Congress and debated potential reforms to the 1833 constitution. The Fusion alliance managed to push through legislation calling for constitutional reform, but religious differences in the liberal and conservative platform began to drive the two factions apart. In the early 1870s, the dominant liberals in Congress approved constitutional amendments limiting the power of the president. For the next two decades, liberal leaders managed to manipulate electoral laws to ensure the party remained in power, effectively eliminating the Conservative Party from any meaningful political participation. Meanwhile, the liberal coalition continued to limit executive power, giving Congress greater influence over national policies. In 1891, liberal president JOSÉ MANUEL BALMACEDA defied Congress and set off a war between the legislative and executive branches of government. A congressional victory marked the end of liberal dominance in the 19th

century and ushered in a long era of congressional rule known as the Parliamentary Republic.

See also O'HIGGINS, BERNARDO (Vol. II).

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**Liberal Party, Colombia** The Liberal Party in COLOMBIA was established in opposition to the CONSERVATIVE PARTY that had formed in the 1840s. The Liberal Party rose to power in 1849, and leaders implemented a number of reforms aimed at moving society away from the traditional tenets that had dominated since the colonial period.

Both parties had antecedents in the 1840 Guerra de los Supremos (War of the Supremes). That conflict began as a small uprising in the isolated southern region of Pasto in opposition to government measures to close some small convents. Devoted Catholics in Pasto initiated a rebellion that was relatively easily put down by the central government administration of President José Ignacio de Márquez (1837–41). General and future president José María Obando (1831–32, 1853–54), a liberal supporter of former president FRANCISCO DE PAULA SANTANDER, saw the uprising as an opportunity to defend FEDERALISM against the increasingly centralized administration of Márquez (see CENTRALISM). Following independence, political and MILITARY leaders had bifurcated into two separate camps: one favoring the highly centralized government espoused by independence leader Simón Bolívar and one supporting the federalist system implemented by Santander. Obando joined the Pasto revolt, his participation attracting support from numerous liberal leaders throughout the country. Obando and his allies each took the moniker of “supreme chief” of various causes, thus giving the conflict its name. The uprising in Pasto quickly morphed into a nationwide civil war. Márquez, facing opposition for having invited former Bolívar allies into his administration, had no other choice than to rely on those same Bolivarian generals to support his government and quash Obando's rebellion. By the early months of 1841, Márquez had effectively put down the rebellion, and the alliance system he had created against the *supremos* turned into the foundation for conservative rule for the next decade.

In the 1840s, the Liberals struggled in opposition to the ruling conservative governments of Mariano Pedro Alcántara Herrán (1841–45) and Tomás Mosquera (1845–49). During that time, the movement splintered into three factions. The *GÓLGOTAS* derived from the upper and middle classes of society and espoused an idealistic vision of social LIBERALISM. Dubbed *gólgotas* because they often referred to the “Martyr of Golgotha” (Jesus Christ) as a predecessor to their brand of social liberal-

ism, these liberals saw the protection of individual liberty as the solution to the nation's problems. An influential group of urban artisans also dominated the Liberal Party. They mobilized through a network of political clubs that developed in urban areas throughout the 1840s. Artisans deviated from the conventional 19th-century liberalism that called for LAISSEZ-FAIRE economic policies. They had been harmed by policies of the Conservative administrations of the 1840s that had opened TRADE and lifted tariffs—measures that traditionally correspond to economic liberalism. Urban artisans saw the Liberal Party as the most effective way of opposing the open economic policies of the Conservative government. A final group, the DRACONIANOS, attracted military leaders who opposed the Conservatives for a variety of reasons.

The Liberal Party rose to power in 1849 with the election of General José Hilario López (1849–53). His presidency marked the beginning of an era of rapid and aggressive liberal reform that continued during the administration of his successor, General Obando. Policies introduced by the Liberals reflected the idealistic bent of the *gólgotas*. They emphasized the notions of equality and individual liberties through measures such as universal male suffrage, direct popular elections, and freedom of the press. In 1851, Liberals achieved the complete abolition of SLAVERY and then set their sights on reforming the system of communally owned property in Amerindian villages. In keeping with the liberal philosophy that favored individual ownership of private property, liberal laws called for indigenous villages to parcel out communal lands to individuals. This measure effectively removed traditional protections on communal landholdings, and many individual plots were eventually consolidated into large private landholdings controlled by the elite, while the indigenous became landless peasants working in a type of peonage on the large estates.

In 1853, Liberal leaders drafted and promulgated a new constitution that solidified their earlier reforms and laid the foundation for additional reforms. New measures extended into issues of church and state. The CONSTITUTION OF 1853 prohibited the mandatory tithes and abolished the long-standing ecclesiastical FUERO, which had given members of the clergy extraordinary privileges such as a separate court system. Liberal leaders aimed to outlaw all religious orders and started by expelling the Jesuits. A final set of reforms dealt with economic matters and eventually divided the precarious coalition between *gólgotas* and urban artisans. In accordance with the theoretical underpinnings of doctrinaire liberalism, López reinforced the laissez-faire economic policies that had been a part of the previous Conservative administrations and had upset the urban artisan class. The Liberal president abolished the state TOBACCO monopoly, maintained low tariffs, and oversaw a precipitous increase in foreign trade.

Such drastic and controversial changes served to foment preexisting antagonism among the various fac-

tions of the Liberal Party. In 1854, *draconianos*, who saw many of the liberal reform measures as impractical policies that weakened the government, joined forces with the urban artisans, who had grown increasingly discontent with liberal economic policies. The disaffected Liberal camps rebelled and overthrew the Obando administration. Infighting within the Liberal Party prompted the *gólgota* faction to turn to Conservatives for support, and the new alliance managed to suppress the artisan revolt. In 1857, Conservative leader Mariano Ospina Rodríguez became president and passed a new federalist constitution in 1858. But, Conservative rule came to an end when civil war, led by former Conservative president turned Liberal Tomás Mosquera, broke out in 1860.

Liberal victory in 1863 led to the introduction of yet another constitution, this one even more progressive than the document created in 1853. The Constitution of 1863 included a bill of rights guaranteeing individual liberties but allowed individual states to place restrictions on suffrage in an effort to prevent a Conservative resurgence. The document is most notable for severely weakening the national government by granting extraordinary rights to states. It also officially changed the nation's name from New Granada to the United States of Colombia. The new constitution was in place for 20 years, but in the 1880s, economic decline precipitated the downfall of the Liberal Party. Conservatives rallied behind formal Liberal Party advocate RAFAEL NÚÑEZ to abrogate the Constitution of 1863. Núñez became president in 1885 and began an era of Conservative government in Colombia that lasted until the 1930s.

See also BOLÍVAR, SIMÓN (Vol. II).

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**Liberal Party, Mexico** Mexican liberals took inspiration from the French and American Revolutions of the late 18th century, as well as from the beginnings of Mexico's war of independence. The central tenet of Mexican LIBERALISM was the protection of individual liberties in the interest of challenging long-standing corporate FUEROS, or privileges enjoyed by members of the CATHOLIC CHURCH, the MILITARY, and aristocratic nobility of corporations. Mexican liberals did not establish a formal party immediately after independence but often banded together to denounce conservative ideals. Liberal conflict with conservatives provided the pretext for countless revolts and resulted in long periods of instability in the nation throughout the 19th century.

The liberal political movement in Mexico began as a counter to the centralist political designs and conservative ideals of the Scottish Rite Masonic Lodge immediately after independence. Scottish Rite Mason AGUSTÍN

DE ITURBIDE oversaw the imposition of a highly centralized government and became Mexican emperor in 1821. U.S. diplomat Joel Poinsett and liberal-minded leaders in Mexico established the York Rite Masons and used the lodge's activities to counter the Scottish Rite with a democratic and federalist political system. In the 1820s, political factions in Mexico differed primarily over the structure of government and debated FEDERALISM versus CENTRALISM. After the overthrow of Iturbide and writing of the federalist CONSTITUTION OF 1824, centralists allied even more strongly with the Scottish Rite Masons, and federalists, with the *yorquinos*. Armed conflict between the competing groups prompted the government to outlaw all secret societies in 1828, but adherents to the political ideals promoted by the lodges remained heavily involved in Mexican politics.

In the 1830s, centralist conservatives formed an alliance with CAUDILLO ANTONIO LÓPEZ DE SANTA ANNA. Disagreements between liberals and conservatives continued. Armed revolts were common as each side blamed the other for the nation's problems, such as military defeat in the TEXAS REVOLUTION and the U.S.-MEXICAN WAR. The liberal movement was further challenged by ideological divisions within the Liberal leadership. *Puros*, or staunch Liberals, wanted strict adherence to federalist and liberal social theories and pushed for aggressive and immediate reforms. *Moderados*, or moderates, advocated a more conciliatory approach to changing Mexican society. In 1848, centralist statesman LUCAS ALAMÁN formally established the CONSERVATIVE PARTY. He defined the party's platform as not just a defense of a strong central executive but also the preservation of long-standing traditions such as corporate privilege and the involvement of the Catholic Church in society.

In the chaotic aftermath of the U.S.-Mexican War, Alamán succeeded in winning support for the return of deposed dictator Santa Anna. Liberals joined together in the REVOLUTION OF AYUTLA to overthrow the dictator in 1855, beginning an era of Liberal rule and social change known as LA REFORMA (1855–58). Under the leadership of future president BENITO JUÁREZ and MIGUEL LERDO DE TEJADA, Liberals passed numerous reform laws designed to curb the power and influence of the Catholic Church and other corporate groups. They intended to use secularization laws and land reform to encourage Mexican citizens to be active and productive members of society. Liberals promulgated the CONSTITUTION OF 1857, which incorporated the laws of La Reforma, but differing ideas expressed by *puros* and *moderados* on its implementation weakened the Liberal position. Conservatives rebelled in 1858, and the two factions fought the WAR OF REFORM.

After the three-year civil war and the subsequent five-year FRENCH INTERVENTION, Liberals finally regained control of the government in 1867. Juárez assumed the presidency and continued to implement the liberal policies that had been interrupted by war. Liberal politics dominated the Mexican government for the rest of the

century, although the ideals of liberalism gave way to the more scientific and less idealistic theory of POSITIVISM during the era of the PORFIRIATO after 1876.

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**Liberal Party, Venezuela** The Liberal Party in VENEZUELA was founded in 1840 by journalist and political leader Antonio Leocadio Guzmán (b. 1801–d. 1884). Guzmán rose to prominence in 1825 when he started the newspaper *El Argos*, which he devoted to criticizing the highly centralized government of GRAN COLOMBIA under FRANCISCO DE PAULA SANTANDER. His outspoken critique of Santander won him many supporters, among them JOSÉ ANTONIO PÁEZ. When Páez and his CARACAS supporters declared Venezuela's secession from Gran Colombia in 1830, Guzmán supported the movement and later held a cabinet post in Páez's administration, which was known as the conservative oligarchy. Guzmán's initial affiliation with Páez's conservative government illustrates the ambiguities that preclude straightforward explanation of the early party system. Páez's government was considered conservative primarily because the president enjoyed the support of the upper classes. Many of his policies, however, fall under traditional definitions of 19th-century LIBERALISM.

By 1840, Guzmán's loyalties had shifted as he allied himself with disaffected intellectuals, merchants, and other professionals. An economic decline precipitated by a drop in the price of Venezuela's COFFEE exports drove many influential business and political leaders to question the course the conservative oligarchy was taking. Many of them began to voice their discontent with the slow pace of social reform and lack of civil liberties. The group of dissidents formed the Liberal Society of Caracas, and Guzmán began publishing a new antigovernment periodical, *El Venezolano*. That movement provided the basis for the Liberal Party, and in response, Páez's coalition of wealthy and upper-class Venezuelans formed the CONSERVATIVE PARTY.

Although the Liberals did not immediately articulate a clear ideology, Guzmán and his fellow founders generally decried the limited electorate and called for greater rights for the larger populace. In particular, the Liberal Party protested the 1834 law that eliminated maximum caps on interest rates paid by farmers and small merchants to Venezuela's wealthy moneylenders. SLAVERY, which had been abolished in Gran Colombia's constitu-

tion of 1821, continued with the establishment of the Republic of Venezuela in 1830. Liberal Party members saw slavery as an antiquated system holding back the nation's progress but stopped short of demanding immediate abolition.

Interest and participation in the Liberal Party grew quickly. Leaders succeeded in attracting advocates of FEDERALISM in rural provinces and earned the name "Yellow Liberals." In an attempt to neutralize mounting opposition, Páez supported Liberal Party member José Tadeo Monagas (1847–51, 1855–58) as the presidential candidate in the 1847 election. Páez hoped that Monagas's presidency would unite the two political factions, but in 1848, the new president ousted Páez and ushered in an era known as the LIBERAL OLIGARCHY. Monagas and his brother, José Gregorio Monagas (1851–55), monopolized the presidency from 1847 to 1858. The two did institute some liberal reforms, such as the abolition of slavery, but their dictatorial rule induced a brief coalition between Conservatives and Liberals to drive them from power.

Differences between Liberals and Conservatives remained, and each side determined to consolidate power, resulting in a five-year civil war known as the FEDERAL WAR. The federalist faction of the Liberal Party brought the participation of regional CAUDILLOS and accelerated the violence between the political factions between 1858 and 1863. Liberals eventually prevailed, paving the way for the presidency of Liberal caudillo and son of Liberal Party founder ANTONIO GUZMÁN BLANCO. His regime, known as the *guzmanato*, provided the first sustained period of Liberal government.

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**Liberal Reformist Party (Partido Liberal Reformista)** The Liberal Reformist Party was formed in 1870 by Puerto Rican liberal leaders Román Baldorioty de Castro, Pedro Gerónimo Goico, and José Julián Acosta. The party's agenda included the abolition of SLAVERY, sweeping political reforms at the local level, and a change in PUERTO RICO's colonial status.

Queen Isabella II (b. 1830–d. 1904) was removed from the Spanish throne in 1868, and a liberal government and constitution were created. As a result, the Liberal Reformist Party and the LIBERAL CONSERVATIVE PARTY were formed in 1870 in PUERTO RICO. Each had very different views on the best course of action for the island's future. Liberal Reformists wanted to change the status quo, which allowed privileges for Spanish-born peninsulars in political and MILITARY appointments, social status, and legal rights. However, within the Liberal Reformist Party, there existed a philosophical split between members who believed that Puerto Rico

should completely sever its political ties with Spain and those who wanted greater autonomy for the island's local government while remaining under the rule of the Spanish Crown. Eventually, this disagreement led to its split in 1895 into two new parties. The "autonomists" formed the Fusionist Liberal Party under the leadership of Luis Muñoz Rivera (b. 1859–d. 1916). Those who favored absolute independence from Spain formed the True and Orthodox Liberal Party under José Celso Barbosa (b. 1857–d. 1921).

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**Liberal Revolution (1895)** Most Ecuadoreans today regard the Liberal Revolution of 1895 as the decisive moment in the creation of the modern state of ECUADOR. Out of power since the late 1850s, the Liberals saw this revolution as an opportunity to undo much of what the conservative GABRIEL GARCÍA MORENO and his PROGRESSIVE PARTY successors had implemented. In addition, liberal-leaning businessmen and CACAO growers from the coast saw it as an opportunity to wrest power from the highland elite.

Liberal CAUDILLO Eloy Alfaro Delgado seized on a scandal in 1894 to justify the revolution. In the midst of a war against China, Japan had sought to upgrade its navy by buying a warship from CHILE, technically violating international law. Ecuador agreed to act as the conduit for the purchase and to sail the vessel under Ecuadorean colors to the transfer point. Liberals howled about corruption and "selling the flag," and Alfaro launched his rebellion. Even Conservatives called for the president to resign. GUAYAQUIL welcomed the exiled Alfaro, and by August 1895, he had defeated the government's forces throughout the country.

Once in power, Alfaro and his followers rewrote the constitution and enacted anticlerical legislation typical of the 19th century. Reforms involved suppressing many of the convents and monasteries, making EDUCATION secular and public, abolishing the nation's concordat with the Vatican, and expelling many foreign-born clergy. These reforms constituted one of the major thrusts of the Liberal Revolution. Coupled with the modernization project, they helped to create Ecuador's national identity.

Alfaro and his fellow Liberals modernized the country by completing the QUITO-GUAYAQUIL RAILROAD. This railroad promised to unite Ecuador's different regions physically, making it easier for people and goods to move between the coast and the sierra. But, Ecuador's abysmal international credit rating (loans from the 1820s remained unpaid) discouraged foreign investment in the project, which finally was completed in 1908.

The revolution of 1895 also meant the coastal elite now dominated the republic politically as well as economically. As a result, the revolution brought progress and modernization to Guayaquil, on its way to becoming the largest city in the country. Under the coastal elite, sanitation projects and new construction were developed, and social problems were tackled. Thus, the Liberal Revolution of 1895 marked a major power shift from highlands to the coast, which would last at least until 1925, when the collapse of the CACAO market caused a fiscal crisis.

See also ALFARO DELGADO, JOSÉ ELOY (Vol. IV).

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**Lima** Lima is the capital city of PERU. It is a major political and economic center located on the Pacific coast, with a population of more than 7 million. It is the largest city in Peru, and it has been the site of many of the nation's most important historical developments.

Lima was founded in 1535 by Spanish conquistador Francisco Pizarro as an administrative center close to what eventually became the port of Callao. It was the capital of the Viceroyalty of Peru during the colonial period and became an important administrative, religious, and trading center in the Spanish colonies. Within the first century of Spanish settlement in South America, an archdiocese, a judicial seat, and a university were all founded in Lima. The city prospered as a result of MINING income generated in the outlying regions.

Because of the strong Spanish presence in the city, residents of Lima (*limeños*) resisted the push for independence that sprang up in surrounding regions in the early 19th century. Peru had also been the site of a major indigenous uprising in the late 18th century. Many colonial elite feared that challenging Crown authority would create a power vacuum that would allow another such rebellion to occur. Independence leader Simón Bolívar led a lengthy campaign in present-day VENEZUELA and COLOMBIA between 1810 and 1821. After liberating those regions, Bolívar recognized that the sovereignty of any former Spanish colony was not secured until the Spanish were driven out of South America completely. The Argentine and Chilean liberator José de San Martín had expanded the independence movement into Peru. He quickly invaded Lima, but his efforts stalled as conservative creole and peninsular elite resisted from the

surrounding countryside. Bolívar and San Martín met in GUAYAQUIL, ECUADOR, in 1822, and Bolívar thereafter took control of the Peruvian independence movement. Lima became the base of operations for Bolívar's movement as liberation forces fought against the last holdouts of Spanish forces. Victory was finally secured in 1824, and Bolívar remained in Lima to oversee the drafting of a new constitution and to try to ensure administrative stability.

Lima became the capital of the newly formed nation of Peru and the site of much of the violence and chaos that plagued the region throughout the 19th century. Bolívar initially envisioned uniting Peru and BOLIVIA under one confederation, but the once-heralded Liberator was forced to abandon Peru in 1827. Power struggles in Lima produced five different constitutions between 1821 and 1840. Much of the conflict was a result of provincial leaders pushing for more local autonomy and resisting the movement to centralize government authority in Lima. Bolivian dictator ANDRÉS DE SANTA CRUZ attempted to capitalize on a Peruvian civil war by invading and establishing the PERU-BOLIVIA CONFEDERATION in 1836. *Limeño* elite mounted a resistance movement and succeeded in breaking apart the confederation in 1839.

Lima benefited from the enormous profits earned from Peru's guano industry, which boomed in the middle decades of the 19th century. In an era known as the GUANO AGE, the Peruvian ECONOMY grew as investors developed the market for dried bird droppings for use in fertilizer. The government began expanding TRANSPORTATION infrastructure and public works. The first rail line between Lima and Callao was built in 1851, and more than 700 more miles (1,127 km) of railroad were built in the 1860s and 1870s. Guano revenue also contributed to an expansion of Peru's MILITARY and its government bureaucracy, both of which were based in Lima, and the city grew as a result.

Despite the lucrative guano trade, Peruvian politics remained unstable, and scholars generally agree that much of the profits earned were misspent. Government leaders used the future profit potential from the guano industry to back loans from European investors and Peruvian elite. Unsound fiscal policies led to rising inflation in Lima, and the standard of living for the city's poor and working class fell throughout the 1850s and 1860s. While working conditions deteriorated and the artisan and laboring classes struggled, Lima's elite flourished.

The abrupt decline of the guano industry set the stage for major crises in Lima and the entire country after 1872. A shift in European markets to artificial fertilizers coincided with the depletion of guano deposits in Peru at a time when the government was deeply in debt. Leaders in Lima attempted to offset the decline in guano revenues by nationalizing the nitrate industry and forming an alliance with neighboring Bolivia. Territorial disputes over nitrate-rich regions of the Atacama Desert culminated in the WAR OF THE PACIFIC in 1879 between

CHILE and the Peru-Bolivia alliance. Decades of increasing military spending in Peru had created a powerful national defense force, but despite those strengths, the Chilean navy quickly dominated the seas. By the early months of 1880, the Chilean army had initiated a ground invasion of Peru, and in January 1881, Chilean forces invaded Lima. They occupied the city for more than three years, and during that time, soldiers looted and pillaged, destroying property and forcing Lima's elite to turn over large sums of money to Chilean military officers. More than 3,000 books and other historic documents plundered from the national library were finally returned to Peru in 2007.

The TREATY OF ANCÓN finally ended the War of the Pacific in 1884, but the withdrawal of Chilean troops did not bring immediate stability to Lima. Local power struggles continued for several years until military leader ANDRÉS AVELINO CÁCERES secured the presidency in 1886. His administration brought some recovery and development after much of the city's and nation's infrastructure had been damaged in the war. Cáceres also oversaw the era of POSITIVISM, when economic and social theories emphasized the need for progress and modernization. Positivist leaders modeled economic structures on European practices, and Lima witnessed the opening of a chamber of commerce and several international banks in the final decades of the 19th century.

The modernization initiatives put in place in Lima in the last decades of the 19th century brought about a period of renewed growth for the city. Urbanization patterns led to population growth, and Lima reexerted itself as the administrative and economic center of Peru. Those trends continued in the 20th century.

See also BOLÍVAR, SIMÓN (Vol. II); LIMA (Vols. I, II, IV); SAN MARTÍN, JOSÉ DE (Vol. II).

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**literature** Literature in 19th-century Latin America became a way for intellectuals to express their ideas about national identity as the region evolved from the independence era to the onset of modernization. Many of the styles and themes that were prominent in Latin American literature during the colonial period were modeled after European, and particularly Spanish, conventions. After independence, writers in Latin America shed many of their European affiliations and began adopting styles and

themes that reinforced an emerging sense of national identity.

Many Latin American writers in the late colonial period were inspired by Enlightenment theories from France and other parts of Europe. One of those writers was JOSÉ JOAQUÍN FERNÁNDEZ DE LIZARDI (b. 1776–d. 1827). Lizardi founded *El Pensador Mexicano* (The Mexican thinker), which became one of MEXICO's first private newspapers after independence. He was imprisoned on several occasions for criticizing the viceregal government and the colonial social system in his journalistic writings. In 1816, Lizardi began publishing *El Periquillo Sarniento* (*The Itching Parrot* or *The Mangy Parrot*), marking one of the earliest movements toward an American literary style. The work was originally published as serialized installments that criticized the inefficiencies and corruption of the Spanish system. After the first three installments, Spanish censors prevented further publications until 1830–31. *The Mangy Parrot* is considered to be Latin America's first novel and marks an important step in shaping a Latin American literary identity.

After independence, literary figures across Latin America adopted European ROMANTICISM as a way to express their thoughts on the departure of colonialism and the process of nation-state formation. Romanticism abandoned the rigidity and formality that had characterized earlier literary styles. Instead, writers embraced disorder, passion, and heroics. The first romantic poem was “En el teocalli de Cholula” (At the temple of Cholula), written by Cuban poet José María Heredia (b. 1803–d. 1839) in 1820. ANDRÉS BELLO (b. 1781–d. 1865) was a Venezuelan-born intellectual and educator who often wrote in the romantic style. Bello eventually relocated to CHILE and viewed literature and EDUCATION as a way to foster a sense of collective identity and national loyalty. His works demonstrate how Latin American writers used romanticism to reinforce nationalism, as did those of Gregorio Gutiérrez González (b. 1826–d. 1872) from COLOMBIA and José Joaquín de Olmedo (b. 1780–d. 1847) from ECUADOR.

For some 19th-century literary figures in Latin America, romanticism became a way to articulate social or political critiques. Argentine writers were particularly vocal in their invectives against CAUDILLO JUAN MANUEL DE ROSAS. ESTEBAN ECHEVERRÍA (b. 1805–d. 1851) used the romantic style to denounce what he saw as the primitive nature of the Argentine countryside and the barbaric inclinations of the Rosas regime. Echeverría formed literary salons in BUENOS AIRES, and such intellectual groups became fertile ground for disseminating anti-Rosas propaganda. Along with Argentine intellectuals, Echeverría was eventually forced to flee into exile in Montevideo to escape the censorship and repression of the Rosas regime. Echeverría's story “El Matadero” (The slaughterhouse) was one of his most scathing critiques of the government and has become one of his most famous works.



DOMINGO F. SARMIENTO (b. 1811–d. 1888) became one of the most famous of ARGENTINA'S 19th-century writers. He eventually served as president of the nation after the overthrow of the Rosas dictatorship. Sarmiento opened a periodical called *El Zonda* and founded the literary movement known as the Generation of '37. He used both forums to publish condemnations of the Rosas government. Sarmiento spent many years in exile in Chile, where he published *Facundo: Civilización y barbarie en las pampas argentinas* (*Facundo, or Life in the Argentine Republic in the Days of the Tyrants*) as a critique of regional caudillo JUAN FACUNDO QUIROGA in 1845. Sarmiento's writings called attention to the role of the GAUCHO in the Argentine countryside and served as a precursor to MARTÍN FIERRO, protagonist of the epic poem by José Hernández (b. 1834–d. 1886). *El gaucho Martín Fierro* was published in 1872 and was followed seven years later by *La vuelta de Martín Fierro*. Together, the two works celebrated the image of the Argentine cowboy and inserted the gaucho prominently into literary expressions of national identity.

By the late 19th century, MODERNISM had emerged as the dominant literary style in Latin America. Modernism originated in Latin America, specifically in poetry, and allowed literary figures to place their works in a more worldly context. Themes in modernist literature were often visceral, erotic, and distant. Writers used the new style as a way of defying the rigid and fixed standards of society presented in ideologies such as LIBERALISM and POSITIVISM. Although the movement was most common in Latin American poetry, modernist writers produced a wide array of literature in the late decades of the 19th century. Brazilian writer Aluísio Azevedo published *THE SLUM (O cortiço)* in 1890, which uses many of the stylistic tools of the modernist movement. The novel, which is considered his greatest work, describes in vivid detail the “tropical” nature of Brazilian culture as portrayed in a RIO DE JANEIRO slum. Each character is closely tied to nature, and Azevedo uses poetic, modernist descriptions to define each one according to racial, national, and gender stereotypes.

Modernist writers also used their works to separate themselves culturally from the growing influence of the United States. Uruguayan essayist José Enrique Rodó (b. 1871–d. 1917) published “ARIEL” in 1900 to distinguish the character of Latin American nations as separate from that of the United States. He considered U.S. culture to be consumed with materialism, while Latin Americans demonstrated a more profound spiritualism. Rodó called on Latin Americans to unite under a cohesive cultural identity as a way of defying U.S. hegemony.

Latin American writers denounced what they saw as expansionist tendencies of the United States in the late decades of the 19th century. The U.S. role in the WAR OF 1898 and in securing PANAMANIAN INDEPENDENCE WAS characterized by many literary figures as a demonstration of MANIFEST DESTINY. Nicaraguan poet Rubén

Darío (b. 1867–d. 1916) wrote the poem “To Roosevelt” in 1903 as a condemnation of U.S. imperialism in the late 19th century.

See also LITERATURE (Vols. I, II, IV).

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**Livingston Codes** The Livingston Codes were a set of legal reforms originally intended for use in Louisiana, United States, but implemented in GUATEMALA by President JOSÉ FELIPE MARIANO GALVÉZ.

Named after their author, U.S. lawyer and statesman Edward Livingston (b. 1764–d. 1836), the codes were initially intended to replace the mixture of Roman, French, and Spanish law and tradition in practice since the U.S. acquisition of the Louisiana Territory in 1803. The codes covered four areas: crimes and punishments, procedures, evidence in criminal cases, and prisoner reform and prison discipline. Although completed in 1826, the codes were not printed until 1833, and the state of Louisiana never adopted them. Livingston's *Code of Reform and Prison Discipline* made its way to Europe, where it significantly influenced the legal systems of Britain, France, and Germany.

President Andrew Jackson appointed Livingston secretary of state in 1831, and the latter found a receptive audience for the codes in Guatemalan liberal president Gálvez. The Guatemalan legislature approved the Livingston Codes in December 1835, and they went into effect on January 1, 1837. The codes provided for trial by jury, use of the writ of habeas corpus, and separate jail cells. The codes also granted the power of judicial appointments to state governors. Guatemalan reaction to the codes was immediate and critical. Political conservatives, lawyers, and judges, accustomed to previous practices, opposed trial by jury and evidence requirements,

while the church viewed the codes as further undermining its authority. In rural Guatemala, NATIVE AMERICANS opposed trial by jury, as this meant they would have to judge their neighbors. In 1839, RAFAEL CARRERA abolished the codes.

#### Further reading:

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Ralph Lee Woodward Jr. *Rafael Carrera and the Emergence of the Republic of Guatemala, 1821–1871* (Tuscaloosa: University of Alabama Press, 1993).

**Lizardi, José Joaquín Fernández de** See FERNÁNDEZ DE LIZARDI, JOSÉ JOAQUÍN.

**Long War** See FEDERAL WAR.

**López, Carlos Antonio** (b. 1790–d. 1862) *dictator of Paraguay* Carlos Antonio López was the second dictator of PARAGUAY, following the stable but autocratic rule of JOSÉ GASPAR RODRÍGUEZ DE FRANCIA. He is known for opening Paraguay to the outside world after decades of isolationism under his predecessor. Paraguay experienced numerous advancements under López, but his rule was marred by corruption and tyranny.

López was born in Asunción on November 4, 1790. He initially studied to be a priest but later pursued a career in law. López left Asunción after falling out of favor with the Francia regime. Nevertheless, shortly after the dictator's death, López was chosen by the Paraguayan congress to rule alongside Mariano Roque Alonso. In 1844, López was elected president and ruled with dictatorial powers for the next 18 years. He devoted his regime to modernizing Paraguay, as well as to building his own private fortune. As the national ECONOMY grew, so too did López's landholdings and profits from regulated industries. Despite his personal corruption, López did oversee some notable achievements in Paraguay, such as the construction of roads and the first telegraph lines. He also devoted considerable resources to improving the EDUCATION system and equipping the national MILITARY. He eased the TRADE and diplomatic restrictions that had been in place under Francia, and Paraguay gradually became embroiled in the thorny foreign affairs that had long plagued BRAZIL, ARGENTINA, and URUGUAY.

Like his predecessor, López achieved progress at the expense of personal liberties. He oversaw the drafting of a constitution in 1844 that gave the executive extraordinary powers and allowed him to name his successor. López died in office on September 10, 1862. He was

succeeded by his son FRANCISCO SOLANO LÓPEZ, who led the nation into the devastating WAR OF THE TRIPLE ALLIANCE.

#### Further reading:

Mario Pastore. "State-Led Industrialisation: The Evidence on Paraguay, 1852–1870." *Journal of Latin American Studies* 26, no. 2 (May 1994): 295–324.

John Hoyt Williams. "Foreign Técnicos and the Modernization of Paraguay, 1840–1870." *Journal of Interamerican Studies and World Affairs* 19, no. 2 (May 1977): 233–257.

**López de Santa Anna, Antonio** See SANTA ANNA, ANTONIO LÓPEZ DE.

**Luperón, Gregorio** (b. 1839–d. 1897) *military and political leader in the Dominican Republic* Gregorio Luperón helped to lead the rebellion in the DOMINICAN REPUBLIC against annexation by Spain in the 1860s. Luperón formed part of the provisional government after the Spanish were ousted and worked to secure a more democratic political system in the new nation. In later decades, Luperón helped lead the Blue Party resistance against BUENAVENTURA BÁEZ's attempts to annex the Dominican Republic to the United States.

Luperón was born into poverty in Puerto Plata in the northern region of the island known as the CIBAO. In his adult years, he quickly rose to greatness as a MILITARY leader. As an ardent supporter of Dominican independence, Luperón joined the anti-Spanish resistance movement in the WAR OF RESTORATION. He participated in several provisional governments as the Dominicans struggled to reassert local authority over the island. Báez posed the most serious challenge to Luperón's attempts to safeguard Dominican sovereignty. The longtime CAUDDLLO persisted in his attempts to negotiate annexation of the nation by the United States. Báez seized power in 1868, and Luperón spent the next five years trying to unseat the autocratic leader. Luperón and his Blue Party supporters finally ousted Báez in 1878 and consolidated their control over the next several years.

Luperón led the nation briefly in 1879. Historically, he is remembered as an exception to the caudillo who dominated much of 19th-century Latin America. Luperón was steadfastly committed to independence and true DEMOCRACY. Nevertheless, his one-time supporter ULISES HEUREAUX seized power and ruled in an increasingly autocratic and corrupt manner in the 1880s. Luperón eventually fled into exile in PUERTO RICO. He died in 1897.

#### Further reading:

Teresita Martínez Vergne. *Nation and Citizen in the Dominican Republic, 1880–1916* (Chapel Hill: University of North Carolina Press, 2005).

**Lynch, Eliza Alicia** (b. 1835–d. 1886) *mistress to Paraguayan dictator Francisco Solano López* Eliza Alicia Lynch was an Irish courtesan who became the mistress to Paraguayan dictator FRANCISCO SOLANO LÓPEZ. Although they never married, Lynch bore Solano López several children and assumed the functions of PARAGUAY’S first lady during his rule.

Lynch was born on June 3, 1835, in Ireland. As a young woman, she relocated to Paris, where she met Solano López in 1853. The two fell in love, and Lynch followed Solano López to Paraguay in 1855. Lynch gave birth to their first son that same year and quickly earned a reputation for flouting the cultural and gendered expectations of Paraguayan high society. Much of the country seemed enthralled by her presence, and Lynch took advantage of her visibility to begin “modernizing” Paraguay by introducing French culture to the nation.

Lynch became extraordinarily wealthy during the administration of Solano López as the dictator bestowed numerous gifts to her. After the outbreak of the WAR OF

THE TRIPLE ALLIANCE, Solano López began transferring large expanses of land to Lynch, who quickly became the largest single landowner in the nation. As the war turned against Solano López, however, Lynch’s landholdings were seized. She fled with the dictator after Asunción fell to the Brazilian MILITARY in 1869 and accompanied him as he continued to wage guerrilla warfare from the countryside.

After Solano López was killed in 1870, Lynch was exiled to Europe. She spent several years unsuccessfully attempting to reacquire the property that had been seized from her in the final years of the war. Lynch died in Paris in 1886.

**Further reading:**

William E. Barrett. *Woman on Horseback: The Story of Francisco López and Elisa Lynch* (Garden City, N.Y.: Doubleday, 1952).

Nigel Cawthorne. *The Empress of South America* (London: Heinemann, 2003).

# M

**Maceo, Antonio** (b. 1845–d. 1896) *leader of Cuban independence* Antonio Maceo was a mulatto farmer who became one of the most prominent MILITARY leaders of CUBA’s independence movement in the TEN YEARS’ WAR. He was known for his bravery and discipline on the battlefield and earned the nickname the “Titan of Bronze.” Maceo later helped resurrect the separatist movement in the final push for independence that started in 1895.

Maceo was born in Santiago de Cuba on June 14, 1845. In his youth, he worked in his father’s agricultural business but showed an early interest in politics. Maceo learned of the GRITO DE YARA issued by CARLOS MANUEL DE CÉSPEDES in 1868 to ignite the independence movement and immediately joined the rebel army. Starting as a private, he quickly moved up through the ranks and was made a general in 1873. As the Ten Years’ War reached an impasse, Maceo refused to give up the fight. Even after a truce had been reached in the 1878 TREATY OF ZANJÓN, he refused to lay down his arms. Maceo rejected the peace accord because it did not guarantee Cuban independence or the abolition of SLAVERY, two of the insurgents’ main objectives. Maceo was forced to flee into exile. He made a failed attempt to incite a rebellion the following year and abandoned the independence cause for the next 10 years.

In 1892, Maceo joined forces with JOSÉ MARTÍ and the Cuban Revolutionary Party. As part of the new revolutionary movement, Maceo helped incite rebellion in 1895 and led insurrections throughout the island. Maceo was shot and killed by the Spanish military on December 7, 1896. He is celebrated today as one of Cuba’s greatest independence heroes.

## Further Reading:

Magdalena Pando. *Cuba’s Freedom Fighter, Antonio Maceo, 1845–1896* (Gainesville, Fla.: Felicity Press, 1980).

John Lawrence Tone. *War and Genocide in Cuba, 1895–1898* (Chapel Hill: University of North Carolina Press, 2006).

**Machado de Assis, Joaquim Maria** (b. 1839–d. 1908) *Brazilian writer* Joaquim Maria Machado de Assis was one of BRAZIL’s most celebrated writers of the late 19th century (see LITERATURE). His literary style reflected several 19th-century artistic movements, including ROMANTICISM and realism.

Machado de Assis was born on June 21, 1839, in RIO DE JANEIRO. He was descended from slaves, and poverty allowed him little in the way of formal EDUCATION. Nevertheless, Machado de Assis found work as a typesetter and proofreader and later developed a career in journalism. By the 1860s, he was writing and translating plays and other literary texts, and in 1864, he published his first book of poetry. He married Carolina Augusta Xavier de Novais in 1869, and in the coming decade, his signature literary style began to emerge. He became known for his portrayal of urban society. Many of his novels and short stories are set in the culturally diverse city of Rio de Janeiro, and many of his plots underscore a cynicism toward human nature in general and the Brazilian social fabric in particular. Machado de Assis and other literary figures of the time were general proponents of abolition of SLAVERY and tended to favor a move away from monarchism. Nevertheless, one of Machado de Assis’s most famous novels, *Esau and Jacob*, published in 1904, expresses a humorous skepticism about whether the new experiment in republicanism would work. Earlier works

include *Posthumous Memoirs of Brás Cubas* (1881) and *Dom Casmurro* (1899).

In 1896, Machado de Assis helped found the Brazilian Academy of Letters, which became the nation's preeminent literary society. Machado de Assis died on September 29, 1908, in Rio de Janeiro.

### Further reading:

José Bettencourt Machado. *Machado of Brazil: The Life and Times of Machado de Assis, Brazil's Greatest Novelist* (New York: C. Frank, 1962).

**maize (Indian corn)** Maize is a grain native to Mesoamerica. It has long been an important part of the diet and ECONOMY in MEXICO and CENTRAL AMERICA, as well as in parts of South America. Maize was widely consumed by pre-Columbian civilizations in the Americas and was also used in rituals. Throughout the colonial period, maize remained an important staple in the diet of the poor and indigenous, while the European elite often preferred European grains such as WHEAT. NATIVE AMERICANS of Mesoamerica continued to view maize in an almost reverent way, as a source of life and spirituality. For centuries, the indigenous of Mesoamerica had prepared maize by soaking it in limewater, a process that both removed the indigestible kernels and added important nutrients. While the indigenous diet was low in animal protein and calcium, the process ensured



Maize has historically been a main staple of the diet in Mexico and Central America. This photo from circa 1903 shows Mexican peasants shelling corn for daily consumption. (*Library of Congress*)

native peoples a nutritious diet. Spaniards tended to consider maize a commoners' grain that was suitable only for consumption by peasantry and livestock. After independence, Latin American elite used FOOD to set themselves apart from the poor, preferring wheat themselves. Nevertheless, Europeans exported maize from the Americas, and it became an important agricultural product in other areas of the world, such as Africa and Asia.

Maize traditionally had been a subsistence product, grown on small plots of land by individual families, and on larger communally administered *EJIDO* lands, for local consumption. Land reforms introduced in Mexico and elsewhere caused many indigenous families and local villages to lose their lands. Liberal governments intended to make the agrarian sector more productive by replacing subsistence farming with larger family farms and agribusiness. Nineteenth-century land reforms resulted in a further concentration of land in the hands of a few elite. This persisted into the 20th century throughout the region.

By the late decades of the 19th century, the association of maize with the lower classes had become part of government policies inspired by POSITIVISM. In Mexico, for example, positivist intellectuals believed they could prove a scientific association between the consumption of maize and the perceived deviant behavior of the poor. Members of the elite believed that eating maize was a sign of backwardness and barbarity, and some policymakers even tried to impose regulations designed to encourage the indigenous to switch from corn to wheat. They failed to take into account that maize was more suited to AGRICULTURE on small plots of land and that corn met the dietary needs of the poor much more effectively than would wheat. It was not until much later in the 20th century that maize, or corn, became a type of national symbol in Mexico.

See also FOOD (Vol. I); MAIZE (Vols. I, II).

### Further reading:

Jeffrey M. Pilcher. *Que vivan los tamales! Food and the Making of Mexican Identity* (Albuquerque: University of New Mexico Press, 1998).

**mambo** See MUSIC.

**Managua, Treaty of** See MOSQUITO COAST.

**Manifest Destiny** Manifest Destiny was a concept used by U.S. leaders to justify territorial expansion in the 19th century. Territorial acquisitions based on the notion of Manifest Destiny at that time were limited primarily to the western Oregon Territory and Mexican lands that make up present-day southwestern United States. At the end of the 19th century, advocates of Manifest Destiny

used the theory to rationalize the expansion of U.S. political and economic influence through informal imperialism.

According to Manifest Destiny, the United States possessed superior political, religious, economic, and cultural systems. Adherents of the philosophy firmly believed that the United States had not only a right but a type of religious mission to spread its superior systems across the continent. As such, Manifest Destiny suggested that it was God's will for the American system to spread throughout the North American continent. At the heart of Manifest Destiny was the notion of American exceptionalism, an idea based on the early Puritan belief that Americans had a God-given mission to be a model of DEMOCRACY, freedom, ambition, and religious integrity in the world. As the leader in these virtues, the United States should work to expand its systems across North America. Signs of these beliefs began to surface in the early decades of the 19th century as U.S. leaders secured new territories through the Louisiana Purchase and the acquisition of Florida.

The phrase *Manifest Destiny* became popular in the 1840s when journalist and Democratic Party member John O'Sullivan used it in an essay to explain the need for American expansion. O'Sullivan and other commentators originally articulated the idea of Manifest Destiny in relation to whether the United States should annex Texas in the wake of the TEXAS REVOLUTION. The 1844 presidential election campaign between James K. Polk and Henry Clay revolved around territorial expansion and helped draw attention to the notion of Manifest Destiny. Interest in the Oregon Territory and Texas helped to propel Polk to victory, but his expansionist policies led to escalating tensions between the United States and MEXICO. Those tensions culminated in the U.S.-MEXICAN WAR.

The U.S.-Mexican War, which lasted from April 1846 to February 1848, cost tens of thousands of lives on both sides and eventually led to a 10-month occupation of MEXICO CITY by U.S. forces. The Treaty of Guadalupe Hidalgo that formally ended the conflict required the Mexican government to cede more than 500,000 square miles (1.3 million km<sup>2</sup>) of national territory—the present-day U.S. states of California, Arizona, New Mexico, Nevada, and Utah, as well as parts of Colorado and Wyoming. Mexico was also required to recognize the U.S. annexation of Texas. It was the single largest transfer of land from one independent nation to another in the Americas as a result of war. The United States acceded to numerous provisions, such as guaranteeing land ownership and citizenship rights to Mexican nationals living in ceded territory. U.S. leaders also compensated the Mexican government with a \$15 million payment and absorbed more than \$3 million in outstanding claims. Despite those concessions, the war left a legacy of resentment in Mexico.

The U.S. push for territorial expansion showed no sign of abating in the immediate aftermath of the U.S.-Mexican War. In 1853, U.S. foreign minister to Mexico and railroad industrialist James Gadsden nego-

tiated the purchase of additional lands from Mexico in what is today the southern edge of Arizona and New Mexico. The GADSDEN PURCHASE resulted in the sale of some 30,000 square miles (77,700 km<sup>2</sup>) for a price of \$10 million, with many observers deeming that to be a much fairer exchange than the territorial acquisition that resulted from the Treaty of Guadalupe Hidalgo.

American filibusterers championed the cause of expansion in the 1850s by leading unilateral incursions into regions of northern Mexico, CENTRAL AMERICA, and the Caribbean with the intent of claiming land for the United States. One of the most famous was WILLIAM WALKER, who was tried and eventually acquitted for leading an invasion into the northern Mexican states of Sonora and Baja California. Walker later led an expedition in NICARAGUA, where he took advantage of the instability created by a violent civil war to declare himself president. He initially gained recognition for his Nicaraguan government by U.S. president Franklin Pierce, but subsequent disputes with U.S. business interests destabilized his regime, and Walker was eventually defeated by a small mercenary band financed by Cornelius Vanderbilt. Other signs of Manifest Destiny occurred in 1856 when the U.S. Congress passed legislation granting the United States the right to claim unoccupied islands in the Pacific for the purpose of guano extraction.

By the end of the 19th century, U.S. leaders no longer actively sought territorial expansion as a way to fulfill Manifest Destiny. Since the conclusion of the U.S.-Mexican War, the United States had shifted attention to settling the newly acquired lands out west. Furthermore, a variety of anti-imperialist movements surfaced throughout the United States to protest the government's turn toward expansion. By the turn of the century, the meaning of Manifest Destiny had become more nuanced as many U.S. policies aimed to expand U.S. economic and cultural influence in a form of informal imperialism, rather than acquiring territory outright. U.S. involvement in securing the independence of CUBA and in acquiring the territories of PUERTO RICO and the Philippines in the WAR OF 1898 are considered among the best examples of Manifest Destiny in the context of informal imperialism. U.S. influence, particularly in Central America and the Caribbean, increased in the early decades of the 20th century. The government ensured U.S. ascendancy by negotiating the treaty to build a Panama Canal and by expanding the U.S. military presence throughout the region (see PANAMA; TRANSISTHMIAN INTERESTS). Private economic interests gained a controlling stake in local economies, and U.S. government policies often sought to protect those interests at the expense of Latin American sovereignty.

#### Further reading:

Thomas M. Leonard. *United States–Latin American Relations, 1850–1903* (Tuscaloosa: University of Alabama Press, 1999).

**maroons** See SLAVERY.

**Martí, José** (b. 1853–d. 1895) *Cuban poet and independence leader* José Martí was one of CUBA's leading literary figures in the late 19th century and was inspired by the incipient quests for independence that sprang up in the 1860s in the Caribbean (see LITERATURE). He became one of the principal organizers of the final movement for Cuban independence that started in 1895 and culminated in the U.S.-led WAR OF 1898.

Martí was born in HAVANA on January 28, 1853. He was only an adolescent when the TEN YEARS' WAR broke out in 1868 but made a name for himself by speaking out in favor of independence. He began his literary career in those early years by publishing a newspaper and other writings against Spanish rule. Martí was imprisoned briefly for his subversive activities, and he fled to Spain upon his release. In Spain, he studied law and philosophy while he continued to publish denunciations of the Cuban political system. Martí attempted to return to Cuba to continue the quest for independence but was forced to flee once again. He spent several years working

as a professor in GUATEMALA and continued to write in opposition of the Spanish colonial system in Cuba. Some of his most famous works include *Ismaelillo* (1882), a book of poetry, and *Versos Sencillos* (*Simple Verses*) (1891).

By 1881, Martí had settled in New York, where he worked as a journalist for several Latin American periodicals. At that time, many of his writings reflected his growing disillusionment with the racial and imperialistic attitudes he encountered in the United States. In particular, Martí grew alarmed at the numerous schemes that called for U.S. annexation of Cuba. He spoke out in defense of the poor and working class and firmly believed a successful revolutionary movement must encompass the needs of the lower classes of society. In 1892, Martí helped establish the Cuban Revolutionary Party (*Partido Revolucionario Cubano*), which was made up of Cuban exiles committed to the independence of their homeland. As a party leader, he argued that Cubans themselves should spearhead the revolutionary movement in order to avoid dominance by the United States. Martí joined forces with MÁXIMO GÓMEZ and ANTONIO MACEO, two leaders of the earlier independence struggle in the Ten Years' War. The three exiles began plotting a final uprising to oust the Spanish from Cuba and finally bring independence to the island.

In January 1895, Martí left New York for the Caribbean. He and Gómez mobilized their forces along the coast of the DOMINICAN REPUBLIC and issued the *Manifiesto de Montecristo*, declaring Cuban independence. The manifesto called for racial equality and appealed to the Cuban people to fight a "civilized" war. The small revolutionary band then led an invasion of Cuba and worked to incite a widespread insurrection in what became known as the War of 1895. Martí's army joined forces with a small group of rebels already on the island. After less than two months of small skirmishes, Martí was killed in a battle against the Spanish MILITARY on May 19, 1895.

Martí did not live to see his dreams of Cuban independence become reality, but his efforts were not in vain. The insurrection he helped spark in 1895 grew over the next several years and attracted the attention of the U.S. population. U.S. president William McKinley intervened and helped to secure Cuban independence by defeating the Spanish in the War of 1898. Unfortunately, many of Martí's concerns about the imperialist nature of the United States came true, as U.S. leaders intervened regularly in Cuban affairs throughout the 20th century. Today, Martí is a symbol of Cuban nationalism and sovereignty against larger nations. He was used as a rallying icon during Fidel Castro's revolution in the 1950s.

See also CUBAN REVOLUTION (Vol. IV).

#### Further reading:

Cathy Login Jrade and José Amor y Vazquez. *Imagining a Free Cuba: Carlos Manuel de Céspedes and José Martí* (Providence, R.I.: Brown University Press, 1996).



This 1896 lithograph shows José Martí with other heroes of Cuban independence, including Máximo Gómez, Antonio Maceo, Salvador Cisneros, and Calixto García. (*Library of Congress*)

José Martí. *Our America: Writings on Latin America and the Struggle for Cuban Independence* (New York: Monthly Review Press, 1977).

**Martín Fierro** Martín Fierro is the principal character in the epic poem *El gaucho Martín Fierro*, published by José Hernández (b. 1834–d. 1886) in 1872 as a celebration of the culture and image of the Argentine GAUCHO. It was followed in 1879 by *La vuelta de Martín Fierro*, and together, the two poems are considered one of the best representations of the gauchesque genre of poetry in Argentine and Uruguayan LITERATURE.

The two poems chronicle the tragic life of the fictional gaucho, Martín Fierro, who has been displaced by the economic shifts that took place as ARGENTINA began to modernize and develop industry (see INDUSTRIALIZATION). Hernández provided a romanticized description of life on the PAMPAS (the Argentine plains). Nevertheless, Martín Fierro's life quickly turns ruinous when he is illegally drafted into the MILITARY. He later abandons military service and becomes a loner and an outlaw. Throughout both poems, Martín Fierro is portrayed as strong and brave, in line with the popular image of the gaucho. His character also seems honorable, yet misunderstood, as he tries to navigate the untamed and unfair world around him.

*El gaucho Martín Fierro* was widely popular immediately after its initial publication. The subsequent *La vuelta de Martín Fierro* was equally well received, and both poems quickly became viewed as a literary expression of national identity. By the early 20th century, *El gaucho Martín Fierro* was lauded by critics and fellow literary figures as a classic of Argentine literature. Short story writer and essayist Jorge Luis Borges published a tribute to the work in the 1920s. The Argentine literary giant later published a more muted interpretation of the poem in 1953.

#### Further reading:

Nancy Hanway. *Embodying Argentina: Body, Space, and Nation in Nineteenth-Century Narrative* (Jefferson, N.C.: McFarland Co., 2003).

José Hernández. *Martín Fierro* (Buenos Aires, Argentina: Zurbarán, 1996).

**Martinique** See CARIBBEAN, FRENCH.

**Matto de Turner, Clorinda** (b. 1852–d. 1909) *Peruvian writer and novelist* Clorinda Matto de Turner was a great literary figure in PERU in the late 19th century. Her best-known literary novel, *Aves sin nido* (*Torn from the Nest*), was published in 1889 and is considered one of the earliest expressions of feminism and the need to protect indigenous rights in the country (see WOMEN).

Matto was born on September 11, 1852, in Cuzco, where she lived on her family's HACIENDA and received an early EDUCATION. In 1871, she married Joseph Turner, a British merchant, and the couple relocated to Tinta. Throughout the 1870s, Matto de Turner pursued a literary career, initially under a pen name. She joined several literary societies and was swept up in the intellectual fervor of the time. Her husband passed away in 1881, and several years later, Matto de Turner took over publication of Peru's premier literary journal, *El Perú Ilustrado*. At the same time, she published her controversial work, *Aves sin nido*. The novel denounced religious corruption and exploitation of the country's indigenous population (see NATIVE AMERICANS). It inflamed the ire of the CATHOLIC CHURCH, and Matto de Turner was eventually excommunicated for publishing her criticisms. The novelist was forced to distance herself from *El Perú Ilustrado* and eventually was forced to leave Peru. She remained involved in important literary circles in CHILE and ARGENTINA. She taught LITERATURE in BUENOS AIRES during the last years of her life, and she traveled throughout the Americas and Europe giving public talks on her works and experiences as a literary scholar. These included *Indole* (Character) (1891) and *Herencia* (Heredity) (1895). Matto de Turner died in Buenos Aires on October 25, 1909.

#### Further reading:

Clorinda Matto de Turner. *Torn from the Nest* (New York: Oxford University Press, 1999).

**Maximilian I** See FRENCH INTERVENTION.

**Mazorca, La** La Mazorca was the name of the special police force used by JUAN MANUEL DE ROSAS to bring order to ARGENTINA and silence dissent to his regime between the 1830s and the 1850s. The Mazorca force was established in 1833 by pro-Rosas FEDERALES in BUENOS AIRES, while the CAUDILLO led his Indian campaigns in the Argentine countryside. Led by Rosas's wife, Encarnación, the *rosistas* created the Sociedad Popular Restauradora as a support base to bring the caudillo back to power and to put down resistance from the *unitario* opposition (see UNITARIOS). The Mazorca force emerged as the armed wing of the Sociedad and used violence and intimidation to silence opposing intellectuals and politicians. The Sociedad succeeded in restoring Rosas as governor of Buenos Aires Province in 1835, a position he held until 1852. As governor, he became the most powerful leader in Argentina and held dictatorial powers for most of his time in office.

*Mazorca* in Spanish means "ear of corn," and many *federales* argued that the name symbolized the closeness and unity of Rosas supporters. The name is also a homonym for the Spanish "*más borca*," or "more hangings," a fitting phrase given the techniques used by the security



force. Individuals who did not conform to the wishes of the Rosas regime were often murdered and their bodies left for public display as a message to all. La Mazorca was reputed to have developed an extensive spy network, which allowed it to monitor the country's citizenry more closely. Out of fear, Argentines avoided wearing blue and white—the colors of the *unitario* opposition—and instead donned ribbons and other accessories in the color red to demonstrate their support for Rosas.

La Mazorca allowed Rosas to rule with impunity throughout the 1840s, but the dictator's increasingly repressive tactics earned him many enemies. Anti-Rosas forces in URUGUAY and BRAZIL joined forces with exiled Argentines to overthrow the caudillo in 1852.

### Further reading:

John Lynch. *Argentine Caudillo: Juan Manuel de Rosas* (Wilmington, Del.: SR Books, 2001).

**medicine** Medicine refers to medical substances produced and consumed with the intent of curing illnesses as well as to the practice of administering medical care. Most early societies used a variety of natural substances for medicinal purposes and passed these traditions down for centuries. Pre-Columbian populations in the Americas had developed a sophisticated understanding of how to use natural medicines such as salves, herbs, and seeds. After the conquest, Spanish and Portuguese settlers imported their own medical practices and also adopted a number of the traditions of NATIVE AMERICANS. Catholic missionaries often served as intermediaries, using their close contact with indigenous peoples to share European traditions and to learn how the Amerindians interacted with the natural environment.

Medicine took a scientific turn around the world in the 19th century. Philosophical movements such as the Enlightenment in the 18th century and POSITIVISM in the 19th century introduced the notion of experimentation and scientific observation. Some intellectuals applied those concepts to the medical field in an attempt to improve existing knowledge of medical substances and curative practices. One major consequence of this shift was the further segregation of Latin American society along class and ethnic lines. Many of the indigenous in MEXICO, the Andean regions of South America, and elsewhere continued to rely on natural remedies, while scientific advancements took hold among the elite. The urban and rural poor also fell victim to faulty assumptions made by scientific medicine, and by the end of the century, supposed medical knowledge led to government policies that limited the mobility of the poor.

The South American coca plant became part of a major medical development that had far-reaching implications around the world. Andean natives had used coca leaves for centuries to cure gastrointestinal ailments. The coca leaves in their natural form also served as a mild

stimulant. Once cultivated, the coca plant had a short shelf life and was difficult to transport, so its medical use was limited primarily to the Americas until scientists began to study the plant in the 1850s. European researchers isolated the active alkaloid in the coca plant and discovered how to chemically alter coca to produce cocaine. In the last half of the 19th century, pharmaceutical entrepreneurs marketed a variety of cocaine-based medicines, including creams, pills, and beverages, in Europe and the United States (see DRUGS).

Other scientific findings in the 19th century changed the medical understanding of communicable diseases. Scientists began to learn how contagions multiplied and how various illnesses could spread. These findings motivated government leaders to devise public health policies in many Latin American countries in the late decades of the century. New laws were passed with the intention of preventing outbreaks of tropical diseases and other illnesses such as tuberculosis that spread easily among people in close contact. While government health programs succeeded in making some improvements, public health officials often discriminated against the poor, blaming them for the spread of disease.

See also DRUGS (Vols. II, IV); ENLIGHTENMENT (Vol. II); MEDICINE (Vol. I).

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**Melgarejo, Mariano** (b. 1820–d. 1872) *caudillo and president of Bolivia* Mariano Melgarejo was a CAUDILLO in BOLIVIA during a six-year dictatorial regime known as the *sexenio*. He was infamous for his ruthless and oppressive administration and catastrophic economic and foreign policies.

Melgarejo was born on April 13, 1820, in a remote mountainous village. A *cholo* of illegitimate lineage, he enlisted in the MILITARY at a young age. He participated in armed revolts against the governments of Manuel Isidoro Belzú (1848–55) and José María de Achá (1861–64). His success in the latter allowed him to ascend to the presidency in 1864.

As president, Melgarejo was known as one of Latin America's most brutal and dictatorial caudillos. Inclined to drink to excess, Melgarejo made seemingly arbitrary policy decisions often for no other purpose than to satisfy a fleeting whim. In 1866, he signed the Mejillones Treaty, which ceded control of contested land rich in guano and nitrate deposits to neighboring CHILE. This action contributed to the ongoing border conflict that eventually culminated in the WAR OF THE PACIFIC (1879–83). In

1867, the impulsive caudillo handed over 40,000 square miles (103,600 km<sup>2</sup>) of land to BRAZIL in exchange for title to the Amazonian ACRE PROVINCE. The region was a lucrative rubber-producing region, but the agreement only produced further conflict between the two nations. In arrangements such as these, Melgarejo sacrificed the long-term well-being of the nation in the interest of expanding his personal wealth.

The dictator's economic policies were equally devastating for the nation. He offered lucrative incentives to foreign investors in Bolivia's MINING industry and in the process relinquished important sources of national income. In 1866, he introduced a land reform decree that abolished Amerindians' traditional rights to communally controlled property. The new policy imposed high rents on titles to private property. Most of Bolivia's indigenous population could not pay and eventually lost their land.

In December 1870, military officer and future president Hilarión Daza (1876–79) led a revolt to overthrow Melgarejo. The deposed caudillo was shot and killed by the brother of his mistress in LIMA in 1872.

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#### Mesilla Valley Treaty See GADSDEN PURCHASE.

**Mexico** Mexico is located south of the United States and north of the Central American nations. Prior to the arrival of the Spanish in the Americas, present-day Mexico was home to large population centers of NATIVE AMERICANS. The Aztecs and the Maya, as well as numerous smaller ethnic groups, developed advanced cities and sophisticated cultures that endured throughout the next 300 years of Spanish colonial rule. The Mexican colony—or the Viceroyalty of New Spain, as it was officially named—was the main seat of political and religious authority for the Spanish Empire in the Americas. It also evolved as a major center of MINING and commerce, strengthening its economic, political, and cultural ties to Spain. It developed a large and diverse population consisting of Spaniards, indigenous peoples, slaves and free blacks of African heritage, and mestizos of mixed-blood descent.

#### INDEPENDENCE

Mexico's colonial period came to an end after a war of independence that lasted more than 10 years. In 1810, Miguel Hidalgo y Costilla, a parish priest, and Ignacio Allende, a military officer, were motivated by Napoléon

Bonaparte's 1808 invasion of Spain and the confusion it caused among New Spain's ruling elite. The two conspired to rebel against colonial authorities and push for independence from Spain. Hidalgo issued his famous Grito de Dolores in the town of the same name to call local parishioners to arms. Thus began the independence movement that, under Hidalgo's leadership, grew into a mass uprising of indigenous and mestizos against those of pure Spanish descent. While Hidalgo's movement enjoyed some early success, this came at the cost of alienating much of the creole (American-born Spanish) population. Many reform-minded elite who might otherwise have supported the move for complete independence saw Hidalgo's army as an out-of-control Amerindian mob, and support for the cause waned. Hidalgo, Allende, and other coconspirators were captured by the Spanish royalist forces and executed in 1811.

José María Morelos y Pavón, a mestizo and also a parish priest, then picked up the faltering independence movement. In 1814, he convened a congress at Chilpancingo, where he articulated a clear direction for the independence cause. Advocating a complete break from Spain, the congress issued a formal declaration of independence and laid the basis for a new constitution. Many of the ideals first expressed by leaders of the independence insurgency—such as individual liberties, abolition of SLAVERY, and universal adult male suffrage—were included in future constitutions in 1824 and 1857.

Morelos was captured and executed in 1815, and GUADALUPE VICTORIA and VICENTE GUERRERO took over leadership of the movement. Under their direction, the rebel insurgency strengthened, and when the Riego Revolt of 1820 in Spain reinstated the Spanish liberal Constitution of 1812, conservative royalists in Mexico sought a compromise with independence leaders. That compromise was the Plan de Iguala, or the Treaty of the Three Guarantees, reached between independence leaders and former royalist officer AGUSTÍN DE ITURBIDE, who celebrated the triumph of independence by marching into MEXICO CITY on September 27, 1821. The plan called for a sovereign Mexico to be ruled under a monarch and guaranteed independence and a vaguely defined notion of equality. The treaty further guaranteed that Catholicism would remain the official RELIGION of the new nation. Eventually, Iturbide was named Emperor Agustín I. His monarchical rule was short lived, as Victoria and other political leaders quickly became dissatisfied with his pompous and extravagant attempts to create a legitimate court. They also decried his increasingly autocratic rule. Antimonarchist leaders conspired to overthrow Iturbide, and in February 1823, a rebellion under the auspices of the PLAN DE CASA MATA forced Iturbide to relinquish the throne and flee into exile.

#### EARLY YEARS OF THE MEXICAN REPUBLIC

The antimonarchists behind Iturbide's overthrow formed a ruling junta and began working to transform Mexico

into a republic. They organized a congress to write a new constitution, which was promulgated in 1824. Also that year, Victoria was elected as Mexico's first president; he was succeeded by Guerrero in 1829. The CONSTITUTION OF 1824 and the nation's first presidential leaders represented a liberal, federalist political ideology that often competed with more traditional conservative, centralist views (see CENTRALISM; FEDERALISM). In its early years as a republic, Mexico faced numerous challenges from abroad and from rival factions within the nation itself. In 1829, Spanish forces attempted to invade and recolonize Mexico but were repelled by up-and-coming military hero ANTONIO LÓPEZ DE SANTA ANNA. Numerous local uprisings challenged locally elected officials, and nearly every president in the 19th century faced attempted coups, some of them successful. Between 1824 and 1872, the office of the presidency was held by more than 30 individuals, and until the Restored Republic, Victoria was the only president to complete his term of office. Further exacerbating Mexico's political problems, the ECONOMY was severely strained from more than a decade of war and relative stagnation in the following years.

It was precisely the turmoil of the postindependence decades that opened the door for the strongman CAUDILLO rule of Santa Anna. As a MILITARY man, he fought on the royalist side in the war of independence and, at first, supported Iturbide's government. He later turned on the emperor and provided valuable military support in his overthrow. In the early years of the republic, Santa Anna supported the position of federalist, liberal politicians and in 1833 was elected president on a campaign of implementing liberal reform (see LIBERALISM). After serving only a few months, the caudillo handed over power to his vice president, VALENTÍN GÓMEZ FARIÁS, and retired to his HACIENDA in Veracruz.

Santa Anna's time away from politics, however, was short lived. By 1835, Gómez Farías had initiated a series of aggressive measures aimed at eliminating the power and wealth of the CATHOLIC CHURCH and reducing the size of the military. Those measures provoked an intense backlash, and conservative interests pressured Santa Anna to overthrow the liberal who was once his own vice president and scale back the reforms (see CONSERVATISM). Santa Anna returned to the presidency as a conservative and put in place a highly centralized government. He replaced the Constitution of 1824 with his SIETE LEYES (Seven Laws), which abolished states in favor of more centralized departments and granted extraordinary power and oversight to the president.

Several areas rose in revolt in response to Santa Anna's move to a centralized system, while others, including the henequen-producing state of Yucatán, threatened rebellion. Local militias in Zacatecas rebelled only to be quickly overpowered by Santa Anna's government forces. Santa Anna, however, turned his attention to the province of Texas in the north, which had attracted numerous U.S. settlers in the years since independence. These

Texans had long felt that their rights and needs had been neglected by the national government. The abolition of the Constitution of 1824 only exacerbated these feelings and propelled Texans into open rebellion in 1835.

The political and military leader marched north and fought a brutal war in an attempt to prevent Texas from becoming independent. Following Mexican victories at the Alamo and Goliad, Santa Anna ordered all captured Texans to be executed. The caudillo's callous actions only strengthened Texans' resolve. Eventually, Santa Anna was captured in April 1836 and forced to sign the Treaties of Velasco, which brought the TEXAS REVOLUTION to an end and granted Texas its independence. The disgraced Santa Anna returned to his hacienda in Veracruz, while political infighting in the capital continued as competing factions vied for power.

Only two years later, Santa Anna again entered public life as a military commander to defend the nation against attack by the French in a short-lived conflict over foreign claims known as the PASTRY WAR. During this conflict, Santa Anna was wounded and lost his leg below the knee. His actions in defending the nation and his very real sacrifice in battle earned him the forgiveness of the nation and allowed him to rise to power once again. The caudillo marched triumphantly into Mexico City in 1843 in a celebration that included a military parade and full presidential regalia. In a ceremony befitting his theatrical and ostentatious personality, Santa Anna dedicated a monument to his amputated leg and where his mummified leg was interred. The national pride generated by the military hero's resurgence was short lived, however, as Santa Anna's supporters pushed through a new constitution granting him nearly unrestricted authority. A revolt in 1844, led by General José Joaquín Herrera (1844–45, 1848–51) removed Santa Anna from power.

Herrera assumed the presidency and attempted to bring a sense of order to Mexican politics but faced both internal and external challenges that made stability an elusive goal. In 1845, the U.S. Congress officially annexed Texas, prompting diplomatic protests from the Herrera government. The two countries wrangled over the border between Texas and northern Mexico, which had been set at the Nueces River. In annexing Texas, U.S. president James K. Polk claimed the border extended 150 miles south to the Rio Grande (Río Bravo). As U.S. diplomat John Slidell negotiated the border dispute in Mexico City, it became clear that U.S. interests extended beyond Texas, and Slidell tried to entice Herrera into selling California as well. As negotiations stalled, Polk sent U.S. troops into the border region to secure U.S. claims there. On April 4, 1846, a skirmish broke out between U.S. and Mexican forces in the disputed territory. On April 25, war between the two nations officially began.

The U.S.-MEXICAN WAR started with two U.S. invasions into Mexico's northern and northwestern territory. General Zachary Taylor continued his push south from the Texas border, while a western front led by General

Stephen Kearney fought across New Mexico and Arizona to occupy California. By January 1847, Kearney had subdued most of the northwestern region. The 1848 Treaty of Cahuenga ended hostilities between U.S. forces and the sparse California population and effectively gave the United States control over a large expanse of Mexico's northern territory.

While U.S. forces were advancing across Arizona and California, political infighting in Mexico City divided the nation's leadership and eventually led to Herrera's overthrow. Santa Anna, who had been in exile in CUBA, convinced U.S. political leaders to provide him safe passage back to Mexico, ostensibly so that he could negotiate an end to the conflict favorable to U.S. interests. Instead, the caudillo began raising an army to confront Taylor's forces in the northeast. Having been named president of the nation once again, he marched north to face Taylor at the Battle of Buena Vista in February 1847. Taylor forced a Mexican retreat and proceeded to control much of Mexico's territory surrounding the cities of Monterrey and Buena Vista and northward to Texas.

The final defeat of Mexican forces came with the central invasion by General Winfield Scott through the port city of Veracruz in March 1847. Scott annihilated much of the Mexican army during his advance toward Mexico City. By May, the U.S. military leader had defeated the last of Santa Anna's organized forces on the outskirts of the city. The last Mexican defenses were led by military cadets at the Battle of Chapultepec. The young cadets who sacrificed themselves in that battle became national heroes, and Mexico still celebrates the bravery of its Niños Heroes. The U.S. military occupied the national capital for 10 months while guerrilla fighting continued in the countryside and leaders negotiated an end to the conflict.

The U.S.-Mexican War officially ended on February 2, 1848, with the signing of the Treaty of Guadalupe Hidalgo. The agreement stipulated the complete withdrawal of U.S. troops from Mexican territory but required Mexico to recognize the U.S. annexation of Texas and to cede the land that makes up the present-day states of California, Arizona, New Mexico, Nevada, Utah, and parts of Colorado and Wyoming. The United States paid \$15 million and absorbed more than \$3 million in outstanding claims in exchange for more than 500,000 square miles (1.3 million km<sup>2</sup>), or more than half, of Mexico's national territory.

Mexico suffered defeat in the war largely because opposing political factions were unable to unite to confront an external threat. Losing the war and such a large chunk of territory enraged nationalists but did little to change the political environment. Political leaders blamed opposing factions for the defeat, and Santa Anna was again forced into exile. In 1848, conservative leaders joined together to present a united front against liberal tendencies that they considered were weakening the nation. Led by LUCAS ALAMÁN, traditionalists formed the

CONSERVATIVE PARTY and articulated a program to stabilize the country. They argued that many of the strongest aspects of Mexican character, such as Catholicism and corporate privilege, had been abandoned as foreign liberal ideas encroached on the national consciousness in the decades after independence. The Conservative Party demanded a return to tradition and a dismantling of liberal policies.

To carry out their plan, these leaders turned one final time to Santa Anna and in 1853 invited the embattled caudillo to lead the nation. In the years following the U.S.-Mexican War, national leadership had been in a state of crisis, with near-constant revolts and civil wars between competing political factions. Conservative leaders believed that circumstances warranted a strong authoritarian leader and bestowed Santa Anna with extraordinary dictatorial powers. During his last tenure as national leader, Santa Anna did little to stabilize the nation. Instead, the former military hero replenished the depleted national treasury by selling yet another section of northern territory to the United States in the GADSDEN PURCHASE. Notable members of the liberal opposition fled Santa Anna's tyrannical regime and sought asylum in the United States. Others stayed behind and immediately began to organize a resistance movement. One such leader, Juan Álvarez (b. 1790–d. 1867), brought liberal opponents together in the REVOLUTION OF AYUTLA and overthrew Santa Anna in 1855.

### THE ERA OF BENITO JUÁREZ

The ousting of Santa Anna began a period of rule under the LIBERAL PARTY known as LA REFORMA. Liberal leaders countered the Conservative Party with their own theories about the way to build a strong nation. Leaders such as future president BENITO JUÁREZ and legal theorist MIGUEL LERDO DE TEJADA argued that Mexico's outdated traditions were holding the nation back. Liberals privileged the role of the individual in society over the traditional social structure that favored corporate groups, such as the church, the aristocracy, and the military. Juárez, Lerdo, and fellow Liberal José María Iglesias (b. 1823–d. 1891) drafted a series of reform laws between 1855 and 1857 that collectively aimed to break down the long-standing traditions of corporate privilege. The Reform Laws, which were eventually incorporated into the liberal CONSTITUTION OF 1857, prohibited corporations from owning property and abolished the *FUERO*, the colonial system of parallel courts for members of the military and the clergy. The reforms also created a civil registry and attempted to secularize many of the record-keeping functions that had previously been the responsibility of the church.

Liberal policies passed during La Reforma enraged the Conservative Party. Members of the corporations whose privileges were attacked joined in antiliberal tirades. Church leaders excommunicated members of the Liberal leadership as well as civil servants who swore

loyalty to the Constitution of 1857. The Liberal Party itself split over the enactment of reform laws with *puros*, or extremist Liberals, pushing for full implementation of the new legislation and *moderados*, or moderates, advocating for a more gradual and conciliatory approach in the interest of maintaining order and unity in the struggling nation. Rifts within the Liberal Party and mounting Conservative opposition escalated into a violent civil war. The WAR OF REFORM gripped the nation from 1858 to 1861 and further destabilized the country's already fragile political and social structure. Liberals were led by Juárez, who had assumed national leadership according to the presidential succession outlined in the Constitution of 1857. After three years of fighting, he led the Liberals to victory, but that victory cost thousands of lives and immeasurable destruction. Mexico emerged from the War of Reform laden with foreign debt and with its economic sectors in ruins. Furthermore, the war did little to resolve the underlying political conflicts that had plagued the nation throughout the 19th century.

Juárez and his Liberal government scarcely had time to recover from their victory over Conservatives before the next national crisis struck. Late in 1861, Queen Victoria of Great Britain, Queen Isabella II of Spain, and Emperor Napoléon III of France signed the Convention of London as a collaborative effort to collect on the large national debt that Mexico had incurred over the previous decades. The European alliance sent a naval force to blockade the port of Veracruz and seize customs revenues. The Spanish and British monarchs intended the intervention to be a temporary effort to collect the moneys owed. Napoléon III, on the other hand, had more ambitious plans. The French monarch, working in collusion with deposed leaders of the Conservative Party, sent a large military force to invade Mexico and establish a French empire in the Americas. Once again, the Mexican government faced the threat of foreign invasion, and Juárez found himself leading the nation in another war.

French troops quickly occupied Veracruz and began moving inland in the spring of 1862. The Mexican army put up a brave defensive in May at the Battle of Puebla; its unexpected victory in the battle is commemorated every year in the celebration of CINCO DE MAYO. The victory at PUEBLA only stalled the French advance, however, and one year later Napoléon's forces took the city and proceeded toward the capital. Juárez and the Liberal government were forced to flee as the French army occupied Mexico City. Napoléon and Mexican Conservatives invited Austrian archduke Maximilian of Habsburg (b. 1832–d. 1867) to take the throne of Mexico. The European royal and his young wife, Charlotte (Carlota), arrived in Mexico in May 1864 and set up residence in Mexico City's Chapultepec Castle. Though they tried earnestly to assimilate to Mexican culture, the couple found themselves rejected by much of the country as outsiders imposing foreign rule on the nation. Juárez

and the Liberal army continued to resist Maximilian, and the struggling monarch found his government propped up only by the continued support of the French army. By 1865, as Liberal forces continued to challenge the monarchy, many of Maximilian's liberal policies lost him important Conservative support. At the same time, the U.S. Civil War was winding down, and North American leaders gave their support to Juárez. Pressured by the United States to withdraw his army, Napoléon began pulling out his forces, effectively leaving Maximilian's government undefended. Juárez's forces quickly encircled Maximilian's remaining defenses, and on May 15, 1867, the monarch was captured at Querétaro. Maximilian was charged with crimes against the nation and executed by firing squad on June 19.

By the time Juárez defeated Maximilian and the French in 1867, he had served two terms as president but had spent most of those terms fighting major wars. At the end of the FRENCH INTERVENTION, Juárez was elected to his third term as president, but it would be his first full, uninterrupted term in office. Juárez's victory over the French began an era known as the Restored Republic, when the war-weary leader was finally able to implement the liberal reforms and the Constitution of 1857 that had been created a decade earlier. From 1867 until his death in 1872, Juárez worked to strengthen the liberal ideology and stabilize the nation. He attempted to alleviate financial problems by implementing aggressive land reforms and auctioning off properties held by the church and Amerindian *EJIDOS*. Juárez also established the *RURALES*, the nation's rural security force that became instrumental in pacifying the countryside during the Porfiriato. He began devoting government resources to developing TRANSPORTATION and communications infrastructure and inviting foreign investors to participate in the economy. The Juárez administration, in fact, initiated many of the policies that came to define the dictatorship of PORFIRIO DÍAZ.

## THE PORFIRIATO

Juárez won a fourth term as president in 1871 but died in office on July 18, 1872. His successor, SEBASTIÁN LERDO DE TEJADA (1872–76), continued his policies and ran for a second term after four years in office. Retired military leader Díaz opposed the decisions of both Juárez and Lerdo to run for reelection, arguing that they violated the liberal political platform of limited executive power. Díaz led a revolt against Juárez in 1871 but was unable to force the popular leader out of office. In 1876, he initiated a successful revolution against Lerdo in the Plan de Tuxtepec. Díaz claimed to be defending liberalism and, in particular, the doctrine of “no reelection.” He succeeded in overthrowing Lerdo, and the former military hero began a four-year term as president.

Díaz remained true to his promise to defend liberalism during his presidential term between 1876 and 1880. He strengthened many of the measures implemented by

Juárez and at the end of four years stepped down in favor of fellow Liberal MANUEL GONZÁLEZ. The González presidency was marred by incompetence and corruption. In 1884, Díaz claimed that the principle of no reelection allowed him to run again after sitting out one term. The popular military leader was elected again in 1884, but by that time, Díaz had determined that Mexico needed a strong hand to guide the nation to modernization and prosperity. After 1884, he remained in office uninterrupted until he was overthrown by revolution in 1911. Díaz allowed controlled elections during his dictatorship but silenced any meaningful political opposition. He assumed a paternalistic attitude, arguing that most of Mexico's population was not ready for DEMOCRACY but that after a period of strong rule, the nation would be prepared for full political participation.

During the Porfiriato, Díaz shifted his political leanings away from the liberalism of the 1870s and instead incorporated the philosophy of POSITIVISM. Surrounded by a close circle of advisers known as CIENTÍFICOS, Díaz believed that Mexico had fallen behind the rest of the world both economically and socially and that the nation needed to develop quickly in order to catch up. He invited foreign businesses to invest in Mexico's economy, seeing their participation as the most efficient and expedient way of modernizing industry and developing infrastructure (see INDUSTRIALIZATION). In order to appeal to foreign interests, Díaz tried to make the nation appear orderly and modern. He ramped up the *rurales* and authorized the use of indiscriminate force to maintain peace in the countryside. Administration officials passed numerous decrees imposing dress codes and other restrictions on the indigenous population in urban areas where foreigners could be found.

Díaz's economic and social policies succeeded in attracting large amounts of foreign investment in the final decades of the 19th century, and the nation appeared to be experiencing astounding economic growth. Foreign companies expanded the railroad, built communications lines, and improved the nation's port system. European and U.S. businessmen acquired controlling shares in mining enterprises and new manufacturing sectors in urban areas. The policies initiated under the liberal reform period also allowed business interests to acquire large landholdings and set up agribusiness ventures throughout the country. Despite these apparent successes, however, policies of the Porfiriato also created a system of exploitation and inequality. Members of indigenous communities who had been forced off their land became peon workers for large haciendas. Furthermore, a large urban population of exploited laborers developed as new industries were set up and foreign-owned factories opened. By the beginning of the 20th century, problems within the system were beginning to surface as numerous protests and local revolts erupted across the country. Díaz generally reacted with policies that favored foreign interests at the expense of Mexico's peasants and working class.

The exploitative and despotic nature of the Porfiriato created a volatile climate in Mexico in the final years of the 19th century. In the early years of the 20th century, Mexico experienced an economic downturn that further exacerbated its problems. As the general populace continued to challenge the Díaz administration, a middle sector of intellectuals and professionals pushed for a more democratic and open political system. Those pressures eventually culminated in the outbreak of the Mexican Revolution in 1910.

See also HIDALGO Y COSTILLA, MIGUEL (Vol. II); MEXICAN REVOLUTION (Vol. IV); MEXICO (Vols. I, IV); MORELOS Y PAVÓN, JOSÉ MARÍA (Vol. II); NEW SPAIN, VICEROYALTY OF (Vol. II).

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### Mexico City (Distrito Federal, Federal District)

Mexico City is the capital of Mexico and is surrounded by mountains in the country's central valley. It is both a city and an administrative unit. With a population of approximately 20 million, present-day Mexico City is considered a megacity and is one of the largest cities in the world. Mexico City has long been the political, economic, cultural, and historic center of the country. Much of the nation's political conflict and cultural development during the 19th century took place there. Mexico City's historic evolution often mirrors that of the nation as a whole.

Mexico City was first settled as the Aztec city of Tenochtitlán in 1325. Spanish conquistadores arriving in 1519 found a sprawling city impressively situated on an island in Lake Texcoco. As the seat of the Aztec Empire, Tenochtitlán became a primary target of Spanish conquerors, and the city suffered a devastating defeat at their hands in 1521. Spanish settlers built a new urban

center on top of the ruins of Tenochtitlán, and within a few years, all of Spain's administrative duties in the Americas had shifted to what had been renamed Mexico City (Ciudad de México). As the Spanish Crown established administrative units to oversee the exploration, settlement, and governing of the Americas, Mexico City became the seat of religious and political power for the Viceroyalty of New Spain. The viceroy, who represented the Spanish monarch in New Spain, governed from Mexico City. During the colonial period, Mexico City became home to the first university and the first printing press in the Americas. It was also the site of the CATHOLIC CHURCH's first mainland archdiocese.

Mexico City was a long-standing and important seat of Crown authority, thus, many of its residents approached the idea of independence cautiously in the early 19th century. When Miguel Hidalgo y Costilla issued his call to arms in 1810, many of New Spain's creole elite feared that a massive Amerindian revolt would ensue. Insurgent attacks on the city of Guanajuato and other outlying areas seemed to validate those concerns. Hidalgo's army also marched on Mexico City but stopped short of attacking the viceregal capital. As a result, the city remained a stronghold of royalist presence until Spanish army officer AGUSTÍN DE ITURBIDE brokered a deal with insurgent leader VICENTE GUERRERO. On September 27, 1821, Iturbide's Army of the Three Guarantees marched into Mexico City, signifying the beginning of the independent nation.

After serving for three centuries as the seat of colonial power, Mexico City became the capital of the independent nation of Mexico. Iturbide's Treaty of the Three Guarantees stipulated that Mexico would be ruled by a monarch. Unable to attract a European king to rule the new nation, Iturbide's supporters urged him to accept the title of Emperor Agustín I, and the new sovereign was crowned in the Mexico City cathedral. Iturbide attempted to set up an ostentatious royal court in Mexico City but was forced to abdicate the throne in 1823. The following year, a liberal constitution established Mexico as a republic, and the nation's first president, GUADALUPE VICTORIA, made Mexico City a federal district. Victoria's actions were intended to reinforce the federalist structure of the new government and maintain a delineation between national and state power (see FEDERALISM).

As the national capital and federal district, Mexico City was the site of much of the conflict and instability that characterized 19th-century Mexico. For decades, national leaders clashed over the type of government system that should be imposed, and Mexico City residents witnessed numerous changes in government through uprisings and *pronunciamientos*, or coup d'états. Confrontations between Liberal and Conservative political groups occurred with frequency in the decades following independence. Those conflicts regularly took place on the streets of the capital city and involved riotous crowds of local residents. During one of those uprisings, the property of a French

baker was damaged, and his monetary claims against the Mexican government eventually led the French to attempt an invasion in what became known as the PASTRY WAR of 1838. CAUDILLO and MILITARY leader ANTONIO LÓPEZ DE SANTA ANNA lost his leg in that war, but his sacrifice and reputation as a military hero allowed him to resuscitate his political career. He took the presidency and in 1842 orchestrated a bizarre ceremony to inter his amputated limb in a shrine in Mexico City. Later that year, Santa Anna was forced from office, and a rebellious mob fed his leg to dogs.

In addition to local unrest, Mexico City was the site of a number of foreign invasions. In 1847, the U.S. military invaded Mexico City during the U.S.-MEXICAN WAR. The military occupation of the city eventually compelled the Mexican government to negotiate the Treaty of Guadalupe Hidalgo, which ceded a large portion of the country's northern territories to the United States. The French military invaded in 1862 as part of the expansionist policies of Napoléon III. The French monarch and Mexican Conservatives invited Austrian archduke Maximilian and his wife, Charlotte (Carlota), to rule Mexico as monarchs (see FRENCH INTERVENTION). The royal couple set up residence at Chapultepec Castle in Mexico City in 1864, but the republican army, led by BENITO JUÁREZ, drove Maximilian and his supporters from the capital in 1867. That year began the era known as the Restored Republic; it was only then that violence and conflict began to abate in Mexico City.

Mexico City was transformed in the late decades of the 19th century. PORFIRIO DÍAZ became president in 1876 and held on to power for more than three decades. This era of dictatorship, known as the PORFIRIATO, brought seeming political stability and economic progress to Mexico City and to the entire country. At the beginning of Díaz's regime, Mexico City suffered a number of problems that reflected trends throughout the country. Roads and communication lines were in desperate need of improvement and expansion. Poor public sanitation, disease, and long-lasting violence had kept mortality rates high and life expectancy low. Throughout the 19th century, Mexico City's sewage and drainage systems were inadequate, and frequent flooding brought noxious waters that exacerbated public health problems. Political and economic instability had made it impossible for city leaders to confront those challenges in earlier decades.

The Porfirian dictatorship brought political stability and facilitated a period of economic recovery. Evidence of growth and change could be seen throughout the capital as the Díaz administration set about modernizing and beautifying the city. Díaz devoted considerable resources to improving the city's infrastructure by introducing electric power, telephone and telegraph communications, and public TRANSPORTATION. A modern drainage and sanitation project was undertaken in the 1880s, and by the turn of the century, Díaz had succeeded in cleaning up many areas of the capital. Mexico City also became

home to numerous monuments and other new public buildings that were intended to portray the opulence and modernity of the Porfiriato. Díaz sponsored the creation of parks, and his administration inaugurated several statues to national heroes along Mexico City's main thoroughfare, Paseo de la Reforma. A monument to Aztec leader Cuauhtémoc was inaugurated along the boulevard in 1887. Construction of the famous Angel de la Independencia (monument to independence) began in 1902, and the statue was inaugurated as part of the centennial independence celebration in 1910. The Díaz administration oversaw the planting of trees and flowers along the boulevard to showcase the main, wide avenue. These beautifying projects were modeled in the image of European cities, and Díaz hoped to promote a new image for the city and nation to attract foreign investors in the economy. City and national government leaders favored French culture in particular, and the upscale areas of Mexico City often showcased the latest in Parisian cuisine, fashion, theater, and even ARCHITECTURE. Strict municipal decrees even restricted the access of rural peasants and urban poor to certain areas of the city. As a result, upscale and business-centered neighborhoods in Mexico City exuded all the trappings of modernity. In many of the poor neighborhoods, however, residents

sank further in poverty and even saw their standard of living decline during the Porfiriato.

The image of modernity being portrayed in Mexico City and other large urban areas did attract the attention of foreign businesspeople. Investments in Mexico's economy increased exponentially in the late decades of the 19th century as foreign financiers backed MINING renovations, railroad construction, and basic manufacturing. Incipient INDUSTRIALIZATION in construction supplies, such as cement and steel, and consumer goods, such as textiles and processed FOODS, began in many of the country's urban areas. Mexico City saw a marked increase in manufacturing during the Porfiriato, setting the stage for the capital city to become one of the country's leading industrial centers in the 20th century.

The Porfiriato came to an end with the onset of the Mexican Revolution in 1910. The decade-long civil war brought renewed violence and unrest to Mexico City. The city continues to be the seat of political and economic power in Mexico today. As the largest city in Mexico, it is also one of the nation's cultural centers. Mexico City is home to numerous universities, foreign embassies, museums, and historic sites.

See also MEXICO CITY (Vols. I, II, IV); NEW SPAIN, VICEROYALTY OF (Vols. I, II); TENOCHTITLÁN (Vol. I).



The Alameda is the oldest park in Mexico City. This 1848 drawing shows the park as a popular spot to spend a Sunday afternoon in 19th-century Mexico. (*Library of Congress*)



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**migration** Migration is defined as the voluntary or involuntary movement of people. Historically, mass migrations have occurred as people looked for new economic opportunities or as a response to ecological changes. Migrations have also been caused by outbreaks of instability and violence or as people relocate in response to shifting national borders. Migration was common throughout Latin America for most of the 19th century for all of these reasons.

The travels and experiences of some Latin American intellectuals had an important impact on the emergence of independence movements in the early 19th century. Future independence leaders such as Simón Bolívar were educated in Europe and were exposed to Enlightenment ideas there. New ways of thinking introduced by European philosophers influenced many of the Latin American elite who eventually pushed for a complete break from Spain. Many of the political and MILITARY leaders who emerged in the decades immediately following independence had traveled to Europe and the United States. Those experiences helped shape their attitudes toward national development in Latin America. ANDRÉS BELLO traveled throughout South America with Bolívar during the independence era and took a post as a diplomatic representative for VENEZUELA and CHILE in London. In Europe, Bello was exposed to views on EDUCATION and politics that he eventually took back to Chile and incorporated into government planning in the 1840s.

The independence era created internal migratory trends in many areas of Latin America that had been under Spanish control. Demographic shifts occurred as militaries recruited followers. Mass migrations resulted as civilians sought to escape the destruction of wartime. After the wars of independence, those who had supported royalist forces either fled or were expelled by the new national governments. In MEXICO, the postindependence government of GUADALUPE VICTORIA issued particularly aggressive decrees calling for the expulsion of all Iberian-born Spaniards (peninsulars) from the new nation.

BRAZIL, CUBA, PUERTO RICO, and other areas that did not achieve independence in the early 19th century had a different experience with migration. Some Spaniards who had fled the mainland settled in the Spanish Caribbean after 1820. Brazil's move toward independence was less violent than that of its Spanish neighbors. A wave of Portuguese immigrants arrived in Brazil in 1808 to escape Napoléon Bonaparte's invasion of the Iberian Peninsula. It included thousands of Portuguese elite as well as the Portuguese monarchs, who ruled from RIO DE JANEIRO until 1821. Even after Brazil formally declared its independence in 1822, immigration from Portugal continued throughout the 19th century.

New Latin American governments confronted enormous challenges in the first decades after independence. Administrative and geographic divisions were often ill defined in the colonial period, and as the former colonies began to split off into separate, sovereign nations, a number of border disputes emerged. Through wars, treaties, and other negotiations, borders shifted, and frontier populations often found themselves living under a new jurisdiction. The largest and most well-known border alteration took place following the U.S.-MEXICAN WAR, when Mexico was forced to cede nearly half its national territory to the United States. The Treaty of Guadalupe Hidalgo, which formalized the agreement, included provisions that allowed Mexican settlers living in the ceded territory to retain their land and eventually become U.S. citizens. Approximately 50,000 Mexicans chose to stay, but many lost legal title to their land in the coming years. Others migrated south to remain within Mexican borders.

Forced migration accounted for a significant portion of the movement of people in Latin America in the 19th century. African SLAVERY had been introduced across the region at the beginning of the colonial period. While newly independent nations generally abolished slavery, those that remained under Spanish rule—namely Cuba and Puerto Rico—maintained and even strengthened the institution. The Spanish Caribbean colonies developed thriving plantation economies in the 19th century and relied on slaves to cultivate SUGAR, TOBACCO, and other commodity agricultural products (see AGRICULTURE). Slavery also continued in Brazil even after the nation broke away from Portugal. Despite British efforts to curtail the transatlantic slave TRADE after 1807, the importation of slaves into Brazil, Cuba, and Puerto Rico continued throughout most of the century: The British called for a gradual ban to end slave imports by the 1830s, but smuggling rings continued to move slaves well into the 1860s. An estimated 600,000 African slaves were imported to Cuba in the 19th century, while Brazil received more than 1.5 million. Internal slave migration also occurred, particularly as pressures increased to end the external slave trade. After the abolition of slavery, some slave LABOR on Brazilian plantations was replaced by the labor of recently arrived European immigrants (see SLAVERY, ABOLITION IN BRAZIL OF).

As slavery was gradually phased out in Latin America, other forms of servile labor replaced it, including debt peonage, which most often affected rural NATIVE AMERICANS. Chinese indentured servants, or “coolies,” also became an important supply of labor in 19th-century Latin America. Chinese laborers worked on plantations that formerly relied on African slaves. They could also be found in the MINING and guano regions of the Andes. At the turn of the century, Chinese laborers made up the bulk of the workforce in the construction of the Panama Canal. Although many Chinese workers migrated to Latin America voluntarily, there was often abuse, exploi-

tation, and deceit, resulting in a situation that was little better than slavery.

African slaves were not the only group subject to forced migration in the 19th century. The rural indigenous in Mexico, PERU, and elsewhere fell victim to liberal land reform policies in the 19th century. Under those policies, governments often confiscated ancestral communal lands (*EJIDOS*) and sold them to private entrepreneurs, forcing the relocation of rural peasants. In Mexico, indigenous policies became particularly oppressive under the dictatorship of PORFIRIO DÍAZ. In an attempt to pacify indigenous insurrections, which had plagued the nation throughout the 19th century, Díaz implemented deportation and resettlement programs to disperse unruly indigenous groups in various regions of the country. Many rebellious Yaqui Indians from the northern state of Sonora were relocated to the Yucatán Peninsula and put to work on henequen plantations. Many defiant Maya from southern Mexico ended up on sugar plantations in Cuba toward the end of the 19th century.

Voluntary migration to Latin America was relatively insignificant in the first half of the 19th century. Most Latin American nations experienced several decades of

economic and political instability after independence. Their volatile circumstances offered few incentives to potential immigrants. That situation changed considerably in the last half of the 19th century as relative political stability and economic growth made some areas of Latin America an attractive option for migrants looking for better opportunities. Population growth in Europe during the 19th century and structural changes within the agricultural sector were other factors that compelled people to consider moving across the Atlantic. European migration to Brazil, URUGUAY, Chile, and ARGENTINA gradually increased in the 1860s and 1870s. By the end of the 19th century, newly arrived immigrants from Germany, Italy, Portugal, and Spain had created a population explosion in Argentina and Brazil. French and British immigrants also arrived in South American nations but in smaller numbers.

The majority of European immigrants settled in Argentina. In the 1870s, the Argentine government implemented policies to attract immigrants as a way to fill the demand for labor, especially in the agricultural sector. Government leaders sought to settle large tracts of uninhabited lands in the countryside. Agricultural colonies popped up throughout the interior and facilitated



Immigrants being transported in a horse-drawn cart in Buenos Aires, Argentina—one of the primary destinations for Europeans migrating to Latin America in the late 19th century (*Library of Congress*)

the development of commercial agriculture in Argentina. Between 1869 and the turn of the century, the population in the Argentine countryside more than doubled. At first, the majority of those immigrants were young men, many of whom migrated seasonally when demand for rural labor was high and returned to their home countries in the off-season. By the end of the century, however, migration patterns had shifted as more European immigrants settled permanently in Argentina, along with members of their families (see FAMILY). Some migrant families managed to acquire landholdings of their own, but many worked for years as hired labor on the large estates of the rural elite.

Uruguay and Brazil both attracted large numbers of European immigrants at the end of the 19th century, and migration patterns there were similar to those in Argentina. The exception was the state of SÃO PAULO, where the abolition of slavery forced plantation owners to look for new labor supplies. Entire families were lured to São Paulo to work on COFFEE plantations. Cuba, which continued to be a Spanish colony, attracted large numbers of Spanish migrants throughout the 19th century, and Spanish immigration to the island intensified in the 1880s. Unlike in other Latin American countries where European immigrants worked almost exclusively in unskilled, underpaid menial labor, Spanish migrants to Cuba engaged in all sectors of the ECONOMY. This distinction was likely a result of the continuation of the Spanish colonial social system in Cuba.

By the beginning of the 20th century, government policies promoting industrial development had created a demand for urban laborers as well, and immigrant communities emerged in industrial areas of large cities (see INDUSTRIALIZATION). Working and living conditions for immigrants in rural and in urban settings were generally quite poor. In the cities, migrants often settled into communities of common origin, which allowed them to be surrounded by familiar language, FOOD, and other cultural comforts. They formed both formal and informal support organizations within those communities and often maintained strong ties to their native lands. Immigrant communities in urban areas were often responsible for introducing such new ideas as anarchism and socialism, which became the foundations of Latin American labor movements in the 20th century.

See also MIGRATION (Vols. I, II, IV).

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**military** The military played an important role in the development of Latin American nations throughout the 19th century. Formal and informal military groups participated in the wars for independence in the early decades of the century and set the stage for continuing conflict in future years. Armed conflict helped shape geographic boundaries of new nations and contributed to the emergence of formal nation-states. Latin American militaries underwent a process of professionalization during the 19th century, making the transition from small and informal local militias to larger national armies.

Throughout most of the colonial period the military presence in Spanish and Portuguese America was quite small, and participation was generally limited to Europeans. Those trends changed somewhat during the 18th century as a response to security concerns and as a result of the Bourbon and Pombaline Reforms. The Spanish monarchs sought to expand and professionalize the military in the Americas and enacted reforms to attract greater participation by creoles and mestizos. New laws extended military *FUEROS*, or legally defined privileges, to colonists born in the Americas. The most important military *fuero* was the parallel court system for members of the military, who thus came under a separate criminal jurisdiction. Creole elite sponsored private militias and provided an important line of local defense. As a result of these reforms, colonists in the Americas had gained valuable military experience by the time the wars for independence began in the 1810s.

Local militia-style forces loyal to specific individuals led the independence insurgencies against the Spanish army. Those local militias then became the military support for the governments of the newly formed nations. These trends gave rise to the emergence of local strongmen throughout Latin America known as CAUDILLOS. Caudillos were often large landowners who had participated in the wars for independence. They relied on their personal charm and their reputations as strong and brave military leaders to ensure loyalty within their own private armies. Caudillos came to dominate the political scene in most Latin American countries in the decades immediately following independence, and rivalry among competing caudillos often produced a great deal of instability and conflict. Caudillos often rose to power and maintained their regimes through violence and repression. Some of the most notable examples were ANTONIO LÓPEZ DE SANTA ANNA in MEXICO, JUAN MANUEL DE ROSAS in ARGENTINA, JOSÉ ANTONIO PÁEZ in VENEZUELA, and ANDRÉS DE SANTA CRUZ in BOLIVIA. Competing loyalties within the private armies prevented the successful establishment of professional national militaries in most countries until the last half of the 19th century.

Many Latin Americans found caudillos appealing precisely because they controlled their own private militias and could call on those forces to protect the fledgling nations from foreign threats. New nations across the region fought wars with neighboring countries to estab-

lish national borders throughout the 1820s and 1830s. In some cases, conflict emerged from attempts to unify large regions under political confederations. That was the case in the civil wars that resulted in the breakup of GRAN COLOMBIA and the PERU-BOLIVIA CONFEDERATION. Many boundary disputes were resolved in the first half of the 19th century, but some conflicts extended into later decades. The WAR OF THE TRIPLE ALLIANCE pitted PARAGUAY against URUGUAY, Argentina, and BRAZIL in 1864. Paraguay suffered a devastating defeat after six years of warfare, ceding large expanses of land to the Alliance forces and losing approximately one-half of its population, according to some estimates.

Latin American nations also faced the threat of imperialist invasion from European powers and the United States. Spanish forces attempted to retake Mexico in 1828, and forces led by the caudillo Santa Anna were instrumental in repelling that invasion. U.S. expansionist interests played a part in the buildup to the TEXAS REVOLUTION in 1836 and culminated in the U.S.-MEXICAN WAR in 1846. Filibusterers such as WILLIAM WALKER attempted to claim territory in northern Mexico and in CENTRAL AMERICA for the United States.

The need to fight external enemies helped create a sense of national identity and common purpose among members of Latin American militaries. Nevertheless, internal strife in most countries ran deep throughout the 19th century. For decades, civil war between liberal and conservative political factions tore nations apart and hindered the development of cohesive national armies (see CONSERVATISM; LIBERALISM). Those decades of violence set the stage for persistent military involvement in the political system and left a legacy that carried over into the 20th century. The debates between liberals and conservatives also affected the status of members of the military, as liberal leaders pushed for an abolition of the traditional *fueros* that had carried over from the colonial period. By the 1870s, liberal oligarchies had consolidated control in most Latin American countries, and the *fueros* had been abolished (see LIBERAL OLIGARCHY).

Ending the military *fueros* coincided with other attempts by liberal oligarchic regimes to modernize Latin American society and to professionalize national militaries in the final decades of the 19th century. Particularly in regions that had resolved border disputes in earlier decades, the late 19th century marked a time of development and supposed progress modeled largely on European models. In Mexico, PORFIRIO DÍAZ consolidated his regime by coopting local caudillos into his inner circle and winning the support of regional militias. Governments in Mexico, EL SALVADOR, GUATEMALA, and elsewhere invited military missions made up of European officers to introduce structural and strategic reforms intended to modernize national militaries in the 1860s and 1870s. Regimes throughout Latin America purchased uniforms, weapons, and other equipment from France, Germany, and Spain as part of modernizing

efforts. At the same time, national policies encouraging foreign investment and the expansion of communications and TRANSPORTATION infrastructure aided militaries. The Brazilian military seized upon notions of modernity and became an instrumental force in ending the nation's long-standing system of monarchy.

Militaries in the Southern Cone underwent a similar process of professionalization, and the armies of CHILE, PERU, Argentina, and Bolivia had an opportunity to test their military readiness with the onset of the WAR OF THE PACIFIC in 1879. The war started largely as a boundary dispute but quickly turned into a statement of nationalism and a quest to demonstrate military superiority. The Chilean forces were outnumbered but managed to gain the upper hand in both land and naval battles. The Chilean population swelled with national pride and urged the army to invade Peru and occupy LIMA. Chile's eventual victory left Bolivia landlocked and resulted in a transfer of territory from Peru as well.

Military professionalization efforts continued in the early decades of the 20th century. But, modernizing efforts failed to remove the military from politics as many liberal leaders had hoped. Instead, Latin American militaries became even more drawn in to the political system throughout the 20th century.

See also MILITARY (Vols. II, IV).

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**mining** Mining has long been a mainstay of many Latin American economies. The Spanish Crown initially pursued the conquest of the Americas hoping to profit from the mining of precious metals. Early settlers in the Caribbean were disappointed to find GOLD and SILVER only in small amounts and of poor quality, but mainland conquistadores in the 16th century found the vast Aztec Empire in present-day MEXICO to have a ready supply of precious metals, and the promise of great mining riches served as a primary motivator for those participating in the conquest that followed. The conquest of Mexico and the lure of precious metals served as a model for conquistadores in South America in later decades.

The economic infrastructure of the Spanish colonies was established to allow the Crown to extract mining wealth from rich silver and gold deposits found in Central Mexico and the Andean regions of South America. The

Spanish Crown held a monopoly over all mining in the colonies and collected a large percentage of the profits. Silver mining generated large amounts of bullion for the Crown. Gold, COPPER, and mercury mining were also important economic activities in many regions of the Spanish colonies. The colonial mining industry required large numbers of indigenous workers, and a dangerous and exploitative LABOR system eventually emerged. The *mita* system used in present-day BOLIVIA and PERU was particularly oppressive and brought disruptions and strife to indigenous communities. Portuguese explorers failed to discover a promising source of precious metals in the early years of the colonial period in BRAZIL. Nonetheless, by the 18th century, large gold deposits had been discovered in Minas Gerais and precipitated a gold rush to that region. Brazilian gold mining caused a major shift in Brazil's ECONOMY and in the colony's population centers, but gold output peaked in the 1750s and then began to decline.

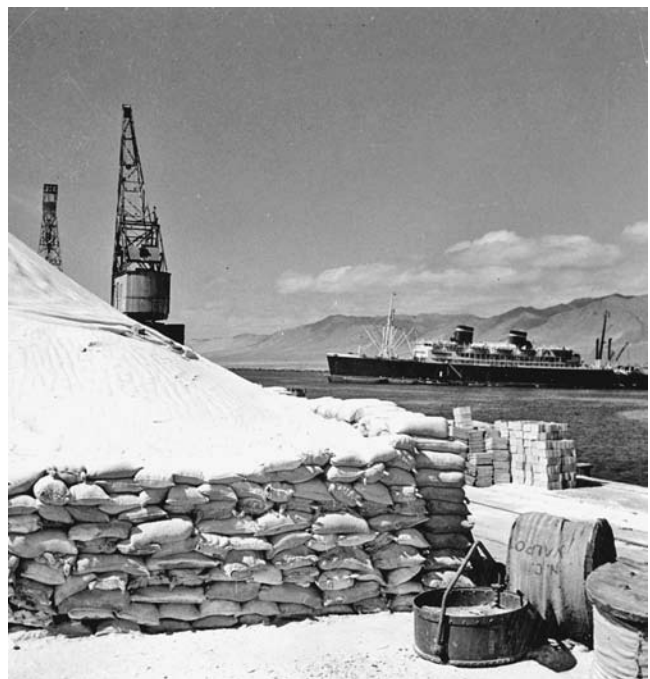
A decade of war and instability eventually brought independence to the Spanish mainland in the early 19th century. But, the independence movement that had started after Napoléon Bonaparte's invasion of Spain in 1808 disrupted the vital mining industries in Mexico and South America. The wars for independence in Latin America combined with the Napoleonic Wars under way in Europe interrupted the TRADE networks that had been an important foundation of the mining industry. Furthermore, local fighting between insurgent and royalist forces often compelled mine owners to abandon their operations. By the early 1820s, independence movements had succeeded across mainland Spanish America. New governments in Mexico, GRAN COLOMBIA, and Peru hoped to build a healthy national treasury from mining income, but by now, many mines had flooded and had otherwise fallen into disrepair.

Despite hopes that mining revenues would help stimulate the economies of newly independent nations, mining activities failed to recover in most Latin American countries. Governments throughout the region suffered decades of political turmoil in the first half of the 19th century. Internal strife between conservative and liberal political movements brought violent overthrows of national leaders. Poorly defined national boundaries resulted in numerous border disputes among neighboring nations. Many of those disputes centered on regions that were rich in mineral resources. Mexico suffered a series of civil wars and faced the threat of foreign invasion throughout much of the century. As a result, most Latin American countries were unable to stimulate a recovery in the mining industry until the last half of the 19th century. One notable exception was CHILE, where new technologies and British investments fueled an impressive surge in copper mining starting as early as the 1830s.

Foreign interests came to control a large share of the mining sector, as many nations saw a recovery in that

industry in the late decades of the 19th century. British businessmen invested large sums of money in Mexico and Chile, and the Mexican mining industry attracted the interest of U.S. investors as well. Both Latin American countries achieved a degree of political stability toward the end of the century, and the national governments worked to create a favorable investment climate to attract foreign funds. In Mexico, the era of dictatorship under PORFIRIO DÍAZ known as the PORFIRIATO brought economic growth fueled by foreign investors' participation in vital sectors of the economy. Silver and copper mines were taken over by foreign owners, and mining output increased substantially as a result of modern technologies. But, at the same time, government policies overlooked the exploitation of workers in Mexico's mines. LABOR unrest in mining and other industries contributed to the discontent that eventually culminated in the 1910 Mexican Revolution. One notable example was the confrontation between mine workers and foreign owners at the Cananea Consolidated Copper Company in 1906. In Chile, the government had also invited foreign participation in the copper industry, and even though Chileans maintained ownership of the vital industry throughout the 19th century, the large degree of foreign (especially British) participation in mining opened the door for outright foreign control of copper and other industries in the 20th century.

Bolivia and Peru experienced a more modest recovery of the mining industry largely because those countries continued to experience political unrest throughout the



Nitrate mining had bolstered Chile's economy by the end of the 19th century, and nitrate continued to be an important export for the nation well into the 20th century. This photo shows a mountain of nitrates waiting to be loaded onto ships at Antofagasta, Chile. (Hulton Archive/Getty Images)

19th century. Bolivia had been the heart of silver production for the Spanish Crown during the colonial period, but silver output never reached those levels in the century following independence. Bolivia suffered through the rule of one ineffective CAUDILLO after another, and foreign investors approached the Bolivian economy only cautiously. Bolivia and Peru joined forces against Chile in the 1879 WAR OF THE PACIFIC. The five-year regional conflict originated as a territorial dispute over control of the nitrate-rich Antofagasta region of the Atacama Desert in present-day northern Chile. Chile eventually won that war and forced both neighboring countries to cede coastal territory. Nitrate mining helped to fuel the Chilean economy in the late 19th century.

Other mining activities surged during the 19th century in Latin America. The Bolivian economy benefited from a late boom in the tin industry, and tin became the nation's primary export by the turn of the century. Other mining products include zinc, nickel, and coal. Mining products made up a large portion of Latin American exports in the era of LAISSEZ-FAIRE economics. Foreign involvement in the mining industry in the 19th century laid a foundation for U.S. and European control of those sectors into the 20th century.

See also MINING (Vols. I, II, IV); MITA (Vol. II).

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**Mitre, Bartolomé** (b. 1821–d. 1906) *writer, intellectual, and president of Argentina* Bartolomé Mitre was an Argentine liberal intellectual and political activist during the dictatorship of JUAN MANUEL DE ROSAS. From exile he challenged the CAUDILLO leader and contributed to his eventual overthrow. Mitre's presidency brought a sense of unity and a period of prosperity to ARGENTINA, which had been beleaguered by tyranny, war, and instability in the earlier decades of the 19th century.

Mitre was born on June 26, 1821, in BUENOS AIRES. At a young age, he devoted himself to his studies and demonstrated a particular affinity for LITERATURE and the arts. At the age of 14, he worked for a brief period on the ranch of the Rosas FAMILY but found more pleasure in reading and writing poetry than in manual labor. Even in his youth, Mitre attracted the enmity of the Rosas dictatorship by criticizing the caudillo's government in his political writings. Eventually, he and his family were forced to seek exile in Montevideo, URUGUAY, to escape the repression of the Rosas regime. In Montevideo, Mitre eventually began a MILITARY career but continued

to write for local periodicals. He also became acquainted with other Argentine intellectuals in exile there, such as José Marmol and ESTEBAN ECHEVERRÍA. The young writers collaborated on a variety of anti-Rosas projects before Mitre left Uruguay for BOLIVIA in 1846.

Over the next five years, Mitre spent time in Bolivia, PERU, and CHILE. He resettled in Montevideo in 1851 and participated in the anti-Rosas revolt led by JUSTO JOSÉ DE URQUIZA. Almost immediately after Rosas's downfall in 1852, Mitre and Urquiza split over issues related to provincial rights versus the dominance of the capital city (see CENTRALISM; FEDERALISM). A native of Buenos Aires, Mitre resisted the federalist agenda being pursued by Urquiza. The militarily trained intellectual led a movement to separate Buenos Aires from the rest of the Argentine provinces. Mitre held important posts in the Buenos Aires government over the next six years as the rebellious province tried to operate autonomously from the rest of the country. Urquiza promulgated the CONSTITUTION OF 1853, but Mitre and the other leaders of Buenos Aires rejected the document, which had been ratified immediately by the interior provinces.

Urquiza relentlessly attacked Buenos Aires until the provinces came to an agreement to make the port city the national capital once again and amend the constitution to reflect Mitre's demands. Buenos Aires ratified the constitution in 1860 and rejoined the other provinces. Two years later, Mitre was elected president of the republic. He immediately began to implement measures to promote economic development and national progress. He expanded the EDUCATION system and devoted resources to improving government services such as the post office and telegraph lines. The attempts to attract European immigration that defined much of the late 19th century in Argentina began under Mitre (see MIGRATION). The president also introduced measures that increased foreign TRADE and augmented the national treasury.

In 1865, Argentina found itself allied with BRAZIL and Uruguay against PARAGUAY in the WAR OF THE TRIPLE ALLIANCE. The war resulted from decades of conflict over the economic and political sovereignty of the nations surrounding the Río de la Plata. Paraguayan caudillo FRANCISCO SOLANO LÓPEZ had amassed an enormous army—far outnumbering the military forces of any of his neighbors. Brazil, Uruguay, and Argentina formed an army of alliance and named Mitre to lead it. The Triple Alliance eventually defeated the Paraguayan dictator, but the costly and violent war was unpopular in Argentina and renewed many of the antagonisms between the interior and the capital city.

When his presidential term came to an end in 1868, Mitre was elected to the Senate. He also served as a diplomatic representative for his presidential successor, DOMINGO F. SARMIENTO. In 1870, Mitre started the national newspaper *La Nación*, which remains one of Argentina's leading dailies. In 1874, he ran for president once again but was defeated by Nicolás Avellaneda. Mitre

declared the elections fraudulent and attempted a minor rebellion. He was subsequently captured and imprisoned for four months. In 1890, he helped form the Unión Cívica (Civic Union) political party, which was the predecessor to the 20th-century Unión Cívica Radical (Radical Civic Union).

Mitre remained active in politics and journalism in the final years of his life. He died at the age of 84 on January 19, 1906, in Buenos Aires.

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**modernism** Modernism is a literary and artistic movement that originated in Latin America and grew to prominence in the late 19th and early 20th centuries. The movement was most notable in poetry, although it appeared to varying degrees in other ART forms. Modernism earned Latin American LITERATURE prominence on the world stage. Much of the poetry written in the modernist tradition in the late 19th century abandoned the nationalistic orientation that had defined the era of ROMANTICISM in earlier decades. Rather, modernism celebrated themes that were often distant and exotic through a style that was almost rhythmic in nature.

The emergence of modernism in Latin America coincided with the push for economic and cultural modernization in the late decades of the 19th century. Ironically, in many ways the modernist literary movement was a reaction against the emphasis on modernization. In particular, it was a mechanism for resisting the formulaic and stratified structure of ideologies such as LIBERALISM and POSITIVISM. Poets writing in the modernist style believed that modern life had devolved into an ugly and fragmented system that was out of touch with nature. But, unlike the romantics, who portrayed scenes of natural beauty, modernists privileged exotic or imaginary beauty. Poets wrote about faraway places and ancient times instead of the unpleasant realities of their own present.

Modernism also delineated a clear separation between Latin American and U.S. culture. Many modernist writers used their literature to criticize the United States. These denunciations targeted a perceived lack of spirituality in U.S. culture, as well as specific U.S. government policies in Latin America. Nicaraguan poet Rubén Darío (b. 1867–d. 1916) is generally considered to be one of the fathers of modernism. He and other writers condemned the U.S. role in the WAR OF 1898 as an imperialist pursuit by a nation consumed with MANIFEST DESTINY. Darío remained suspicious of American expansionist intentions after the United States supported PANAMANIAN INDEPENDENCE in exchange for the right to build a canal to connect the Atlantic and Pacific Oceans in 1903. His poem

“To Roosevelt” is one of the first literary statements in opposition to U.S. imperialism in Latin America.

Uruguayan writer José Enrique Rodó (b. 1871–d. 1917) is also considered one of the great modernist writers of the late 19th century. In 1900, he published “ARIEL,” an essay that stressed the common culture of spirituality and refinement among Latin American nations. He saw U.S. culture as shallow and materialistic and urged Latin Americans to embrace their common identity and resist the cultural hegemony of the United States.

Modernist Latin American writers of the late 19th century inspired later literary movements. They also helped frame a sense of alternative character as Latin American nations grappled with modernity.

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**Monroe Doctrine** The Monroe Doctrine was a statement issued by U.S. president James Monroe in 1823 outlining U.S. policy toward Latin America. The doctrine stated that as a central tenet, the United States would actively protect the sovereignty of the newly independent nations of Latin America and would work to prevent any European power from reestablishing a colonial empire in the region.

The policy was originally proposed by British foreign minister George Canning, who sought to ensure British access to Latin American TRADE markets. Throughout the colonial period, the British had aggressively pushed to break into the tightly controlled mercantilist economies of the Spanish and Portuguese colonies. Merchants and government leaders wanted to ensure that Latin American markets remained open and feared that these European powers would attempt to recolonize Latin America in the 19th century. Canning recommended a bilateral policy whereby the United States and Britain would protect Latin America from the threat of other European incursions. U.S. leaders endorsed the spirit of the policy, but some remained suspicious of British motives. Secretary of State John Quincy Adams speculated that the British had their own imperial aims and argued that a unilateral policy would better serve U.S. interests. Under Adams’s counsel, Monroe articulated the unilateral policy in a congressional address on December 2, 1823.

The Monroe Doctrine became the basis for U.S. policy on Latin America for the rest of the 19th century, and its influence in U.S.–Latin American relations continued into the 20th century. The policy’s three main concepts defined the role the United States would play in Latin America. First, it was suggested that the Americas and Europe resided in “separate spheres.” The political and cultural systems of the “New World” and the “Old

World” were fundamentally different, and the common American heritage made the United States uniquely qualified to safeguard the well-being of the rest of the region. Second, the notion of noncolonization posited that the Americas were no longer open to colonization by Europe. The doctrine stated that the United States would consider any European attempt to interfere in Latin America as an attack on the United States itself. Third, according to the concept of nonintervention, the United States pledged not to become involved in internal European affairs. The doctrine also stated that the United States would not interfere in the few remaining European colonies in the Americas.

The Monroe Doctrine met with a mixed reception in Latin America. While some interpreted it as a progressive statement of anticolonialism, others viewed it with suspicion, especially as it became clear that the United States lacked the ability to enforce its provisions. U.S. leaders protested an attempted Spanish invasion of MEXICO in 1829, French incursions into Mexico in 1838 and the 1860s, and the reestablishment of Spanish colonial rule in the DOMINICAN REPUBLIC in the 1860s (see FRENCH INTERVENTION; WAR OF RESTORATION). But, in the early decades of the 19th century, the U.S. MILITARY was neither large enough nor powerful enough to offer any real protection to Latin America, and the U.S. Civil War prevented full implementation of the Monroe Doctrine in the 1860s (see U.S. CIVIL WAR AND CENTRAL AMERICA).

Other detractors of the doctrine insisted that it was merely a guise under which the United States could expand its influence in Latin America in the spirit of MANIFEST DESTINY. Indeed, the United States did expand its territorial, economic, and cultural control in many areas of Latin America in the 19th century (see U.S.-MEXICAN WAR; WAR OF 1898). At the turn of the century, U.S. president Theodore Roosevelt offered a “corollary” to the Monroe Doctrine to justify the expansion of U.S. influence, drawing further criticism in Latin America.

See also U.S. CARIBBEAN INTERVENTIONS, 1900–1934 (Vol. IV); U.S.-MEXICAN RELATIONS (Vol. IV).

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Ernest R. May. *The Making of the Monroe Doctrine* (Boston: Harvard University Press, 1975).

**Montalvo, Juan** (b. 1832–d. 1889) *Ecuadorean essayist and liberal polemicist* Juan Montalvo, an erudite writer from Ambato, ECUADOR, spent his adult life critiquing his country’s governments. Consequently, he spent much time in exile in COLOMBIA and Paris. His writings incited enthusiasm for Liberal Party leaders such as Eloy Alfaro Delgado (1897–1901, 1907–11).

In the 1870s, Montalvo made his mark by critiquing GABRIEL GARCÍA MORENO’s Conservative government, which he defined as a tyranny. His impassioned essay “The Perpetual Dictatorship” caused liberal youths in QUITO to plan García Moreno’s assassination, after which Montalvo noted, “It is not Rayo’s sword, but my pen that has killed him.”

Unable to make peace with either the moderate Liberals or the dictator who ruled from 1877 to 1883, Montalvo penned two more popular, sarcastic, and critical essays, “The Catalinas” and “Seven Treatises.” Montalvo’s writing criticized the shortcomings of leaders who failed to share his belief in 19th-century anticlerical LIBERALISM.

Drawing on the traditions of French essayists such as Montaigne and the 19th-century thinker Félicité Lamennais, who espoused ideas of Christian socialism, Montalvo characterized himself as a liberal Catholic, retaining his belief in the faith to the end of his life. Although today readers tend to find Montalvo’s work bombastic and overblown, he is still considered one of the foremost figures of 19th-century Ecuadorean LITERATURE.

See also ALFARO DELGADO, JOSÉ ELOY (Vol. IV).

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**Montt, Jorge** (b. 1845–d. 1922) *president of Chile* Jorge Montt was a Chilean naval officer who helped lead the revolt of the congressional army in the CHILEAN CIVIL WAR against President JOSÉ MANUEL BALMACEDA. He served as president after the overthrow of Balmaceda (1891–96) and is generally credited with easing political animosities and bringing a sense of calm back to the Chilean presidency.

Montt was born in Casablanca, CHILE, on April 26, 1845. From an early age, he devoted himself to a MILITARY career. Montt participated in defending VALPARAISO from an attempted Spanish invasion in 1865. In the following years, he advanced within the naval hierarchy, working up to the rank of captain by 1879. Montt also played an important role in commanding Chile’s naval fleet in the WAR OF THE PACIFIC (1879–84).

By 1890, Montt had risen to the position of maritime governor at Valparaiso. When Congress rebelled against President Balmaceda in 1891, Montt and his fellow naval officers joined forces with the legislators. Balmaceda had the support of the army, and the two branches of government, each backed by separate branches of the military, engaged in a violent civil war throughout 1891. By September, Montt’s naval forces and the Congress had overthrown Balmaceda. A governing junta named Montt provisional president, and several months later, the war hero was chosen as constitutional president in



an official election. Because he was not formally aligned with any political party, Montt was able to pacify many of the political hostilities that had been brewing for decades. He offered amnesty to numerous army commanders who had supported Balmaceda. Generally, the president deferred to the authority of Congress, thus avoiding further political confrontations.

After serving one term as president, in 1896, Montt stepped down and continued his military career. He died in SANTIAGO DE CHILE in 1922.

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**Morais, Prudente de (Prudente José de Morais e Barros)** (b. 1841–d. 1902) *president of Brazil* Prudente de Morais was the third president of BRAZIL and first civilian to hold the office of president since the establishment of the republic in 1889. He represented the COFFEE interests of the state of SÃO PAULO and was in charge during the violent repression of separatists in the community of CANUDOS.

Morais was born on October 4, 1841. As a young man, he entered local politics and was eventually elected to the national legislature as a member of the LIBERAL PARTY. As a *paulista* politician, Morais supported the Brazilian abolitionist movement and aligned himself with republican and positivist leaders who led the REVOLUTION OF 1889, which overthrew the Brazilian monarchy. With the establishment of the Republic of Brazil, Morais continued to represent the interests of São Paulo, first as state governor and later as a national senator. He unsuccessfully ran for president in 1891 against the provisional president and MILITARY leader MANUEL DEODORO DA FONSECA. After Deodoro was forced to resign, Morais became the first civilian president of the new republic (1894–98) and the first executive elected by direct popular vote.

Morais faced a number of insurrections during his presidency, particularly as old imperial interests looked for ways to reestablish a monarchy. The president ordered military forces to bring the separatist rural community of Canudos back under government control. A violent confrontation took place between the Brazilian military and inhabitants of Canudos, resulting in tens of thousands of casualties.

Morais died in Piracicaba, São Paulo, on December 3, 1902.

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Leslie Bethell. *Brazil: Empire and Republic, 1822–1930* (Cambridge: Cambridge University Press, 1989).

**Morant Bay Rebellion** See CARIBBEAN, BRITISH.

**Morazán, Francisco** (b. 1792–d. 1842) *statesman and president of the United Provinces of Central America* Of West Indian descent, Francisco Morazán was born in Tegucigalpa, HONDURAS, where he rose to the leadership of the liberal cause at the time of CENTRAL AMERICA'S independence in 1821. He held several government positions in the newly independent Honduras and represented the country at the regional congress that formed the UNITED PROVINCES OF CENTRAL AMERICA in 1823.

As a champion of the liberal cause, between 1827 and 1829, Morazán commanded the army that drove the conservatives from power in Honduras, EL SALVADOR, and GUATEMALA. As head of state in Honduras in 1829, he expelled Archbishop Ramón Casaus and Franciscan and Dominican priests for opposing the Liberal Party and directed Congress to close down the male monastic orders and approve the state's confiscation of their property. In 1830, he became the first president of the United Provinces of Central America, but owing to independence-minded states, a weak constitution, and regional jealousies and rivalries, Morazán accomplished little in this role. Honduran scholar and statesman José Cecilio del Valle (b. 1780–d. 1834) was selected to succeed Morazán as the federation's president in 1834 but died en route to his inauguration in Guatemala City. Morazán completed Valle's term.

Morazán presided over the collapse of the federation and the temporary end to the era of liberal politics in Central America. The civil, judicial, and penal code reforms introduced to Guatemala by its president, JOSÉ FELIPE MARIANO GÁLVEZ, brought stiff conservative reaction that was exacerbated by a cholera outbreak in 1837 and used by RAFAEL CARRERA to organize disgruntled Amerindian groups into an insurgent army. The Carrera and Morazán armies battled each other for the next three years. Recognizing the futility of Morazán's cause, the provincial congress voted in 1838 to release the states from the federation, if they wished to separate. COSTA RICA, Honduras and NICARAGUA quickly withdrew. No authorized body existed in February 1839 to choose Morazán's successor.

In June 1839, Morazán became president of El Salvador and immediately fended off troops from conservative Honduras and Nicaragua sent to depose him. With visions of bringing the fragmented Central American federation back together, Morazán led an army into Guatemala to oust Carrera. Instead, the tables were reversed in the battle for Guatemala City on March 19, 1840. Morazán escaped to PERU and two years later arrived in Costa Rica with plans to restore the federation. He ousted President Braulio Carrillo but, as a foreigner, quickly fell victim to various opposition groups. He was captured and then executed on September 15, 1842, the 21st anniversary of Central America's independence from Spain.

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**Moret Law** (1870) Named for then minister of colonial affairs Segismundo Moret y Prendergast (b. 1838–d. 1913), the Moret Law was issued by the Spanish government on July 4, 1870, in regards to all its remaining colonies. The law stated that all government-owned slaves, all slaves over the age of 60, all slaves born after September 17, 1868, and all slaves who served in the Spanish army during the recent unrest in CUBA were free. The law effectively freed elderly and very young slaves in PUERTO RICO and Cuba.

The man largely responsible for the creation of the law, Moret y Prendergast, was not only a minister in the Spanish government but also the president of the Spanish Abolitionist Society. For several years, he had called for an end to SLAVERY throughout the Spanish Empire, and following the removal of Queen Isabella II (b. 1830–d. 1904) from the throne in 1868, the new liberal Spanish government saw fit to agree with his views. An estimated 10,000 slaves were freed as a result of the Moret Law; these freedmen and -women became known as *libertos*.

The law, however, angered many Puerto Rican plantation owners and was difficult for the Spanish authorities to enforce. The primary disagreement between slave owners and the Spanish government concerned the amount of compensation paid for the infant slaves freed by the law. The law stipulated an amount of 125 pesetas to be paid to slave owners for each infant slave, an unreasonably low sum in the opinion of many slave owners. The conflict eventually came to an end when Spain abolished slavery altogether in 1873, freeing some 30,000 additional slaves in Puerto Rico.

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**Mosquito Coast** The Mosquito Coast is a lowland, swampy, bug-infested strip of land about 40 miles (64 km) wide and approximately 225 miles (362 km) long running from the San Juan River on the Nicaraguan–Costa Rican border north to Cape Gracias a Dios, HONDURAS, just above the Coco River. Named after the Miskito Indians who inhabit the region, it has long been isolated from CENTRAL AMERICA’s historical development.

In the early Spanish colonial period, the British and Dutch used the coast as a haven from which to attack Spanish shipping (see CARIBBEAN, BRITISH; CARIBBEAN, DUTCH). British loggers also operated in the region. In

1678, the British established a township at Bluefields, proclaimed a protectorate over the Miskito, and brought slaves from Jamaica to boost the LABOR force. Despite protests, first from the Spanish and later the Central American republics after their independence in 1821, it was not until the 1840s that the challenge became significant. At that time, U.S. interests in the region resulted in a confrontation with the British.

The U.S.-British controversy began on June 1, 1848, when the British raised the Miskito flag at the mouth of the San Juan River and renamed the enclave there Greytown. The United States viewed this as an attempt to thwart its interests in a transisthmian canal utilizing the San Juan River and dispatched ELIJAH HISE (1848) and EPHRAIM GEORGE SQUIER (1849) to Central America to counter the British (see TRANSISTHMIAN INTERESTS). While the treaties the diplomats negotiated were never ratified, they played a significant role in the development of the 1850 CLAYTON-BULWER TREATY, which temporarily curtailed Britain’s territorial expansion and limited U.S. options in building a transisthmian canal. The diplomatic maneuverings, however, prevented neither Cornelius Vanderbilt from constructing a transit route across NICARAGUA using the San Juan River, nor the leveling of Greytown by a U.S. naval ship in 1854 (see GREYTOWN AFFAIR).

Beset by problems in Europe and rising U.S. interest in Central America, the British government backed away from the region in the latter part of the 1850s. Desirous of easing tensions, in 1859, the British dispatched Charles Wycke to GUATEMALA, Honduras, and Nicaragua. In a series of treaties Wycke temporarily defused regional tensions. In return for abandoning its claims to BELIZE, he committed the British to constructing a railroad from Guatemala’s interior to the Caribbean port at Belize City. The railroad was never built, and the Guatemalan-Belize boundary dispute continues to this day. In Tegucigalpa, Wycke recognized the Honduran claim to the Bay Islands in return for a Honduran promise not to transfer the islands to a third party or to interfere with British property or RELIGION. This agreement was upheld. According to the 1860 Treaty of Managua, Great Britain relinquished its protectorate over the Mosquito Territory and turned Greytown into a free port under Nicaraguan sovereignty. Within Nicaragua, the Miskito enjoyed self-government until 1864, when Britain canceled its annual 1,000-pound subsidy and the Nicaraguan government withdrew its recognition of Miskito sovereignty over the kingdom.

The Miskito kingdom remained a backwater until the 1880s, when U.S. expatriates began to arrive, first in Bluefields, the kingdom’s capital and main port. Bluefields quickly came to resemble a small U.S. town, with horses, a blacksmith, tavern, and the like, as well as its own newspaper. The surrounding region supported banana growing and, by 1893, U.S. plantations had appeared along the Escondido River. Bluefields, along with Puerto Limón, COSTA RICA, were the main suppliers of bananas to the world.

Bluefield's lush life changed in 1894 when Nicaraguan president José Santos Zelaya imposed martial law on the city and an export tax on bananas and refused to recognize any concessions made by the Miskito government. His actions also violated the 1860 Treaty of Managua. The United States hesitated to act, but Britain did not. British troops were dispatched to Bluefields, where they received a warm reception from the North Americans on March 2, 1894. The United States faced a dilemma: It could either let Britain defend its interests in the Miskito kingdom or charge Britain with violations of the MONROE DOCTRINE and the 1850 Clayton-Bulwer Treaty. The U.S. government reluctantly supported the Nicaraguan position, which contributed to the British softening their position. Finally, in November 1894, the Miskito Indians and the Nicaraguan government reached an agreement that effectively put the 1860 Treaty of Managua into effect. The Miskito kingdom was absorbed by Nicaragua, but its residents were exempted from national taxes and MILITARY service and the Miskitos were able to govern their local townships and communities. The British quietly withdrew from the area, while the North Americans remained at the mercy of President Zelaya.

See also ZELAYA, JOSÉ SANTOS (Vol. IV).

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**music** Music has long been a medium of cultural expression, and regional music often reflects political, demographic, ecological, and economic trends over time. The development of music in Latin America in the 19th century incorporated these and other factors, with each region producing its own unique musical style. A distinction can also be made between popular music, which was the everyday music created and enjoyed by a large majority of people, and artistic music, which refers to the high-culture styles intended for elite audiences.

Local traits were evident in popular music dating back to the colonial period in the various regions of Latin America. The presence of African slaves in the Spanish Caribbean resulted in the emergence of distinct musical styles that merged tropical sounds with African rhythms (see SLAVERY). Popular Caribbean music was generally accompanied by a dance style, and forms such as the mambo and the *contradanza* emerged in the 19th century and became predecessors to the salsa genre of the 20th century. A similar evolution in popular music occurred along the Caribbean coast of northern South America, which was a main point of entry for African slaves into the Spanish mainland. *Cumbia* music and dance developed first in present-day COLOMBIA as a fusion of African sounds and native instruments. Because of its African and indigenous roots, *cumbia* was long considered the music

of the poor and lower classes. Versions of *cumbia* spread to other South American countries.

BRAZIL also witnessed an amalgamation of African, indigenous, and European musical and dance styles throughout the colonial period and during the 19th century. Brazilian plantation owners imported African slaves whose musical traditions merged with local styles. Hybrid musical forms and accompanying dances were incorporated into religious practices in those communities, despite elite attempts to curtail their popularity. By the 19th century, the predecessor to samba had emerged as both a musical style and a seductive dance. By the end of the century, many urban elite had embraced the distinctly Brazilian music, and samba eventually became part of carnival celebrations in RIO DE JANEIRO and elsewhere.

Various new forms of music emerged in 19th-century MEXICO, during which time much of the regional variation of musical styles that still exists today took root. The *son*, which was a combination of indigenous, European, and some African styles, had developed as the main form of popular music in Mexico during the colonial period. It became the foundation for *ranchera* music first in the Jalisco region, and that style spread throughout the country. The Jalisco *ranchera* also gave rise to the distinctly Mexican mariachi style, characterized by the musical instruments and the *charro* attire of the musicians. Mexico's northern regions became home to *norteño* music. The *norteño* style evolved as *ranchera* musicians borrowed musical styles from polka and other immigrant music. By the end of the 19th century, *norteño* music included a distinctive and unique accordion sound that was not found in other parts of the country. Mexican *corridos*, or narrative ballads, became important throughout the 19th century as a way for local villages to disseminate news, history, and other important information.

Artistic music followed the trends of other ART forms in the 19th century. Much of the opera, classical music, and musical theater that were popular among Latin American elites were heavily influenced by European styles. By the 1870s, modernization efforts by a number of Latin American governments included the construction of national theaters and the opening of music conservatories. The European influence in artistic music was evident throughout most of Latin America until well into the 20th century.

See also MUSIC (Vols. I, II, IV).

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# N

**Nabuco, Joaquim** (b. 1849–d. 1910) *Brazilian writer and abolitionist* Joaquim Nabuco was a politician, abolitionist, and writer in late 19th-century BRAZIL. He was also the founder of one of the nation's leading antislavery societies.

Nabuco was born in Recife in the northeastern SUGAR-producing state of Pernambuco on August 19, 1849. He came from a wealthy landowning family, and his father was an influential politician in the EMPIRE OF BRAZIL. The young Nabuco initially pursued a career in law. Eventually he served in the national legislature where he became a member of the LIBERAL PARTY and an advocate of more progressive economic and political structures. Despite the FAMILY's strong ties to the slave-based ECONOMY of the northeast, both father and son opposed SLAVERY largely because they believed it was an antiquated LABOR system that would slow the nation's pace of economic modernization. Nabuco spoke out against the 1871 LAW OF THE FREE WOMB on the grounds that it provided for only gradual abolition, arguing that under its provisions, slavery could effectively continue into the 20th century. In 1880, Nabuco helped establish the BRAZILIAN ANTI-SLAVERY SOCIETY and served as president of the visible emancipationist organization. In 1884, he published one of his most famous antislavery works, *O Abolicionismo* (Abolitionism), in which he argued that slavery was damaging BRAZIL's national character (see LITERATURE). Gradually, individual states began passing emancipation laws, effectively creating havens for escaped slaves. Finally, a national abolition law was passed in 1888, making Brazil the last nation in the Americas to end slavery (see SLAVERY, ABOLITION IN BRAZIL OF).

Nabuco was an advocate of monarchy, and he ended his legislative career after the establishment of the OLD

REPUBLIC in 1889. He continued to write on political issues and eventually served as a diplomat on behalf of the Brazilian government in Washington D.C. He died on January 17, 1910.

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**Native Americans** Large populations of Native Americans and people of indigenous ancestry have played a central role in Latin American history. The American continents and the islands of the Caribbean were populated by millions of native peoples living in diverse settlements. Those groups ranged in size from very small clanlike settlements to enormous empires spanning large swaths of the continent. The estimated millions who resided within the Aztec Empire in the Valley of Mexico were subdued by Spanish conquistadores in the 1520s. The once-impressive Maya civilization was already in decline when European settlers arrived in the Americas, but a significant population remained in southern MEXICO and CENTRAL AMERICA. The vast Inca Empire stretched for approximately 2,500 miles (4,023 km) along the Pacific coast of Andean South America. Those large empires are the most well known of Latin America's Native American groups because of their impressive cultural advancements and the extraordinary way in which they confronted Spanish conquistadores.

Nevertheless, they made up only a portion of the indigenous population on the eve of the European conquest. Millions of Amerindians lived in small, relatively isolated communities, and the sparsely populated regions of the Americas proved to be some of the most difficult for the Spanish and Portuguese to subjugate.

### THE COLONIAL ERA

During the colonial period, the Spanish devised a number of policies to deal with the native population. Crown officials wanted to bring the indigenous under Spanish administrative control and felt a strong obligation to convert the native population to Christianity. Spanish settlers also saw Native Americans as a potential source of LABOR. An early mechanism for accomplishing all of these ends was the *encomienda*, a royal grant that gave Spanish lords control over all Amerindians living on a specified plot of land. Spanish conquistadores received *encomienda* grants as a reward for MILITARY service in the conquest. They often imposed harsh labor requirements and exacted tribute payments from the indigenous living on their *encomiendas*. While the *encomienda* system was eventually eliminated in all but the most peripheral regions of the colonies, the tribute system remained. Indigenous villages made regular contributions—usually in the form of agricultural products—to Crown officials throughout the colonial period. Although Spanish laws forbade the enslavement of Amerindians, other exploitative labor systems emerged that forced Native Americans to work in mines, on HACIENDAS, and elsewhere (see MINING). The *mita* established native labor obligations in Peruvian mines, while the *repartimiento* performed a similar function in mines, on haciendas, or on public works projects in Mexico.

Portuguese settlers found even smaller indigenous groups in colonial BRAZIL. In that country, the development of SUGAR plantations in the 16th century led to attempts to enslave the native people. But, small, scattered tribes could easily seek refuge in the large, unsettled Brazilian interior, thus Portuguese planters quickly looked to African SLAVERY to supply plantation labor. Official policies eventually outlawed the enslavement of Native Americans, but illicit slave raids into Amerindian settlements continued throughout most of the colonial period.

Racial miscegenation occurred in both Spanish and Portuguese regions of the Americas. Mestizo offspring of combined indigenous and European heritage fell within a social hierarchy that privileged pure-blooded Europeans. Mestizos were considered socially inferior to the Spanish and Portuguese, and their political and economic opportunities were limited. The indigenous, however, were considered to be in a separate ethnic category, removed from the rest of society. Religious distinctions were also evident throughout the colonial period. Despite church leaders' attempts to Christianize the Amerindians and eradicate their native religious practices, many indig-

enous rituals survived the colonial period and were integrated—often secretly—into indigenous notions of Catholicism. Several hybrid RELIGIONS incorporating indigenous, European, and African religious practices emerged during the colonial period and survived into the 19th century. They include CANDOMBLÉ in Brazil, SANTERIA in CUBA, and VODOU in HAITI.

### NATIVE AMERICANS UNDER LIBERALISM

The colonial practices set up to administer Native Americans set a foundation that continued into the 19th century. During the independence era, liberal leaders spoke of abandoning the social and legal restrictions that had long discriminated against indigenous people. Inspired by the European Enlightenment, independence leaders in the former Spanish colonies initially abolished the tribute system and began discussing Native American issues in terms of equality and freedom. Those discussions proved to be short lived, however. In the political and economic chaos that followed independence, new governments reinstated indigenous tribute as a way to fill the national treasury. New constitutions that purported to foster democratic political structures excluded Native Americans from the political process. Indigenous issues had little priority in the decades following independence as elite leaders vied for power and considered new political and social systems that offered few improvements for Amerindians.

The early decades of the 19th century in many regions of Latin America were defined by conflict between liberal and conservative political factions (see CONSERVATISM; LIBERALISM). Disputes arose over how to implement new political, economic, and social systems in the newly independent nations. Landownership emerged as a particularly contentious issue as liberal leaders promoted a system of private property ownership over the collective, institutional control of land that had dominated in the colonial period. Liberal attitudes toward land control can be understood as part of a larger strategy to weaken the long-standing influence and power of the CATHOLIC CHURCH. As a result of special endowments and payments of indulgences, the Catholic Church had emerged from the colonial era as the largest single landowner in Latin America. But, in heavily populated indigenous areas such as Mexico and the Andean regions of South America, indigenous communities also controlled large landholdings (see EJIDO). Liberal leaders believed that only individuals should own land and passed laws calling for the dismantling of church and indigenous communal lands for sale to private individuals.

The impact of 19th-century land reform laws was devastating to indigenous communities. Many groups had lived on and worked ancestral lands collectively since pre-Columbian times and had developed a deeply rooted sense of identity that was closely tied to those lands. Dispossessed Native Americans were not only deprived of their traditional lands but were forced to become

manual laborers on those same lands. Rural elite gained control over much of the land that had belonged to the church and to indigenous communities. Large haciendas emerged as land became concentrated into the hands of a few in a system known as *LATIFUNDIO*. Those patterns of land concentration became particularly pronounced in the last half of the 19th century as government economic policies increasingly favored *LAISSE-FAIRE TRADE* to develop an export market for raw materials (see *AGRICULTURE*).

Latin American elite and foreign investors developed a commercial agricultural sector to produce grains, fruits, and other agricultural goods for export. Large-scale agricultural production required a ready supply of cheap rural labor, and landless indigenous peasants often had no choice but to fill that role. In many areas of Latin America, an exploitative system of debt peonage developed under which poor and generally illiterate indigenous peasants entered into labor contracts on large agricultural estates. Under those contracts, the landlord often made an initial “loan” to workers to provide necessary capital to begin production. In return, rural workers owed the landlord a set share of the harvest. Contract terms generally made it impossible for workers to escape the debt they carried from that initial loan. Liberal land reforms that were envisioned to create nations of small independent farmers in the end created a large and exploited rural servile class among Latin American indigenous. Disputes over indigenous land and labor exploitation continued into the 20th century and became the basis of a number of later conflicts.

### NATIVE AMERICANS UNDER POSITIVISM

By the final decades of the 19th century, many liberal leaders in Latin America were incorporating positivist theories of progress and development into their social policies. *POSITIVISM* is a theory of human knowledge and social development originally proffered by French philosopher Auguste Comte. Under positivism, government leaders pursued economic and social policies that would bring modernization and progress. In areas with a large native population, like Mexico, leaders turned to positivism to explain the disparities between elite and indigenous cultures. Advisers to Mexican dictator PORFIRIO DÍAZ who subscribed to the positivist philosophy were known as *CIENTÍFICOS*. DÍAZ attempted to attract foreign investors by showcasing the cultural and economic progress the nation had supposedly made in the last half of the 19th century. Mexican elite defined progress as an imitation of all things European, and they especially favored French fashion, cuisine, and entertainment. DÍAZ and the *científicos* aimed to make Mexico look modern often by disguising the indigenous through sumptuary laws and other regulations intended to control their appearance and behavior.

Leaders in other Latin American nations adopted positivist attitudes toward the indigenous to varying

degrees. In ARGENTINA, DOMINGO F. SARMIENTO and BARTOLOMÉ MITRE expanded EDUCATION in Argentina as a way to “civilize” rural peasants. Elite leaders in many countries adopted the theory of SOCIAL DARWINISM to explain the apparent lack of progress among indigenous and other poor populations. Social Darwinism took on racist undertones in Latin America and became a justification for exploitation of the indigenous and urban working classes. Despite government leaders’ attempts to force modernity and progress on to their nations, the gap between indigenous and urban elite widened in the last decades of the 19th century.

### NATIVE AMERICANS IN FRONTIER REGIONS

Areas of Latin America that had been on the periphery of the Spanish Empire during the colonial period were often home to indigenous groups that were never fully brought under European control. For much of the 19th century, frontier Native Americans in CHILE, Argentina, Mexico, and Brazil resisted national government authority. Those frontier regions were beset by rebellions in the late 19th century, particularly as white settlers attempted to move in. Government leaders passed policies to encourage MIGRATION and settlement of the previously indigenous regions, and the military was often brought in to subdue rebellious native groups.



Many indigenous Latin Americans lived in extreme poverty throughout the 19th century. Here, a native Brazilian family poses in front of their humble dwelling. (Library of Congress)

In Chile, the Mapuches (Araucanians), native inhabitants of the southern Araucania territory, had resisted Spanish control throughout the colonial period. In the early decades following independence, the Chilean government had largely ignored the continuing recalcitrance in the region, preferring instead to devote national resources to ensuring political stability in SANTIAGO DE CHILE. In the 1850s, the Chilean military began efforts to pacify the region and to bring the Mapuche under government control. A new administrative province of Arauco was created, which placed the Amerindian territory of Araucania under national jurisdiction. President José Joaquín Pérez (1861–71) introduced policies intended to populate the Arauco in the 1860s. Government planners, backed by the Chilean military, moved in to build cities and extend TRANSPORTATION lines into the region. Conflict erupted between Mapuche natives and Chilean military forces almost immediately. Relative peace was finally secured in the region in the 1880s, although the last remaining groups of Mapuche resisted government authority until 1890. By the turn of the century, the Chilean government had largely succeeded in encouraging migration into Arauco Province.

The Argentine government undertook a similar enterprise when JULIO ARGENTINO ROCA initiated what is known as the CONQUEST OF THE DESERT in the PAMPAS and Patagonia from 1878 to 1879. Roca's campaign was in many ways a reaction to Chile's actions in the OCCUPATION OF THE ARAUCANIA. Argentine leaders feared that new Chilean settlements along the Argentine border would encroach into their national territory. Just as the Chilean Mapuche tribes had withstood Spanish and then Chilean authority, Native American inhabitants of the Argentine countryside had a long history of resisting government attempts to subordinate the region. An early campaign to force the Pampas Indians into submission had been led by BUENOS AIRES GOVERNOR and CAUDILLO JUAN MANUEL DE ROSAS in the early 1830s. While Rosas achieved some success, the indigenous inhabitants of the interior continued to reject government authority. As government leaders sought to settle the Pampas and develop commercial agriculture there, the defiant Native Americans again attracted attention as they attacked white settlers in an attempt to defend their lands. Roca's new campaign in 1878 involved the systematic removal of Amerindians from the Pampas. Thousands of native peoples who resisted the campaign were killed. Many more were captured and relocated. By 1880, the "Conquest of the Desert" was complete but at an enormous human cost. In later decades, European and Argentine settlers populated the formerly indigenous territory, and commercial agriculture emerged as a vital part of the national ECONOMY.

Mexico experienced its own episodes of indigenous insurrection in the 19th century. Tribes in the northern regions were never fully brought under Spanish control during the colonial period, and they remained outside Mexican government control throughout the first half

of the century. Mexico lost some of that territory in the U.S.-MEXICAN WAR, but rebellious Yaqui tribes remained primarily in the northern state of Sonora. The Díaz government relocated a number of Yaqui Indians to the henequen plantations in the Yucatán Peninsula as a way of quelling the continued northern rebellions. The Maya of the Yucatán also posed challenges to the Mexican government in the 19th century. A rebellion erupted in 1847 and eventually culminated in the full-scale CASTE WAR OF THE YUCATÁN, which lasted throughout most of the last half of the 19th century. Parts of the peninsula effectively seceded from Mexico, and the national government was unable to regain control until the turn of the century.

Native Americans in the interior of Brazil defied Portuguese rule throughout the colonial period. Brazil's vast jungles and dense foliage made full control of the interior elusive. Small and relatively isolated indigenous communities survived into the 19th century, but government initiatives to develop the nation's export markets brought a number of changes to the interior. The Amazon region became home to large-scale rubber cultivation in the 1840s and 1850s. Along with the rubber industry came new transportation and communication lines. The relative isolation that many Amazonian indigenous groups had enjoyed began to disappear.

Despite the challenges faced by many of Latin America's native groups during the 19th century, a sense of indigenous identity persisted and even thrived. That sense of identity provided an important foundation for Native American movements that gained ground in the 20th century. By the 1930s, *indigenismo*, or the movement celebrating indigenous heritage, had emerged. It became particularly strong in areas with large Native American populations, such as Mexico and Peru. But, Latin American indigenous continued to battle government policies that targeted their land and drove many further into poverty. By the late 20th century, many Native American groups were pushing for their rights in areas where they still felt legal and social discrimination.

See also ARAUCANIANS (Vol. II); AZTECS (Vol. I); DEBT PEONAGE (Vol. II); ENCOMIENDA (Vols. I, II); ENLIGHTENMENT (Vol. II); HACIENDA (Vol. II); INCAS (Vol. I); MAYA (Vol. I); MESTIZAJE/MESTIZO (Vols. I, II); MITA (Vols. I, II); NATIVE AMERICANS (Vols. I, II, IV); REPARTIMIENTO (Vol. II); TRIBUTE (Vol. II).

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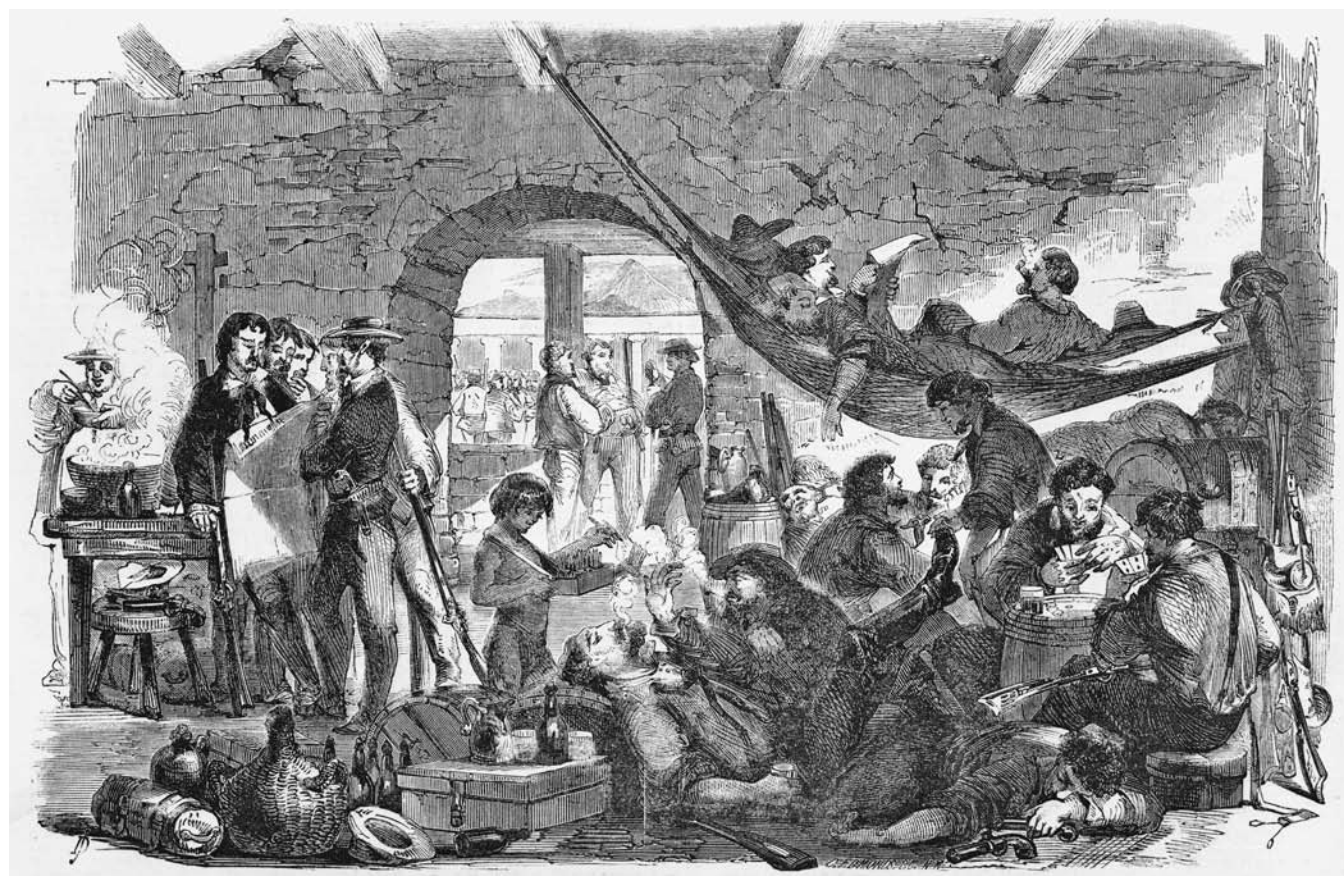
## New Granada See COLOMBIA.

**Nicaragua** The Republic of Nicaragua is CENTRAL AMERICA's largest nation at 49,579 square miles (128,409 km<sup>2</sup>). It sits on the Pacific Ocean side of the isthmus and is bounded by HONDURAS to the north, COSTA RICA to the south, and the Caribbean Sea to the east. Founded by Christopher Columbus in 1502, its two most important cities, Granada in the south and León in the north, developed into centers of conservative and liberal thought, respectively, on the eve of independence (see CONSERVATISM; LIBERALISM).

This political division flared up in 1821. The conservative Granadian elite favored the establishment of an independent nation, while the liberals in León successfully lobbied for joining the Mexican Empire. When the latter collapsed in 1823, Nicaragua joined

the UNITED PROVINCES OF CENTRAL AMERICA, and after its demise in 1838, Nicaraguan liberals sought but failed to revive the union in the 1840s. A constituent assembly declared Nicaragua a sovereign nation in 1838, and intermittent warfare between Liberals and Conservatives continued until 1854, when Conservative general Fruto Chamorro (b. 1804–d. 1855) gained control and declared Nicaragua a republic. Not to be denied political power, the Liberals turned to WILLIAM WALKER, a U.S. citizen who dabbled in law and journalism before leading an unsuccessful filibustering expedition into MEXICO in 1853.

Walker arrived in Nicaragua in June 1855 with a band of 56 men ostensibly to fight on behalf of the Liberal cause but in reality to establish himself as president of Nicaragua and then of all Central America. But his vision of "Americanizing" the region included the legalization of SLAVERY, an institution that brought on him the wrath of Central American conservatives. Led by Conservative Costa Rican president Juan Rafael Mora and aided by U.S. entrepreneur Cornelius Vanderbilt, whose cross-isthmian transit route was threatened by Walker, the Central Americans gathered their forces and ousted Walker on May 1, 1857. The undeterred Walker returned twice more, on the last occasion falling victim to



Much of Nicaragua's 19th-century history is dominated by the activities of North American filibusterers. In this 1856 newspaper illustration, William Walker and his men celebrate their entrance into Granada, Nicaragua. (Library of Congress)



a Honduran firing squad in the Caribbean coastal town of Trujillo on September 12, 1860.

The Walker affair resulted in a political peace between the Conservatives and Liberals that lasted 30 years, from 1863 to 1893, during which Nicaragua was governed by a series of conservative presidents. The 1857 constitution affirmed the principle of centralized government and the privileges enjoyed by the CATHOLIC CHURCH. Contrary to traditional conservative thought, Nicaragua increasingly encouraged agro-exports, with COFFEE becoming the most important product by 1890. Government laws also insured cheap LABOR for coffee growers. The Nicaraguan government also welcomed foreign capital into the country for the completion of a railroad that connected the western part of the country to the port city of Corinto and the construction of port facilities there. Foreign investment also went into the coffee, TOBACCO, timber, and GOLD MINING industries. Telegraph lines were expanded and infrastructure improved.

The Conservative period came to an end in 1893. The Liberals, led by General José Santos Zeleya, capitalized on a split in the Conservative Party to seize power. They quickly convened a constituent assembly that confirmed Zelaya as president and wrote a more liberal constitution. It included anticlerical provisions, abolished the death penalty, and placed restrictions on foreigners' claims to diplomatic protection. During his presidency, Zelaya opened Nicaragua to further foreign investments, particularly from U.S. firms, and expanded coffee and banana production. Zelaya also directed vast improvements in roads, ports, and railroads. Schools were constructed, and government buildings became modern facilities. Despite his successes, however, Zelaya soon emerged as a dictator. He ruled until 1909, when he was ousted in a U.S.- and British-assisted revolt.

Beyond Nicaragua's liberal-conservative political and economic issues in the 19th century, the country became a focal point of international interest because of its geographic location, which made it a potential base for a transisthmian canal (see TRANSISTHMIAN INTERESTS). In 1834, Charles Biddle surveyed several potential canal sites along the isthmus, including PANAMA, but serious U.S. interest did not come until the mid-1840s with its recognition of British influence in the region and particularly along Nicaragua's MOSQUITO COAST, where it had hoisted its flag at Greytown at the terminus of the San Juan River on the Caribbean Sea. To challenge the British, President James K. Polk dispatched ELIJAH HISE in 1848, and a year later, President Zachary Taylor sent EPHRAIM GEORGE SQUIER to negotiate treaties with Nicaragua. Neither was submitted to Congress for consideration, the Hise Treaty because it committed the United States to protect Nicaraguan sovereignty and the Squier Treaty because it came after discussions between the United States and Great Britain that led to the 1850 CLAYTON-BULWER TREATY, which provided that neither country would undertake by itself a transisthmian canal.

The Clayton-Bulwer Treaty did not prevent other private ventures, such as that of Vanderbilt, whose ACCESSORY TRANSIT COMPANY connected the Atlantic and Pacific Oceans via boats on the San Juan River and across Lake Nicaragua and carriages that used "macadam" roads to reach the port at Realejo. At Puntarenas on the northern reaches of Greytown harbor, Vanderbilt constructed a village to serve his ships, but the presence of those ships threatened the British. Tensions increased, until a U.S. naval ship leveled Greytown in 1854 (see GREYTOWN AFFAIR). The British, engrossed in the Crimean War, soon lost interest in Central America and under the terms of the 1860 Treaty of Managua relinquished control of the Mosquito Coast to Nicaragua, although they did not abandon the coast until 1893. In the meantime, the Accessory Transit Company had closed its doors soon after the Panama Railroad opened for business in 1855.

Although French canal engineer Ferdinand de Lesseps failed in his attempt to construct a transisthmian waterway at Panama between 1879 and 1881, his effort contributed to the United States's desire to construct, operate, and defend its own canal, to the exclusion of others, across the Central American isthmus. Nothing materialized from the 1884 FRELINGHUYSEN-ZAVALA TREATY, which promised a canal in return for a U.S. guarantee of Nicaraguan neutrality. Between 1887 and 1891, U.S. naval engineer A. G. Menocal supervised an unsuccessful canal project starting at Greytown. The failures, however, did not quiet U.S. public opinion throughout the 1890s, which increasingly called for the construction of a U.S.-owned canal. But, disputes within Nicaragua over the canal project eventually contributed to the decision to consider an alternate canal site in Panama.

See also NICARAGUA (Vols. I, II, IV); ZELAYA, JOSÉ SANTOS (Vol. IV).

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**Núñez, Rafael** (b. 1825–d. 1894) *president of Colombia* Rafael Núñez, as president of COLOMBIA, transformed the nation's politics in the late 19th century. He spearheaded the writing of the CONSTITUTION OF 1886, which imposed a conservative political system that lasted well into the 20th century. He was a writer and poet and is responsible for penning the lyrics of Colombia's national anthem.

Núñez was born in Cartagena on September 28, 1825, on the heels of Colombian independence. He studied law

and, like many of his generation, initially supported the platform of the LIBERAL PARTY. Núñez eventually helped to author Colombia's liberal CONSTITUTION OF 1853 and held several political appointments in Liberal administrations. Disenchanted by the often extreme policies of the GÓLGOTAS, or radical Liberals, Núñez attempted to form a faction within the Liberal Party and ran for president in 1876 with the support of other disaffected party members. The official vote count showed Núñez with a majority of the popular vote, but the election was not decided by calculating individual votes. His opponent, Aquileo Parra (1876–78), won more states and claimed victory.

By the 1880s, liberal economic and religious policies had provoked increasing discontent. Núñez was elected president in 1882 and during his first two-year term faced numerous challenges. The government's confiscation and auctioning of CATHOLIC CHURCH property, which began in the 1860s, disturbed many citizens. Furthermore, a decline in exports destabilized the ECONOMY, which had grown reliant on a strong export base in the LAISSEZ-FAIRE TRADE environment of the 19th century. A final challenge to the Liberal government had been manifesting for some time in the disjointed federalist system. Local leaders often used the large degree of regional autonomy granted in the Constitution of 1863 to conspire against the national government. One such conspiracy erupted into a rebellion against the national government at the onset of Núñez's second presidential term in 1884. The leader had come to doubt the prudence of many radi-

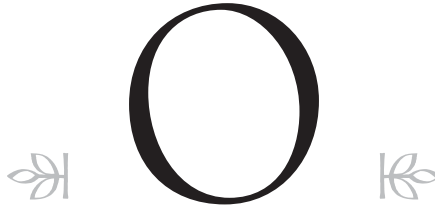
cal liberal policies, which he considered to be based on overly zealous idealism. Núñez used the rebellion to justify dissolving the Constitution of 1863 and began organizing a movement to write a new one.

Núñez's disillusionment with doctrinaire LIBERALISM is visible in the changes he pushed forward in the Constitution of 1886. His political philosophy seemed to shift from the liberal platform he had once espoused to the more rational and positivist ideology favored by many leaders in the late 19th century (see POSITIVISM). As Núñez and his allies began drafting the new constitution, the president began an era of conservative reform known as the Regeneration (see CONSERVATIVE PARTY, COLOMBIA). The constitution, along with a series of Regeneration laws, rolled back many of the liberal measures that had been implemented in the 1860s and 1870s. Núñez established a close alliance between church and state and pushed through policies to limit local authority. He extended the presidential term from two to six years and imposed literacy requirements for voting rights.

Núñez's reforms defined Colombian politics until Liberals regained power in 1930. The constitution he helped to draft remained in effect until 1991. Núñez died in office on September 12, 1894.

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### **occupation of the Araucania (pacification of the Araucania)**

The occupation of the Araucania refers to the efforts by the Chilean MILITARY to bring the indigenous inhabitants, the Mapuche, of the southern Araucania territory under government control. Throughout the colonial period, the Mapuche had successfully resisted Spanish authority and had led the War of Arauco against European attempts at colonization. After independence, early presidents of CHILE had allowed the southern region to remain outside of the national government's control for fear of destabilizing the country. By the 1850s, Chilean leaders were confident that the nation's powerful military could pacify and control the area. President Manuel Montt (1851–61) created the new administrative province of Arauco, which encompassed the Amerindian territory.

In 1860, President José Joaquín Pérez (1861–71) announced a strategy to colonize the region by building cities and TRANSPORTATION lines. Chilean military units began moving into the region to set up a government presence, and a revolt quickly ensued. The Chilean army managed to pacify much of the region and began building public roads and telegraph lines. Peace in the region was tenuous at best and was maintained largely by the presence of thousands of Chilean soldiers. Mapuche uprisings destabilized the region once again when large numbers of government troops were pulled out in 1879 to fight in the WAR OF THE PACIFIC. A final military campaign spearheaded by President Domingo Santa María (1881–86) made incursions deep into the Araucania territory and brought the last groups of Mapuche under government control by 1890. Once the region had stabilized, the Chilean government initiated policies to encourage MIGRATION to the region.

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**Old Republic (First Republic)** The Old Republic of BRAZIL was the period from 1889, when the EMPIRE OF BRAZIL was overthrown, to 1930, when Getúlio Vargas rose to power. During the Old Republic, the nation underwent enormous changes as it made the transition from a monarchy to a republic. It was also a time of INDUSTRIALIZATION, urbanization, and economic modernization.

The Old Republic began when MILITARY forces led by MANUEL DEODORO DA FONSECA led a coup to overthrow the Brazilian emperor PEDRO II. Deodoro's actions resulted from an alliance between positivist intellectuals in Brazil's military elite and a small but influential group of republican politicians. Deodoro issued a decree that created the republic on November 16, 1889. He became provisional president and called for a special commission to draft a new constitution. The CONSTITUTION OF 1891 was modeled largely on the U.S. Constitution and created the governing structure under which the Old Republic operated for the next four decades. Despite the ostensibly smooth transition to a constitutional DEMOCRACY, the new republican government faced a number of immediate challenges. Monarchist supporters threatened to destabilize the nation's incipient experiment with republicanism, and government leaders often suppressed democratic freedoms in the interest of maintaining order. In 1897, government forces destroyed the religious community of CANUDOS, partly out of fear that its inhabitants were plotting a monarchist rebellion. A financial

crisis that resulted from poorly conceived fiscal policies known as the ENCILHAMENTO in the 1890s spurred a major rebellion in the state of Rio Grande do Sul in 1893. Government leaders were forced to tap COFFEE planters in São PAULO for monetary and militia aid to put down the rebellion. In exchange, the *paulista* elite gained greater influence in national politics. Brazil's first civilian president, PRUDENTE DE MORAIS, was a former governor of São Paulo. Elected in 1893, he was the first in a long line of *paulista* presidents who ran Brazil during the Old Republic. The São Paulo elite alternated power with the elite of Minas Gerais during this time, in a political alliance known as *café com leite*.

During the Old Republic, government and economic leaders also promoted industrialization in an attempt to modernize the nation's ECONOMY. TRANSPORTATION networks expanded, and foreign and domestic industrialists set up operations in major cities, including RIO DE JANEIRO and São Paulo. Government policies to attract European immigrants resulted in a sudden expansion of the population, and rapid urbanization created a number of problems in major cities. The influx of foreign immigrants and the general expansion of the working class in urban areas helped instill a sense of nationalism and provided for an emerging LABOR movement. Those developments helped propel Brazilian populist trends in the early 20th century.

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**Oribe, Manuel** (b. 1792–d. 1857) *president of Uruguay*  
Manuel Oribe was a political leader in URUGUAY in

the years immediately following independence. He served as the nation's second president and founded the BLANCO PARTY, the predecessor to today's National Party.

Oribe was born in Montevideo on August 27, 1792. He enlisted in the MILITARY at a young age and fought with the forces of José Gervasio Artigas in the movement for independence. In the 1820s, he was a member of the THIRTY-THREE IMMORTALS who rebelled against BRAZIL'S occupation of the BANDA ORIENTAL, leading to the CISPLATINE WAR. Led by JUAN ANTONIO LAVALLEJA, Oribe fought alongside JOSÉ FRUCTUOSO RIVERA, who became Uruguay's first president after the conclusion of the war resulted in the nation's complete independence. Oribe and Rivera initially worked together amicably, but when Oribe became president in 1835, the former allies split and formed opposing political factions. Oribe's supporters, made up largely of rural agricultural and ranching interests, became known as the *blancos* and later formed an official political party. Rivera's supporters, made up of urban interests in Montevideo and other larger cities, formed the COLORADO PARTY.

The conflict between *blancos* and *colorados* dominated Uruguayan politics for the next several decades. The two political factions fought the bloody GUERRA GRANDE between 1838 and 1851. Oribe's *blancos* formed an alliance with Argentine dictator JUAN MANUEL DE ROSAS, and when Rosas was overthrown by JOSÉ JUSTO DE URQUIZA in 1852, Oribe fled into exile in Spain. Oribe returned to Uruguay in 1855. He died two years later, on November 12, 1857.

See also ARTIGAS, JOSÉ GERVASIO (Vol. II).

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# P

**Páez, José Antonio** (b. 1790–d. 1873) *caudillo and president of Venezuela* José Antonio Páez was a MILITARY leader who joined forces with Simón Bolívar in the war of independence in VENEZUELA. He also led the rebellion that ultimately separated Venezuela from GRAN COLOMBIA and became the first president of the Republic of Venezuela. He held the office of the presidency on three occasions. He became Venezuela’s most renowned 19th-century CAUDILLO.

Páez was born on June 13, 1790, near Acarigua in the province of Barinas in New Granada (present-day Venezuela). A mestizo, Páez began working as a ranch hand in his youth and quickly acquired the skills necessary to become a *llanero*—cowboy or horseman—of the Venezuelan Llanos (plains). When the war of independence broke out in 1810, Páez joined the liberation forces and eventually commanded a band of *llaneros*, who were known for their skill as horsemen, intimate knowledge of the interior plains, and ruthless fighting techniques. His military reputation earned him the nickname the “León de Payara” (Lion of Payara). In 1817, he formed an alliance with Bolívar, and together, they developed a two-pronged strategy against Spanish forces in Venezuela. Páez won major battles in the northern regions, including a crucial victory over Spanish general Pablo Morillo along the Arauca River in 1819. That victory helped Bolívar consolidate control over the Orinoco River region so that in the coming months, the Liberator was able to convene the CONGRESS OF ANGOSTURA and declare the Republic of Colombia (Gran Colombia).

After the creation of Gran Colombia, Páez continued to lead forces against the Spanish army. As chief commander of Bolívar’s armed forces, Páez was in command in the vital victories at Carabobo in 1821 and

Puerto Cabello in 1823. Those two battles precipitated the complete withdrawal of Spanish troops from Gran Colombia. When Bolívar went off to continue fighting in PERU in 1822, Páez stayed behind as the highest military commander in CARACAS.

During the next several years, regional disputes began to emerge as discontent with the central government in BOGOTÁ grew among the elite in Venezuela and ECUADOR. Venezuelans, in particular, remonstrated over the sense of isolation they felt at being separated from the republic’s capital by more than 600 miles (966 km) of rugged mountain terrain. Páez helped maintain order in the region until the government of Gran Colombia, under acting president FRANCISCO DE PAULA SANTANDER, called him to Bogotá to be investigated for charges of abuse of power. Páez disregarded the order and began a revolt against Santander’s government. Bolívar was able to pacify the rebellion for a time, but when the Liberator tried to give himself even more centralized power, Páez and other local leaders rose in revolt once again. In 1830, the Republic of Colombia dissolved into the republics of New Granada, Ecuador, and Venezuela. Páez became provisional president of Venezuela in 1830, and later that year, a new constitution was enacted. Páez was elected according to procedures set out in the constitution the following year.

As president, Páez inherited a country rife with acrimony and instability. Regional and national leaders harbored resentment toward Bolívar and the political organization of Gran Colombia, which had left them feeling like a neglected appendage of Bogotá. Although Venezuela was made up of various autonomous regional identities, common ill feelings toward Gran Colombia allowed a nationalist movement to flourish. As a military

hero from the wars of independence and a strong and capable horseman, Páez fit the mold of the 19th-century Latin American caudillo, and his supporters firmly believed that his strong-handed leadership was necessary to separate from Gran Colombia and foster a sense of national unity.

The period from 1830 to 1848 is known as the era of conservative oligarchy in Venezuela under the leadership of Páez. During that time, he served either as president or as the strongman behind the scenes in Venezuelan politics. Between 1835 and 1839, three different Conservative leaders held the office of the presidency, and Conservative politician Carlos Soublette won the presidency in 1842, giving the period its name. In his first years in office, Páez confronted numerous regional insurrections as local caudillos attempted to undermine his highly centralized administration. Local leaders' attempts to force a more federalist system of regional autonomy culminated in the brief *Revolución de las Reformas* (Revolution of the Reforms) in 1835–36. Páez's national government managed to put down the rebellions, but discontent and a desire for local autonomy continued to simmer.

Under Páez's guidance, Venezuela achieved some degree of stability as the caudillo worked to modernize the economy, normalize foreign relations, and secularize society. Like most caudillos, Páez employed questionable methods combining repression, coercion, persuasion, and compromise to achieve a sense of stability and control over the general populace. He attracted foreign and domestic investors in the nation's economy. With expanding revenues in the 1830s, he was able to improve the nation's infrastructure.

Order and stability under Páez's strong rule eventually gave way to political infighting. In 1840, opponents of the caudillo formed the LIBERAL PARTY under the leadership of Antonio Leocadio Guzmán (b. 1801–d. 1884). Guzmán challenged Páez and his CONSERVATIVE PARTY through his newspaper, and in 1848, newly elected president José Tadeo Monagas (b. 1784–d. 1868) dismissed all Conservative government officials and sent Páez into exile. For the next 10 years, Monagas and his brother José Gregorio Monagas (b. 1795–d. 1858) monopolized the presidency and led an era known as the LIBERAL OLIGARCHY. The liberal oligarchy ended in 1858 with the beginning of a civil war known as the FEDERAL WAR. For 14 years, Liberals and Conservatives engaged in a bloody and destructive confrontation over FEDERALISM VERSUS CENTRALISM. In 1861, Páez supporters managed to overthrow the Liberal government, and the exiled caudillo returned to power. He ruled as a dictator until 1863 and during his two years in office attempted to reach conciliation between the two warring factions.

Conservatives eventually succumbed to their opponents, and Páez was forced from office with the signing of the Treaty of Coche in 1863. The independence



Portrait of José Antonio Páez, president of Venezuela on various occasions between 1830 and 1863 (*Library of Congress*)

hero-turned-caudillo withdrew into exile once again. He died in New York on May 6, 1873.

See also BOLÍVAR, SIMÓN (Vol. II); LLANEROS (Vol. II).

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**Pampas** *Pampas* literally means “plains” and refers to a large region of ARGENTINA and URUGUAY. The Pampas are characterized by flat, lowland, fertile terrain that is well suited to a variety of agricultural activities. The Pampas encompass the Argentine provinces of BUENOS AIRES, La Pampa, Santa Fe, and Córdoba. Nearby Entre Ríos and Corrientes are often associated with the plains region and share similar economic activities. The Pampas also include portions of Uruguay and BRAZIL, although the term is most closely associated with Argentina. During the late colonial era and the 19th century, the Pampas were home to the South American GAUCHO, or cowboy, who was romanticized as leading a carefree and rugged lifestyle. The region supported large cattle-ranching and sheep-grazing operations.

In the early decades following independence, the agricultural interests of the Pampas were heavily favored by Buenos Aires governor and CAUDILLO JUAN MANUEL DE ROSAS. The province of Buenos Aires and parts of Santa Fe, in particular, benefited from his policies. Ranchers and SALADEROS, or salted meat processors, emerged as leaders in the new national ECONOMY. Other areas of the Pampas remained largely unsettled in the first half of the 19th century and were populated primarily by NATIVE AMERICANS who did not submit to the authority of the Argentine government. Numerous campaigns were undertaken to subdue the Amerindians of the Pampas—one of these was led by the caudillo Rosas (see CONQUEST OF THE DESERT).

In later decades, the Pampas became even more integrated into the national economy. The national government attracted immigrants from Spain and Ireland to the fertile plains of the region in the last half of the 19th century. Many newly arrived immigrants became involved in sheep grazing and aided national economic growth through the export of wool. By the 1870s, sheep outnumbered cattle on the Pampas, and the new agricultural activity encouraged more FAMILY settlements than ranching had in earlier decades. As a result, the population of the Pampas boomed. In later years, WHEAT cultivation also became an important activity in the Pampas (see AGRICULTURE).

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**Panama** Two events 12 years apart in the mid-18th century turned Panama into a quiet and geographically isolated appendage of New Granada. In 1739, British admiral Edward Vernon's capture of Portobelo on Panama's Caribbean coast marked the end of the Spanish fleet system and brought to an end the importance of Panama as a land bridge in the colonial TRADE system. As a result, Spain made Panama part of the Viceroyalty of New Granada, which effectively suppressed any movement toward autonomy on the part of its inhabitants. Twelve years later, in 1751, Spain canceled the Panama *audiencia* (court). Thereafter, the department was scarcely self-supporting, even in terms of FOOD production, and offered little of value for trade. In its poverty, the region attracted mediocre administrative officials and was too weak to suppress indigenous rebellions. A decade before independence, in 1793, the first recorded census counted 71,888 inhabitants, 7,857 of whom lived in the city

of Panama. Populations ranging from 2,000 to 5,000 resided in other towns throughout the department.

Owing to its fringe location and lack of communication, Panama was not involved in the early 19th-century Spanish American independence movements. With the end of Napoleonic rule over Spain, the restoration of King Ferdinand VII on December 11, 1813, and a more liberal constitution in 1812, Panama, like the other the colonial states, was permitted to send delegates to the Spanish legislature convening in Madrid. There, the Panamanian delegate unsuccessfully pleaded for the liberalization of trade and immigration, the reestablishment of the old colonial trade fairs, and government support for EDUCATION. The merchants of Cádiz persuaded King Ferdinand VII not to expand Panama's trading opportunities, however, which awakened Panama's separatist sentiment. During the struggle for independence, the eastern port city of Portobelo became a focal point in the fighting between Colombian insurgents and Spanish forces. The Spanish viceroy fled to Panama following Colombian independence in 1819, where he ruled harshly until departing for ECUADOR in 1821, leaving native Panamanian colonel José de Fábrega behind as acting governor.

At the time of Panama's official declaration of independence on November 28, 1821, there was considerable discussion regarding its possible affiliation with COLOMBIA, PERU, or MEXICO. Panamanian authorities rejected linkage to Peru as it was still under Spanish control and spurned the Mexican offer because of Mexico's distance and different colonial history. According to the 1821 Constitution of Cúcuta, Panama was incorporated into Colombia as a department, with the provinces of Panama and Veragua. With the addition of ECUADOR and VENEZUELA, the new country became known as GRAN COLOMBIA. Subsequently, Panama sent 700 men to fight with Simón Bolívar's troops against the Spanish in Peru.

Interstate tensions and self-interests brought the Gran Colombian confederation to an end in 1830, which further contributed to Panama's wish to separate from Colombia. The next 11 years saw three unsuccessful separatist movements in Panama, revealing the depth of its inhabitants' nationalism. Panama's reintegration into Colombia was decreed on December 31, 1841. European liberal ideas swept across Latin America, including Colombia, throughout the 1840s. A succession of Liberal presidents and national legislatures led to a new Colombian constitution in 1853, which established Panama as a federal state. Accordingly, Panama controlled its own internal affairs, save for foreign policy and the levy of federal taxes. The Colombian Liberals produced another constitution in 1858. It created the Grenadine Confederation, which dramatically increased state power at the expense of the national government and was the source of armed conflicts between the BOGOTÁ government and the states. Political turmoil characterized the

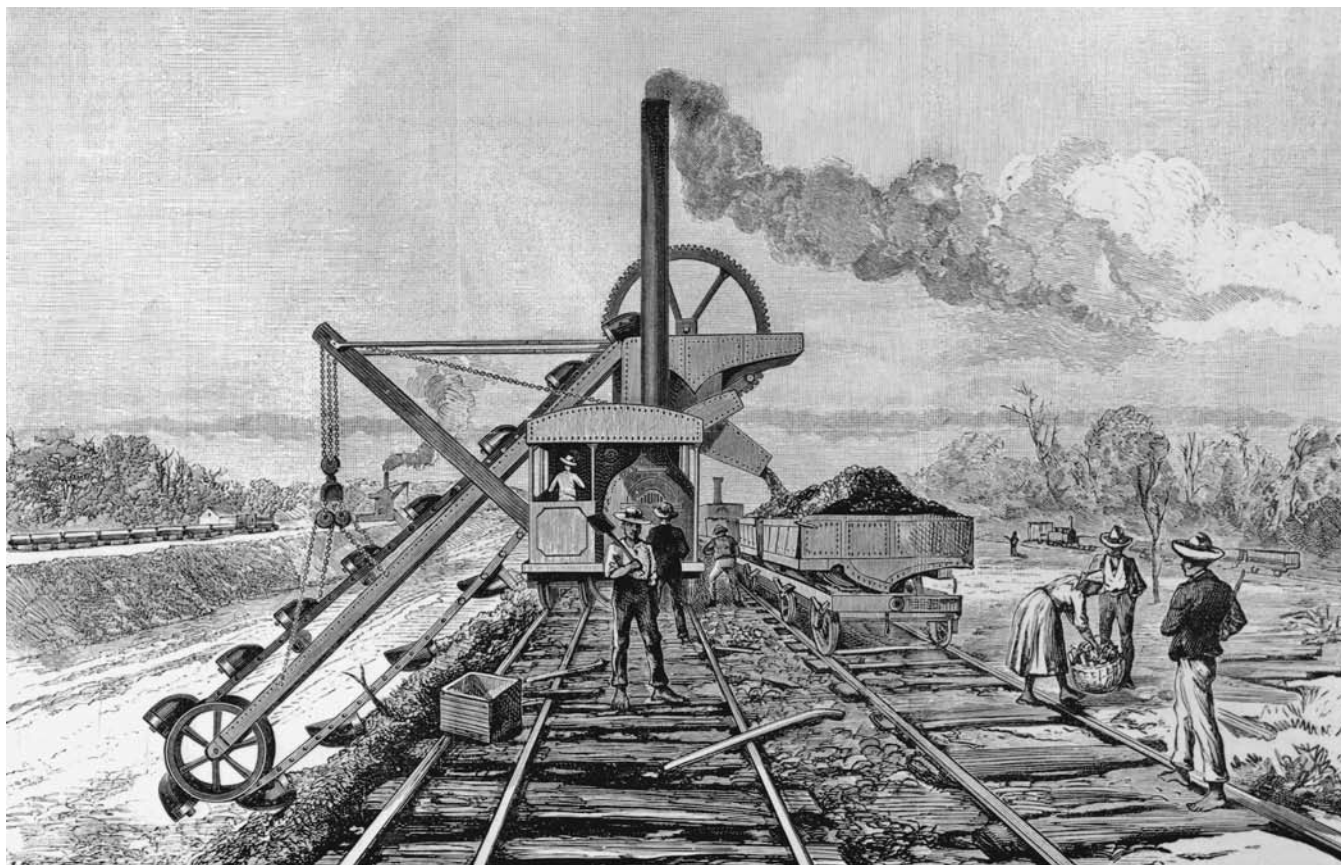
national government as it struggled for control of state governments.

Panama did not escape the liberal-conservative struggles seen across the region between 1859 and 1886: It had 28 presidents during that period. Constant coup d'états, rebellions, and violence pitted Liberals against Conservatives, those out of power against those in power, and rural areas against the central government. The chaotic conditions continued until the 1884 election of RAFAEL NÚÑEZ as president of Colombia by a coalition of moderate Liberals and Conservatives. Núñez's call for a new constituent assembly was met with armed rebellion on the part of radical Liberals. The conflict spilled over to the Panamanian cities of Colón and Panama City. The conflict resulted in the near destruction of Colón and the landing of U.S. troops at the request of the Colombian government. The U.S. government also stationed naval ships off the coast of Colón and Panama City, which along with U.S. troops in Panama, ensured that the PANAMA RAILROAD continued to operate.

With tranquillity restored in 1885, a new Colombian constitution went into effect a year later (see CONSTITUTION OF 1886). It established Colombia as a unitary state, with the departments (formerly states) subject to the central government's rigid authority. Panama was singled

out for special mention and became subject to the direct authority of the central government. Resentment at this became so high in Panama that the U.S. consul in Panama City reported that approximately 75 percent of inhabitants wanted independence from Colombia. The consul also reported that Panamanians would fight to secure independence if they could get arms and be assured that the United States would not intervene. At this point, PANAMANIAN INDEPENDENCE sentiment and U.S. TRANS-ISTHMIAN INTERESTS in a canal began to converge.

Between 1893 and 1898, Panamanians undertook serious efforts to develop a strong industrial base founded on AGRICULTURE and specialized artisanry, such as textiles. While educational opportunities in Panama City increased, the city's water system was not modernized because of a lack of funds. Subsequently, Panama was drawn into the War of a Thousand Days (1899–1902), which pitted Liberals against Conservatives and cost an estimated 100,000 lives. By 1900, the war had largely degenerated into a guerrilla conflict fought in Panama. It led to the collapse of the local ECONOMY, and many small towns and villages were destroyed. The conflict was brought to an end in 1902 when the Colombian government asked the United States to broker a peace settlement, which it did in November 1902 on board



A French company began construction of a canal project in Panama in 1881. The French efforts ultimately failed, and the project was taken over by the United States after Panamanian independence. This 1888 drawing depicts early excavation on the canal project. (Hulton Archive/Getty Images)



the USS *Wisconsin*, which was anchored in Panama Bay. The Panamanian elite, tired of centralized control from Bogotá, hoped the war would serve as a catalyst to independence, but Colombia refused to grant it. For the United States, the war heightened interest in a transisthmian canal in Panama, particularly if that state were free of Colombian domination. A year later, in November 1903, the United States backed a Panamanian separatist movement and helped to secure independence in exchange for amicable negotiations over canal construction. Panama and the United States achieved their individual objectives, and those objectives dominated their relationship throughout the 20th century.

See also NEW GRANADA, VICEROYALTY OF (Vol. II); PANAMA (Vols. I, II, IV); PORTOBELLO (Vol. II).

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## Panama Canal

See TRANSISTHMIAN INTERESTS.

**Panama Congress** (1826) Concerned that Europe's Holy Alliance (Austria, Prussia, and Russia) would militarily restore the fledgling independent Latin American states to Spanish authority, in 1818, Latin American liberator Simón Bolívar enunciated his vision of a league of independent Spanish American states for the purpose of mutual defense. Six years later, on December 7, 1824, Bolívar sent a circular to the "American republics, formerly to convene in Panama to establish principles for the preservation of peace and to the defense of their common cause." Only four states—PERU, COLOMBIA, the UNITED PROVINCES OF CENTRAL AMERICA, and MEXICO—sent delegates to PANAMA for the meeting that lasted from June 22 to July 15, 1826. Because of tense relations with the United Provinces of the Río de la Plata, BRAZIL appointed but did not send its delegate. The United Provinces of the Río de la Plata and PARAGUAY refused to take part. BOLIVIA and CHILE appointed delegates, but they arrived too late to participate in the conference.

Bolívar also extended invitations to the British and belatedly to the United States. Bolívar believed that an association with Great Britain was essential to the survival of the newly independent Latin American countries and to help check anticipated U.S. advances southward. The British shared the Latin American desire to prevent any U.S. encroachments into the Caribbean, particularly in CUBA. Edward J. Dawkins, the British delegate to the

conference, was also instructed to prevent U.S. leadership of the conference and any association of states that might result from the meeting. The U.S. invitation was issued by Mexico, Central America, and Colombia.

In the end, the U.S. government's decision-making process negated Bolívar's, Dawkins's, and others' concern with U.S. presence at Panama. Secretary of State Henry Clay, a passionate supporter of inter-American cooperation, persuaded President John Quincy Adams to appoint conference delegates. Adams took the unusual step of asking Congress to approve the appointment of Richard Anderson and John Sergeant as delegates and to make a special financial appropriation to support the trip.

The delayed invitation to the United States and its four-month congressional delay in approving its delegates demonstrated the different perceptions that North America and South America had of each other. Bolívar saw the United States as an obstacle to free discussion about the abolition of the African slave TRADE (see SLAVERY). Others feared that the United States would control the congress itself. Latin Americans were of two opinions regarding Britain and the United States: Some believed that the United States would implement its recently declared MONROE DOCTRINE to resist British advances in Latin America, while others thought the United States would cooperate with Great Britain to jointly exploit the region economically. Neither was an optimistic outcome for Latin America. Those few who believed that the United States would use the Panama Congress to forge a defensive coalition with its southern neighbors based on the Monroe Doctrine were, at the time, visionary idealists.

President Adams instructed Anderson and Sergeant not to enter into any contractual arrangements nor to partake in any discussions of a belligerent nature. Clearly, Adams wanted the United States to pursue a unilateral policy. Congress also used its confirmation proceedings to raise policy questions and as a cover for partisan politics. Participation in the Panama Congress contradicted the noninvolvement in the affairs of other nations as laid down by Presidents George Washington and Thomas Jefferson. Southern delegates opposed participation because abolition of the slave trade was on the agenda. Both issues potentially threatened U.S. policy independence. Additionally, by 1826, the North Americans began to learn that the governments of South America were not republican or democratic in form but more centralized, authoritarian, and grounded in a singular religious belief, which led them to mistrust those same. While the debates set the tone for the future, they mattered little at the time. Congress approved the Anderson and Sergeant appointments. Sergeant died en route to Panama, and Anderson arrived after the Panama Congress concluded.

The Panama Congress concluded three conventions: a treaty of perpetual union, two conventions establishing a MILITARY force and its funding, and an agreement for future meetings. Because Colombia was the only state to ratify the agreements, they became nonoperable, and the

anticipated meeting at Tacubaya, Mexico, never materialized. Historians, however, look back on the Panama Congress as the beginning of the hemisphere's Pan American movement.

See also BOLÍVAR, SIMÓN (Vol. II); PAN-AMERICANISM (Vol. IV); UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**Panamanian independence** Panamanian independence refers to the secession of the Panamanian state from the Republic of COLOMBIA in 1903. During the colonial period, PANAMA had been a part of the Viceroyalty of New Granada, and after the Spanish colonies had achieved independence from Spain, Panama was absorbed into the newly formed republic of GRAN COLOMBIA. Gran Colombia disbanded in 1830, and Panama remained part of, first, New Granada, then eventually the Republic of Colombia.

Panamanian independence is intricately tied to its strategic location and topography, which allowed for ease of transport between the Atlantic and Pacific Oceans. Throughout the 19th century, the United States and other foreign nations turned their sights to Panama and NICARAGUA for interoceanic transit routes. Revenues from land transit brought a steady supply of cash to Panama, but much of that income ended up in the national treasury in BOGOTÁ. The potential for financial self-sufficiency produced a sense of autonomy, and turning over large caches of transit taxes to the national government began to breed resentment. Local leaders in Panama began to talk of secession from an early date, and the Colombian government thwarted several early attempts at separation. The federalist political system put in place in Colombia's Constitution of 1858 and the Constitution of 1863 provided a large degree of self-rule and served to encourage secessionist ideas. Many local leaders began to feel that Panama's status as an appendage of Colombia prevented the region from enjoying the full benefits of transisthmian TRADE.

In the last half of the century, foreign investors began investigating the viability of building a canal to allow ocean vessels to cross the isthmus (see TRANSISTHMIAN INTERESTS). A French company began construction of a canal in the 1880s, but the project stalled and the company went bankrupt. By 1899, French investors were trying to sell off their interests in the failing project and looked to the United States to step in. U.S. leaders debated the viability of the Panama location for a canal,

compared to a stretch of land in NICARAGUA. Convinced by the campaigning of French investors, U.S. Congress approved Panama as the site for a U.S.-backed canal project in 1902.

Secretary of State John Hay began negotiating with Colombian foreign minister Tomás Herrán to grant the U.S. concessions to build the canal. In January 1903, the two diplomats signed the Hay-Herrán Treaty, and the accord went to Colombia's Senate for ratification. Colombian leaders, finding common ground after the recent WAR OF THE THOUSAND DAYS (1899–1902), rejected the treaty, arguing that the agreement gave the United States too much control over the proposed canal zone. Local Panamanian leaders, encouraged by U.S. representatives, declared independence in October 1903. U.S. president Theodore Roosevelt dispatched naval ships to the Panamanian coast to provide support to the movement and to block the Colombian national army from putting down the insurrection. After just two weeks, Panama had effectively achieved its independence from Colombia and received official recognition from the United States on November 6. On November 18, the Hay-Bunau-Varilla Treaty gave the United States the right to build the Panama Canal and included provision for U.S. sovereignty in the Panama Canal Zone. Construction began in May 1904, and the canal was completed in August 1914.

See also PANAMA (Vols. I, II, IV); PANAMA CANAL, CONSTRUCTION OF (Vol. IV).

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**Panama Railroad** Completed in 1855, this 47-mile railroad connects the Caribbean Sea with the Pacific Ocean at the Panamanian port cities of Colón and Panama City. Construction began in May 1850, and the final rail track was laid on January 27, 1855. Construction costs were estimated at \$8 million, and the project cost an estimated 5,000–10,000 lives.

Spanish American liberator and president of GRAN COLOMBIA Simón Bolívar ordered a feasibility study in 1827, just as railroads came into vogue for TRANSPORTATION. The two-year study reached a positive conclusion, but nothing came of it. U.S. president Andrew Jackson's plan for an interoceanic railroad fell victim to his nation's 1837 financial panic. An 1838 French plan also fell victim to inadequate funding. Following the U.S. acquisition of the California and Oregon territories in 1846, Congress authorized subsidies for two steamship lines to carry mail and passengers from the mainland to Colón and from

Panama City to California and Oregon on the continent's Pacific northwest. Businessman William H. Aspinwall (b. 1807–d. 1895) and his partners then raised \$1 million in stock sales to finance a railroad across PANAMA'S isthmus connecting the two port cities. Once in operation in 1855, the Panama Railroad provided quicker and safer passage across the isthmus than did Cornelius Vanderbilt's (b. 1794–d. 1877) ACCESSORY TRANSIT COMPANY, which used the San Juan River bordering COSTA RICA and NICARAGUA.

The Panama Railroad remained highly profitable even after the U.S. transcontinental railroad opened in 1868. Ferdinand de Lesseps's (b. 1793–d. 1879) French Canal Company purchased a controlling interest in the Panama Railroad in 1881. In 1904, the French sold their investment to the United States. By then, the track, equipment, and buildings were in disrepair, prompting the U.S. government to spend an estimated \$9 million on repairing and modernizing the route. The reconstruction project was completed in 1912. The Panama Railroad played a significant role in the construction and maintenance of the Panama Canal and in supplying the U.S.-owned and operated commissary supply operation in the zone (see TRANSISTHMIAN INTERESTS).

The railroad, however, never generated significant monies for Panama. Even at the height of the California gold rush from 1855 to 1858, only one-tenth of the ordinary commercial freight was destined for, or originated in, California. The balance concerned TRADE of the North Americans with Europe and Asia. The railroad company, because of its exceptionally high rates on a capitalization that never exceeded \$7 million, paid a total of nearly \$38 million in dividends between 1853 and 1904. Panama received \$25,000 out of COLOMBIA'S annual annuity and benefited from the transient trade and some capital inflow.

By the terms of the 1977 Panama Canal Treaties, the Republic of Panama began a gradual process of taking over administration of the canal and its surrounding infrastructure two years later. On June 19, 1998, Panama turned control of the Panama Canal Railway Company to a joint venture group consisting of the Kansas City Southern Railroad and the Lanigan Holdings, LLC, largely for the purpose of carrying container freight too large to transit through the Panama Canal.

See also BOLÍVAR, SIMÓN (Vol. II); PANAMA CANAL, CONSTRUCTION OF (Vol. IV); PANAMA CANAL TREATIES (Vol. IV).

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**Paraguay** Paraguay is located in the southeastern portion of South America. It encompasses approximately

155,000 square miles (401,448 km<sup>2</sup>) and is roughly the size of the state of California. A landlocked country, Paraguay boasts many navigable rivers, including the Paraguay, Paraná, and Pilcomayo. The country is surrounded by BOLIVIA to the north and west, BRAZIL to the east, and ARGENTINA to the south and west. Paraguay's landscape is a combination of fertile grasslands and dense jungle, and it has historically had an agricultural ECONOMY (see AGRICULTURE).

### THE COLONIAL PERIOD AND INDEPENDENCE

During the colonial period, Paraguay was a frontier outpost of the Río de la Plata Province in the Spanish viceroyalty of PERU. It was primarily a buffer colony between Portuguese settlements in Brazil and the rest of the Spanish Empire in South America. With few mineral resources and a native population that resisted European control, Paraguay failed to attract the attention of colonial officials in its early years as a colony. The small European population there struck a delicate balance with the Guaraní and Chaco peoples who dominated the region. Settlers concentrated around the town of Asunción, which served as a depot for TRADE to and from Peru. For more than 200 years, residents of Asunción governed themselves with relative autonomy and attracted little attention from the Spanish Crown. Settlers selected their own governors, which helped protect local interests.

Eventually the CATHOLIC CHURCH brought Paraguayan Indian groups more firmly under Spanish control. The Jesuits established missions, or *reducciones*, throughout the region starting in the early 17th century. The Jesuits protected the NATIVE AMERICANS from both slave traders from Brazil and colonists looking to exploit their LABOR. Despite nearly constant opposition from the local elite, the missionaries helped develop profitable agricultural production. Nevertheless, concerns about the Jesuits' loyalties prompted the Spanish Crown to bow to pressure from white settlers and expel the order in 1767. The missions were abandoned, and the once-thriving indigenous communities fell apart.

A short time after the expulsion of the Jesuits, the Spanish Crown reorganized the administrative divisions of its South American colonies as part of the Bourbon Reforms. Paraguay became part of the newly formed Viceroyalty of Río de la Plata, with its capital in BUENOS AIRES. The viceregal capital quickly surpassed Asunción in river transport and trade. Paraguay seemed forgotten on the outskirts of the Spanish Empire. Many residents of the colony sank into financial ruin, while the *porteños* in Buenos Aires profited from the administrative reorganization. Indeed, the divergent paths taken by Buenos Aires and Asunción greatly affected the way their residents reacted to the movements for independence in the early 19th century.

Napoléon Bonaparte's invasion of the Iberian Peninsula in 1808 set off a series of reactions in the

Spanish colonies that eventually culminated in widespread rebellion and independence. The ruling elite in Buenos Aires reacted by convening a local *cabildo* or town council and ousting the Spanish viceroy. While *porteños* initially claimed self-rule in the name of the deposed Spanish king, Ferdinand VII, the residents of Asunción were hesitant to join the viceregal capital. Deep-seated resentment toward Buenos Aires surfaced almost immediately, and Paraguayans rebelled against *porteño* officials. Local Paraguayan militias first defeated a *porteño* army and several months later overthrew the last Spanish officials in the country. A group of local elite in Asunción declared independence on May 17, 1811.

### THE ERA OF DICTATORS

A ruling junta formed immediately, and among its members was Enlightenment thinker and future dictator JOSÉ GASPAR RODRÍGUEZ DE FRANCIA. Francia helped secure Paraguay's independence both from Spain and from the creole elite in Buenos Aires. In October 1811, he spearheaded negotiations with *porteño* representatives, which resulted in a treaty that guaranteed Paraguayan independence. Although the lawyer and theologian seemed poised to rule Paraguay from the start, Francia grew disillusioned with the power grab that began to unfold among Asunción elite. He resigned his post on the junta in protest, and for several years, the Paraguayan independence movement seemed precariously close to collapsing. Asunción leaders faced constant threats from Brazil and the newly formed United Provinces of the Río de la Plata. In 1813, delegates from Buenos Aires attempted to renegotiate the 1811 treaty, and Asunción leaders invited Francia to corule with Fulgencio Yegros (b. 1780–d. 1821) in an attempt to protect the nation's independence. Francia once again succeeded in strengthening Paraguay's autonomy, and the Paraguayan congress elected him dictator for life in 1816.

In its first decades as an independent nation, Paraguay defied the norms of instability and violence set by neighboring Brazil and Argentina. Instead, Doctor Francia, as he was known, forced a sense of order on to the new nation through his autocratic rule. In the process, he also created a thriving and self-sufficient nation that was largely protected from the turmoil afflicting its neighbors. He implemented numerous liberal reform measures, such as curbing the power and influence of the Catholic Church and confiscating large landholdings. Francia's land redistribution policies, combined with his efforts to encourage agricultural diversification, helped make Paraguay self-sufficient in numerous foodstuffs by 1830. By the end of his rule in 1840, Paraguay had a few basic industries and boasted a healthy, albeit isolated, economy.

As dictator, Francia consolidated his authority after discovering a conspiracy to overthrow his regime led by the old ruling elite. He had hundreds of the most prominent Paraguayans arrested on suspicion of treason. The

majority of those detained were later executed or forced into exile. In the years that followed, Francia suppressed individual freedoms and censored the press in the interest of preserving political order. As the "Supremo Dictador" (supreme dictator), Francia sought to isolate Paraguay from influences from Europe, Brazil, and Argentina. He intensely distrusted foreigners and anyone of pure European descent. Francia even prohibited Europeans from marrying other Europeans in an attempt to dismantle the elite's traditional power structures.

While Francia did bring stability and progress to Paraguay during the tumultuous postindependence years, his harsh, tight control left the nation in a state of virtual political infancy at his death in 1840. Francia left no instructions for a successor and chaos erupted for several months after he died. A governing junta formed but was quickly overthrown. In March 1841, confusion subsided long enough for Congress to select CARLOS ANTONIO LÓPEZ as Francia's successor. In 1844, López was given the title of president and began to rule in the same dictatorial fashion as his predecessor.

López ruled from 1841 until his death in 1862. During that time, he continued policies aimed at developing Paraguay's fledgling economy. The López administration oversaw the construction of roads and the development of a telegraph system. López was less concerned with foreign powers than Francia and opened up the nation to trade with neighboring Brazil and Argentina. In 1844, he led efforts to write a new constitution that strengthened his authority and gave him the ability to select his own successor. To that end, López began grooming his eldest son, FRANCISCO SOLANO LÓPEZ, to be the nation's next leader. During his father's presidency, Solano López took over leadership of the MILITARY and carried out several diplomatic missions in Europe. He secured investors for the construction of arms factories and other military infrastructure. Under the dictatorship of López and the subsequent administration of Solano López (1862–70), Paraguay's military expanded as the nation became increasingly involved in conflicts with its powerful neighbors. On his father's death in 1862, Solano López immediately seized power. Within two years, Paraguay was caught up in disputes with Brazil and URUGUAY that eventually culminated in the WAR OF THE TRIPLE ALLIANCE.

### WAR OF THE TRIPLE ALLIANCE

In 1864, Paraguay went to war against the Triple Alliance forces of Brazil, Argentina, and Uruguay in what eventually became the single most destructive war in 19th-century Latin America. The war brought Paraguay firmly out of its isolationism and devastated the nation for years afterward. The causes of the war were complex and varied, with issues dating back to regional rivalries along the Río de la Plata in the decades after independence. Brazil and Argentina had a long history of competing for hegemony in the region, often at the expense of the sovereignty of

smaller nations such as Uruguay. While Francia's earlier isolationist policies had shielded Paraguay from much of the regional rivalry, Solano López formed an alliance with Uruguay's conservative party, the BLANCO PARTY, and attempted to alter the delicate balance of power in the region.

In 1864, Brazilian forces backed Uruguay's COLORADO PARTY in an internal dispute and helped overthrow the *blanco* president. Solano López reacted by declaring war against Brazil and sending an invasion force into that country. The Paraguayan dictator also sent troops into Argentina in order to attack locations in southern Brazil. That action prompted Argentine president BARTOLOMÉ MITRE to formalize an alliance with Brazil and the ruling Colorado Party in Uruguay. The three nations established the Triple Alliance and prepared to wage war against Paraguay.

Thanks to his and his father's policies of military expansion, Solano López's armed forces numbered more than 30,000 when the war began. The combined forces of the Alliance nations totaled only a fraction of Paraguay's army, and Solano López enjoyed several early victories. Nevertheless, as the Triple Alliance mobilized, Solano López's apparent advantage began to disappear. The Paraguayan dictator lost more than half his original fighting force in the war's first year. Furthermore, the Brazilian navy won several crucial victories along the Río de la Plata and effectively cut Paraguay off from outside aid. Unable to resupply his military, Solano López suffered a series of devastating defeats. Casualties mounted on and off the battlefield as both militaries were afflicted by outbreaks of cholera and other diseases. Facing a shortage of able soldiers, Solano López resorted to recruiting children—some as young as 10 years old—into his army.

By 1867, nearly all Paraguayan citizens were contributing to the war by either fighting on the battlefield or working to produce necessary supplies. Nonetheless, Solano López now found himself easily outnumbered and outgunned by the Triple Alliance. As Paraguay suffered increasing losses, the dictator became increasingly delusional, imagining himself surrounded by traitors and conspiracies. He reacted by purging his inner circle as he called for the execution of hundreds of suspected conspirators, including several members of his own family. Solano López transferred ownership of large landholdings to his mistress, ELIZA ALICIA LYNCH, in a desperate attempt to preserve his personal wealth. In later years, he cast his net of suspicion even wider and may have been responsible for thousands of executions within his own military.

In 1869, Brazilian forces captured Asunción, and Solano López fled into the jungle with his mistress and their children. He and his supporters continued to fight for more than a year before he was captured and killed on February 14, 1870. In the peace agreement that brought an end to the conflict, Brazil and Argentina confiscated

large swaths of territory from the defeated nation. The two larger countries installed a provisional government that was friendly to foreign interests and continued to occupy Paraguay for another six years. The foreign occupation set the stage for a new political conflict to develop in the late decades of the 19th century. Political parties emerged, and a power struggle developed between Paraguay's Liberal Party and its own COLORADO PARTY.

### POLITICAL PARTY CONFLICT

The new Paraguayan government was made up of young, liberal-minded anti-López exiles who had sought refuge in Buenos Aires during the war. Under the watchful eye of Brazil and Argentina, a Paraguayan assembly wrote a new constitution in 1870 and selected Cirilo Antonio Rivarola (b. 1836–d. 1878) as the nation's first postwar president. Rivarola had been a firm *lopizta*, or supporter of Solano López, and aligned himself with conservative leaders. Factionalism began to emerge among the postwar ruling class. Rivarola was forced to step down just one year into his administration, and the liberal Salvador Jovellanos (b. 1833–d. 1881) was chosen to replace him. Jovellanos and his close adviser Benigno Ferreira (b. 1846–d. 1920) began taking steps to distance Paraguay from the constant interference of Argentina and Brazil. Conservative leaders seized the opportunity to strengthen their position. Rivarola along with fellow *lopiztas*—Cándido Bareiro (b. 1833–1880), Patricio Escobar (b. 1843–d. 1912), Bernardino Caballero (b. 1839–d. 1912), and Juan Bautista Gill (b. 1840–d. 1877) received assistance from both Brazil and Argentina and overthrew Jovellanos's liberal government in 1874.

In 1880, Bernardino Caballero took the presidency and began implementing policies that enraged the deposed liberal leadership. The president's rule became known as *caballerismo*, under which individual rights were violated and political freedoms were infringed upon. Caballero and his supporters were also known for rampant corruption. In 1887, their opponents formally established the Liberal Party as a political mechanism for challenging the ruling elite. Caballero and his supporters responded by formalizing their alliance in the Colorado Party. The remainder of the 19th century was characterized by a constant power struggle between the two parties.

While the Colorado and Liberal Parties challenged each other internally, Paraguay continued to face interference by foreign powers as well. Throughout the 1890s, Brazil's rulers worked to influence Paraguay's commercial policies to favor their country. When Brazilian interests seemed threatened, leaders did not hesitate to intervene in Paraguayan affairs. In 1894, Brazil sponsored a coup that brought Colorado politician Juan Bautista Egusquiza (b. 1845–d. 1910) to the presidency. Egusquiza's leadership provoked changes in both political parties as he promoted policies of conciliation with the Liberal Party. Egusquiza represented a more idealistic generation in the Colorado Party, and many of the old guard rejected the

new president's attempts to promote interparty cooperation. Calling themselves the *caballeristas*, the faction split from the *egusquistas*, weakening the Colorado Party considerably. The Liberal Party also split between the *cívicos*, who sought to work with Egusquiza, and the radicals, who rejected any notion of interparty cooperation.

The rift in the Colorado Party proved to be more damaging than the split between the Liberals. In 1904, Liberal leaders took advantage of the Colorado Party's weakness and incited a revolution to take control of the government. Led by former liberal adviser Ferreira, the Liberal Revolution of 1904 removed the Colorados from power. Paraguay's experiences with dictatorship and foreign intervention in the 19th century left the nation unprepared for the economic and political transformations that would arise in the 20th century. The Liberals continued to be beset by factionalism and instability throughout the first half of the next century but held on to power until the rise of Alfredo Stroessner in 1954.

See also BOURBON REFORMS (Vol. II); GUARANÍ (Vols. I, II); PARAGUAY (Vols. I, II, IV); PERU, VICEROYALTY OF (Vol. II); REDUCCIÓN (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II).

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**Pardo, Manuel** (b. 1835–d. 1878) *president of Peru* Manuel Pardo was a Peruvian businessman who rejected decades of MILITARY CONTROL of the government by founding the CIVILISTA PARTY in 1872. He was subsequently elected PERU's first civilian president and took the first steps in securing control over the national government for the merchant oligarchs.

Pardo was born in LIMA on August 9, 1834. He was educated in SANTIAGO DE CHILE and Europe in the fields of law and economics. At a young age, he began a career in the fiscal and statistical administration of the Peruvian government. He earned a reputation for honest economic practices and for recommending sound policies. He became involved in local politics, and his integrity earned him enough support to win the 1872 presidential election. Before he could take office, Tomás Gutiérrez, the minister of war under the outgoing administration, led a coup and declared himself dictator. After a brief but violent interlude, Gutiérrez was killed by a mob in Lima, and Pardo assumed the presidency.

The beginning of Pardo's presidency marked the end of Peru's profitable GUANO AGE, during which the national

treasury had overflowed with revenues from cultivation of the fertilizer ingredient. The decline of guano production caused a series of financial crises, which subsequent administrations attempted to curb by borrowing large sums of money from foreign interests. During his administration, Pardo negotiated an alliance with BOLIVIA that distressed Chilean leaders and eventually pulled Peru into the WAR OF THE PACIFIC (1879–84).

Pardo's presidency ended peacefully in 1876 with the election of Mariano Prado (1865–68, 1876–79). After stepping down from the presidency, Pardo was elected to the national senate. He was assassinated, most likely by members of the military elite, on November 16, 1878.

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**Pastry War** (1838–1839) The Pastry War was a brief armed conflict between MEXICO and France in 1838 over debts and unpaid claims owed to the French government and private citizens.

In the chaos of the early years following independence, wars and regional fighting often caused damage to property and businesses owned by both foreigners and Mexicans. By 1838, numerous foreign nationals had issued claims against the Mexican government for restitution for property losses. The French government supported the efforts of a number of its nationals to seek reparations. Among them was a French baker who accused Mexican soldiers of having looted his pastry shop in 1828. Citing this and other claims, the French government of King Louis-Philippe demanded that Mexico pay 600,000 pesos in compensation, and when the sum was not forthcoming, the French initiated a blockade of the port of Veracruz with more than two dozen ships. Creative French journalists, focused on the lunacy of going to war over baked goods, designated the conflict the "Pastry War."

The blockade of Veracruz began in April 1838. After months of stalled negotiations, French forces attacked the port city on November 27. As the situation became urgent, former president and MILITARY leader ANTONIO LÓPEZ DE SANTA ANNA rushed to the city to ward off the impending invasion. French forces entered the city on December 5, and Santa Anna led Mexican troops in defending it. In the fighting that ensued, the former president was wounded and lost his left leg below the knee.

The French withdrew from Veracruz in March 1839 after the British helped arbitrate a peaceful end to the conflict. In the end, Mexico paid the 600,000 pesos originally demanded by Louis-Philippe.

The real significance of the Pastry War for Mexico was that it paved the way for Santa Anna's return to power. Seeing him make real and symbolic sacrifices for the nation by losing a limb while defending his country from foreign invasion restored his legitimacy and heroism in the eyes of many of his supporters. Santa Anna used that momentum to garner support and restore himself as dictator in 1841.

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**Pedro I (Dom Pedro)** (b. 1798–d. 1834) *emperor of Brazil* Pedro I was the first emperor of independent BRAZIL and is credited with spearheading the nation's separation from Portugal.

Dom Pedro was born in Lisbon on October 12, 1798, to Prince John of the royal Braganças family and his wife, Carlota Joaquina, of the Spanish Bourbon royal line. One year after Pedro's birth, John became regent and officially ruled in place of his mentally ill mother. In 1807, the royal family fled Napoléon Bonaparte's invasion of the Iberian Peninsula, relocating the Portuguese Court to Brazil. The family ruled from RIO DE JANEIRO even after Napoléon's defeat in 1814. John declared Brazil a kingdom in 1815 and one year later was crowned King JOHN VI following the death of his mother. After five years of mounting pressure from Portuguese elite and facing a liberal movement for democratic reform in Lisbon, John returned to Portugal in 1821, leaving Pedro as regent in Brazil.

Both Pedro and his father were confronted with a rising tide of political LIBERALISM in the early 19th century. After the king's departure, Pedro found himself surrounded by advisers who increasingly advocated a formal separation from Portugal. On September 7, 1822, Pedro issued the GRITO DE IPIRANGA, declaring Brazil's independence. He was crowned Emperor Pedro I on December 1, making him the first leader of the sovereign nation of Brazil. Despite his dramatic declaration, only a few principal states recognized Pedro's rule in 1822. He spent the next two years consolidating his authority and driving Portuguese MILITARY forces out of the country.

In 1823, a constituent assembly began drafting a constitution with the intention of establishing a parliamentary monarchy and limiting the emperor's powers. Pedro disbanded the assembly and promulgated his own governing document, the CONSTITUTION OF 1824. Pedro's document established a centralized political system and granted him extraordinary oversight into virtually all aspects of the government. The emperor's despotic actions stirred discontent in several provinces, which rose in revolt. Led by liberal elite in Pernambuco, those provinces attempted to form the Republic of

the Confederation of the Equator, only to be violently put down by the emperor's forces. In 1825, JUAN ANTONIO LAVALLEJA led an insurrection in the problematic Cisplatine Province. The resulting CISPLATINE WAR led to the creation of the nation of URUGUAY in 1828.

Pedro faced dissent throughout the 1820s and generally responded by becoming increasingly repressive. Scattered uprisings continued in the provinces until he bowed to pressure in 1831 and abdicated the throne in favor of his five-year-old son, PEDRO II. Pedro II took the throne directly in 1840 after the nine-year REGENCY period. The deposed monarch, meanwhile, departed for Portugal to claim the Portuguese throne in a civil war against his brother, Miguel. He was successful in placing his daughter on the throne as Queen Maria II. Pedro died on September 24, 1834.

See also JOHN VI (Vol. II).

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Neill Macaulay. *Dom Pedro: The Struggle for Liberty in Brazil and Portugal, 1798–1834* (Durham: Duke University Press, 1986).

**Pedro II** (b. 1825–d. 1891) *emperor of Brazil* Pedro II was the second and last emperor of BRAZIL, who ruled throughout much of the 19th century, from 1831 to 1889. He is generally credited with bringing unity to the struggling nation and with paving the way for economic and political modernization.

Pedro II was born in RIO DE JANEIRO on December 2, 1825, to Brazilian emperor PEDRO I (r. 1822–31) and his wife, Maria Leopoldina. His mother died the year after his birth. In 1831, when Pedro was just five years old, his father abdicated the throne and returned to his native Portugal. An elected three-man regency took power until Pedro II came of age. As a young boy, Pedro received the best EDUCATION Brazil had to offer, much of it from members of the clergy and other tutors. He acquired a love of learning and appeared to develop an early understanding of the complexities of governing. He had an isolated childhood, surrounded by the trappings of royalty but having little contact with his immediate FAMILY.

The REGENCY period of Brazilian history lasted from 1831 until 1840. During that time, political interests in Rio de Janeiro and the provinces competed to influence Pedro's upbringing and to alter Brazil's governing systems. Pedro's father had pushed through a constitution that established a constitutional monarchy with power centralized in an authoritarian emperor. More moderate political forces passed an amendment in 1834 that decentralized power and effectively weakened the monarch. Rival political ideologies challenged each other throughout the Regency, as advocates of CENTRALISM fought to maintain traditional power structures while supporters



Pedro II and his daughter Isabel, who served as regent during the emperor's absence. Portraits, circa 1889 (Library of Congress)

of FEDERALISM promoted provincial autonomy. Regents found themselves in near-constant conflict with the provinces as well. Regional revolts were common, and many were put down with force. In Rio Grande do Sul, the WAR OF THE FARRAPOS resulted in rural rebels declaring an independent republic.

Conflict in the provinces and internal infighting in Rio de Janeiro ultimately hastened efforts to transfer power from the regency to the young emperor. In 1840, at the age of 14, Pedro II took control of the Brazilian government. He was officially crowned in a regal ceremony the following year. Pedro II's accession to the throne marked the beginning of an era known as the Second Empire. One of Pedro's first actions as emperor was to appease members of Brazil's CONSERVATIVE PARTY by reversing the structural changes made in the 1834 constitutional amendment. The Brazilian royal also brought provincial revolts under control, and the 1840s became a decade of emerging stability and national unity. Pedro managed to balance the rivalries between the LIBERAL PARTY and the more traditional Conservatives. The emperor reinstated the Cabinet of State, an advisory group that had been abolished as a part of 1834 reforms. He filled cabinet positions with members of both parties and alternated support between parties in the legislature. Indeed, Pedro's ability to strike a diplomatic equilibrium between the two parties helped ensure that they could work together.

Brazil went through drastic transformations in the second half of the 19th century. After 1850, COFFEE began replacing SUGAR as the mainstay of Brazilian agricultural production (see AGRICULTURE). As a result, regional power began to shift from the traditional plantation economies of the northeastern provinces of Bahia and Pernambuco to the southern states of SÃO PAULO and Rio Grande do Sul. The emergence of the coffee ECONOMY precipitated enormous changes in the country's economic and LABOR systems. Sugar plantations had relied heavily on slave labor and had not attempted to incorporate more modern equipment or production techniques. Coffee production expanded just as restrictions on the trans-

atlantic slave TRADE were increasingly being enforced. Furthermore, coffee planters tended to be more open to liberal economic principles and were willing to adopt alternate labor and production systems. Coffee planters were more likely to employ immigrant labor, and they pressured Pedro II to adopt favorable immigration policies in the late decades of the century (see MIGRATION).

The final years of Pedro's reign coincided with a growing abolitionist movement and the eventual ending of SLAVERY. The emperor himself seemed to oppose slavery from an early date but bowed to pressure from the planter aristocracy until the economic shifts of the late 19th century made abolition more acceptable. In 1871, Pedro II signed the LAW OF THE FREE WOMB, which granted freedom to all children born to slave mothers after it came into effect. The law was intended to bring about gradual emancipation, but by 1880, the emperor faced new pressures from liberal politicians and intellectuals. Individual states began passing emancipation decrees by 1884, making it clear that slavery was no longer a viable institution in Brazil. In 1888, Pedro II's daughter Isabel, acting as regent during his travels abroad, signed the Golden Law to bring about a complete abolition of slavery (see SLAVERY, ABOLITION IN BRAZIL OF).

The triumph of liberal interests on the issue of abolition encouraged a growing reform movement that pushed for an end to the empire in favor of republicanism. Those forces incited a coup, which deposed Pedro II in 1889 and initiated the OLD REPUBLIC. Pedro II and his family fled into exile in France, where he died in 1891.

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**Peru** During the colonial period, the area that makes up present-day Peru formed the bulk of the Viceroyalty of Peru. With its capital at LIMA, this administrative arm of the Spanish Crown oversaw government and economic matters for all of Spanish South America for most of the colonial era. Not until the 18th century did the Spanish Crown create two new separate viceroyalties in South America: New Granada (COLOMBIA, VENEZUELA, and ECUADOR) in 1717 and Río de la Plata (the Southern Cone) in 1776.

#### INDEPENDENCE

Serving as a seat of administrative authority for nearly 300 years made Peruvians slow to support a movement for independence, even as bordering regions rebelled in



the early 19th century. The close presence of viceregal power and recent memories of the violent Túpac Amaru indigenous revolt caused many Peruvian creole elite to reject the notion of breaking from Spain. In response to Napoléon Bonaparte's invasion of Spain in 1808, uprisings erupted in neighboring CHILE and New Granada, while the Peruvian reaction was much more subdued. Peruvian viceroy José Fernando de Abascal (1806–16) maintained law and order for the creole elite, who constantly feared a resurgence of Amerindian violence. These fears were almost realized during a short-lived Andean rebellion in 1814, led by Inca descendant Mateo Pumacahua (b. 1760–d. 1815). Abascal and his supporters remained loyal to Ferdinand VII and the Spanish Crown and even sent contingents of royalist forces into neighboring regions to suppress independence revolts there. Peru remained the last stronghold of royalist support in South America, as Simón Bolívar and José de San Martín (b. 1778–d. 1850) secured independence in New Granada and Río de la Plata, respectively.

In 1820, San Martín expanded his efforts into Peru, leading an invasion force in an attempt to liberate the stubborn colony from Spanish rule. Aided by former British admiral Thomas, Lord Cochrane, San Martín landed along the southern coast and began attracting local support to his cause. Peruvian viceroy José de la

Serna (1821–24) was forced to flee Lima in July 1821, and San Martín easily took the capital. The Southern Cone liberator declared Peruvian independence on July 28 but struggled to bring the countryside in line with his vision for the new nation. A year later, San Martín and Bolívar met in GUAYAQUIL to hammer out a strategy for the final liberation of Peru. San Martín handed power to Bolívar, and Congress named Bolívar president shortly thereafter. Bolívar led San Martín's army to its final victory over one of the last holdouts of royalist supporters at the Battle of Junín in August 1824. By the end of the year, Bolívar's trusted comrade ANTONIO JOSÉ DE SUCRE had defeated the last remnants of the royalist army at the Battle of Ayacucho, bringing an end to the Peruvian war for independence.

From 1824 to 1826, Bolívar ruled from Lima, attempting to stabilize nearly constant discontent among the Peruvian creole elite. At the same time, he had been named president of BOLIVIA (Upper Peru) and had drafted the BOLIVARIAN CONSTITUTION of 1826, in which he articulated his political vision. The Liberator intended to unify Peru and Bolivia as one independent nation, but local leaders in La Paz voted to separate from (Lower) Peru in 1825. Bolívar hoped that in short order the whole of South America would unite as one large and powerful nation under the auspices of his new constitution.



The Plaza de Armas and national cathedral in Lima, Peru, 1867 (Hulton Archive/Getty Images)



This statue of independence hero Simón Bolívar was erected in Lima, Peru, in 1858. (*Library of Congress*)

The document called for four branches of government led by a lifetime president and a limited electorate. The independence leader-turned-president, however, was soon called back to GRAN COLOMBIA to put down a revolt against the new government of FRANCISCO DE PAULA SANTANDER. Bolívar's departure created a power void in Peru, and for years, local elite jockeyed for power in one revolt after another.

### THE PERU-BOLIVIA CONFEDERATION

After Bolívar left the presidency in 1827, leadership of Peru changed hands numerous times. Local politicians vied for power, and Bolivian leaders also turned their attention to Peru, as border conflicts ignited hostilities between the two nations. In 1833, internal animosities over TRADE policies between northern and southern regions further divided Peruvian politicians. Three years later, Bolivian dictator ANDRÉS DE SANTA CRUZ reacted to infighting among Peruvian leaders by invading and declaring the region the unified PERU-BOLIVIA CONFEDERATION. Santa Cruz claimed that the common cultural and ethnic heritage of the two nations provided a logical basis for combining them into one powerful confederation. The Bolivian CAUDILLO convened a congress,

which organized the confederation into three autonomous states. Local Peruvian political leaders opposed to the confederation fled to neighboring Chile, while Santa Cruz worked to formalize his political project. The tenuous support for the confederation that did exist within Peru and Bolivia began to break down quickly as Chile and ARGENTINA both declared war in an attempt to dismantle the perceived threat along their borders. The Chilean army succeeded in forcing the dissolution of the confederation in 1839. Ousting the Bolivian dictator, however, did not bring political order to the new nation. Regional caudillos competed for power, and Peru had five different constitutions in the first two decades after independence.

### THE GUANO AGE

Relative stability and prosperity came to Peru only after the installment of strongman RAMÓN CASTILLA and the development of the lucrative guano industry in the 1840s. In a period known as the GUANO AGE (1843–79), Peru's ECONOMY flourished as foreign investors processed guano on the nation's coastal islands for use in agricultural fertilizers. The development of the guano industry brought considerable economic prosperity to the country in the middle decades of the 19th century. The government used the revenue to develop the nation's infrastructure and expand public works. New schools were built, and railroads connecting major cities were completed. President Castilla built on his popularity as the economy flourished and the national treasury swelled.

In 1854, Castilla used his influence and popularity to push through legislation abolishing SLAVERY in Peru. He was able to win support from slave owners by using guano revenues to compensate them for their lost "assets" after freeing slaves. The president also canceled the indigenous tribute tax, replacing that revenue with guano profits. In 1860, the powerful politician promulgated a new constitution that expanded political participation and consolidated governmental control under a strong central executive.

While the guano age brought economic growth and some social reform to Peru, it also created a variety of problems. Many of Castilla's and subsequent leaders' spending projects were mismanaged and failed to create mechanisms that would allow the country to earn income outside of the guano industry. Much of the guano industry came under the control of foreign investors from the United States and Europe. Government economic policies also caused discontent as urban merchants and skilled craftspeople in the interior felt that the coast and island economies were the sole beneficiaries of free trade and foreign investment. Furthermore, while Castilla formally abolished Peruvian slavery, the government simultaneously encouraged the immigration of Chinese workers to fill the demand for labor in guano processing. Those immigration and LABOR policies created an entirely new class of exploited workers in Peru (see MIGRATION).

By the 1870s, Peru's guano boom was already showing signs of distress. Output from the once guano-rich coastal islands began to decline, and foreign guano companies had depleted those deposits. Exacerbating the problem, European companies had started to develop synthetic ingredients that replaced guano in fertilizer production. The guano trade also created a potential for foreign conflict. In 1866, Peru fought a brief war with Spain over control of a vital guano-rich island. Peru won the war and finally obtained Spain's recognition of its independence, but the conflict was costly. As guano extraction continued to decline, the Peruvian government began taking out foreign loans to sustain established levels of government spending. As the national debt soared, financial collapse seemed imminent. In 1869, Finance Minister and future president NICOLÁS DE PIÉROLA negotiated a controversial contract granting French investor Auguste Dreyfus virtually unlimited access to the nation's guano deposits in exchange for restructuring the national debt.

Much of the precariousness of Peru's economy could be tied directly to government corruption and misspending. In 1872, influential Peruvian businessmen joined forces with landed oligarchs and liberal intellectuals to challenge the traditional MILITARY dominance of the political system. Led by railroad magnate MANUEL PARDO, they formed the CIVILISTA PARTY and elected Pardo to the presidency. Pardo inherited a struggling economy and a corrupt political system. Nevertheless, he ruled for four years and set the stage for future oligarchic rule. One of Pardo's most notable acts was reaching a defense agreement with neighboring Bolivia. His administration did, however, face constant revolts from regional caudillos and supporters of political rival Piérola.

### WAR OF THE PACIFIC

Pardo's alliance with Bolivia had dragged the nation into a devastating war by the end of the decade. In 1879, hostilities erupted between Bolivia and Chile over the disputed border region in the Atacama Desert. When Chilean leaders learned of Peru's defense pact with Bolivia, they declared war on both countries. Peru was pulled into the WAR OF THE PACIFIC (1879–84) and faced an internal political collapse as the Chilean army invaded and advanced toward Lima. Peruvian president Piérola fled, leaving the defense of the country in the hands of military commander and future president ANDRÉS AVELINO CÁCERES. Cáceres led a last-ditch guerrilla war to defend against the invading army, but in 1883, Peruvian leaders signed the TREATY OF ANCÓN. The peace agreement required Peru to cede its southern province of Tarapacá. Control of the Tacna and Arica regions was to be determined 10 years later by a local plebiscite. Several months passed before Cáceres agreed to recognize the legitimacy of the treaty, while the Chilean army continued to occupy the country. Cáceres finally acceded, and the Chilean military withdrew in August 1884.

For two years after the conclusion of the War of the Pacific, Peruvian leaders battled among themselves for power. Military leader Cáceres colluded with the Civilista Party, and in 1886, he was elected president. The War of the Pacific had devastated the nation. The economy, already in a slump after the decline of the guano industry, continued to deteriorate. Railroads, ports, and other infrastructure systems had been severely damaged. As president, Cáceres spent several years negotiating the Grace Contract to restructure the nation's external debt. The agreement created the PERUVIAN CORPORATION, made up of British investors who held the majority of the nation's debt. Members of the corporation forgave the bulk of the debt in exchange for almost unrestricted use of railroads, waterways, and other resources. The contract was extremely controversial in Peru, but in the end, the Peruvian Corporation made needed repairs and improved important TRANSPORTATION networks.

### THE ERA OF MODERNIZATION

In the last decade of the 19th century, Peruvians experienced a crisis of national identity similar to that seen in many other Latin American nations. Many leaders argued that the previous century of chaos and instability had caused the nation to fall behind the rest of the world. They contended that development of Peru's economic and social systems had stalled and that the nation needed to modernize rapidly in order to compete with more developed nations. Beginning with the first Cáceres presidency, Peruvian leaders prioritized modernization and the positivist philosophy. Intellectual and political elite formed the Sociedad Geográfica de Lima (Geographical Society of Lima) and used that organization as a forum for debating economic policy, resource development, and population issues. One of the main issues taken up by the positivists of the Sociedad was the plight of the nation's large indigenous population. Numerous Amerindian uprisings throughout the 19th century had convinced many leaders that Peru's NATIVE AMERICANS were a backward and uncivilized race. They encouraged a national policy to attract European immigration, thinking that this would promote mixing between the races and thus "dilute" the indigenous population. This policy was firmly in line with the theories of POSITIVISM and SOCIAL DARWINISM that prevailed in the late 19th century.

Peru had achieved some economic stability by the close of the century. Cáceres experimented with reinstating controversial measures to bolster the national treasury, such as the poll tax, but later administrations relied more on taxing popular consumer productions such as TOBACCO and salt. The government worked to diversify the nation's exports and moved the economy away from its reliance on guano. The export economy, however, remained firmly entrenched in the agricultural and MINING sectors (see AGRICULTURE). The expansion of agricultural production also meant a consolidation of land in the hands of wealthy oligarchs. Often that land

came from the struggling indigenous population, many of whom were now forced to work as wage laborers in an increasingly exploitative system of *LATIFUNDIO* for the landed elite.

Piérola served a final term as president in the late 1890s, this time in alliance with the Civilista Party. Piérola oversaw the opening of a number of banks and moved the nation toward sound monetary policy. He implemented trade policies to favor big business and the landed elite, and his government did bring continued economic stability. Nevertheless, his policies also enabled the continuation of the *latifundio* system. Foreign involvement in the economy was also renewed. Piérola saw foreign investment as a way for the country to modernize quickly. In the first decades of the 20th century, much of the nation's plantation land and its mining industry fell into the hands of foreigners, usually to the detriment of Peruvian workers.

The policies initiated during the last decade of the 19th century set the stage for major transformations in Peru in the 20th century. The development of the agricultural and mining industries provided the basis for what would become Peru's export-oriented economy early in the next century. The dominance of the Civilista Party ensured that government policies continued to favor large commercial interests. Relative stability in the 1890s also ushered in a period of population growth and the gradual urbanization of the country, and these new developments ultimately posed new challenges to Peru.

See also BOLÍVAR, SIMÓN (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II); PERU (Vols. I, IV); PERU, VICEROYALTY OF (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); SAN MARTÍN, JOSÉ DE (Vol. II); TÚPAC AMARU II (Vol. II).

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**Peru-Bolivia Confederation** (1836–1839) Peru-Bolivia Confederation was a short-lived confederation of present-day PERU and BOLIVIA between 1836 and 1839. The attempt at creating a union between the two regions was a remnant of independence leader Simón Bolívar's vision of uniting the newly independent nations of South America into one strong and powerful confederation. Bolivian CAUDILLO and dictator ANDRÉS DE SANTA

CRUZ attempted to unite the two struggling nations in the interest of restoring a sense of common indigenous cultural identity and strengthening economic and commercial activities in the region.

Throughout most of the colonial period, Upper Peru (Bolivia) and Lower Peru (Peru) were important regions within the South American Viceroyalty of Peru. The creation of the Viceroyalty of Río de la Plata in 1776, with its seat in BUENOS AIRES, however, divided the two regions, as administratively, Upper Peru became a part of Río de la Plata. Culturally, Upper Peru had more in common with Lower Peru than it did with the new viceroyalty. Upper Peru, also known as Charcas, and Lower Peru had been the heart of the pre-Columbian Inca civilization, and many descendants of the Inca still lived in both regions. Furthermore, after Bolívar secured independence for both Upper and Lower Peru in 1825, he intended to unite the two under one sovereign nation. Only after congressional delegates in La Paz voted for autonomy was the Liberator forced to abandon those visions. He hoped to convince leaders in Bolivia and Peru to reunite and eventually become part of a larger confederation of South American states.

Bolívar served as president of both Peru and Bolivia until 1826. After his departure, both nations experienced a period of political turmoil. Santa Cruz was elected president of Bolivia in 1829 to replace Bolívar supporter ANTONIO JOSÉ DE SUCRE, who had resigned in 1828. Santa Cruz had served as provisional president of Peru in 1826 and dreamed of one day of fulfilling Bolívar's vision by bringing the two nations together. Furthermore, he was a *cholo*, or a mestizo, from La Paz, who closely guarded his Quechua indigenous roots. He envisioned reuniting the regions that had been the heart of the Inca Empire in one powerful and cohesive nation. Santa Cruz capitalized on a destabilizing Peruvian civil war in 1834 to invade that nation. He ordered his army across the border in June 1835, and by October 1836, he occupied and controlled most of Peru and proclaimed the Peru-Bolivia Confederation.

A congress convened the following year and formalized Santa Cruz's proclamation. It organized the confederation into three autonomous states—North Peru, South Peru, and Bolivia—each ruled by a president. Santa Cruz held the title of supreme protector of the confederation and ruled with absolute authority. By most accounts, the confederation brought a period of stability and progress to Peru and Bolivia after the unrest in those nations following independence. Nevertheless, Santa Cruz alienated influential citizens on both sides, who resented his authoritarian style. Furthermore, the confederation alarmed the governments in neighboring ARGENTINA and CHILE, who saw the alliance between their Andean neighbors as a threat to the delicate balance of power among the new nations in South America. Already in 1836, Chilean forces had engaged in skirmishes with Santa Cruz's confederation army over TRADE

disputes. In 1837, Argentine caudillo JUAN MANUEL DE ROSAS attempted an invasion, but Santa Cruz repelled his army. He was not so fortunate when facing Chile, whose government aimed to settle a feud that had begun years earlier over tariffs and trade.

Chilean president José Joaquín Prieto (1831–41) declared war against the confederation and sent an invading naval expedition to Peru's coast in 1837. Santa Cruz's forces initially gained the upper hand and forced Chilean commander Manuel Blanco Encalada (b. 1790–d. 1876) to sign the Treaty of Paucarpata in November 1837. The treaty effectively stated that the Chilean government recognized the legitimacy and sovereignty of the confederation, but the Chilean leader immediately renounced the agreement.

War continued for more than a year as a new Chilean force under the command of General Manuel Bulnes (b. 1799–d. 1866) arrived in southern Peru. This time, Bulnes found that Santa Cruz had lost much of his internal support, as the president of North Peru had declared independence from the confederation. The Chilean army finally defeated Santa Cruz's forces in the Battle of Yungay in January 1839. What was left of the confederation disbanded, and Santa Cruz escaped into exile.

The Peru-Bolivia Confederation marked the first and only attempt to unite those two nations. The demise of the confederation ushered in an era of Chilean commercial and territorial dominance in the region.

See also BOLÍVAR, SIMÓN (Vol. II); CHARCAS (Vol. II); INCAS (Vol. I); PERU, VICEROYALTY OF (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II).

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**Peruvian Corporation** The Peruvian Corporation was a privately held group of British investors who gained control over much of PERU'S TRANSPORTATION and communications infrastructure and various natural resources in the late 19th century. The establishment of the corporation was unpopular among many Peruvians but ultimately helped the nation recover and rebuild after its defeat in the WAR OF THE PACIFIC (1879–84).

The Peruvian Corporation was formed as a result of the Grace Contract, which came out of negotiations between Peruvian president ANDRÉS AVELINO CÁCERES and representatives of British investors. The investors had loaned large sums of money to the Peruvian government, and the government had used that money to develop transportation and industrial infrastructure to support the guano and nitrate industries. Peru's defeat in the War of the Pacific left much of that infrastructure in ruins, and the government struggled to meet its debt obligations. To settle outstanding debts and create

a strategy to repair the nation's damaged infrastructure, the government of President Cáceres negotiated the Grace Contract with the British. The contract created the Peruvian Corporation, made up of the British investors, who held the majority of Peru's debt. The corporation agreed to cancel most of the nation's debt, and in exchange, members of the group were granted virtually unlimited access to Peru's resources and infrastructure.

Cáceres faced strong resistance within Peru as he negotiated the Grace Contract. He dissolved Congress to stifle opposition, and in 1889, the agreement became official. The Peruvian Corporation controlled Peru's railroads for more than six decades and took over a sizable portion of land in the Amazonian region. The agreement ran contrary to Peruvian national pride and identity, but most analyses of its results show that the Peruvian Corporation succeeded in rebuilding damaged sectors after the War of the Pacific and stabilizing the economy.

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**Pétion, Alexandre (Alexandre Sabès)** (b. 1770–d. 1818) *president of Haiti* Alexandre Pétion was born in Port-au-Prince on April 2, 1770, to a French colonel, Pascal Sabès, and a mulatto mother known as "la dame Ursaline." He was sent to the MILITARY academy in France and returned to HAITI to assist in the expulsion of the British in 1798. He was a mulatto belonging to the class of *affranchis*, or freedmen, and remained partial to European and elitist political factions. Desiring to lose his racist white father's name, he adopted *Pétion* in honor of Frenchman Pétion de Villeneuve, a notable member of the Société des Amis Noirs, a society of abolitionists, in the National Assembly in Paris in 1789.

In the early days of the Haitian Revolution, Pétion first fought against Toussaint Louverture (1801–03). When Toussaint's victory became imminent, he went into exile. He returned to Haiti with French general Charles-Victor-Emmanuel Leclerc's troops in 1802 in an attempt to reestablish colonial rule. After the treacherous treatment of Toussaint was made known and Leclerc attempted to disarm the blacks, Pétion defected and joined JEAN-JACQUES DESSALINES'S rebel forces. Pétion also feared that Napoléon Bonaparte would reinstate SLAVERY, as he had done in nearby Guadeloupe. As a united force, blacks and mulattoes successfully defeated the French, declaring the independence of Haiti in 1804, with Dessalines as the nation's first leader, from 1804 to 1806.

Following Dessalines's assassination in 1806, HENRI CHRISTOPHE, a popular black general of the northern territories, clashed with Pétion over leadership. As a result,

the country became divided. Christophe established a kingdom in the north and reigned from 1807 to 1820. Pétion took charge of the republic in the south until 1818.

Pétion is known for his land distribution policies, whereby he distributed large plots of state-owned land to individuals in smaller tracts and then lowered the selling price to make it affordable. This practice is believed to have caused irreparable damage to the Haitian economy, however, as it promoted subsistence farming over large-scale agricultural production (see AGRICULTURE).

Pétion supported Simón Bolívar in his liberation wars throughout the Caribbean and allowed him sanctuary in 1815. Pétion died later that year of yellow fever and was succeeded by his mulatto secretary and commander of the presidential guard, General JEAN-PIERRE BOYER.

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**Piérola, Nicolás de** (b. 1839–d. 1913) *finance minister and president of Peru* Nicolás de Piérola was a prominent politician who rose to the rank of finance minister of PERU under the presidency of José Balta (1868–72). In the 1870s, he opposed the new CIVILISTA PARTY but later formed an alliance with it and supported *civilista* policies during his presidency in the 1890s.

Piérola was born in Arequipa on January 5, 1839. He rose through the ranks of the MILITARY and embarked on a political career. As minister of finance, Piérola negotiated an unpopular contract with French businessman Auguste Dreyfus, granting the investor a virtual monopoly over Peru's struggling guano industry. Piérola organized an opposition to the newly formed Civilista Party in 1872. Several years later, he attempted to overthrow the government and was briefly forced into exile. He entered the Peruvian political scene once again in 1879 to lead a Peruvian force in the WAR OF THE PACIFIC. He proclaimed himself president and attempted to defend the nation and the capital from the Chilean invasion. Piérola was eventually forced to flee and to surrender his claim as president.

Piérola returned to politics for a final time when he forged an alliance with his one-time nemesis, the Civilista Party, against the leadership of ANDRÉS AVELINO CÁCERES. The *civilista-pierolista* alliance overthrew Cáceres in 1895, and Piérola assumed national leadership once again. In the final years of the 19th century, Piérola protected the interests of the big-business oligarchy and imposed policies to stabilize the nation's monetary supply. Piérola

remained involved in local politics after stepping down from the presidency in 1899. He died in LIMA in 1913.

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**Pilgrimage of Bayoán, The** (*La peregrinación de Bayoán*) Published in 1863, *The Pilgrimage of Bayoán* was the first of many works by Eugenio María de Hostos (b. 1839–d. 1903) on Latin American social and political philosophy. The political work masquerading as a fictional novel was deemed too controversial for popular circulation and was banned by Spanish authorities for its critical portrayal of the Spanish colonial regime in PUERTO RICO.

Composed during a time of intense revolutionary fervor in Puerto Rico, Hostos wrote the book as a direct attack on the restrictions and injustices perpetrated by the Spanish Crown against his island home. After receiving his law degree from the Central University of Madrid, Hostos became interested in politics, joining other university students in the call for the independence of CUBA and Puerto Rico, as well as the abolition of SLAVERY. It was at this time that Hostos, only 24 years old, wrote *The Pilgrimage of Bayoán*, considered by many to be his finest work.

The novel follows the protagonist, Bayoán, on his journey back to Puerto Rico from Europe, rediscovering his beautiful homeland and its people besieged by the social and political evils of the Spanish colonial system. The plot is relayed through Bayoán's diary entries, and the novel contains strong elements of romantic LITERATURE (see ROMANTICISM). Bayoán frequently laments the disturbance of the natural beauty and order the island had before the arrival of the Spanish. Eventually, Bayoán determines that the only way to save Puerto Rico is to return to Spain to convince the government to grant Puerto Rican independence.

When Spain formally denied Puerto Rican independence in the formation of its Constitution of 1869, Hostos traveled to the United States, COLOMBIA, PERU, CHILE, BRAZIL, and ARGENTINA. Finally returning to Puerto Rico in 1898 following its acquisition by the United States, he strongly but unsuccessfully advocated for Puerto Rican independence to then U.S. president William McKinley.

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**Plácido (Gabriel de la Concepción Valdés)** (b. 1809–d. 1844) *Cuban poet, political activist, and abolitionist* Plácido was a Cuban poet and journalist who used his literary skills to challenge Spanish authority in CUBA and to push for the abolition of SLAVERY (see LITERATURE). He is best known as one of the great martyrs in the LADDER CONSPIRACY (*Conspiración de la Escalera*) of 1844.

Plácido was born Gabriel de la Concepción Valdés on March 18, 1809, to a Spanish father and a mixed-race Cuban mother. Abandoned by his parents, he spent much of his youth in a HAVANA orphanage. As a young man, he relocated to Matanzas and began earning a living as a comb maker. Plácido earned a reputation for his ability to compose short, impromptu rhymes. In 1837, he began writing poems for a local newspaper on a regular basis and over the next few years published collections of his work. Much of Plácido's poetry featured cleverly worded criticisms of the Spanish colonial system in Cuba. He also frequently commented on the oppressive nature of slavery in Cuba and became an icon of the growing abolitionist movement.

In 1844, Spanish authorities uncovered an abolitionist conspiracy in Matanzas to incite a slave uprising. The plot became known as the Ladder Conspiracy after the Spanish torture technique of tying suspects to a ladder to be flogged. Plácido immediately fell under suspicion for his activist writings and was arrested and detained for several months. He was executed by Spanish authorities on June 28, 1844, along with other free black abolition leaders. Already well known for his poetry, Plácido was exalted in death as a martyr of the anti-Spanish movement.

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**Plan de Casa Mata** (1823) The Plan de Casa Mata was the declaration of rebellion against AGUSTÍN DE ITURBIDE in Mexico in 1823. The proclamation and subsequent rebellion ended his reign as emperor (1821–24) and made MEXICO a republic.

Mexico achieved its independence from Spain after Iturbide, a Spanish army officer, ended the decade-long war of independence by reaching a compromise with VICENTE GUERRERO. Under their Plan de Iguala, Mexico became an independent nation but was to be ruled by a monarch. When Iturbide failed to recruit a European monarch to accept the position, his supporters declared him Emperor Agustín I. He ruled with all the pomposity befitting a royal leader, and his tactics became increasingly autocratic. As liberal opposition to his monarchy mounted, Iturbide censored the press, jailed dissidents, and dissolved Congress.

Several former independence leaders, including ANTONIO LÓPEZ DE SANTA ANNA, Nicolás Bravo (b. 1786–d. 1854), Guerrero, and GUADALUPE VICTORIA, rose in opposition almost immediately. Iturbide sent José Antonio Echáverri to put down the insurrection, but Echáverri instead joined the agitators, who declared the Plan de Casa Mata on February 1, 1823. The rebellion incorporated the earlier Plan de Veracruz promulgated by Santa Anna on December 1, 1822. The Plan de Casa Mata called for a new congress to be convened and for a republican form of government to be established. Iturbide briefly attempted to reinstate Congress, hoping to negotiate a peaceful end to the rebellion, but organizers of the Plan de Casa Mata were beyond compromise. Instead of fighting a protracted war, Iturbide abdicated on March 19, 1823, and fled into exile in Europe.

Organizers of the Plan de Casa Mata installed Bravo, Victoria, and Pedro Celestino Negrete (b. 1777–d. 1846) as an interim ruling triumvirate and called for delegates to write a new constitution. The Plan de Casa Mata paved the way for the drafting of the CONSTITUTION OF 1824, which established the federal republic of Mexico.

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**Plan de Tacubaya** See JUÁREZ, BENITO; REFORMA, LA.

**Porfiriato** (1876–1911) The Porfiriato was the period from 1876 to 1911 when MEXICO was ruled by PORFIRIO DÍAZ. During that time, Díaz ruled under the dictum of order and progress, and the nation experienced advancements in industry, security, and culture. Not all Mexicans benefited, however, from the prosperity that accompanied those advancements. The Porfiriato ended when Díaz was forced from power with the onset of the Mexican Revolution.

The Porfiriato began with Díaz's overthrow of SEBASTIÁN LERDO DE TEJADA in 1876 under the Plan de Tuxtepec. Lerdo had been elected to a second presidential term in possibly fraudulent elections. Díaz had led a similar revolt under the Plan de Noria after losing the 1871 election to BENITO JUÁREZ, but that rebellion had failed. In both campaigns, Díaz called for "effective suffrage, no reelection" as proscribed in the CONSTITUTION OF 1857. In 1880, after serving as president for four years, he stepped down in keeping with his no reelection principles but continued to exert influence behind the scenes during the MANUEL GONZÁLEZ interregnum (1880–84). González's presidency was marred by economic instability and corruption, and after four years, Díaz was able to justify running for another presidential term despite his earlier claims. He ruled from 1884 to 1911 without inter-

ruption, although he held elections at regular intervals, giving at least the illusion of an open political process.

During the Porfiriato, Mexico experienced unprecedented stability and prosperity, with the pursuit of modernity often cited by Díaz as justification for his despotic rule. Since gaining independence in 1821, the nation had been plagued by wars and economic instability as it struggled with political rivalries, attempted foreign invasions, and regional unrest. As a result, Mexico had gained a reputation as a nation of lawlessness and financial uncertainty so that foreign businesses, which it desperately needed to attract, hesitated to invest in it. Díaz reversed those misgivings by augmenting security and cracking down on banditry and other crimes. He relied increasingly on the *RURALES*, or rural mounted police, originally established by Juárez. Díaz increased their numbers and continually expanded their jurisdiction and duties. Through repressive tactics, including the *ley fuga*, a law under which prisoners could be shot in the back while supposedly trying to escape, the *rurales* helped create an illusion of stability.

The Porfiriato saw the rise of a new type of bureaucrat as Díaz surrounded himself with advisers known as the *CIENTÍFICOS*. Generally ascribing to the philosophy of POSITIVISM, this group of intellectuals and technocrats believed that only scientific endeavors could pave the way for progress in Mexico. Many *científicos* firmly believed that traditional sectors of the Mexican population, such as the “backward” NATIVE AMERICANS, were hindering the advancement of the entire nation. They promoted social and economic policies that became the basis for pursuing order and progress during the Porfiriato.

In 1884, the Díaz administration settled the nation’s outstanding debt with Great Britain, which encouraged even more foreign involvement in the ECONOMY. Throughout the Porfiriato, the government passed laws favoring INDUSTRIALIZATION and creating an economic climate favorable to foreign interests. MINING laws were changed to allow foreign control of subsoil rights, and agricultural laws allowed the government to confiscate and sell any lands not being put to productive use (see AGRICULTURE). Facilitated by foreign money and technology, Mexico’s railroad industry expanded, with 15,000 miles (24,140 km) of track connecting the country for the first time. Mining output in SILVER and COPPER increased substantially. New industrial endeavors in coal, oil, steel, and textiles sprang up. With economic development came the growth of urban areas as many who had been displaced in the countryside relocated to the cities to work as laborers in emerging industries.

Foreign businesses saw the greatest benefit of the economic policies of the Porfiriato, but an elite class of wealthy Mexican businessmen also profited. The Porfiriato facilitated the growth of a small middle class whose professional services were needed in urban areas. As the middle and upper classes enjoyed greater prosperity, they increasingly embraced foreign trends as

the model of culture and sophistication. They adopted French cuisine and fashion and many foreign recreational pastimes in an attempt to exude cultural modernity (see FOOD; SPORTS AND RECREATION). Government policies complemented these attitudes; numerous laws attempted to regulate the appearance and behavior of traditional sectors of Mexican society. For example, the poor were prohibited from entering certain urban areas, and the indigenous were forced to abide by CLOTHING laws prohibiting wide-brimmed sombreros, huaraches (sandals), and other typically indigenous garb in many cities. Foreigners often ridiculed Mexican socialites’ attempts to emulate foreign trends.

Although Mexico seemed to be modernizing and advancing in many economic and social areas during the Porfiriato, the benefits of that progress were not evenly distributed. The indigenous and urban poor fell even further behind as their standard of living and working conditions declined in the interest of attracting industrialists. Díaz also severely constrained political freedoms by censoring political opposition and preventing open and fair elections. By the beginning of the 20th century, many Mexicans had grown dissatisfied with the direction in which Porfirian progress had taken the nation. When economic recession struck in 1906, discontent became even more pronounced. Ricardo and Enrique Flores Magón, publishers of the anti-Díaz periodical *Regeneración*, created a resistance movement under the Mexican Liberal Party (Partido Liberal Mexicano). Their efforts succeeded in inciting several workers’ riots.

In 1908, Díaz gave his famous interview to U.S. journalist James Creelman in which he boasted of the accomplishments that Mexico had achieved under his watch and declared the nation ready for him to step down. Díaz’s assertion that he would not seek reelection in the 1910 election raised the hopes and expectations of many would-be contenders, including future revolutionary leader Francisco Madero, who began laying plans to run for president. Those hopes were dashed when Díaz rescinded his promise not to enter the campaign and assured his own victory by having Madero arrested. This final repression of political freedoms proved to be the undoing of the Porfiriato. Madero escaped from jail and issued the Plan de San Luis Potosí, calling Mexicans to arms against the Díaz regime. On November 20, 1910, armed rebellion began throughout the country, and on May 11, 1911, the Porfiriato officially came to an end when Díaz fled into exile in Europe.

See also FLORES MAGÓN BROTHERS (Vol. IV); MADERO, FRANCISCO (Vol. IV); MEXICAN REVOLUTION (Vol. IV).

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**Portales, Diego** (b. 1793–d. 1837) *Chilean businessman and political leader* Diego Portales was a businessman who led an influential group of entrepreneurs known as the *estanqueros* in the decades after independence in CHILE. He became one of the most influential leaders in government and politics, holding several cabinet positions and helping draft the CONSTITUTION OF 1833 during the era of conservative rule in the 1830s.

Portales was born on June 26, 1793 to an influential family in SANTIAGO DE CHILE. Immediately after Chile achieved independence, Portales began to build a successful business as a merchant, taking advantage of opportunities for commerce in the newly independent colonies. In 1824, his company entered into an *estanco* contract with the Chilean government, whereby the company assumed responsibility for the nation's large foreign debt in exchange for monopoly control of TOBACCO commerce. The contract provoked a backlash among liberals, who pressured the government to dissolve it. Portales's company went bankrupt, and he became convinced that a strong central government must be put in place to maintain a firm rule of law and allow the nation's ECONOMY to thrive.

In 1829, Portales and his *estanquero* allies joined forces with conservatives to oust the liberal government and back the presidency of General Joaquín Prieto (1831–41). In 1833, Portales helped craft a new conservative constitution, which helped stabilize Chile's economy and political system. Portales was serving as minister of war when Chile declared war on the PERU-BOLIVIA CONFEDERATION in 1837. As the result of a short-lived mutiny within the Chilean army, he was arrested and executed on June 6, 1837.

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**positivism** Positivism is a social theory that was originally articulated by French philosopher Auguste

Comte (b. 1798–d. 1857). It formed the ideological foundation of many Latin American governments in the final decades of the 19th century. At its most basic level, positivism argued that all fact-based knowledge must be tied to observation and experience. Proponents in Latin America used the theory to promote policies aimed at achieving order and progress.

Positivism developed from the ideas of the European Enlightenment, according to which knowledge must be based on rational thought. Comte ventured beyond the concept of rationalism by privileging the role of scientific experiment. He favored reason and logic over “metaphysic knowledge” that could not be proved. Comte's theories inspired other European philosophers such as John Stuart Mill and Herbert Spencer. Positivism was slow to take root in Latin America, largely because most nations were mired in political and economic instability throughout the first half of the 19th century. But, in later decades, relatively stable governments led primarily by liberal oligarchies embraced positivist philosophies as a way to understand their nations' histories and as a model for economic and social policies (see LIBERAL OLIGARCHY).

Comte's positivist theories presented the notion of deterministic progress to explain the evolution of human societies. Comte insisted that all societies would naturally pass through three phases of development. The first phase was the prehistoric, or theological, stage, which was characterized by small social units organized around the FAMILY. During this phase of development, economies were small and simplistic. More important, knowledge centered on religious beliefs that often led to what Comte referred to as “fictitious knowledge.” The earliest civilizations in the theological stage organized themselves around polytheistic religious systems, but those systems eventually evolved into widespread monotheism.

The second phase of development was the metaphysical stage, in which societies started to make the transition from religious to scientific knowledge. According to Comte, societies in this stage could still base their knowledge on the philosophical or metaphysical, even while believing they were engaging in empirical thought. Monotheistic RELIGIONS still dominated the way people approached knowledge, but societies organized themselves around the nation-state. The economic foundation of the metaphysical stage had developed by this phase but was still a relatively simple system and often tied to what Comte considered backward religious traditions.

The final phase of social evolution was the positive, or scientific, phase. Societies in this phase of development had developed industrial economies and had rejected the religious influence in acquiring knowledge. Comte envisioned positivistic “religions” worshipping human knowledge rather than a metaphysical being whose existence could not be proved. Societies in the positive phase broadened their organizing principles to include all of humankind rather than smaller nation-state structures.

Comte's notion of deterministic progress became an influential model for Latin American leaders. Positivism proposed that all societies would inevitably move through the three stages of progress but would do so at different rates. Latin American positivists saw industrial and secular trends emerging in the United States and Europe throughout the 19th century, while many new nations in Latin America clung to traditional "metaphysical" beliefs. They were convinced that Latin America was falling behind the rest of the world. They often measured positivistic progress in terms of tangible advances in technology and the acquisition of material goods. Latin American leaders vowed to implement policies that would allow the region to catch up. They rushed to introduce new technologies such as railroad transport, electricity, and communications systems in their countries in an effort to force progress. Many Latin American elite began to revere European material culture as a manifestation of positivist progress. French clothing,

sophisticated cuisines, and European art and theater were highly regarded as measures of progress.

Although many intellectuals and political leaders embraced the scientific doctrine, positivism faced several obstacles in 19th-century Latin America. The CATHOLIC CHURCH continued to hold considerable influence over much of the population, and Comte's principles required people to eschew their reliance on religious superstitions. Furthermore, many intellectuals and politicians saw a disconnect between the educated elite and the rural and urban poor, made up of the indigenous and colored population. They believed that while many among the elite in Latin America were ready to move to stage three of deterministic progress, the wider population was lagging behind. Because of this, positivism took on a tone of racism and ethnic discrimination in some areas of Latin America.

Positivism was most prominent in MEXICO and BRAZIL, while in countries such as CHILE, ARGENTINA, and CUBA the philosophy played a lesser role. Positivism



Positivist regimes in the late 19th century aimed to portray their nations to the rest of the world as advanced and modern. This photo shows the Argentine and Brazilian pavilions from the 1889 Paris Exposition. Many Latin American nations used the exposition as an opportunity to showcase their versions of modernity in the late 19th century. (*Library of Congress*)

was first promoted in Mexico by philosopher and intellectual GABINO BARREDA, who had studied in Europe and become a close colleague of Comte. Barreda wrote a number of essays promoting positivist thought and eventually accepted a position under liberal president BENITO JUÁREZ to reform the Mexican educational system according to positivist tenets (see EDUCATION). Barreda founded Mexico's National Preparatory School, which trained an entire generation of positivist intellectuals known as *CIENTÍFICOS*. Many *científicos* later became advisers to dictator PORFIRIO DÍAZ, convincing the leader to embrace positivism as a governing principle.

Mexican positivists, in particular, believed that rural NATIVE AMERICANS lagged behind the rest of the country and were preventing Mexico from fully entering the final stage of deterministic progress. Many of the social policies implemented during the PORFIRIATO were intended to force the indigenous to catch up to the rest of the country. In the meantime, Díaz and the *científicos* attempted to disguise the indigenous to make the rest of the country look "modern." The Díaz administration passed sumptuary laws and vagrancy regulations to try to control the behavior and appearance of the nation's poor (see CLOTHING; FOOD). These laws were also intended to make the nation more appealing to foreigners. Mexico's positivists believed that one of the most effective ways to bring rapid progress to the nation was to invite foreign investment into the ECONOMY. Díaz passed laws granting exceptional concessions to business interests from the United States and Europe, and foreign involvement in the economy intensified.

In Brazil, positivist ideology was particularly important in ending the monarchy and ushering in the republic. Unlike Mexico, where positivism resonated primarily in intellectual circles, in Brazil, the ideology was embraced by the emerging middle class as a way to exert more influence over national development. BENJAMIN CONSTANT, the head of the RIO DE JANEIRO military academy, is generally credited with promoting the philosophy in Brazil. As the rest of mainland Latin America ushered in republican governments in the early decades of the 19th century, Brazil remained closely tied to Portugal. Even as leaders of an independent Brazil severed formal ties with Europe, the persistence of the colonial system could be seen in the establishment of a Portuguese-descended monarchy. Positivism flourished as many came to understand the nation's past in the context of Comte's deterministic progress. Brazilian positivists argued that the nation had progressed from the first stage of theological thought with the end of colonialism, but that the continuation of monarchy caused the nation to lag in the second stage. Positivists argued for the establishment of a republic as the only way to move Brazil into the final phase of progress.

Brazilian intellectuals also posed abolitionist arguments within the context of positivism, marking another difference between the Mexican and Brazilian movements. Brazilian positivists argued in favor of a more egalitarian racial system and promoted miscegenation as the nation

moved toward the abolition of SLAVERY in the 1880s. Both Brazilian and Mexican national leaders emphasized European technological and cultural progress and favored foreign investment as a mechanism for speeding the pace of modernization and progress in their own countries.

In all areas of Latin America, positivists continued some of the ideological trends initiated by liberals in earlier decades. In particular, positivists pushed for the strict separation of church and state. Positivist influence is evident in educational policies in countries such as Chile and Argentina. The philosophy was also used by independence leaders in Cuba in the late decades of the 19th century to argue for a break from Spain.

See also ENLIGHTENMENT (Vol. II).

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**Progressive Party** From 1883 to 1895 in ECUADOR, the political faction called the Progressives, which included moderates from both the Liberal and Conservative Parties, sought to outline a third way for Ecuadorean politics. After assisting in the overthrow of a MILITARY dictator, businessman and landowner José María Plácido Caamaño, the country's first Progressive president, enacted a moderate program that continued many of GABRIEL GARCÍA MORENO's policies while embracing other moderate liberal reforms.

Caamaño (1883–88) and his successor, Antonio Flores (1888–92), a diplomat and son of JUAN JOSÉ FLORES, continued to employ foreign monks and nuns to expand EDUCATION. Caamaño rededicated Ecuador to the cult of the Sacred Heart of Jesus, a Catholic devotion that originated in Europe in the 17th century and was intended to appeal to the popular masses. This had been one of García Moreno's most proclerical actions, and he began construction of the National Basilica in QUITO to house the cult. At the same time, the Progressives abolished the tithe as Liberals demanded, making the clergy dependent on government subsidies.

The Progressives also continued their predecessors' modernization project, adding to the railroad and road networks, and constructing a national telegraph system. Flores

tried valiantly to arbitrate the ongoing border conflict with PERU but failed. The Progressives furthered Ecuador's quest for a national identity by creating a national currency, the sucre, named for the nation's independence hero.

The final Progressive president, Luis Cordero Crespo (1892–95), became embroiled in foreign policy controversies in 1895. Although he resolved a debt issue with Great Britain that dated back to the 1820s, Ecuador fell into default again when CACAO export revenues declined in 1894. The president then became involved in a scheme to sell a vessel to Japan, which led directly to the LIBERAL REVOLUTION of 1895. By then, extreme elements in both the Conservative and Liberal Parties made compromise unworkable, and the Progressive Party died.

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**Puebla** Puebla is a city and state located in Central MEXICO. The city of Puebla was founded in 1531 as the Spanish consolidated control over its new colonies in the Americas. It grew quickly as an important stop along the land route between MEXICO CITY and the port of Veracruz. Puebla boasted a strong Spanish presence throughout the colonial period. The city was a mainstay of Crown and church authority, the latter evidenced by the large number of churches, monasteries, and convents in the region. The nun, scholar, and poet Sor Juana Inés de la Cruz lived in Puebla in the late 17th century.

The residents of Puebla generally remained loyal to royalist forces during the wars for independence. The city was one of the last holdouts against insurgent forces in 1821. Puebla's strong religious traditions made the city a natural base for Mexico's conservative political movement, which emerged in the decades following independence. Conservatives advocated preserving the power structures that had defined colonial Mexico and defended the long-standing social and legal privileges held by members of the CATHOLIC CHURCH. As a result of the city's conservative heritage, elite leaders in Puebla often challenged liberal national leaders in Mexico City. The WAR OF REFORM was a violent civil war between Liberals and Conservatives fought between 1858 and 1861. Puebla was one of the first conservative areas to rise up against the Liberal government, and the city became an important seat of Conservative resistance during the war. Church leaders in Puebla and in other regions of the country backed the conservative movement by contributing financial resources to its army and excommunicating citizens who supported and enforced liberal policies. Liberal forces under BENITO JUÁREZ eventually triumphed in the civil war, but divisions between the two sides remained.

Puebla continued to play an important role in the conservative-liberal struggle when French emperor

Napoléon III sent an invasion force to Mexico in 1862 on the pretext of collecting outstanding debt. Napoléon intended to establish an empire in the Americas, and French troops occupied Mexico in an era known as the FRENCH INTERVENTION. As it became clear that Napoléon's army was preparing to invade, Mexican leaders scrambled to organize a defense strategy. The French army began its attack by blockading the port of Veracruz in January 1862. Throughout the spring, an invasion force of 6,000 seized major cities along the coast and began the march toward MEXICO CITY.

French leaders expected the traditionally conservative city of Puebla not to pose any significant resistance, but Juárez dispatched a large defensive force under General Ignacio Zaragoza to halt the French advance. French leaders—familiar with the city's recent role in the War of Reform—hoped that it would rise up against the Juárez government and join the Conservatives in backing an imperial and monarchical political shift. The two armies faced off on May 5 at Fort Guadalupe and Fort Loreto on the outskirts of the city. Fierce fighting by Mexican forces was aided by poor strategy decisions on the part of French MILITARY leaders. Defenders of the Mexican forts held off the French, and future Mexican president PORFIRIO DÍAZ led the cavalry forces to victory. The French suffered hundreds of casualties and retreated to Veracruz. Victory in the Battle of Puebla allowed the Mexican military to delay the French invasion of Central Mexico and the occupation of Mexico City for more than a year. It was an even greater symbolic victory, as word of Zaragoza's success spread throughout Mexico, creating a sense of national pride. Juárez declared May 5 a national holiday to commemorate the military triumph, hence the origin of today's CINCO DE MAYO celebration.

Puebla reaped the benefits of government policies aimed at encouraging economic growth and foreign investment during the PORFIRIATO of the late decades of the 19th century. TRANSPORTATION networks sprang up throughout the country, connecting Mexico City and other interior urban areas with the coast. Puebla's location en route between the capital city and Veracruz on the Gulf coast allowed it to experience unprecedented growth as TRADE and transportation networks developed. Puebla became home to a number of foreign immigrants toward the end of the century. The city also profited from a new interest in SPORTS AND RECREATION among the nation's elite and foreign travelers. Outdoor enthusiasts embarked on weekend climbing expeditions to Puebla State's famous volcano, Popocatepetl.

Puebla continued to play a prominent role in Mexican history throughout the 20th century. Strains within the industrial and agrarian sectors of Mexican society that propelled the 1910 revolution were particularly visible in the city. Puebla continued to be a center of conservative politics throughout the 20th century.

See also PUEBLA (Vol. II).

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**Puerto Rican Revolutionary Committee** See COMITÉ REVOLUCIONARIO DE PUERTO RICO.

**Puerto Rico** Traditionally a location of great MILITARY importance for protection of the Caribbean Sea and the Americas and later as a source of SUGAR, COFFEE, and TOBACCO, Puerto Rico was a highly valuable possession of the Spanish Crown throughout the 19th century. As the wars of independence raged throughout the rest of Latin America, Puerto Rico remained under Spanish control until it was lost to the United States, following the WAR OF 1898.

**A TASTE OF POWER**

During Napoléon Bonaparte's occupation of Spain, from 1807 until 1813, the royal family and most members of the Spanish Court were placed under house arrest. The remaining members of the Spanish government met at Cádiz in opposition to French rule. The national legislative body, the Cortes, met on September 24, 1810, inviting representatives from the Spanish colonies to join the meeting for the first time. Ramón Power y Giralt (b. 1775–d. 1813) was selected by the Puerto Rican government to represent its interests at the Cortes of Cádiz, namely to advocate for colonial reforms granting Puerto Rico more control over its internal affairs. Power successfully convinced the other legislative members to allow Puerto Rico more autonomy, which resulted in what became known as the Power Law, or Ley Poder. These governmental reforms decentralized Spanish control over Puerto Rican commerce and formally gave Puerto Rican-born Spanish (creole) citizens the same legal and personal rights as the elite Iberian-born (peninsular) Spaniards.

However, this taste of new freedom would not last, as the constitutional government formed during the absence of Spanish king Ferdinand VII was abolished on his return to power in May 1814. The Spanish government and its colonies returned to an absolute monarchy, but many of Spain's colonies in the New World grew resentful of the loss of freedom that they had enjoyed in the king's absence. Over the next few decades as the wars of independence raged throughout Latin America, Puerto Rico remained loyal to the Spanish Crown only because of a series of political reforms enacted by King Ferdinand himself.

**GROWTH AND IMMIGRATION**

To discourage the growing separatist movements across Latin America from taking root in PUERTO RICO and to stimulate new economic growth on the island, on August 10, 1815, King Ferdinand proclaimed the Cédula de

Gracia, or ROYAL DECREE OF GRACE. Under the decree's provisions, Puerto Rico was granted a number of economic freedoms to encourage its TRADE with other Latin American nations and the United States. The royal decree also for the first time allowed colonists of non-Spanish origin to immigrate to the island and to earn Spanish citizenship if they remained there for a set period of time. These non-Spanish settlers were offered six acres of land for each FAMILY member and three acres for each slave brought to Puerto Rico as a further incentive to help increase the island's small, stagnant population level.

The decree greatly stimulated Puerto Rico's economic growth and helped extinguish much of the separatist fervor on the island. The Puerto Rican sugar TRADE, primarily with the United States, greatly increased in the years after its passage. Trade with the United States had been previously stifled by disturbances in shipping during the War of 1812 but afterward grew to surpass the record trade revenues set in the years before its onset. Overall, Puerto Rican foreign trade revenues surged as a result of the royal decree, growing 800 percent from 1813 to 1818. Thanks to the record influx of foreign trade revenues, Puerto Rico's primarily agrarian society could now import modern farming equipment, as well as link areas of sugar, coffee, and tobacco production to major ports such as Ponce, Mayagüez, Fajardo, Cabo Rojo, Humacao, and San Juan through the construction of new roads and railroad lines. The decree also quickly turned the island into a cultural and racial melting pot. Throughout the 19th century, colonists from across Europe, Latin America, Africa, and even Asia made their way to the tiny island in search of fortune and adventure.

Not only was Puerto Rico's population and economic strength growing as a result of the royal decree, but it acquired new territory during this period. In 1811, Puerto Rican governor Salvador Meléndez initiated a series of military actions against the neighboring VIEQUES ISLAND as part of a formal attempt by Spanish authorities to impose the rule of law on the pirates and thieves who had taken up residence there. Following the military cleanup of the island by Spanish troops, Vieques was officially annexed to Puerto Rico. Large-scale sugar plantations were established once Vieques was permanently settled, increasing the island's population through the importation of thousands of African slaves. Many of these slaves were brought from the neighboring British island colonies of St. Thomas, St. Croix, and St. Kitts, and their work on the plantations helped to rapidly turn both Vieques and Puerto Rico into highly profitable, but largely single-crop, agricultural economies (see CARIBBEAN, BRITISH).

**RESENTMENT AND REVOLUTION**

Following the death of King Ferdinand VII in 1833, the Queen Mother Maria Christina of Bourbon (b. 1806–d. 1878) allowed for the re-creation of the Cortes to curb growing liberal dissatisfaction with Spanish royal rule.

The Cortes began work on a new constitution and completed it by 1837, but the representatives of CUBA, Puerto Rico, and the Philippines were excluded from the process. Denied a voice in the Spanish government yet again, it was not until the 1860s that Spain once more invited colonial representatives to plead their case for greater local autonomy. When the Cortes convened on the subject of possible new colonial reforms in 1867, the matter of Puerto Rican autonomy was once more denied for the time being, to be reviewed again at a later date. This dismissal of the Puerto Rican representatives' demands led many to believe that revolution was now the only real means of achieving the freedoms they desired.

This belief led to the most famous uprising in Puerto Rican history the following year. Organized by revolutionary Puerto Rican nationalists, the revolt known as the GRITO DE LARES was an armed rebellion against Spanish control of Puerto Rico launched on the night of September 23, 1868. Its chief planner was RAMÓN EMETERIO BETANCES, a Puerto Rican physician in political exile but in communication with fellow revolutionaries on the mainland.

On the night of the 23rd, around 400 poorly armed men gathered outside the town of Lares, and at midnight, they arrested the local Spanish leaders, declared the establishment of the Republic of Puerto Rico, and created a new provisional government. The rebellion did not, however, gain the support it needed from the local populace or from abroad in order to defeat the Spanish troops on the island. On the outskirts of the town of San Sebastián de Pepino, the Spanish army killed or captured the majority of the rebel army less than 24 hours after the uprising had begun. This would be the first and last major uprising against the Spanish Crown in Puerto Rico. Liberal reformers resigned themselves to using political means to gain freedoms for their homeland.

### REMOVAL AND REFORMS

Hampered by the inflexible and corrupt court of Spanish queen Isabella II (b. 1830–d. 1904), the Spanish military removed her from the throne in 1868 and installed a new liberal Spanish government and constitution. This event had direct repercussions for Puerto Rico: It allowed for the formation of new political parties on the island. Both the LIBERAL REFORMIST PARTY and the LIBERAL CONSERVATIVE PARTY were formed in 1870, but with very different views on the best course of action for the future of Puerto Rico. Liberal Reformists wanted to change the status quo, which allowed privileges for Spanish-born peninsulars in respect to political and military appointments, social status, and legal rights. Conversely, Liberal Conservatives wanted to maintain the status quo and retain all the privileges that came with it. Both parties worked against each other for the next 30 years, collaborating with Spanish political parties within the Cortes to push their agendas.

More liberal reforms were passed in an attempt to further curb the tide of growing anti-Spanish sentiment in Puerto Rico. The MORET LAW, named for the minister of colonial affairs, Segismundo Moret y Prendergast (b. 1838–d. 1913), was issued by the Spanish government on July 4, 1870, in regards to all its remaining colonies. The law stated that all government-owned slaves, all slaves over the age of 60, all slaves born after September 17, 1868, and all slaves who served in the Spanish army during the recent unrest in Cuba were now set free. Spain eventually went as far as to abolish SLAVERY altogether in 1873, freeing some 40,000 slaves from Puerto Rico. Following the death of conservative Spanish prime minister Antonio Cánovas del Castillo (b. 1828–d. 1897) at the hands of Spanish terrorists in August 1897, the new liberal prime minister, Práxedes Mateo Sagasta (b. 1825–d. 1903), granted autonomy to Puerto Rico via a royal decree on November 25, 1897. The freedom that Puerto Ricans had sought for nearly a century would be short lived, however, as events between larger nations intervened in less than a year.

### U.S. ACQUISITION

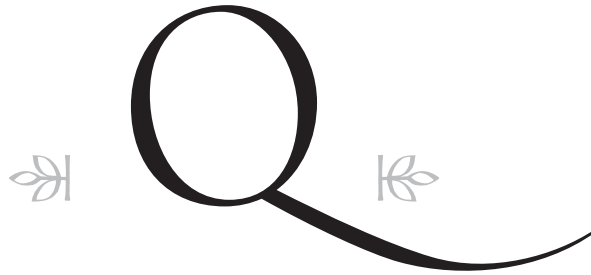
With the outbreak of war between the United States and Spain on April 19, 1898, Puerto Rico endured a brief and uneventful bombardment by U.S. naval forces followed by formal occupation beginning on July 25. When the Treaty of Paris between Spain and the United States was signed on December 10, 1898, Puerto Rico came under the military control of the United States. Spain renounced all claims to the island, leaving independence or assimilation into the United States as possibilities.

Pro-independence advocates such as Eugenio María de Hostos (b. 1839–d. 1903) and Betances beseeched U.S. president William McKinley to grant Puerto Rico independence. Nevertheless, many Puerto Ricans viewed acquisition by the United States as a chance for further liberal reforms and for fusion with a wealthy country they otherwise knew little about. The new autonomous government had had little chance to prove itself during the previous year, and the stability afforded by U.S. governance appealed to those who feared economic and social chaos once U.S. military occupation ended. From the United States's point of view, Puerto Rico was both racially and economically less than desirable, but its strategic location in the Caribbean made it potentially useful for the protection of U.S. interests in Latin America.

See also PUERTO RICO (Vols. I, II, IV).

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**Quanta Cura** See SYLLABUS OF ERRORS.

**Quiroga, Juan Facundo** (b. 1788–d. 1835) *Argentine caudillo and regional leader* Juan Facundo Quiroga was the CAUDILLO of La Rioja Province in ARGENTINA in the early years after independence. He was a member of the alliance of *FEDERALES* who supported JUAN MANUEL DE ROSAS and earned a reputation for his ruthless and tyrannical tendencies. Quiroga was immortalized through the literature of future president DOMINGO F. SARMIENTO in his 1845 opus *Facundo, or Life in the Argentine Republic in the Days of the Tyrants* (*Facundo: Civilización y barbarie en las pampas argentinas*).

Quiroga was born into a rural family in La Rioja Province. He served in local militias and fought against the Spanish in Argentina's independence movement. He developed a reputation as a ruthless local caudillo, with the strength and physical prowess to match. According to local stories, Quiroga fought and killed a cougar barehanded, earning him the nickname the "Tigre de los Llanos" (Tiger of the Plains). In the aftermath of independence, Quiroga emerged as a defender of the rights of the provinces and frequently found himself at odds with the *unitario* leadership in Buenos Aires (see *UNITARIOS*). When BERNARDINO RIVADAVIA became president in 1826 and began initiating highly centralized policies, Quiroga joined the *federales* opposition. Between 1827 and 1829, battles raged between the *unitarios* and *federales*. Eventually, the federalist alliance put down most of its opposition and brought Rosas to power as governor of BUENOS AIRES.

During Rosas's first administration, Quiroga led national MILITARY forces on several campaigns to subdue

remaining *unitario* strongholds. The caudillo from La Rioja became one of Rosas's most important allies. Quiroga eventually relocated to Buenos Aires, where he became further involved in politics after Rosas left office in 1832 to pursue a series of military campaigns to secure the Argentine countryside. Quiroga began to speak publicly about the need to establish a constitutional government and compromise with political opponents. By 1833, many influential federalist leaders considered Quiroga a strong candidate to lead the nation into constitutional DEMOCRACY.

In December 1834, Quiroga traveled to the northern province of Córdoba to mediate a dispute between local leaders. While on that trip, he was detained by a group of gunmen. The caudillo was shot and killed on February 16, 1835. Rosas used Quiroga's death as a pretext for returning to power and ruling in an even more autocratic fashion. Some speculated that Rosas orchestrated Quiroga's assassination because he opposed the local caudillo's plans to move the nation toward constitutional government.

A decade after Quiroga's death, Argentine writer and intellectual Sarmiento chronicled Quiroga's life in his literary masterpiece *Facundo* while in exile in CHILE. As a precursor to the Latin American novel, *Facundo* was a collection of essays that provided a critical biography of the "Tiger of the Plains." Sarmiento pointed to Quiroga's tyranny to argue that Argentina's caudillos ruled as barbarians. The narrative of Quiroga's life also served as a broad denunciation of caudillo rule in general and of the Rosas dictatorship in particular. It is considered one of the greatest works of Latin American LITERATURE.

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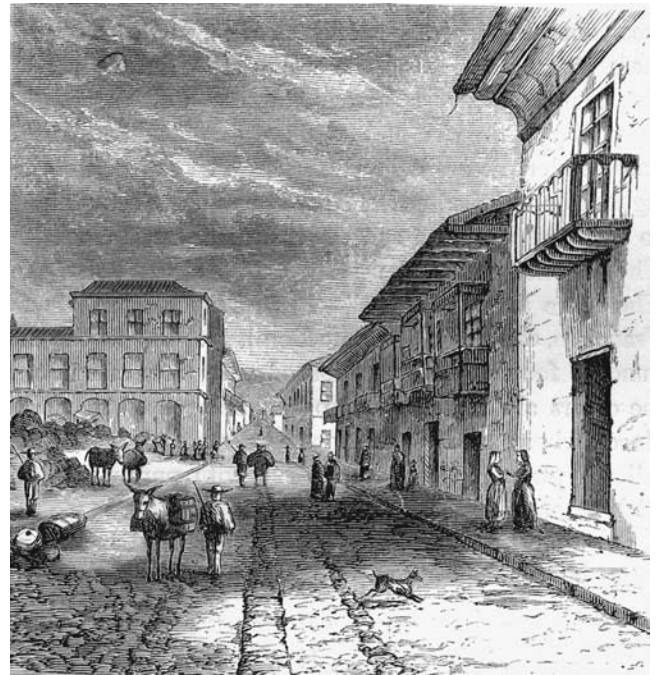
**Quito** Founded in 1533 on the ruins of the capital of the northern half of the Inca Empire, Quito became an administrative center during the colonial period. Francisco de Orellana left from Quito in 1541 to explore the Amazonian Basin, giving ECUADOR a claim to that region until the final border settlement with PERU was reached in 1998. Lacking a dynamic ECONOMY in the colonial era, Quito evolved into a regional capital and a very religious community divided into neighborhoods dominated by churches such as San Francisco, Santo Domingo, and La Compañía in what today is the Historic Center.

Quito achieved some renown early in 1809 as the first city in the Spanish Empire to declare its autonomy from the Crown. This rebellion and the one that followed a year later were brutally suppressed. As a result, Quito lost much of its elite leadership and was quiet through the wars of independence. Ultimately, a Venezuelan, General ANTONIO JOSÉ DE SUCRE, liberated Quito and what would become the nation of Ecuador at a battle fought on the slopes of Mt. Pichincha on the outskirts of Quito on May 24, 1822.

Quito changed little until the administrations of GABRIEL GARCÍA MORENO (1861–65, 1869–75). García Moreno paved some of the central streets, flattened some hills, filled gullies, and brought electric lighting and potable water to parts of the city. He began construction of two well-known public buildings, the main prison and the astronomical observatory at the northern edge of the city, the latter completed during the Progressive era (1883–95).

Quito changed rapidly after the LIBERAL REVOLUTION of 1895. One of José Eloy Alfaro Delgado's modernization projects was to construct a railroad that connected Quito to GUAYAQUIL. Completion of the QUITO–GUAYAQUIL RAILROAD in 1908 allowed the capital to develop as a commercial center and to expand to both the north and south. (Mountains hemmed in the city to the east and west.)

New prosperity in the early 20th century caused Quito to evolve in dramatic ways. A series of cottage industries grew up around the train station on the south side of the city. Attracting migrants from nearby rural areas, the southern part of the city housed these new arrivals and became a working-class district (see MIGRATION). Those who profited from the new industries and commercial traffic going through Quito abandoned their traditional homes in the center for new opulent mansions, wide boulevards, and green parks to the north of the Alameda where the observatory stood. Shops and businesses also soon migrated to “New Town.”



Drawing of a street scene in Quito, Ecuador, circa 1870 (From *The Andes and the Amazon or Across the Continent of South America*, by James Orton. New York: Harper & Brothers, 1870, p. 63)

See also ALFARO DELGADO, JOSÉ ELOY (Vol. IV); INCAS (Vol. I); QUITO (Vol. II).

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**Quito–Guayaquil Railroad** The Quito–Guayaquil Railroad, begun in the 1870s and completed in 1908, was one of the few development projects that coastal and highland elites in ECUADOR found mutually beneficial. Coastal elites hoped that the railroad would transport LABOR from the highlands to work on their increasingly bountiful CACAO plantations, while highland elites believed that the line would distribute their agricultural products to coastal markets (see TRADE; TRANSPORTATION).

Two problems slowed the railroad project until the 20th century. First, Ecuador's mountainous topography and devastating rainy seasons hampered construction. Second, the country's shaky finances, coupled with a large foreign debt that made Ecuador uncreditworthy, hamstrung the costly project. Finally, in 1897, U.S. railroad entrepreneur Archer Harmon contracted to build the railroad and persuaded British investors to underwrite the construction by pledging significant portions of cacao tax revenues to guarantee the project.



Beginning on the relatively flat coastal plain, the railroad reached to the sierra via double switchbacks up the “Devil’s Nose” to Alausí, a route that has been described as one of the greatest railroad engineering feats ever. Construction challenges to the Quito-Guayaquil Railroad included also labor problems, because indigenous workers were reluctant to work far from their homes, forcing the government to rely on coercion and to bring in Jamaican

workers. Nevertheless, the Quito-Guayaquil Railroad helped Ecuador achieve a national identity by providing a measure of physical unity in the country.

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# R

**Reforma, La** (1855–1858) La Reforma refers to the period between 1855 and 1858 in MEXICO when Liberals took power and introduced a series of hardline liberal reforms. Those measures, which were incorporated into the CONSTITUTION OF 1857, triggered a reaction among Conservatives that eventually culminated in a three-year civil war known as the WAR OF REFORM.

When ANTONIO LÓPEZ DE SANTA ANNA returned to power as a Conservative dictator in 1853, many prominent Liberal intellectuals escaped into exile in New Orleans. Led by BENITO JUÁREZ and Juan Álvarez, the group launched the Plan de Ayutla to remove Santa Anna from power and replace the nation's conservative political and social structures. The REVOLUTION OF AYUTLA drove Santa Anna from power in 1855, and the new Liberal government under the presidency of Álvarez immediately began drafting legislation to dismantle the conservative system.

The foundation of La Reforma was the Reform Laws, a series of liberal measures put in place in 1855. Three main laws, the Juárez Law, the Lerdo Law, and the Iglesias Law provided the basis for a period of aggressive liberal reform that often threatened the privileges, resources, and wealth of the conservative elite.

## JUÁREZ LAW

The Juárez Law was introduced by Juárez, who held the post of minister of justice. Enacted in 1855, the Juárez Law reined in the clergy and members of the MILITARY by eliminating ecclesiastical and military *FUEROS* that had allowed them to stand trial under a separate court system. The Juárez Law limited the jurisdiction of ecclesiastical and military courts to church and military law. Clergy and military personnel accused of civil or criminal viola-

tions now had to go through the same judicial process as all other citizens.

## LERDO LAW

The Lerdo Law was conceived by the minister of the treasury, MIGUEL LERDO DE TEJADA, in 1856 as a way to bring the CATHOLIC CHURCH further under government control and raise money for the government at the same time. The law limited the ability of corporations, or legally defined groups, to own and administer property. Lerdo was inspired by the agricultural ideal of the yeoman farmer promoted in the United States by Thomas Jefferson, which argued that individuals who own private property will be responsible citizens and will put the land to its most productive use. Most of Mexico's arable land in the 1850s was owned by the Catholic Church or other corporate groups that rented it out to agricultural interests. Lerdo and many in the Liberal administration saw this as a hindrance to economic development.

Under the Lerdo Law, the church and other corporations that possessed landholdings beyond their immediate needs for day-to-day operations were forced to sell the excess property. The Catholic Church had to divest itself of all real estate aside from church buildings, monasteries, convents, and clerical residences. Municipal and state governments also had to sell off all nonessential properties, keeping only government buildings, city halls, jails, and the like.

The Lerdo Law produced two important consequences. First, it further alienated the already agitated conservative and church elite. Second, it aggrieved traditional indigenous communities by dispossessing them of lands, or *EJIDOS*, they had held communally for centuries. After the church, indigenous communities owned the

most property in the 1850s, and the Lerdo Law eliminated the legal protection they had enjoyed since early in the colonial period. Since the surplus land was sold at public auctions, most poor Amerindian peasants who had worked the *ejidos* were not able to purchase land and become private property owners.

### IGLESIAS LAW

The Iglesias Law was formulated by Minister of Justice José María Iglesias (b. 1823–d. 1891) in 1857. It aimed to wrest control and influence over the population from the church and give it to the state. To do this, the Iglesias Law created a civil registry for births, marriages, and deaths to be administered by the government. The church had traditionally overseen and recorded important events through its administration of the sacraments. This function gave the church both knowledge and control over the vital statistics of the population and enriched church coffers through the fees the clergy generally charged for such sacraments. Iglesias and other leaders believed that the national government should have ultimate authority and should control record-keeping functions related to the population. They also saw registry fees as a way for the government to raise desperately needed funds. The Iglesias Law limited the church's ability to charge fees for the administration of sacraments and also placed cemeteries under government control. Elite families, in particular, who had made large cash payments to the church for burial plots on holy ground now worried that being relegated to a public cemetery would threaten their spiritual well-being.

### REFORM LAWS AND CONSTITUTION OF 1857

The Reform Laws were intended to promote individual liberties and equality, two tenets that were foundations of the liberal ideology of the 19th century. As they took shape, the debate over their merits revealed fissures among the Liberal leadership. Indeed, that debate marked one of the clearest articulations of the liberal political agenda. Until the era of La Reforma, the church had been more powerful and more visible than the national government, and nearly all Liberal leaders agreed that in order for the nation to prosper, the state must be the strongest and most powerful institution in people's lives. Ardent liberal *purros* wanted to reverse that trend immediately with radical reform. The more cautious and restrained *moderados*, however, urged a more gradual and conciliatory approach. The debates between the two sides resulted in such antagonism that shortly after the promulgation of the Juárez Law in 1856, President Álvarez and several members of his cabinet resigned in frustration. IGNACIO COMONFORT, a steadfast *moderado*, assumed the presidency to oversee the rest of the era of La Reforma.

The Reform Laws paved the way for the staunchly liberal Constitution of 1857 that rounded out the era of La Reforma. Leaders convened a constitutional convention in 1856, and delegates fashioned the document in

the spirit of the constitutions of Spain and the United States. Generally, the Reform Laws and the constitution are seen as a victory for the *puro* faction of the Liberal leadership. All three major Reform Laws were incorporated into the Constitution of 1857, which also included additional measures to safeguard individual freedoms and curtail the authority of the Catholic Church. Unlike the liberal CONSTITUTION OF 1824, the new document did not uphold the status of the Catholic Church as the official RELIGION of the nation. It addressed many of the concerns of social liberals in more than 30 articles outlining individual liberties such as freedom of speech and freedom of the press.

Weaknesses within the Liberal leadership that surfaced during the promulgation of the Reform Laws and the drafting of the constitution became even more pronounced once the document was signed, with *moderados* urging that its implementation be delayed. Elites on both sides of the political divide attempted to win the support of the general populace. Church leaders preached against the document and threatened to excommunicate parishioners who abided by it. Liberal leaders, on the other hand, dismissed any public employees who did not swear loyalty to it.

Tensions erupted further in December 1857 when *moderado* Liberal president Comonfort negotiated a truce with Conservative general Félix María Zuloaga in the Plan de Tacubaya. The compromise declared that the constitution would not be implemented, and in exchange, religious leaders would withdraw the threat of religious censuring against liberal supporters. Comonfort arrested several members of his own cabinet and allied with Conservative leaders to rework the constitution. After only a few months, the embattled president resigned and retreated into exile.

The departure of Comonfort complicated the political landscape even more as Conservatives recognized General Zuloaga as president, while Liberals claimed that presidential succession as defined in the constitution passed to Juárez as the chief justice of the Supreme Court. With the political extremes recognizing a different leader as president, civil war was virtually inevitable.

The era of La Reforma came to an abrupt halt with the outbreak of a protracted and bloody civil war. During the War of the Reform, the ideological differences that had pitted Liberals and Conservatives against each other gave way to violence and destruction. The three-year war left the nation financially devastated. Juárez and the Liberals eventually were able to claim victory in the conflict, but shortly after reinstating the Liberal government, the nation faced yet another threat in the FRENCH INTERVENTION OF 1862–67. The era of La Reforma and the civil war that resulted ultimately weakened the nation and left it open to foreign invasion. While La Reforma refers to reform measures passed between 1855 and 1857, Juárez and his coalition of Liberal allies were not able to implement those reforms for more than a decade.

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**Regency** (1831–1840) The Regency in BRAZIL refers to the period from 1831 to 1840 when a series of regents officially ruled Brazil until heir apparent PEDRO II (r. 1831–89) came of age. During the Regency, Brazil endured a number of regional uprisings that threatened to destabilize the recently independent nation. The central government was also tested as those in the inner circle jockeyed for power. The Regency ended when Pedro II was crowned at the age of 15; the young emperor brought a semblance of unity and stability to the nation.

PEDRO I (r. 1822–31)—the first emperor of the independent nation—had grown increasingly unpopular as a result of his autocratic interference in the writing of the CONSTITUTION OF 1824. He was forced to abdicate in 1831, when his son and heir apparent was only five years old. Brazil then entered the era of the Regency. Political conflicts quickly surfaced as those who wanted to see the return of Pedro I and a reaffirmation of monarchical power lined up against those who wanted fundamental reform and an expansion of provincial autonomy. An elected three-man regency ruled in the place of Pedro II until 1834, when new legislation restructured government power. A constitutional amendment stipulated a one-man regent and abolished the traditional advisory body known as the Council of State. The amendment also strengthened the authority of provincial politicians.

The disputes over centralized power and provincial autonomy plagued the Brazilian government throughout the 1830s. The ideological crisis came to life in a series of provincial revolts including the War of the Cabanos in Pernambuco and the WAR OF THE FARRAPOS in Rio Grande do Sul. Infighting during the Regency reached a new level of urgency when the *farrapos* rebels declared independence and formed the Piritini Republic. Hoping to end the provincial crisis, legislators introduced new laws declaring that Pedro II was of age. The teenager took power on July 23, 1840, and was formally crowned the following year. Pedro II's assumption to the throne ended the Regency, and many of the governing elite hoped it would bring an end to the unrest that was dividing the EMPIRE OF BRAZIL.

**Further reading:**

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**religion** Religion in Latin America has historically been dominated by the CATHOLIC CHURCH. Spanish and Portuguese conquistadors in the 15th and 16th centuries justified the conquest and settlement of Latin America in the name of bringing Christianity to the NATIVE AMERICANS. Church leaders accompanied conquerors and settlers, and missions, chapels, and cathedrals proliferated. Priests worked to diminish the role of deeply rooted native religions and replace them with Christianity. To carry out those tasks, church leaders were granted extraordinary rights and privileges in Latin American society. As a result of church privilege, religious and political authority in Latin America remained intricately intertwined throughout the colonial era. In the 19th century, many new governments took steps to reduce the influence of the Catholic Church.

After independence, liberal leaders sought to discard many of the traditional power structures that had defined the Spanish colonies. Inspired by the ideas of the European Enlightenment, Latin American liberals believed that the long-standing influence and power of the Catholic Church was preventing progress in the new nations. Governments in MEXICO, ARGENTINA, PERU, and elsewhere attempted to introduce liberal reforms that would erase the legal and social privileges (*FUEROS*) traditionally enjoyed by members of the church. Liberal reforms also aimed to promote economic growth by dismantling church landholdings and using them to create nations of independent farmers. Church leaders and the conservative elite opposed these measures, and confrontations between liberal and conservative factions often turned violent. Civil wars and political instability plagued many Latin American nations in the first half of the 19th century as the conflict between liberal and conservative ideologies played out (see CONSERVATISM; LIBERALISM).

By the end of the 19th century, liberal leaders had consolidated control over most Latin American nations. The rise of liberal oligarchies in Latin American governments coincided with a weakening of the Catholic Church's position in politics and society (see LIBERAL OLIGARCHY). Civil institutions began to replace religious ones as the foundation for recording vital statistics—such as marriages, births, and deaths—and as the administrators of social welfare services—such as hospitals, schools, and orphanages. Even though the institutional influence of the church diminished in the last half of the 19th century, Latin America remained a predominantly Roman Catholic region. Protestant faiths did not start gaining ground in the region until well into the 20th century.

Despite the historically dominant position of the Catholic Church, remnants of native religious practices survived throughout the 19th century. During the

colonial period, local indigenous groups often retained their native religious heritage by blending their ancestral practices with those of Catholicism. In areas with large slave populations, African religious rituals also made their way into local practices. Church leaders attempted to suppress these syncretic practices in the colonial period, and the indigenous often found clever ways of hiding their native traditions. Nevertheless, many local religions representing a fusion of indigenous, African, and Catholic beliefs emerged and survived into the 19th century. As religious freedom became more widespread, many of those hybrid religions thrived. Some examples include SANTERIA in CUBA, VODOU in HAITI, and CANDOMBLÉ in BRAZIL.

See also ENLIGHTENMENT (Vol. II); RELIGION (Vols. I, II, IV); SYNCRETISM (Vol. I).

#### Further reading:

Enrique D. Dussel. *A History of the Church in Latin America: Colonialism to Liberation (1492–1979)* (Grand Rapids, Mich.: Eerdmans, 1981).

**Republican Party, Brazil** See REVOLUTION OF 1889.

**Rerum Novarum** Rerum Novarum was a papal encyclical issued by Pope Leo XIII on May 15, 1891. The document was titled “Rights and Duties of Capital and Labor” and offered the first official statement of the CATHOLIC CHURCH’s position on working-class conditions after the onset of rapid INDUSTRIALIZATION. In Latin America, the Rerum Novarum was seen as part of the church’s attempt to combat the social and economic trends of LIBERALISM that had taken root in the last half of the 19th century. It followed the more overt criticism of liberal policies published in the 1864 SYLLABUS OF ERRORS issued by Pope Pius IX.

Throughout much of the 19th century, liberal intellectuals in Latin America had challenged traditional-minded conservatives over the direction that the newly independent nations should take. Liberals advocated a complete break from the colonial past, which included rejecting the long-standing influence of the Catholic Church in Latin American society and diminishing the church’s economic power. Liberals also welcomed free and open TRADE and general modernization of the economic system. Liberal reforms in MEXICO, COLOMBIA, and elsewhere broke up large church-owned landholdings and introduced civil jurisdiction over social services that had long been controlled by the church. Liberal governments also insisted on establishing a civil registry of vital statistics such as births, marriages, and deaths to replace that of the church.

The Rerum Novarum argued that liberal policies had created a vast system of injustices and social inequali-

ties. By promoting modernization, liberal governments in Latin America and around the world had spawned massive industrialization and urbanization. The encyclical went on to argue that those forces were negatively affecting the lives of the working poor and that the Catholic Church must step in to defend those being hurt by the changing economic and social structure. It advocated state intervention to ensure fair wages, safe working conditions, and social morality. Pope Leo XIII’s pronouncement was also an attempt to challenge the secular movement of socialism, which also promised to defend the rights of the working poor against the forces of industrial expansion.

The Rerum Novarum marked a major transformation in the role of the Catholic Church in society. It opened the door for local religious movements to incorporate Christianity and social justice into a common cause. Many of the ideas expounded in the papal encyclical were later embraced by Christian democracy and liberation theology. Both of those ideas grew to considerable influence in Latin America in the 20th century by emphasizing the connection between the church’s morality mission and the need for social justice, particularly among the poor.

See also CATHOLIC CHURCH (Vol. IV).

#### Further reading:

John Aloysius Coleman and Gregory Baum. *Rerum Novarum: A Hundred Years of Catholic Social Teaching* (London: SCM Press, 1991).

**Revolution of 1889 (Bourgeoisie Revolution)** The Revolution of 1889 refers to the relatively peaceful movement that brought about the downfall of the EMPIRE OF BRAZIL in favor of the Republic of BRAZIL. The revolution came about when intellectuals, MILITARY officers, and politicians inspired by POSITIVISM and republicanism formed a coalition and forced the overthrow of PEDRO II (r. 1831–89). It ushered in the first experiment in DEMOCRACY in Brazil during an era known as the OLD REPUBLIC.

Brazil’s political history during the 19th century was very different from that of its Spanish-speaking neighbors. As prince regent of Portugal, PEDRO I (r. 1822–31) declared Brazil’s independence from the empire controlled by his father, King John VI (r. 1816–26) in 1822. Brazil became a constitutional monarchy with the promulgation of the CONSTITUTION OF 1824, under which the emperor continued to wield enormous power. The Empire of Brazil survived the abdication of Pedro I in 1831 and the tumultuous period known as the REGENCY, during which an inner circle of advisers ruled in place of the former emperor’s young son, heir-apparent Pedro II. When the 15-year-old monarch was declared of age in 1840, he began a reign of more than four decades in the “Second Empire.” During the rule of Pedro II,

Brazil underwent sweeping changes as the country's economic base shifted from SUGAR to COFFEE production and European immigrants began to arrive in large numbers (see MIGRATION). Politics began to transform as well, as many leaders—particularly those representing the interests of the increasingly influential coffee planter class—incorporated republican ideals into their platform. In the 1870s, a formal Republican Party was founded in the coffee-producing region of SÃO PAULO. The party grew to become a powerful force in national politics. Members advocated the abolition of SLAVERY—which came about in 1888—and the end of Brazil's system of monarchy in favor of a republic.

In the 1880s, republicanism began to fuse with the positivist theories of Auguste Comte that were being debated in earnest among the cadets of the Brazilian military academy. Spearheaded by military officer and intellectual BENJAMIN CONSTANT, Brazilian POSITIVISM privileged the notions of “order and progress.” Its adherents were a young and forward-looking generation who had witnessed the emergence and strengthening of liberal institutions in much of the rest of the world. They wanted to pave the way for economic and social modernization and believed that Brazil was falling behind countries such as the United States and France. Positivists spoke out against slavery and supported policies that would advance the development of industry. Politically, they began to see republicanism as the path to progress and believed the monarchy represented the antiquated and backward institutions of the past. Tensions began to mount as positivist leaders in the military voiced their opposition to a number of Crown policies in the 1880s, and military leaders found support for their concerns among republican politicians. Constant and MANUEL DEODORO DA FONSECA founded the Clube Militar in 1887 as a forum for challenging government policies, and in the coming years, the positivist and republican-inspired military became increasingly involved in politics. On November 15, 1889, Deodoro and a group of loyal officers staged a military coup. With relatively little violence, the rebel force occupied the Royal Palace and deposed Pedro II.

The Revolution of 1889 created a sense of uncertainty among many Brazilians who had enjoyed the general stability of the imperial period. Their concerns are illustrated in the late 19th-century writings of JOAQUIM MARIA MACHADO DE ASSIS. But, leaders of the revolution went ahead with the founding of a republican government. Deodoro da Fonseca took control as “generalissimo,” and the government was quickly recognized by important foreign powers. Military officers and positivist intellectuals held the first ministry positions, including Constant, who served as minister of war and later as minister of public education. Government leaders pursued notable and immediate reforms such as the separation of church and state and the abolition of titles of nobility. In December 1889, Deodoro appointed a commission

to write a new constitution for the republic. Modeled largely on the U.S. Constitution, the new governing document was written and promulgated in 1891. Brazil's CONSTITUTION OF 1891 established a federal republic, and as expected, Deodoro was elected the nation's first president.

Brazil faced a number of challenges during its first decade after the fall of the empire. Political infighting erupted and destabilized the government throughout the 1890s. Government leaders feared a resurgence of monarchism, and the military often violently put down any perceived threat to the republic. One of the most infamous took place in the Bahian community of CANUDOS in 1897. Despite those difficulties, the Old Republic, which was created by the Revolution of 1889, remained in place until 1930.

See also JOHN VI (Vol. II).

#### Further reading:

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**Revolution of Ayutla (1855)** Revolution of Ayutla was the armed insurrection in MEXICO led by Liberals that drove ANTONIO LÓPEZ DE SANTA ANNA from power for the final time in 1855. The Revolution of Ayutla resulted in a new constitution and ushered in the era of liberal change known as LA REFORMA.

When the Conservative-backed Santa Anna led a MILITARY coup to return to power in 1852, his rule turned increasingly despotic. He dictated that he be addressed as “His Most Serene Highness” and spent large sums from the national treasury to secure the accoutrements of a royal court. He further enraged his Liberal opposition by attempting once again to centralize Mexico's political system by abolishing regional elections and other forms of local autonomy.

Santa Anna faced resistance almost immediately as numerous local CAUDILLOS began organizing militias in defense of local rights promised under the federalist liberal agenda. In the early months of 1854, Colonel Florencio Villarreal declared the Plan of Ayutla in the town of Ayutla, in the state of Guerrero. The plan called for the overthrow of Santa Anna, and Juan Álvarez (b. 1790–d. 1867), a local strongman, immediately joined the movement backed by his local militias. IGNACIO COMONFORT, then serving as a government official in Acapulco, also joined the rebellion in its early days and secured much-needed assistance from the United States.

The Revolution of Ayutla quickly gained momentum in Mexico as leaders throughout the nation's southern states joined the rebellion. It also attracted the attention of Liberal leaders who had fled into exile when Santa Anna returned to power. BENITO JUÁREZ and other intellectuals supported the movement from New Orleans,

Louisiana. When Álvarez took MEXICO CITY late in 1855 after more than a year of guerrilla warfare, a Liberal coalition was poised to take power.

Liberal leaders devoted the next two years to promulgating legislation aimed at dismantling the conservative system by attacking the power and wealth of the CATHOLIC CHURCH, the military, nobility, and other traditional corporate groups. New laws and a new constitution in 1857 defined the era of La Reforma and provoked a conservative backlash that climaxed in civil war (see WAR OF REFORM).

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**Rio Branco Law** See LAW OF THE FREE WOMB.

**Rio de Janeiro** Rio de Janeiro is a principal city in BRAZIL. It was a viceregal capital during the colonial period, and it served as the seat of the Portuguese Empire from 1808 to 1821. Rio de Janeiro was also the capital of the independent nation of Brazil throughout the 19th and much of the 20th century, until replaced by Brasília in 1960. The city of Rio de Janeiro is located along the Atlantic coast in the southern part of the state of the same name. Historically, the city has played an important role as an economic, political, and cultural center.

The city of Rio de Janeiro was founded in 1565 by the Portuguese governor Mem de Sá on the mouth of the "January River," or Rio de Janeiro, in Guanabara Bay. The settlement was initially established as a base from which to fight against French incursions in the region, but the city quickly grew as an important port for colonial shipping. The tropical climate made the region suitable for SUGAR cultivation, and Rio de Janeiro became a main destination for the African slaves who were brought to work on the plantations throughout the 17th century. Eventually, sugar production shifted to the northeastern states, but Rio de Janeiro became the capital of the Portuguese colony in 1763.

In 1807, Napoleón Bonaparte invaded the Iberian Peninsula, prompting the long-discussed relocation of the Portuguese Crown to the Americas. Prince Regent John set up the new seat of power in Rio de Janeiro. In 1815, he declared Brazil to be a kingdom of equal status with Portugal and continued to rule from Rio, despite demands from Portuguese elite that he return to Europe. John VI was eventually forced to return to Portugal in 1821, leaving his son Prince Pedro in Brazil. Urged by elite *cariocas* (residents of Rio de Janeiro) and other powerful Brazilians, Pedro declared the nation's independence on September 7, 1822. His coronation as Emperor PEDRO I took place in the Cathedral of Rio de Janeiro

later that year. The capital of the new EMPIRE OF BRAZIL was Rio de Janeiro. The Praça XV, or central plaza, became the site of much of the nation's political history over the coming decades. It housed the Paço Imperial, or royal palace, where Pedro I resided until he was forced to abdicate the throne in 1831 in favor of his five-year-old son PEDRO II (r. 1831–89). A series of regents ruled in lieu of Pedro II until the child was deemed to be of age, in 1840. As Brazil's second emperor, Pedro II continued to reside in and rule from Rio de Janeiro.

Brazil underwent a process of modernization starting in the middle decades of the 19th century, and Rio de Janeiro was one of the best representations of those efforts. It continued to be a principal port as the nation's export and import TRADE expanded and grew substantially as a main center of economic activity. Pedro II devoted considerable attention and resources to modernizing the city from the 1850s. As the population grew and government income increased, Rio de Janeiro benefited with new streets, improved sanitation systems, and an incipient network of public TRANSPORTATION. The city expanded beyond the historic center that had defined its outer boundaries in earlier decades. In 1854, the first rail line opened between Rio de Janeiro and Petrópolis, 10 miles (16 km) away. The state of Rio de Janeiro also saw numerous changes in the 19th century. The nation's economic base began to shift away from sugar as COFFEE production expanded in the south. Coffee plantations saw an initial period of growth in the lowland regions of the state, but neighboring states such as SÃO PAULO also saw a surge in coffee production. *Paulista* planters depended less on African SLAVERY, while *fazendeiros* in Rio de Janeiro continued to rely on the forced LABOR system (see FAZENDA/FAZENDEIRO). As slavery was gradually phased out, Rio lost ground to São Paulo as the main coffee producer.

By the 1880s, a republican movement was growing in Brazil, with many calling into question the validity of the old system of monarchy. Rio de Janeiro became the site of many political debates, as republican politicians formed alliances with positivist intellectuals among the nation's MILITARY leadership (see POSITIVISM). BENJAMIN CONSTANT helped engender an entire generation of positivist thinkers as a professor of mathematics at the nation's military academy in Rio. Constant founded his Clube Militar there to provide a forum for debate among fellow military officers. These meetings eventually led to the REVOLUTION OF 1889, led by Constant and MANUEL DEODORO DA FONSECA, which dethroned Pedro II in favor of a republic.

Rio de Janeiro remained the capital of Brazil after the overthrow of the emperor and the establishment of the OLD REPUBLIC in 1889. In the late decades of the 19th century, positivist leaders and intellectuals advocated even more aggressive modernization strategies, including INDUSTRIALIZATION and attracting foreign investments. The national government actively recruited European immigrants; many of these new arrivals passed through



Rio de Janeiro became a site of Brazilian modernity and wealth in the late 19th century. This photo shows the home of a wealthy resident. (*Library of Congress*)

the capital city and others settled there (see *MIGRATION*). Brazil's major cities, including Rio de Janeiro, experienced rapid urbanization in the 1880s and 1890s. City infrastructure and public services were unable to keep up with the population growth, and poverty, crime, and other problems surfaced. Oftentimes, poor neighborhoods were sites of conflict between immigrants, Afro-Brazilians, and other ethnic groups. Rio de Janeiro became famous for its *favelas*, or urban slums, in the late 19th century. The 1890 novel *THE SLUM (O Cortiço)* by Aluísio Azevedo chronicles the lives of a sundry assortment of *favela* inhabitants in vivid detail. The novel is famous for illustrating the daily life in Rio de Janeiro slums and for highlighting the social problems that coincided with rapid urbanization.

Rio de Janeiro was eventually surpassed by São Paulo as the nation's main economic center in the early 20th century. Rio de Janeiro remains Brazil's second-largest city today.

See also JOHN VI (Vols. II); RIO DE JANEIRO (Vols. II, IV); SÁ, MEM DE (Vol. II).

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**Rivadavia, Bernardino** (b. 1780–d. 1845) *president of Argentina* Bernardino Rivadavia was an intellectual who became an important leader in the Argentine move-

ment for independence. He eventually served as the first president of the new republic. Rivadavia played an important leadership role among the *UNITARIOS*, the emerging political party that favored a centralized government and privileged the interests of BUENOS AIRES.

Rivadavia was born on May 20, 1780. He was raised in Buenos Aires and studied at the Colegio de San Carlos. Rivadavia was influenced by the local free *TRADE* cabals that had formed in the 1790s pushing for more autonomy from the Spanish Crown. He participated in the resistance movements against the British invasions in Buenos Aires in 1806 and 1807. In later years, he helped lead the independence junta in Buenos Aires and in 1811 was chosen as one of the leaders of ARGENTINA'S first ruling triumvirate. In this initial foray into national leadership, Rivadavia immediately began working to implement liberal social policies, such as lifting censorship of the press and ending the slave trade. Rivadavia and his cohorts also aggressively pursued more open trade policies that would benefit Buenos Aires at the expense of the interior. By October 1812, Rivadavia's triumvirate had been overthrown by dissenters in the provinces. The new leadership established a formal government, and Rivadavia went to Europe to secure support for the fledgling nation. He also attempted to find a suitable candidate to accept the post of constitutional monarch in an independent Argentina.

After six years in Europe, Rivadavia returned to Argentina and served in the administration of Buenos Aires governor Martín Rodríguez. He found the nation deeply divided between the *unitarios*—liberal leaders who wanted a centralized government in Buenos Aires—and *FEDERALES*—more conservative provincial leaders who resented national policies that favored the capital city. As a leader of the *unitarios*, Rivadavia spearheaded initiatives to reform the Buenos Aires social, political, and economic systems along more liberal lines. He continued to promote more open trade, contributed to the end of *SLAVERY*, and oversaw the creation of the UNIVERSITY OF BUENOS AIRES.

Many of Rivadavia's policies deepened the divide between Buenos Aires and the provinces, and between 1820 and 1829, regional tensions mounted. In 1823, he approved an antivagrancy law that required rural laborers to attach themselves to large landowners. Rivadavia also sponsored the Law of Emphyteusis in 1826, which attempted to raise revenue by creating a system of rents for public lands. Instead, the system created a small but influential landholding elite in the interior and accelerated the pace of *LATIFUNDIO* in the newly independent nation.

In 1826, Congress passed a new constitution, and Rivadavia became the first president of the United Provinces of the Río de la Plata. The constitution represented the interests of the *unitarios* and privileged Buenos Aires over the interior. As a result, Rivadavia continually faced opposition from provincial *CAUDILLOS*, in addition to external challenges. Shortly after he took office, Argentine forces were easily defeated in an attempted invasion



into Brazilian-occupied Montevideo. The military debacle, combined with internal turmoil, compelled the leader to resign in 1827. He immediately went into exile in Europe.

Rivadavia returned to Argentina in 1834 to face charges by the federalist government. He was immediately sent back into exile. Rivadavia returned to Spain, where he died in 1845.

See also UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**Rivera, José Fructuoso** (b. 1784–d. 1854) *president of Uruguay* José Fructuoso Rivera was a MILITARY hero and political leader in early 19th-century URUGUAY. He served as the first president of the new nation and founded the COLORADO PARTY.

Rivera was born on October 17, 1784, on the outskirts of Montevideo. He was raised in the countryside and learned ranching and other agricultural skills. When the independence movement started in the BANDA ORIENTAL, Rivera joined forces with José Gervasio Artigas. He also supported JUAN ANTONIO LAVALLEJA'S THIRTY-THREE IMMORTALS in the CISPLATINE WAR in the 1820s. During that time, he formed an alliance with MANUEL ORIBE, and in 1830, Rivera was chosen as Uruguay's first president. In 1836, the two independence heroes had a falling out, and two years later, Rivera overthrew Oribe's presidency (1835–38). The former allies split into rival factions as Rivera's urban-based intellectual supporters took the name *colorados* and Oribe's rural supporters formed the BLANCO PARTY.

The rivalry between the *colorados* and the *blancos* escalated into a protracted civil war known as the GUERRA GRANDE between 1838 and 1851. As the war dragged on, Rivera served another term as president, from 1839 to 1843. Oribe formed an alliance with Argentine dictator JUAN MANUEL DE ROSAS, and the two served Rivera a major defeat in 1842. As Oribe laid siege to Montevideo, Rivera escaped to BRAZIL in exile. When the war finally drew to a close in 1852, Rivera was named to form part of a ruling triumvirate, and the exiled former president made plans to return to Montevideo. Rivera died in transit on January 13, 1854.

See also ARTIGAS, JOSÉ GERVASIO (Vol. II).

#### Further reading:

David Rock. "State-Building and Political Systems in Nineteenth-Century Argentina and Uruguay." *Past and Present*, no. 167 (May 2000): 176–202.

**Rivière-Hérard, Charles** (b. 1784–d. 1850) *president of Haiti* Charles Rivière-Hérard was born in Port-

au-Prince in 1789. He was a career MILITARY officer in the Haitian army and came into the political arena during the overthrow of the JEAN-PIERRE BOYER (1818–43). Rivière-Hérard's cousin, Hérard Dumesle, a mulatto poet and political activist, formed an organization called the Society of the Rights of Man and the Citizen and began openly attacking Boyer's policies. In an attempt to silence his opposition, Boyer immediately purged politicians connected to Dumesle from the legislature.

Rivière-Hérard took up his cousin's popular political cause. In January 1843, he began marching toward the capital, intending to overthrow Boyer by military coup. In response, Boyer fled into exile in Jamaica, and Rivière-Hérard became military leader. A constituent assembly partial to Rivière-Hérard's liberal political views drew up a constitution, legally appointing him as president in December 1843.

As president, Rivière-Hérard's power was quickly weakened with the loss of SANTO DOMINGO in the Dominican revolt of 1844 (see HAITIAN OCCUPATION OF SANTO DOMINGO). This event inspired discontent in HAITI's countryside between the rural black *piquets* (a term derived from the tool they used as cultivators) and the *cacos*, former *piquets* organized under the black ex-military officer Louis Jean-Jacques Accau. These southern groups rioted and demonstrated, demanding the election of a black president and an end to mulatto rule.

The demands of the *piquets* and *cacos* were finally met when Rivière-Hérard was overthrown by another rebel group and Philippe Guerrier, an aged black officer, became president from 1844 to 1845.

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**Roca, Julio Argentino** (b. 1843–d. 1914) *military leader and president of Argentina* Julio Argentino Roca is best known for his leadership in the so-called CONQUEST OF THE DESERT, in which he led a series of MILITARY campaigns against the Amerindians of the PAMPAS and Patagonia from 1878 to 1879. He later became president of ARGENTINA and effectively ended the dominance of BUENOS AIRES in national politics.

Roca was born on July 17, 1843, in Tucumán. He was educated and joined the military at a young age. During his military career, he participated in a series of campaigns between Buenos Aires and the provinces. He fought in the WAR OF THE TRIPLE ALLIANCE and rose through the ranks by defending the governments of DOMINGO F. SARMIENTO (1868–74) and Nicolás Avellaneda (1874–80) against regional rebellions. In 1877, Roca became minister of war under President Avellaneda. In that post, he began devoting his attention to subduing indigenous groups in the nation's frontier regions. Earlier attempts to bring the NATIVE AMERICANS under government control had focused

on negotiating with indigenous leaders and encouraging settlers into the region. Roca's strategy was to force the Amerindians to submit to government control, with violence if necessary. His Conquest of the Desert began in 1878 and has been described as a virtual genocide. By 1879, it had resulted in the deaths of thousands of Amerindians and the imprisonment of even more.

Argentines largely approved of Roca's frontier campaign, which opened large expanses of land to settlement. In 1880, he was elected president of Argentina. Roca's opponent, Buenos Aires governor Carlos Tejedor, led a brief, unsuccessful rebellion in an attempt to prevent the military leader from taking office. One of Roca's first actions as president was to federalize Buenos Aires in an effort to end the city's dominance over national politics. His first term, which lasted until 1886, also saw the rise of the "Generation of '80" and the onset of the influence of POSITIVISM in Argentine social and economic policy.

Roca served a second term as president from 1898 to 1904. In his later years, he traveled to Europe and served as an Argentine diplomat to BRAZIL. He died on October 19, 1914.

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Douglas W. Richmond. *Carlos Pellegrini and the Crisis of the Argentine Elites, 1880–1916* (New York: Praeger, 1989).

**Rocafuerte, Vicente** (b. 1783–d. 1847) *diplomat and president of Ecuador* This GUAYAQUIL-born Ecuadorean served the Mexican government as a diplomat for five years and then returned to ECUADOR to become its first native-born president. Because of this distinction and his general avowal of liberal principles, Rocafuerte remains one of Ecuador's most highly regarded historical figures.

From an extremely wealthy family, Rocafuerte spent much of his youth in Europe, where he steeped himself in liberal Enlightenment ideas and befriended intellectuals such as Alexander von Humboldt. Elected as a deputy to the Spanish parliament in 1814, Rocafuerte became one of the leading Spanish-Americanists. He and other moderate intellectuals recognized the common heritage of Spaniards and creoles (Spaniards born in the New World) and sought for Latin America an autonomous position within the Spanish Empire.

When this proposal failed, Rocafuerte believed that as a Spanish American he could serve any of the newly independent nations, and in 1824, he accepted a post as the secretary of MEXICO's legation to Great Britain. He worked to secure diplomatic recognition from the British government to protect Mexico from any attempted reconquest and to secure a loan to rekindle Mexico's ECONOMY. Returning to Mexico in 1829, Rocafuerte found he had little in common with the country's new conservative government, and perceiving the abandonment of Spanish Americanism, he left for Ecuador in 1833.

Back in his homeland, Rocafuerte entered politics. He and other liberals protested President JUAN JOSÉ FLORES's alleged implication in the assassination of a member of liberal literary society, which began the conflict known as the War of the Chihuahuas. Despite being captured by Flores, Rocafuerte was able to convince his rival to enter an agreement whereby they would alternate presidential terms. As a result, Rocafuerte became Ecuador's first civilian president, serving from 1834 to 1839.

As president, Rocafuerte embarked on some modest reforms and fruitlessly sought to create a national identity. He tried to upgrade roads, establish a more professional MILITARY, draft new legal codes, and provide more EDUCATION. He also attempted unsuccessfully to decree religious toleration. Despite his intentions, Ecuador's treasury was so threadbare that the government could not undertake much after paying military and bureaucratic salaries. Rocafuerte also believed in using a firm hand to maintain order, reportedly executing more dissidents than any other 19th-century president.

After returning the presidency to Flores in 1839, Rocafuerte became governor of Guayas Province (in the Guayaquil area) with every expectation of returning to the presidency in 1843. Flores betrayed their agreement, writing a new constitution that became known as the CHARTER OF SLAVERY and attempting to continue in office. Liberals and moderates such as Rocafuerte protested, leading to a civil war, which the Liberals won in 1845. After serving as the president of the constitutional assembly in 1845, Rocafuerte accepted a diplomatic appointment to PERU, where he died in 1847.

See also ENLIGHTENMENT (Vol. II).

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**Rodó, José Enrique** See "ARIEL."

**Rodríguez de Francia, José Gaspar** See FRANCIA, JOSÉ GASPARD RODRÍGUEZ DE.

**romanticism** Romanticism was a literary and artistic movement that originated in western Europe in the late 18th century and became popular in Latin America in the early 19th century. Romanticism is seen as a reaction to the intellectualism and scientific rationalism of the European Enlightenment. It is also seen as a departure from the calm and peaceful artistic themes that dominated earlier classicist styles. Moving away from the formality, order, and exclusivity of earlier artistic

trends, it embraced passion, imagination, and irrationality. LITERATURE, ART, and MUSIC created in the tradition of romanticism aimed to elicit strong emotions by portraying a variety of subjects such as folk culture, natural scenes, and heroic episodes. In the decades immediately following independence in Latin America, many artists and intellectuals embraced the style as a way to articulate their feelings about the shift away from colonialism toward a new national identity.

Themes of nationalism, native life, and individualism pervaded the romantic style of Latin American artists and writers in the 19th century. Mexican journalist JOSÉ JOAQUÍN FERNÁNDEZ DE LIZARDI (b. 1776–d. 1827) wrote *El periquillo Sarniento* (*The Mangy Parrot*) in 1816. One of Latin America's first novels, Lizardi's work emphasizes many of the themes prominent in romantic literature by mocking the Spanish viceregal court and depicting Mexican society. Even though the Caribbean remained under Spanish imperial rule, Cuban poet José María Heredia (b. 1803–d. 1839) is credited with publishing the region's first romantic poem, "En el teocalli de Cholula" (*At the temple of Cholula*), in 1820. Other early figures writing in the style of romanticism include Venezuelan ANDRÉS BELLO (b. 1781–d. 1865), Ecuadorean José Joaquín de Olmedo (b. 1780–d. 1847), and Colombian Gregorio Gutiérrez González (b. 1826–d. 1872).

ARGENTINA's long experience with CAUDILLO rule under JUAN MANUEL DE ROSAS also proved to be fertile ground for the emergence of literature in the romantic tradition. ESTEBÁN ECHEVERRÍA (b. 1805–d. 1851) was influenced by romanticism and often compared what he called the primitive nature of the Argentine countryside to the more cultured settings of Europe. DOMINGO F. SARMIENTO (b. 1811–d. 1888) was one of the most notable Argentine literary figures to emerge at this time. He became a vocal critic of the Rosas regime and eventually fled into exile, where he wrote *Facundo: Civilización y barbarie en las pampas argentinas* (*Facundo, or Life in the Argentine Republic in the Days of the Tyrants*) as a denunciation of tyranny and caudillo rule in Argentina. Sarmiento also stressed the inherent uncivilized character he saw in the rural culture of Argentina, and his vivid descriptions of that barbarism were centerpieces of his writings. Sarmiento also highlighted the role of the rural GAUCHO in postindependence Argentina, as did writer José Hernández (b. 1834–d. 1886) in the epic poem *El gaucho Martín Fierro* in 1872 (see MARTÍN FIERRO).

Argentine writers also offered an example of the way intellectuals used the style of romanticism to promote a liberal political platform (see LIBERALISM). Many of the most prominent romantic artists and literary figures were politically active in advancing liberal policies during an era when conflict among liberals and conservatives dominated the national landscape. By the final decades of the 19th century, writers and artists in Latin America had largely abandoned romanticism in favor of realism and MODERNISM.

See also ENLIGHTENMENT (Vol. II).

### Further reading:

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**Rosario Mining Company** Rosario Mining Company was a U.S.-based company that became involved in the MINING industry in HONDURAS in the late 19th century. The company's principal holding was the Rosario Mine, which extracted large amounts of GOLD and SILVER in the central mountainous region, near present-day Tegucigalpa. The company worked closely with the Honduran national government. Its mining activities left substantial environmental damage in the surrounding area in the first half of the 20th century.

Like other Central American liberal political leaders in the 1880s and 1890s, Honduran president MARCO AURELIO SOTO (1876–83) sought to diversify the nation's agriculturally based ECONOMY. Silver mining dated back to Spanish times, and in the 1880s, the Honduran government issued 129 mining concessions to foreign companies, including the Rosario Mining Company, headed by the American Washington S. Valentine (b. 1859–d. 1920). But the millions of dollars worth of silver extracted in Honduras in the mid-1890s provided little benefit to the country. The concessions granted to Rosario and other mining companies gave them the right to bring into Honduras, duty free, whatever they needed to conduct their operations, including machinery, equipment, and other materials. The last came to include fine Scotch whiskey and European dinnerware and clothing. The mining companies were also exempted from paying export taxes. The Rosario operation, in addition, received rights to water and timber on and adjacent to its property. As a result, thousands of acres around the company's operations became vast wastelands. Soto's successor, Luis Bográn (1883–91), instituted press gangs to ensure an adequate supply of workers. Rosario became so influential in 20th-century Honduran politics that Valentine earned the nickname "King of Honduras."

The owners of the Rosario Mining Company used their wealth and political influence to ensure that infrastructure projects were completed to benefit the mine and the surrounding area. Central Honduras benefited from a modern network of electrical plants and communications networks. But, at the same time, extensive mining activity in the region caused damage to the surrounding countryside. A general LABOR strike forced the Rosario Mine to close in 1954.

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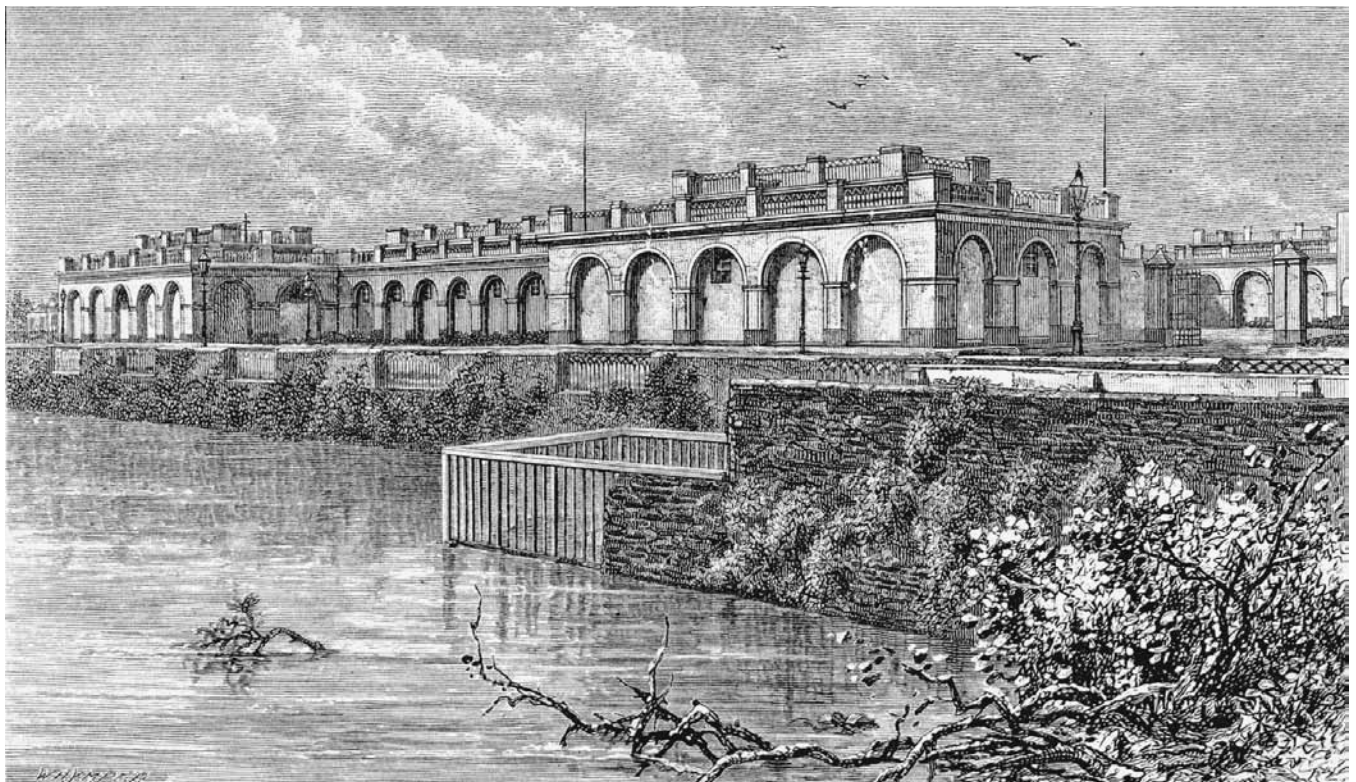
**Rosas, Juan Manuel de** (b. 1793–d. 1877) *Argentine caudillo and dictatorial governor of Buenos Aires* Juan Manuel de Rosas was a CAUDILLO who became the most powerful ruler in ARGENTINA as governor of BUENOS AIRES. Rosas rose to power by forming an alliance with the FEDERALES and persecuted dissenters during his long rule. He ruled as a tyrant but did manage to bring some stability and a sense of national unity to Argentina in the early decades of its independence.

Rosas was born on March 30, 1793, to a wealthy FAMILY that owned large landholdings in the province of Buenos Aires. He was raised in the countryside and learned the skills of the GAUCHOS, or rural-dwelling cowboys. Rosas accumulated extensive landholdings and grew wealthy through cattle ranching and meatpacking activities. He participated in the defense of Buenos Aires against the British invasion in 1806 but did not become involved in the MILITARY and political maneuvering taking place during the era of independence. During that time, he married and had three children. His youngest daughter, Manuelita, eventually became one of his closest political allies and in later years served as a kind of first lady during his gubernatorial administration.

In 1820, Rosas supported Martín Rodríguez as governor of Buenos Aires, although Rosas grew disillusioned with the centralizing political policies of *unitario* leader BERNARDINO RIVADAVIA, who wielded enormous influence behind the scenes. Rosas grew to believe that divi-

sive *unitario* policies were destabilizing the country. He wanted to unite and secure the newly independent nation and claimed that preserving provincial authority was the best way to accomplish this. In 1828, he formed an alliance with other regional caudillos who resented policies of the *UNITARIOS* that favored the interests of Buenos Aires over those of the provinces. As the protector of regional interests, the *federales* overthrew the *unitario* governor of Buenos Aires, Juan Lavalle. Rosas was elected governor of the province in 1829 and with his federalist allies formed the Confederación del Río de la Plata, or River Plate Confederation.

As governor of Buenos Aires, Rosas ruled in an autocratic manner in an attempt to bring order to the nation. He became known for his persecution of political rivals, and many *unitario* political leaders were detained and executed in an attempt to silence dissent. Other individuals who opposed his regime fled into exile. Neighboring Montevideo, in URUGUAY, became a haven for Argentine intellectuals and political leaders, and an anti-Rosas movement began to develop there. As a quintessential caudillo, Rosas was also known to be strong, capable, and charismatic. He presented himself as a man of the people and won the confidence of large numbers of Argentines. Those who were not swayed by his personal charm generally fell in line with his wishes out of fear of reprisal. In the early years of his governorship, Rosas secured control over Buenos Aires as well as the interior provinces with



Sketch of an estate formerly belonging to Argentine dictator Juan Manuel de Rosas near Palermo Park in Buenos Aires, circa 1880 (From *The Great Silver River: Notes of a Residence in Buenos Ayres in 1880 and 1881*, by Sir Horace Rumbold. London: John Murray, 1890, p. 28)

the help of federalist allies JUAN FACUNDO QUIROGA and Estanislao López (b. 1786–d. 1838).

After serving three years as governor in 1832, Rosas stepped down and spent the next several years pursuing an aggressive campaign against NATIVE AMERICANS in the nation's southern regions. During those campaigns, Rosas cultivated his reputation as a typical caudillo and a strong military leader, capable of achieving the impossible. His absence from Buenos Aires, however, brought renewed political conflict as members of the *unitario* opposition who had been silenced during his governorship revived their antifederalist challenges. In 1833, Rosas's wife and other supporters in Buenos Aires formed the Sociedad Popular Restauradora, an organization whose objective was to bring Rosas back to power and extend his dictatorial authority. The group's armed wing, known as LA MAZORCA, accelerated the pace of repression against Rosas's political adversaries. *Mazorca* literally translates from Spanish to "ear of corn" but is also a play on words with the Spanish "*más borca*," or "more hangings."

Backed by the Mazorca force, Rosas returned to office in 1835 and stayed there until 1852, using more far-reaching powers and even more repressive tactics. The dictator censored the press and educational material and required that his portrait be displayed in public spaces throughout the country. Individuals who did not conform to Rosas's expectations immediately fell under suspicion as potential opponents. An act as simple as wearing the colors white and blue could be considered support for the centrist *unitarios*. Citizens of Argentina resorted to wearing ribbons and other adornments in the color red to demonstrate their affiliation with Rosas and the *federales*. This practice was ridiculed by the anti-Rosas intellectuals who had sought refuge abroad. Among those, intellectual and future Argentine president DOMINGO F. SARMIENTO used his writings to publicize the tyrannical nature of the Rosas government and to destabilize his regime (see LITERATURE).

Although Rosas rose to power as a self-proclaimed federalist, the policies of his administration reflected a much more centralist preference. He quickly abandoned the interests of the interior and imposed measures that favored Buenos Aires. He levied tariffs on goods moving in and out of the interior provinces and used national revenue predominantly to the benefit of Buenos Aires. Throughout the 1830s and 1840s, opposition to Rosas mounted among centralist dissenters as well as disgruntled federalists. Rosas also developed foreign enemies through policy decisions that pushed the nation into war with the PERU-BOLIVIA CONFEDERATION in 1837. Throughout the 1840s, the dictator was at odds with neighboring Uruguay. He sent several invading forces and controlled the area off and on throughout much of the decade.

By 1851, anti-Rosas forces in Uruguay joined forces with exiled Argentines to form an opposition force and

bring down the dictator for good. Under the leadership of JUSTO JOSÉ DE URQUIZA, the coalition defeated the Rosas army at the Battle of Monte Caseros in 1852. Rosas went into exile in Europe. He died in England on March 14, 1877.

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**Royal Decree of Grace (1815)** To combat any separatist sentiments on the islands and stimulate new economic growth in CUBA and PUERTO RICO, King Ferdinand VII of Spain (b. 1784–d. 1833) proclaimed the Cédula de Gracia, or Royal Decree of Grace, on August 10, 1815. Cuba and Puerto Rico were granted free TRADE rights with Spain, low trade duties with other friendly nations, a 15-year amnesty from various royal taxes, and permission to allow colonists of non-Spanish origin to immigrate to the two island colonies (see MIGRATION). To attract non-Spanish settlers from Europe and elsewhere in the Americas, new arrivals to the islands were offered six acres of land for each FAMILY member and three acres for each slave brought to Cuba or Puerto Rico. After five years of residence, new settlers were offered full Spanish citizenship contingent upon their swearing of unwavering loyalty to the Spanish Crown and the CATHOLIC CHURCH.

This royal decree greatly stimulated the economic growth of Cuba and Puerto Rico and helped extinguish the separatist fervor previously prevalent on the islands. The volume of foreign trade, especially with the United States, greatly increased for both Cuba and Puerto Rico in the years following its passage. Puerto Rican foreign trade revenues alone rose from \$269,008 in 1813 to \$1.08 million by 1816 and \$2.1 million by 1818. The primarily agrarian societies of Cuba and Puerto Rico could now legally import modern machinery and link areas of SUGAR, COFFEE, and TOBACCO production to major ports such as San Juan and HAVANA via the construction of new railroad lines. The decree also quickly turned both islands into true cultural and racial melting pots. As the 19th century progressed, Dominican, Venezuelan, Haitian, French, German, Italian, Irish, and eventually Chinese immigrants integrated into the mix of Spanish, Amerindian, and African cultures already present on both islands.

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**Rural Code** See CODE RURALE.

**rurales (Guardia Rural)** The *rurales* were the rural mounted police force, officially the Guardia Rural, established in MEXICO by BENITO JUÁREZ in 1861 and used extensively by PORFIRIO DÍAZ to impose a sense of order and stability in what had become a lawless countryside. The *rurales* were known for their ruthless tactics and often operated outside of legally prescribed norms.

In the 1860s, the *rurales* were poorly trained and underfunded but participated in resisting the invasion forces of the FRENCH INTERVENTION. They became more active in stabilizing the countryside in the late 1860s and early 1870s under Juárez and then SEBASTIÁN LERDO DE TEJADA, but it was not until Díaz's dictatorship, known as the PORFIRIATO, that they gained an international reputation for bringing peace and stability to the Mexican countryside. Contingents of *rurales* were organized in state capitals with smaller detachments in more localized areas, giving them a wide geographic reach. But, their stabilizing effect was superficial. *Rurales* incited terror by using repression and

the *ley fuga*, a law under which suspects and prisoners could be shot while supposedly trying to escape. The *rurales* are one example of Díaz's attempts to bring order at all costs so that Mexico could progress and modernize.

Further undermining the *rurales*' effectiveness, many units were beset by corruption and ineptitude. Officers often embezzled money from official coffers, while lower-ranking *rurales* resorted to extortion and bribes from their would-be victims. Rates of alcoholism, desertion, and petty crimes were high among the rank and file of this supposedly elite law enforcement group. Their abuses were widely known and provided one more catalyst for the Díaz opposition to push for change. After the onset of the Mexican Revolution in 1910, Francisco Madero failed in his attempt to reform the *rurales*, and the group was disbanded in 1914.

See also MEXICAN REVOLUTION (Vol. IV).

**Further reading:**

Paul J. Vanderwood. *Disorder and Progress: Bandits, Police, and Mexican Development* (Wilmington, Del.: SR Books, 1992).



**Saco, José Antonio** (b. 1797–d. 1879) *Cuban writer and abolitionist* José Antonio Saco was a Cuban journalist and essayist who rose to prominence in the 1830s and 1840s. He used his writings to decry the institution of SLAVERY and to promote a sense of Cuban nationalism. Saco became one of the leading proponents of Cuban independence from Spain and opposed annexation to the United States.

Saco was born in 1797 in Bayamo and was educated in HAVANA. He traveled extensively throughout Europe and the United States and worked as a professor, a translator, and a writer (see LITERATURE). By the 1830s, Saco was already publishing denunciations of the slave TRADE and criticisms of the Spanish colonial system. Because of his polemical writings, Saco was forced to leave CUBA; he spent most of the rest of his life in Paris. There, he published numerous works challenging both colonialism and slavery. Despite his reputation as an ardent abolitionist, his stance on race and slavery is somewhat controversial. Saco believed that Cuba's black slave population was a negative foreign influence, corrupting the island's white population. He envisioned a free and independent Cuba made up of white, middle-class citizens. To that end, he encouraged white immigration to Cuba, and his writings reflected a strong disdain for the influence of African culture on Cuban society.

Saco was never able to return to his native Cuba. He began writing a general history of slavery, which was to be his masterpiece. He published several volumes but never finished the project. Saco died in Europe in 1879.

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**Saget, Nissage** (b. ca. 1810–d. 1880) *president of Haiti* The elderly Nissage Saget was elected president of HAITI in 1870. He succeeded Sylvain Salnave (1867–69). Despite his age, he is remembered as a wise executive head of state who was respectful of the provisions of the constitution.

Under Saget's regime, the German government extorted money from Haiti on the grounds that two of its nationals had complained to their government that they were subject to "crimes of victimization" while in Haiti. On June 11, 1872, two German warships arrived in the country. An immediate payment of 3,000 British sterling was demanded as "damages" for the alleged crimes.

Indignant but powerless, the Haitian government paid the sum. At the end of his term, in 1874, President Saget placed power with the Conseil des Ministres (Advisory Council) and retired voluntarily. He died August 7, 1880, in Saint-Marc.

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**Saint Domingue** See HAITI.

**saladeros** The *saladeros* were a powerful new economic class tied to the cattle ranching industry that emerged in 19th-century ARGENTINA. *Saladeros* were those who processed and marketed salted meat and other by-products. The meat they produced was a kind of beef jerky, which grew in popularity in the era prior to refrigeration.

eration. It could be transported and stored more easily and at a lower cost than fresh meat. The salted and dried meat, also known as *tasajo*, became a staple food in the diets of Brazilian slaves. It was also used to feed neighboring armies, which were often on the move throughout the volatile 19th century.

South American cattlemen had been drying and salting beef for centuries, but the first *saladero* factory was established in the early 19th century. The term *saladero* refers both to the people involved in the industry and to the factories where salted meat was produced. By the mid-19th century, the production facilities were quite large—slaughtering 200 to 400 cattle per day. *Saladeros* processed nearly every part of the cattle. They boned the meat and dried it in thin strips. The factories extracted the tallow and fat for use in the production of candles, soap, and lubricants. The hides also were processed.

Most *saladeros* were established in the province of Buenos Aires. CAUDILLO and future dictator JUAN MANUEL DE ROSAS built his personal fortune operating a *saladero* in Buenos Aires Province in the early decades of the 19th century. During his administration as governor of Buenos Aires, Rosas favored the *saladeros* by exempting them from taxes and granting favorable export conditions through the capital city. He argued that the factories were a fundamental source of national wealth, and *saladeros* provided Rosas with much-needed support throughout his dictatorship. In the mid-19th century, the *saladeros* formed the largest industry in Argentina. Their influence diminished only after the advent of refrigeration in the late decades of that century.

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**Salcedo, José Antonio (Pepillo Salcedo)** (b. 1816–d. 1864) *Dominican military leader* José Antonio “Pepillo” Salcedo led the anti-Spanish insurrection in the DOMINICAN REPUBLIC during the WAR OF RESTORATION. He spearheaded a declaration of independence and organized the scattered rebel movement into one organized and powerful revolt that eventually led to the ousting of the Spanish occupation army.

Salcedo was born in Madrid in the year 1816. His family moved to a northern village in Santo Domingo when he was a small child. He was educated in the city of Santo Domingo and joined the military in the independence struggle against neighboring Haiti in the 1840s.

Former president and CAUDILLO PEDRO SANTANA had invited Spanish occupation in an attempt to prevent Haiti from invading the newly independent nation. Salcedo participated in the guerrilla campaigns that sprang up against the Spanish as early as 1861. Santana violently suppressed these uprisings, and the resistance movement

descended into chaos. Indeed, disorganization almost destroyed the incipient movement until Salcedo rallied the forces. The movement quickly gained momentum as Santana was captured and many in the Spanish MILITARY succumbed to tropical disease. Salcedo issued a declaration of independence on September 14, 1863, and led a provisional government.

Even as the resistance movement had strengthened, divisions in the leadership began to surface. Salcedo advocated inviting former Santana rival, BUENAVENTURA BÁEZ, to rule again. Other restoration leaders opposed Báez’s long-standing support of annexation by the United States and feared that the deposed caudillo would turn the Dominican Republic over to yet another foreign power (see SECOND REPUBLIC). Salcedo was eventually overthrown and killed in October 1864.

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**Salomon, Lysius** (b. 1815–d. 1888) *president of Haiti* Lysius Salomon was born in Castel Pèrè near Aux Cayes, HAITI, in 1815, to a well-known and influential southern FAMILY. He and his family had some severe clashes with the mulatto elite and were forced into exile during the regime of CHARLES RIVIÈRE-HÉRARD (1843–44). Salomon returned to Haiti and served as minister of finance under FAUSTIN SOULOUQUE’s (1847–59) regime. After Soulouque’s decline, Salomon again went into exile in Europe.

After 28 years abroad, Salomon returned to Haiti in August 1879 and ran for president as the representative of the National Party (Parti National). He had a huge following and was subsequently elected. During his two terms in office (1879–88), he revived AGRICULTURE, improved EDUCATION, attracted foreign investment, organized the army, established a national bank, and connected Haiti to the rest of the world through the telegraph.

Salomon is best known for his contributions to Haitian finances. In addition to establishing the National Bank, he resumed overdue loan payments to France from both President MICHEL DOMINGUE’s (1874–76) loan scandal of 1876 and the treaty of 1824 under which Haiti, in essence, paid France for its independence. By 1888, the Domingue loan had been paid off and a better payment plan for the 1824 indemnity developed. Haiti maintained a remarkable payment history for this debt, not defaulting until the United States’s occupation of the country in 1915.

Salomon withstood years of conflict with the Liberal Party (Parti Liberal) and other elitist forces. After learning of a hostile Liberal Party demonstration against him in the streets, he resigned and then left for France on



the afternoon of August 10, 1888. He died in Paris on October 19, 1888.

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**samba** See MUSIC.

**Santa Anna, Antonio López de** (b. 1794–d. 1876) *military leader and 11-time president of Mexico* Antonio López de Santa Anna was a popular MILITARY leader, CAUDILLO, and 11-time president of MEXICO in the decades following independence. During his long and convoluted career, he was lauded for numerous successes in repelling attempted invasions by foreign powers and simultane-



Portrait of Antonio López de Santa Anna, president of Mexico numerous times between 1833 and 1855 (*Library of Congress*)

ously vilified for his erratic political views, dictatorial tactics, and harsh treatment of enemies. He ultimately fell from favor after losing large expanses of Mexican territory to the United States.

Santa Anna was born into a creole family in Veracruz on February 21, 1794. He joined the Spanish army at a young age and between 1810 and 1821 fought on behalf of the royalist forces against the independence movement in Mexico. Like many military officers, Santa Anna abandoned the Spanish army and pledged loyalty to AGUSTÍN DE ITURBIDE'S Plan de Iguala in 1821, helping secure Mexican independence. He joined the Army of the Three Guarantees and supported Iturbide as he became Emperor Agustín I.

Santa Anna's support for Iturbide was short lived, as personality conflicts between the two began to show. As Santa Anna's thirst for power became evident, Iturbide attempted to rein him in; however, Santa Anna declared open rebellion against the emperor in his 1822 Plan de Veracruz. Santa Anna joined forces with other military leaders and liberal politicians who opposed Iturbide, merging his own revolt with the larger PLAN DE CASA MATA that helped drive Iturbide from Mexico the following year.

For nearly a decade, Santa Anna served as a loyal military commander, supporting liberal political leaders in their attempts to sustain a federalist system, with strong states and a relatively weak executive under the CONSTITUTION OF 1824. He had charisma and political savvy—characteristics common among 19th-century Latin American CAUDILLOS—which won him many political allies. In 1827, he helped thwart an attempted coup against President GUADALUPE VICTORIA. In 1828, he supported a revolt by liberal leaders who accused their conservative foes of duplicity in securing the presidential election for their candidate Manuel Gómez Pedraza. Santa Anna's personal connections and military efforts were instrumental in securing a liberal victory.

In 1829, the fledgling national government tapped Santa Anna's military expertise and appointed him to fight an attempted invasion by Spain. After pinning down the Spanish forces for several months in the tropical climate of Tampico, Santa Anna once again emerged victorious and was hailed as a hero.

After the Spanish invasion was repelled, conservative vice president Anastasio Bustamante overthrew liberal president VICENTE GUERRERO, and Santa Anna acted once again. In 1832, he ousted the dictator, and new elections gave Santa Anna the presidency. Contrary to his previously incessant quest for power, Santa Anna almost immediately handed power to his liberal vice president VALENTÍN GÓMEZ FARÍAS (1833–34) and retired to his estate in Veracruz.

Santa Anna remained silent as Gómez Farías set about instituting a liberal reform agenda. Within months, his administration had attempted to curtail the influence of the military and the CATHOLIC CHURCH, abolishing

many of the *FUEROS*, or privileges, held by those institutions. Santa Anna defied his earlier liberal politics and joined forces with the conservative opposition in 1834. He overthrew Gómez Farías and once again assumed the presidency, operating under the slogan “*religión y fueros*” (religion and privileges). Santa Anna and his conservative allies abrogated the Constitution of 1824 and replaced it with a series of conservative laws. The *SIETE LEYES* (Seven Laws), which became the basis for the Constitution of 1836, restored a centralist political system in Mexico by strengthening the power of the executive, dissolving states, and subverting local authority.

Santa Anna’s move toward **CENTRALISM** and **CONSERVATISM** had serious repercussions for the nation’s security and stability. In response to the abolition of states and local authority, several provinces rose in revolt and threatened secession. One of those regions was the northern province containing Texas. In attempting to take a strong stand against the large numbers of U.S. settlers in Texas, Santa Anna led the Mexican army into a bloody war. After six months of fighting, Santa Anna was forced to sign the Treaties of Velasco to bring hostilities to an end and recognize the independence of Texas (see **TEXAS REVOLUTION**).

For a time, the disgraced Santa Anna sank into seclusion at his Veracruz **HACIENDA**, but another attempted foreign invasion gave him an opportunity to redeem himself. In 1838, French ships stationed off the coast of Veracruz in a conflict known as the **PASTRY WAR**. While defending the port from French forces, Santa Anna was wounded and lost his leg below the knee. Emphasizing the real and symbolic sacrifices he had made for his nation, he used his injury to regain political power. He assumed the presidency in 1841 and, in an ostentatious display, built a shrine in Mexico City devoted to his amputated leg. He buried the limb at the shrine in an extravagant ceremony. Not long after, a widespread revolt drove him from power and into exile in **CUBA**.

In 1845, Santa Anna was brought out of exile to lead Mexico as it headed toward war with the United States. Santa Anna managed to raise and equip an army and mounted an impressive offensive against the U.S. invasion in the **U.S.-MEXICAN WAR**. Nevertheless, U.S. forces succeeded in taking **MEXICO CITY** and forcing Santa Anna’s surrender in the Treaty of Guadalupe Hidalgo in February 1848. In defeat, Santa Anna was also forced to cede northern lands amounting to nearly half of Mexico’s national territory to the United States.

Disgraced once again, Santa Anna retreated into exile. He made one more comeback in 1853 at the behest of Conservative leaders in another attempt to centralize the Mexican political system. He assumed the role of dictator and the title “most serene highness.” This was Santa Anna’s last tenure as leader of Mexico, and his leadership style was even more aristocratic and ostentatious than before, with the luxuries in which he indulged straining an already depleted treasury. To replenish national funds,

Santa Anna sold yet another portion of Mexico’s northern territory to the United States in the 1853 **GADSDEN PURCHASE**.

In 1855, the nation’s Liberal leaders united in the **REVOLUTION OF AYUTLA** to force Santa Anna from power once and for all. In the 1860s, he made two more failed attempts to return to power. Santa Anna was finally allowed to return to Mexico in 1874. He died in Mexico City on June 21, 1876.

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**Santa Cruz, Andrés de** (b. 1792–d. 1865) *independence leader and president of Bolivia* Andrés de Santa Cruz was a Spanish **MILITARY** officer–turned–independence leader in Andean South America. He served briefly as president of **PERU** and as president of **BOLIVIA** after independence. He also created the short-lived **PERU-BOLIVIA CONFEDERATION** (1836–39) and held the executive title of protector over the federation.

Santa Cruz was born in La Paz on December 5, 1792, to a Spanish father and a Quechua mother. He joined the Spanish army at the outbreak of the wars of independence and fought against insurgents until 1821, when he switched sides and joined the army of Argentine general José de San Martín and independence leader Simón Bolívar. He rose in the ranks of the independence movement and eventually became president of Peru in 1826 after Bolívar was recalled to **GRAN COLOMBIA**. He held that position for one year.

In 1829, the struggling new government of Bolivia offered the presidency to Santa Cruz after a series of coups and failed administrations. Leaders hoped the La Paz native would stabilize Bolivian politics. Santa Cruz introduced a number of fiscal and economic reforms and created a civil code modeled after the Napoleonic Code of 1804. But, even as Santa Cruz addressed the internal needs of the new nation, he had his sights set on Peru. Citing his mother’s Quechua heritage, he claimed a direct lineage to the Sapa Inca. He envisioned reuniting the territory of the former Inca Empire—Peru and Bolivia—under one united federation.

In 1836, civil war in Peru created an opportunity for Santa Cruz to realize his vision. He led an occupation force and declared the Peru-Bolivia Confederation. Naming himself protector of the new federation, Santa Cruz extended the social, economic, and political reforms that he had earlier introduced in Bolivia. In 1837, neighboring **CHILE** declared war against the confederation, seeing the unification of the two nations as a threat to its own security. By 1839, a protracted war with the Chilean army forced the dissolution of the confederation.

After the failed Peru-Bolivia Confederation, Santa Cruz was forced into exile in ECUADOR. He died on September 25, 1865.

See also BOLÍVAR, SIMÓN (Vol. II); INCAS (Vol. I); SAN MARTÍN, JOSÉ DE (Vol. II).

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**Santana, Pedro** (b. 1801–d. 1864) *caudillo and president of the Dominican Republic* Pedro Santana was an autocratic leader who came to power in the DOMINICAN REPUBLIC just months after the nation broke away from HAITI and declared its independence. For a period of 20 years, Santana alternated power with fellow CAUDILLO and political rival BUENAVENTURA BÁEZ. Santana is noted for his dictatorial rule and for turning his nation back over to Spanish control in 1861.

Santana was born along the Haitian border region to an HACIENDA-OWNING FAMILY of SANTO DOMINGO. He led a relatively quiet life in the early decades of the 19th century and during the HAITIAN OCCUPATION OF SANTO DOMINGO. But, when Dominicans rose in revolt against Haitian leader CHARLES RIVIÈRE-HÉRARD in 1843, Santana joined the movement and demonstrated adept MILITARY leadership skills. He challenged the democratic inclinations of LA TRINITARIA leaders and forcibly took power in 1844. Later, he was elected president under the provisions laid out in the CONSTITUTION OF 1844. Santana was convinced that the Dominican Republic needed an authoritarian leader in order to repel the constant threat of reinvasion by Haitian leader FAUSTIN SOULOUQUE (1847–59). Throughout his tenure in office, Santana attempted to place the nation under the protection of a foreign power.

In 1861, Santana negotiated an arrangement whereby Spain reclaimed control of the Dominican Republic. An anti-Spanish revolt broke out almost immediately, and it quickly escalated into the WAR OF RESTORATION. Santana was captured by rebel forces and died while in custody on June 14, 1864.

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**Santander, Francisco de Paula** (b. 1792–d. 1840) *independence leader and president of New Granada* Francisco de Paula Santander was an independence leader who

fought with Simón Bolívar in liberating New Granada and VENEZUELA from Spanish rule. He was vice president of GRAN COLOMBIA from 1821 to 1828 and president of the Republic of New Granada (present-day COLOMBIA) from 1832 to 1837.

Santander was born on April 2, 1792, in Rosario, in the Viceroyalty of New Granada, to a wealthy land-owning FAMILY. His father was a local politician, and Santander followed a similar path by enrolling in law school in 1810. His studies were cut short when the wars of independence broke out, and Santander joined the liberation movement in New Granada. In 1819, he joined Bolívar's army and helped secure the independence of New Granada by his leadership on the battlefield at Boyocá. In 1821, he was elected vice president of the newly formed Republic of Colombia (Gran Colombia). When Bolívar, who had been elected president, departed to continue fighting the wars of independence in BOLIVIA and PERU, Santander served as acting president of Gran Colombia. It fell upon him to implement the new government structure and enact the social reform dictated in the Constitution of 1821.

Between 1822 and 1826, Santander oversaw modest degrees of economic recovery in Gran Colombia. He secured foreign loans and worked to attract foreign investors into the struggling republic's ECONOMY. He also began implementing social reforms, the most notable of which was secularizing EDUCATION at the expense of the CATHOLIC CHURCH. Despite his efforts, the economy of Gran Colombia remained weak, and political adversaries stood poised to challenge the national government. Resentment began to surface among regional factions in Venezuela and ECUADOR over the political organization and geographic layout of the republic. In 1826, a rebellion led by JOSÉ ANTONIO PÁEZ in Venezuela precipitated the return of Bolívar, who had been orchestrating the creation of the BOLIVARIAN CONSTITUTION.

Bolívar negotiated a peaceful end to the rebellion but then attempted to change the Constitution of 1821 to follow the more centralized system as defined in the Bolivarian Constitution. Santander and other political leaders opposed Bolívar's plans to further consolidate centralized executive authority. In 1828, Bolívar discovered a conspiracy to assassinate him. He suspected Santander's involvement and ordered his execution. With no evidence tying Santander to the conspiracy, Bolívar commuted his sentence but expelled him from Gran Colombia.

In 1831, Gran Colombia broke apart into Venezuela, New Granada, and Ecuador. In 1832, Santander returned to New Granada to serve as president. During his presidency, he earned a reputation for upholding the constitution and stabilizing the young nation's economy. He continued the liberal approach to education that had defined his tenure in the administration of Gran Colombia and provided access to education to a growing number of young people. His education policies, in

particular, evoked some opposition from former Bolívar supporters, but he did not face a major revolt against his presidency.

In 1837, Santander stepped down as president of New Granada and served briefly as a senator. Santander fell ill and died in Bogotá on May 6, 1840.

See also BOLÍVAR, SIMÓN (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II).

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**Santería** Santería is an Afro-Cuban RELIGION that combines aspects of Christianity with the Yoruba religion of West Africa, specifically Nigeria. It originated during the colonial period when Europeans imported African slaves into the American colonies to work on plantations (see SLAVERY). As the Spanish attempted to enforce Catholicism, many slaves incorporated similar practices from the Yoruba religion, and the hybrid belief system of Santería emerged.

Practitioners of Santería believe in one supreme being who is accessible through intermediaries known as Orishas. These beliefs, derived from the Yoruba religion, fused with the Christian concept of one true god and the Catholic veneration of the saints. Each practitioner of Santería has a patron saint/Orisha and pays special homage to that saint through various rituals. Religious meetings are run by priests and priestesses and consist of a combination of incantations and the ceremonial lighting of candles. Some ceremonies include ritualistic animal sacrifice, with the meat of the sacrificed sheep and/or chickens often being served as part of elaborate meals. The highest-ranking priests and priestesses, known as *babalawos* and *lyanifas*, respectively, are believed to be clairvoyant and regularly perform divination.

During the colonial period, the CATHOLIC CHURCH made nominal attempts to prevent the type of syncretism that produced Santería. In practice, however, most plantation owners in CUBA tolerated the incorporation of African religious beliefs into Christianity, and the religion was deeply rooted in Cuban culture by the 19th century. Furthermore, the continuation of the slave TRADE in Cuba until the late 19th century ensured that the Yoruba influence on local religious practices continued. In the 1880s, government officials attempted to eradicate the influence of African culture by requiring local communities to adopt the name of a Catholic saint. By that time, many Catholic saints had become synonymous with Santería's Orishas. The attempts to extinguish African culture, therefore, had the opposite effect of strengthening the association between Orishas and saints.

Today, it is estimated that approximately 75 percent of Catholics in Cuba actually practice some form

of Santería. The religion also migrated to the United States with exiles who relocated after the 1959 Cuban Revolution.

See also RELIGION (Vols. I, II, IV); SYNCRETISM (Vol. I).

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**Santiago de Chile** Santiago de Chile is the capital of CHILE, located in the country's central valley of the Andes mountain range. The city sits at an altitude of approximately 1,800 feet (549 m) above sea level and is surrounded by mountains and volcanoes reaching up to 20,000 feet (6,096 m) high. Santiago was founded in 1541 by Spanish conquistador Pedro de Valdivia. The city remained a small and relatively isolated outpost on the periphery of the Spanish Empire throughout most of the colonial period. In the last half of the 18th century, the Bourbon monarchs of Spain began devoting more resources to developing public works and other infrastructure in Santiago as part of larger reform efforts. Those reforms led to the construction of government buildings to house the local cabildo, or town council, the colonial audiencia, or judicial district, a royal mint, and a local hospital. Even with renewed attention from the Spanish Crown, Santiago remained small and underdeveloped, with a population of no more than 35,000 until after independence.

Chile's independence movement began in 1810 with the formation of a cabildo abierto, a town hall type meeting, in Santiago as the city's elite debated how to respond to Napoléon Bonaparte's invasion of Spain. Because Chile was administratively a part of the Viceroyalty of Peru during the colonial period, royalist forces in LIMA immediately stepped in to thwart the attempts at self-government in Santiago. Chilean leaders fled to neighboring ARGENTINA and regrouped to challenge royal authority in Santiago. By 1818, the city had been liberated, and it was named the capital of the newly independent nation. For the next 10 years, Chile experienced a period of instability as political leaders vied for power. But, by the 1830s, the country had entered an era of relative stability as leaders in the capital city, who were nominally conservative, consolidated power.

In the first half of the 19th century Santiago experienced unprecedented growth as the population increased, and the entire nation benefited from economic expansion. The revival of the nation's MINING industry and the discovery of nitrate deposits in northern Chile led to a surge of infrastructure development. TRANSPORTATION and communication lines were built between Santiago

and VALPARAISO, which was quickly becoming the nation's primary coastal port. Overland roads also expanded, connecting Santiago to the rest of the country and to important outposts in Argentina.

Economic and political stability allowed for a greater degree of cultural development in Santiago than in other Latin American cities. In 1843, President Manuel Bulnes (1841–51), future president Manuel Montt (1851–61), and ANDRÉS BELLO collaborated to create the UNIVERSITY OF CHILE, based in Santiago. The opening of the new university marked an important shift in the secularization of EDUCATION, with the university replacing the church-run Royal University of San Felipe that had dominated higher education in the colonial period. The educational and cultural environment in Santiago attracted intellectuals from all over the world who traveled to Chile to join the faculty of the university. Political leaders from other Latin American countries who were seeking refuge from repressive CAUDILLO regimes also found a welcoming intellectual environment in Santiago. Argentine presidents BARTOLOMÉ MITRE (1862–68) and DOMINGO F. SARMIENTO (1868–74) both spent time in exile in Santiago in the 1840s. The University of Chile quickly became one of the most distinguished institutions of higher education in the Americas. It represented the efforts of Chilean government leaders to use the educational system to reinforce a sense of national identity in the country's population.

Throughout the last half of the 19th century, Santiago's cultural development was accompanied by a general economic boom. Many of the nation's former rural elite relocated to the capital city and pursued new economic opportunities there. Santiago's financial and administrative infrastructure allowed HACIENDA and mine owners to diversify their landholdings and to invest in new city-based opportunities. Santiago's development allowed Chile's rural sector to make significant leaps toward more integrated commercial AGRICULTURE. Santiago kept the agricultural and mining sectors connected to the world market in important ways. The capital city also became a main setting for government attempts at economic modernization in the late 19th century. Transportation and communications networks came together in Santiago and made it a natural site for industrial development. Santiago became home to basic consumer goods industries such as textiles and foodstuffs and also to some heavy industry (see INDUSTRIALIZATION). As the city's industrial sector expanded, so, too, did its working-class population. The ranks of the laboring class were filled by some immigration from abroad and by rural Chileans relocating from the countryside (see MIGRATION). By the turn of the century, laborers in some sectors had started organizing to protect members' workplace interests. Those organizations provided an important foundation for the emergence of LABOR unions and other syndicates in the early decades of the 20th century.

Economic expansion in Santiago propelled an era of unprecedented cultural development in the late 19th

century. The Museo Nacional de Bellas Artes opened in 1880 originally as a center to showcase painting and sculpture. By the end of the century, the museum had expanded after receiving additional government funding. Beautification projects resulted in the construction of numerous parks and historic monuments. By the end of the century, Santiago residents enjoyed a variety of entertainment, including the finest in dining and theater (see SPORTS AND RECREATION). The Teatro Municipal de Santiago opened in 1857. In the final decades of the 19th century, the Chilean government renovated a number of colonial structures and converted them into government buildings. Many of those structures officially became national monuments in the 20th century.

In 1891, Santiago became part of the intense fighting between President JOSÉ MANUEL BALMACEDA and the Chilean Congress in a conflict known as the CHILEAN CIVIL WAR. The confrontation lasted only nine months but cost the nation more than 6,000 in casualties and required the government to spend valuable resources. Most of the fighting took place outside the capital city, but the outcome of the war left a new form of government in Santiago, and administration of the country remained under congressional control for several decades.

See also CHILE (Vols. I, II, IV); PERU, VICEROYALTY OF (Vol. II); SANTIAGO DE CHILE (Vols. II, IV); VALDIVIA, PEDRO DE (Vol. I).

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**Santo Domingo** Santo Domingo is the capital city of the DOMINICAN REPUBLIC. It was also the name of the Spanish-controlled portion of the island of Hispaniola during the colonial period, which eventually became the independent nation of the Dominican Republic. Santo Domingo was the first permanent Spanish settlement in the Caribbean and is the oldest city in the Americas. It is located along the southern coast at the mouth of the Ozama River. The city's strategic location made it an early base of exploratory expeditions for the Spanish in the late 15th and early 16th centuries. In later centuries, Santo Domingo became an important TRADE outpost.

Santo Domingo was founded in 1496 during one of Christopher Columbus's expeditions. It is home to the first monastery, the oldest cathedral, and the first university in the Americas. As Spanish administrative power shifted to the mainland in the 16th century, Santo Domingo continued to be the seat of an *audiencia* judicial district, and the city supported the plantation ECONOMY that emerged on the island. But, Spanish interest in the island declined, and when the French-controlled western portion of Hispaniola (Saint Domingue) rose in revolt

in 1791, the violence quickly spread to Santo Domingo. Spain ceded the colony of Santo Domingo to the French from 1795, only to regain control in 1809. But, leaders in the recently liberated nation of HAITI invaded in 1822 and occupied Santo Domingo for more than two decades. During the HAITIAN OCCUPATION OF SANTO DOMINGO, SLAVERY was abolished, and outward manifestations of traditional Spanish culture were suppressed. Santo Domingo native Juan Pablo Duarte (b. 1813–d. 1876) formed LA TRINITARIA as an opposition movement against Haitian rule in the 1830s. The movement succeeded in ousting the French in 1844, and its leaders formally established the eastern portion of Hispaniola as the Dominican Republic. The CONSTITUTION OF 1844 formalized that decree, and Santo Domingo became the capital of the new nation.

Dominican independence did not bring long-term stability to Santo Domingo. The city was the site of a number of political conflicts in the coming decades as opposing factions struggled for control of the newly formed government. Political volatility in Santo Domingo allowed the Spanish to regain control over their former colony from 1861 to 1865. The WAR OF RESTORATION began with sporadic rebellions in the countryside and culminated with nationalists driving the Spanish from Santo Domingo and establishing the SECOND REPUBLIC. Nevertheless, the nation and the capital city continued to languish in the final decades of the 19th century as political infighting continued, and Dominicans endured several corrupt and ineffective leaders. ULISES HEUREAUX (1882–84, 1887–99) virtually drove the nation into financial ruin in the 1890s. By the turn of the century, U.S. investors had developed a strong economic stake in the island; U.S. influence in Santo Domingo became increasingly evident throughout the 20th century.

See also DOMINICAN REPUBLIC (Vol. IV); HISPANIOLA (Vols. I, II); SANTO DOMINGO (Vols. II, IV).

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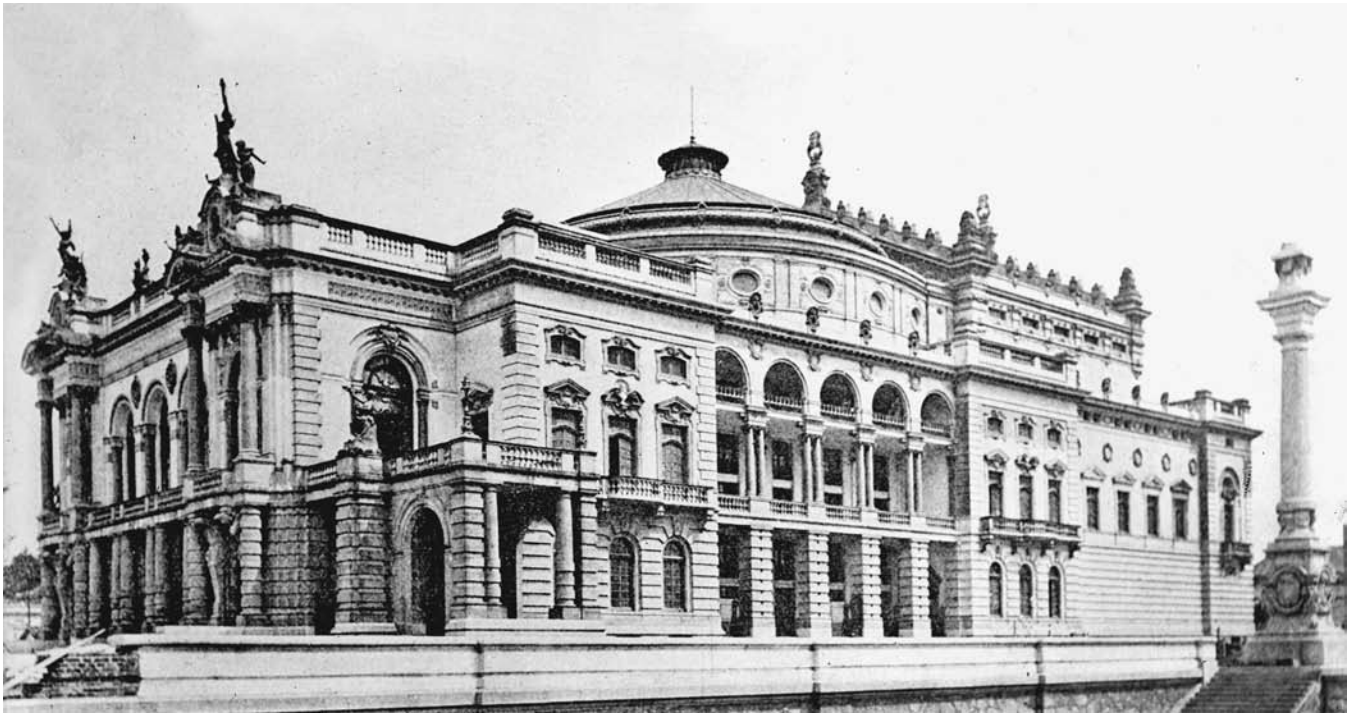
**São Paulo** São Paulo is the largest city in BRAZIL and is the capital of the state of the same name. The city is located approximately 40 miles (64 km) inland in the highlands of southern Brazil. São Paulo began as a small outpost for *bandeiras*, or colonial exploratory expeditions, but grew in importance as the most productive center of COFFEE production in the 19th century. São Paulo's increasing economic importance also gave *paulistas*, or residents of São Paulo, enormous political influence in the late 19th century.

São Paulo was founded as a Jesuit missionary site in the 16th century and became a colonial city after the establishment of the captaincy of São Paulo in 1710. By the beginning of the 19th century, plantation AGRICUL-

TURE had emerged throughout the province, and for a time, the southern region lagged behind the northeastern provinces that were the leading producers of SUGAR. But throughout the first half of the 19th century, agriculturalists in São Paulo experimented with new crops and new cultivation techniques and found coffee to be a much more suitable crop for the region's climate and economic infrastructure. São Paulo's transition to coffee production coincided with growing demand for the product on the world market. By mid-century, coffee had replaced sugar as Brazil's most important agricultural product, and the planters of São Paulo saw the political balance of power begin to shift in their favor.

Brazil had achieved independence from Portugal in 1822, but the newly sovereign nation remained under a constitutional monarch, PEDRO I, of the Portuguese royal FAMILY. Pedro I abdicated in favor of his son PEDRO II in 1831, and the EMPIRE OF BRAZIL continued under a monarchical political system. Pedro II was forced to strike a political balance between the traditional sugar planter elite of the northeast and the emerging coffee planter elite of São Paulo. The emperor was open to modernization strategies, but the *paulistas'* eagerness for progress was often stifled by resistance from the traditional *fazendeiros* of Bahia and elsewhere (see FAZENDA/FAZENDEIRO). In particular, *paulistas* embraced the free market forces that dominated 19th-century global economic networks. Some *fazendeiros* in São Paulo perceived the continued use of African SLAVERY to be a hindrance to the free market, while others resisted talk of abolition. Generally, coffee planters in São Paulo were quick to adopt new production technologies and LABOR-saving devices, and many of them sought immigrant wage laborers in anticipation of emancipation policies that were sure to come (see MIGRATION). Liberal politicians pressured the national government to abolish slavery, and abolitionist-friendly policies began to materialize in the last half of the 19th century. In 1850, the Brazilian government officially banned the external slave TRADE, and in 1871, Pedro II signed the LAW OF THE FREE WOMB, which granted freedom to all children of slave mothers born after the date it went into effect. The Golden Law finally decreed nationwide abolition in 1888, and São Paulo and other regions adjusted to the postslavery social system (see SLAVERY, ABOLITION IN BRAZIL OF). Some scholars have argued that planters' willingness to incorporate free market techniques in São Paulo in earlier decades made that transition easier. As slavery came to an end, immigration into São Paulo intensified and was aided by government policies that actively recruited European workers. The state became home to agricultural colonies, and many itinerant wage laborers found work on the coffee plantations. The influence of those immigrant groups is still visible today.

The desire for modernization and free market reform also led to the emergence of a republican movement in São Paulo in the late 19th century. A Republican Party formed in the 1870s, and the movement attracted



Construction of the Municipal Theater in São Paulo, Brazil, began in 1903 to showcase the city's wealth and its importance in the national economy. (*Library of Congress*)

planters, politicians, and intellectuals who were anxious to end—or at the very least reform—the system of monarchy that had defined Brazil's political system. Republican leaders from São Paulo won seats in the national congress, and pressure mounted to open up the political process. São Paulo Republicans found allies in the national MILITARY, where positivist thinker BENJAMIN CONSTANT was pushing for reform (see POSITIVISM). In 1889, a small coup led by MANUEL DEODORO DA FONSECA overthrew Pedro II and established the OLD REPUBLIC.

An economic crisis provoked by the unsound fiscal policies known as the ENCILHAMENTO challenged the new Republican government in the 1890s. A revolt erupted in Rio Grande do Sul in 1893, and leaders in the struggling government looked to the economically powerful planters of São Paulo for support. São Paulo's planters offered money and militia support in exchange for a political alliance that would last for decades. São Paulo's influence in national politics became evident when former *paulista* governor PRUDENTE DE MORAIS was elected Brazil's first civilian president in 1893 on the first ever popular ballot. From that point until 1930, a series of *paulista* presidents alternated power with leaders from Minas Gerais as part of a political coalition known as *café com leite*.

By the turn of the century, São Paulo had become the nation's main economic center. The coffee industry expanded as government leaders devoted resources to the expansion of railroads and other infrastructure in the

region. The city of São Paulo became the beneficiary of INDUSTRIALIZATION strategies pursued by the Brazilian government well into the 20th century.

See also *BANDEIRAS* (Vol. II); *BRAZIL* (Vols. I, II, IV); *JESUITS* (Vol. II); *SÃO PAULO* (Vols. II, IV).

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**Sarmiento, Domingo F.** (b. 1811–d. 1888) *writer, educator, and president of Argentina* Domingo Faustino Sarmiento was one of ARGENTINA's leading Liberal intellectuals in the 19th century. He is best known for his 1845 literary masterpiece *Facundo, or Life in the Argentine Republic in the Days of the Tyrants* (*Facundo: Civilización y barbarie en las pampas argentinas*), which offered a scathing critique of CAUDILLO rule in Argentina. Through his writings, Sarmiento contributed to the intellectual propaganda campaign that helped to bring down the dictatorship of JUAN MANUEL DE ROSAS (1829–32, 1835–52). Sarmiento eventually became president of the nation and worked to implement liberal ideals.

Sarmiento was born on February 15, 1811, in a poor neighborhood in San Juan, Argentina. From an early age, his parents emphasized the need for an EDUCATION. Sarmiento helped found a rural schoolhouse and started to become involved in local politics. He led a relatively quiet life as the independence movement gave way to attempts to establish a coherent national identity. In 1827, Sarmiento witnessed the invasion of his hometown by the caudillo JUAN FACUNDO QUIROGA. The young intellectual joined the forces of the UNITARIOS to oppose Quiroga and the FEDERALES. But, the caudillo's forces proved too powerful, and in 1831, Sarmiento was forced to flee into exile, for the first time, to neighboring CHILE. Sarmiento managed to return to San Juan a few years later and began publishing his first periodical, *El Zonda*. He became an important leader in the intellectual and literary movement known as the Generation of '37. The writer's outspoken criticisms of Rosas and the *federales* provoked a backlash by the autocratic government. Sarmiento's periodical was shut down, and he left for Chile once again in 1840.

From Chile, Sarmiento pursued an aggressive anti-Rosas campaign through his writing. He started two periodicals while in exile and in 1845 published *Facundo*. The work is seen as a precursor to the Latin American novel, a genre that was in its infancy in the 19th century. It chronicles the life of Quiroga, the caudillo who had invaded Sarmiento's home province in earlier years. Sarmiento portrayed Quiroga—and by extension all caudillos—as a barbarian who was impeding the development of the nation. By decrying the barbarism and tyrannical rule of Argentina's caudillos, Sarmiento was also assailing the dictatorship of Rosas. The alternative to despotism, Sarmiento argued, was a stable society based on education and cultural growth. His portrayals of Argentine caudillos and enlightened intellectuals is often summed up in the phrase “civilization versus barbarism.” *Facundo* is widely considered one of the most important works of Latin American LITERATURE.

While in Chile, Sarmiento also devoted himself to studying various programs for national education. He toured Europe, the United States, and other parts of Latin America to observe educational programs. He eventually returned to Chile and made important contributions to the government's efforts at educational reform. He also continued to write in opposition to the Rosas dictatorship in Argentina. In 1852, Sarmiento returned to his native country and aided JUSTO JOSÉ DE URQUIZA in overthrowing the despot.

Sarmiento continued his writings and immediately became involved in Argentine politics. He eventually joined forces with BARTOLOMÉ MITRE and other political leaders to oppose the federalist system imposed by Urquiza. Mitre became president in 1862, and Sarmiento became governor of San Juan. Although their tactics differed, the two intellectuals both worked to unify the country under the notion of “civilization” that had

defined much of Sarmiento's literary works. As governor, Sarmiento transformed San Juan's educational system. He also revived his periodical *El Zonda* and continued to write.

In 1868, Sarmiento was elected president of Argentina. He inherited a nation at war with PARAGUAY and in the process of major internal transformations. Sarmiento ended the WAR OF THE TRIPLE ALLIANCE and began implementing the liberal philosophies he had initiated in San Juan on a national scale. He overhauled the national education system, building new schools and increasing enrollment exponentially. He also devoted national resources to improving TRANSPORTATION and communications infrastructure. Largely with the aid of British investors, Argentina laid thousands of miles of telegraph cables and rail lines during Sarmiento's presidency. With a growing infrastructure, Sarmiento was also able to promote INDUSTRIALIZATION and economic development. He initiated an immigration campaign in an effort to attract a skilled LABOR force (see MIGRATION). However, instead of attracting large numbers of immigrants from northern and western Europe, as Sarmiento had hoped, his program primarily attracted migrants from southern and eastern Europe. Sarmiento did bring economic growth and progress to Argentina, but many of his policies were unpopular with large segments of the population. His emphasis on modernization and industry was seen by many as an attack on the traditional economic role of the GAUCHO. In 1872, José Hernández (b. 1834–d. 1886) wrote his epic poem about MARTÍN FIERRO as a denunciation of Sarmiento's policies and a celebration of the Argentine gaucho.

Sarmiento served as Argentina's president until 1874. After he left office, he remained active in education and literature. He died on September 11, 1888, in Paraguay.

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**Second Republic** The Second Republic in the DOMINICAN REPUBLIC refers to the period of time following the Spanish reannexation of the country and subsequent reestablishment of Dominican independence in 1865. At the beginning of the Second Republic, local leaders attempted to institute a resolutely democratic tradition, but political infighting resulted in tyranny and dictatorship in the final decades of the century.

Throughout the first half of the 19th century, Santo Domingo struggled to secure independence and stabilize



the island's political and economic systems. After more than two decades of occupation by neighboring HAITI, the former Spanish colony finally became independent in 1844 (see HAITIAN OCCUPATION OF SANTO DOMINGO). Leaders wrote a constitution and formally established the nation of the Dominican Republic, but the threat of invasion by Haiti continued. Dominican leader PEDRO SANTANA believed that he could best safeguard national security by inviting the Spanish to reannex the island. In 1861, Spanish forces occupied the nation, making it a protectorate and part of the Spanish Empire once again.

Resistance to the Spanish began almost immediately, and Dominicans fought the WAR OF RESTORATION until occupation forces withdrew in 1865. The removal of the Spanish marked the beginning of the Second Republic. Dominicans wrote a new constitution, and restoration leaders such as GREGORIO LUPERÓN attempted to institute a DEMOCRACY. Nevertheless, the nation's second foray into independence was equally turbulent. Luperón (1879–80) was challenged by longtime CAUDILLO and former Santana rival BUENAVENTURA BÁEZ. Factional rivalry continued to plague the country, leading to the rise of dictator ULISES HEUREAUX (1882–84, 1887–99). Heureaux ruled tyrannically and drove the nation into economic ruin. Because of his mismanagement, U.S. interests increased considerably, setting the stage for decades of conflict and intervention in the 20th century.

See also HISPANIOLA (Vol. II).

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## Seven Laws See SIETE LEYES.

**sexuality** *Sexuality* is a term that describes a person's association with either the male or female gender. It also describes the way individuals relate to and engage in sexual activities. Both aspects of sexuality have played an important role in Latin American history. Individual and societal attitudes toward sexuality evolved significantly after independence and often reflected important social changes that were occurring throughout the region.

During the colonial period in Latin America, sexuality was closely monitored and regulated by the CATHOLIC CHURCH. Religious teachings dictated the types of gender and sexual roles WOMEN and men should play, attempting to establish acceptable behavioral norms for both sexes. Under the colonial Catholic ideal, only married couples were to engage in sexual intercourse and, even then, only

for the purpose of procreation. Women were to strive for chastity and purity by safeguarding their sexual virtue, which was also associated with their FAMILY'S "honor." The religious and social expectations applied to men were more lax. Colonial society accepted that men would engage in sexual pursuits and so often cast a blind eye when men—both married and single—were caught in some sexual transgression.

The rigid assumptions relating to sexuality carried over into the 19th century after independence. But, as forward-looking liberal movements competed with conservative vanguards, sexuality and gender norms were affected. The liberty and equality promised by LIBERALISM inspired some women to challenge the informal system of gender hierarchies left over from the colonial period. New constitutions did not give women equal political rights, but some women found greater freedom to voice their opinions and step outside the strict boundaries that had defined their roles. Peruvian writer and journalist CLORINDA MATTO DE TURNER (1853–1909) published novels and essays advocating greater protections both for women and for the Andean indigenous (see LITERATURE).

The consolidation of liberal rule in many Latin American nations in the last half of the 19th century brought further changes in the regulation of sexuality. Liberalism called for limitations on the authority of the Catholic Church and for the adoption of civil codes in such countries as MEXICO, CHILE, and ARGENTINA with the aim of establishing state control over gender and family issues. Civil codes also established government control over the registration of vital statistics, such as marriages and births, which had long been the purview of the Catholic Church. Many codes transformed family law by changing the age of majority and redefining the legal rights that fathers and husbands held over female family members.

The late 19th century saw a rise in state involvement with sexual health concerns. Positivist governments in Argentina and Mexico, for example, used scientific rationale to pass laws intended to regulate prostitution and the spread of sexually transmitted diseases (see POSITIVISM).

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**Sierra, Justo** (b. 1848–d. 1912) *Mexican writer and liberal intellectual* Justo Sierra was a prominent writer, poet, and historian in MEXICO in the late 19th century. Through his writings and his political activities, Sierra devoted himself to advancing the liberal cause in an era when liberal and conservative ideologies clashed in

Mexico. He is remembered for his literary and historical writings as well as for his career in public service, especially in the field of EDUCATION (see LITERATURE).

Sierra was born in Campeche on January 26, 1848. His father, the famous Mexican novelist Justo Sierra O'Reilly, died in 1861, and the young Sierra moved to MEXICO CITY where he finished his education at the Colegio de San Ildefonso. He completed his law degree in 1871 and began a career as a writer and public servant. Early in his career, he published general histories of Mexico and started work on what would become a classic biography of BENITO JUÁREZ, *Juárez, su obra y su tiempo* (Juárez, his works and his times). He also wrote plays, novels, and poetry.

As a public servant, Sierra served several terms as a congressional deputy and as a Supreme Court justice. In 1902, he became minister of education in PORFIRIO DÍAZ's cabinet, and in that position, his liberal inclinations became particularly prominent. He deviated slightly from the prevailing positivist ideology held by leaders of the PORFIRIATO (see POSITIVISM). Sierra viewed education as the way to build a strong nation and move Mexico along a path of progress.

Shortly after the outbreak of the Mexican Revolution, Sierra became ambassador to Spain and relocated to Madrid. He died there on September 13, 1912.

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#### Siete Leyes (Seven Laws, Siete Leyes Constitucionales)

The Siete Leyes were a series of laws passed by ANTONIO LÓPEZ DE SANTA ANNA in MEXICO in 1835. They reversed many of the liberal measures contained in the CONSTITUTION OF 1824 and imposed a centralized, conservative form of government.

In 1833, MILITARY leader, CAUDILLO, and liberal supporter Santa Anna was elected president. After only a few months in office, he handed over power to his vice president, VALENTÍN GÓMEZ FARIÁS, who immediately began implementing reforms that threatened conservative interests. Many of these had been introduced in the Constitution of 1824 but had never been fully implemented. Church and military leaders, who stood to lose the most under Gómez Farías's liberal reforms, appealed to Santa Anna to depose his own former vice president and re-form a conservative government. Santa Anna, sensing a need for strong, centralized authority, reversed his earlier politics and obliged. He forced Gómez Farías into exile and took power for himself. Once in office, Santa Anna reversed the liberal reforms of the former administration and attempted to erase the constitutional authority that had made them possible.

In 1835, Santa Anna began working with the now conservative congress to rewrite the foundations for

Mexico's political system. The laws, which are known formally as the Siete Leyes Constitucionales, were promulgated between December 1835 and December 1836. They superseded the Constitution of 1824 and erased Mexico's status as a federal republic. They established a new government system and vested the central executive with extraordinary powers, including the ability to close Congress and restrict the activities of the Supreme Court. The presidential term was extended to eight years. The Siete Leyes called for a bicameral legislature, but the president would have the power to nullify any legislation he deemed a threat to the overall security and well-being of the nation. The laws further limited citizenship and voting rights to educated and wealthy property owners.

One of the most controversial measures in the Siete Leyes was the decree that abolished states and replaced them with departments, subdivided into districts, whose local leaders were appointed by and answered directly to the president. Santa Anna and his supporters viewed Mexico's earlier federalist organization as a weak system that allowed individual states too much autonomy. They hoped to hold the nation together by centralizing authority. The Siete Leyes, however, provoked a major backlash against the national government. Several states rose in rebellion. Texas and the Yucatán officially seceded and declared their independence. As a result of the Siete Leyes, the Mexican government was forced to engage in the TEXAS REVOLUTION, which resulted in the loss of Texas and laid the foundation for the U.S.-MEXICAN WAR. The laws also contributed to the instability and tension that culminated in the CASTE WAR OF THE YUCATÁN.

The Siete Leyes remained in place until new efforts at establishing a constitutional base in Mexico replaced them in 1843. Conflict over CENTRALISM VERSUS FEDERALISM and CONSERVATISM VERSUS LIBERALISM continued throughout most of the 19th century.

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**silver** Silver is a precious metal found in MEXICO, PERU, CHILE, and BOLIVIA. It can be mined directly or extracted as a by-product in the MINING OF GOLD, COPPER, zinc, and other elements. During the colonial period, the majority of the world's silver came from Mexico and South America. Silver mining declined during the 19th century but remained an important part of the economies of some Latin American countries.

Throughout the colonial period, the mining of silver and other metals for bullion provided the foundation for the economic system of mercantilism under which the Spanish Empire operated. Large quantities of silver were extracted from mines in Central Mexico and the Andean regions of South America. Workers labored

under oppressive conditions, descending into steep and treacherous mining tunnels without safety equipment and with little light. Early mining techniques were rudimentary and dangerous. Mine shafts were narrow, so small adults and even children were preferred as workers. Miners removed ore manually, then climbed out of the shafts with up to 100 pounds (45 kg) of ore on their backs. Processing the ore was equally hazardous, as crushed ore was mixed with poisonous mercury to remove the silver from impure deposits. Mercury mining increased in line with the need to process silver. Throughout the colonial period, the Spanish Crown maintained a monopoly over mining activities in the colonies, reaping the benefit of the rich silver deposits found in the Americas.

During the wars for independence, widespread violence shut down many of the silver mines in Latin America. In the decades immediately following independence, the economies of the new nations struggled to recover from the devastating effects of the wars. Continued instability and political conflicts in many areas kept would-be investors from risking their money in the Latin American silver mining industry.

Relative political stability accompanied the emergence of liberal oligarchic regimes, which actively encouraged investment in mining (see LIBERAL OLIGARCHY). Additionally, new technologies allowed silver to be extracted from lower-quality ore in mines that were previously thought to be depleted. The introduction of dynamite in the late 19th century changed the mining process but also made mine shafts more dangerous for workers. At the same time, the cyanide process, or cyanidation, was introduced as a more efficient way of extracting silver. This process involved dissolving the ore in a highly poisonous chemical solution of sodium cyanide. Because of these developments, countries such as Chile and Mexico experienced a silver boom in the late decades of the 19th century. Silver mining in Mexico declined once again with the onset of the Mexican Revolution in 1910.

See also MINING (Vols. I, II, IV); SILVER (Vol. I, II).

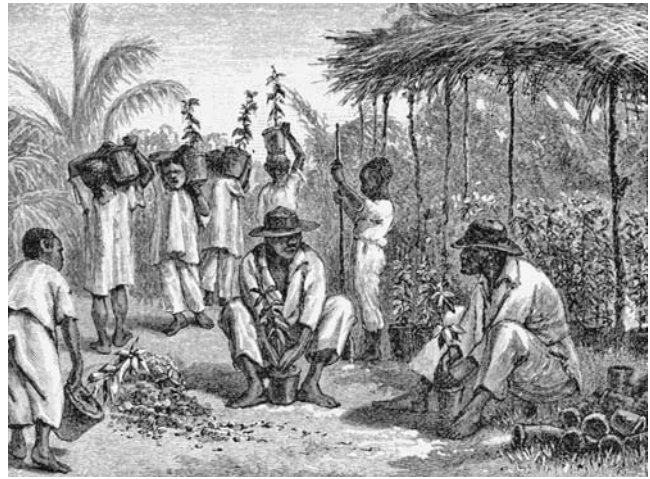
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**Sint Maarten** See CARIBBEAN, DUTCH.

**slavery** Slavery is a form of forced LABOR under which workers are purchased and considered the property of their owners. The use of slavery as a labor system dates back to ancient times and became particularly prevalent during the era of European colonialism, from approxi-



African slaves on a Brazilian coffee plantation, circa 1879 (From *Brazil, the Amazons and the Coast: Illustrated from Sketches by J. Wells Champney and Others*, by Herbert H. Smith. New York: Charles Scribner's Sons, 1879, p. 516)

mately the 16th to the 19th century. The Portuguese developed a thriving plantation economy in the Canary Islands off the coast of Africa in the 15th century, with planters relying on slave labor to cultivate SUGAR (see AGRICULTURE). Some slavery also existed in Spain, largely as a result of the Reconquista, the name given to the war of reconquest against the Moors. Various forms of slavery were also used by pre-Columbian civilizations throughout Mesoamerica, and South American civilizations used other forms of coerced labor. Slavery was a principal labor system in many regions of Latin America throughout the colonial period. Most of these slaves worked on plantations in the cultivation of agricultural commodities such as sugar and COFFEE. Some urban-based, household slavery existed as well. The institution survived in only a few areas after independence.

#### SLAVERY DURING THE COLONIAL ERA

Spanish explorers were the first to introduce African slaves to the Americas as part of the settlement of the Caribbean islands in the early 16th century. African slaves provided a reliable labor source after the NATIVE AMERICAN population declined due to disease and maltreatment. Portuguese settlers colonized BRAZIL in the 16th century, and they also relied on African slaves as a main source of labor. Plantation economies emerged in Brazil and along coastal areas of the Spanish mainland in the early years of the colonial period. Slavery began in the BRITISH CARIBBEAN and DUTCH CARIBBEAN colonies in the 17th century, and the forced labor system spread into the Spanish and FRENCH CARIBBEAN in the 18th century.

By the end of the colonial period, African slavery had become a mainstay of plantation economies in Latin America. The economies of Brazil, CUBA, PUERTO RICO, Hispaniola (present-day HAITI and the DOMINICAN

REPUBLIC), Jamaica, and the islands of the Lesser Antilles relied largely on the production of sugar and other agricultural commodities supported by slave labor. Although historical statistics are not precise, estimates indicate that more than 10 million Africans were transported to the Americas and that more than 85 percent of those people were sent to Latin American colonies. Most of these slaves went to work on sugar plantations first in Brazil and then in the Caribbean toward the end of the colonial period. Slavery in Latin America deprived millions of Africans of their freedom. Working conditions were usually cruel and unhealthy, as overseers and plantation owners aimed to keep costs low and profits high. Many workers were injured or killed in common mill accidents. Other suffered from malnutrition and tropical diseases. Dysentery, a preventable dietary disease, was the number-one killer of slaves on Brazilian plantations. Life expectancy averaged only around 23 years, and infant mortality rates were extraordinarily high. Estimates indicate that as many as one-third of all male children born to slaves died before the age of one. Female children suffered a similar fate, although life expectancy was slightly higher.

Throughout the colonial period and into the 19th century, slave owners in most areas of Latin America had few incentives to create a healthier living and working environment for slaves. It was generally more cost effective to purchase new slaves through the Atlantic slave TRADE that continued well into the 19th century than it was to improve living conditions for existing ones. As a result of high mortality rates and a continuous supply of newly imported slaves, slave populations in Brazil and the Spanish Caribbean never reached a point of natural reproduction. Rather, in those areas, they grew as a result of new imports.

Despite the harsh conditions of plantation life, some slaves in Latin America succeeded in advancing within the system. Slaves with several years of experience and a good work record could be promoted to less dangerous tasks that could allow them to develop a set of valuable skills. Slave owners often allowed slaves to hire themselves out for a wage on days off. Those who were able to accumulate savings after many years could purchase their freedom. By the 19th century, Brazil, Haiti, and Cuba all had large free black populations as a result of such practices of manumission.

Slaves also formed families and other kinship networks. Slave marriages were difficult in many locations because male slaves outnumbered female slaves by an average of four to one. Plantation owners often took female slaves into the household as domestic servants and concubines, which further complicated the process of kinship formation. Despite the imbalanced sex ratio and other obstacles, many slaves in Latin America did manage to form families. Some slave owners permitted men and WOMEN to marry slaves on other plantations or to marry free blacks. These arrangements complicated FAMILY life but did allow slaves a greater degree of freedom than

they otherwise would have had. Slaves who married free blacks often benefited from the spouse's ability to earn a wage. Free blacks often worked to purchase the freedom of a spouse and other family members. Children born to a free person and a slave inherited the status of the mother, so that babies born to slave mothers were born into slavery. It was not uncommon for white men to father children with slave women, and other forms of racial miscegenation occurred regularly in Brazil, Haiti, and elsewhere. Racial mixing created a large mulatto class, and many mulattoes became slave owners themselves.

## SLAVERY AND INDEPENDENCE

The institution of slavery began to face challenges from abolitionist movements starting in Europe in the late 18th century, many of them tied to Enlightenment ideas. Serious abolitionist movements took root in Great Britain in the 1780s. The Haitian Revolution of 1791 began as a slave rebellion and eventually escalated into a full-scale war for independence. The revolution brought about the abolition of slavery on the island, and the newly independent republic of Haiti was the first nation in the Americas to outlaw slavery completely. The Haitian experience caused concern in slave societies elsewhere in the Americas and had a long-lasting impact throughout Latin America. One of the most immediate consequences was the disruption of the sugar economy in Haiti. Haiti had been one of the largest sugar producers in the world, and the abolition of slavery destroyed its plantation economy. Haiti's withdrawal from the sugar economy decreased the world sugar supply and caused a sharp rise in prices. As a result, the neighboring islands of Cuba, Puerto Rico, and Jamaica along with Brazil expanded sugar production, and slave imports into those areas rose precipitously in the first half of the 19th century.

Haiti's independence movement also overturned the racial and social order that had traditionally privileged the white planter elite. Not only did it bring about the abolition of slavery, but the mulatto and colored population on the island pushed for greater rights and equality. By all accounts, colored populations in other regions of the Americas looked to the Haitian experience as a potential model for reform, but attempts to replicate the changes on the former slave island were quickly stymied. Slave societies in the rest of Latin America reacted in the short term by enforcing slave laws more strictly in an attempt to avoid upsetting the local balance of power. Portuguese officials had already cracked down on participants in the Tiradentes Conspiracy in 1789, which represented an early attempt in Brazil to establish a republic. A movement in Bahia in 1798 involved a number of blacks and mulattoes, and the racial tensions underlying that attempted rebellion brought a similarly aggressive reaction. Slave owners and colonial officials were particularly aware of the recent events in Haiti and feared that a slave revolt could take place in Brazil. Those fears partly explain why Brazilian elite did not follow the

same path toward independence as the Spanish colonies. After Napoléon Bonaparte's invasion of the Iberian Peninsula in 1807–08, independence movements erupted throughout the Spanish Empire, and within 15 years, the mainland colonies had broken completely from Spain. The planter elite and other colonial leaders in Brazil feared a major slave uprising if Brazilians challenged the traditional power structure of the Portuguese monarchy. When the Portuguese royal family relocated to RIO DE JANEIRO in 1807, most Brazilians welcomed the continuation of traditional monarchical rule.

The impact of Haitian independence was also evident in the Spanish colonies after Napoléon's invasion of Iberia. In areas with a large indigenous population, the white elite looked back on the Haitian experience as an example of what could happen if the traditional authority figure was removed. Slavery was not widespread in most of the Spanish mainland colonies, but areas such as MEXICO and PERU relied on a large population of Amerindians in a variety of forced labor systems. Elite in those areas feared a major indigenous revolt, and many were reluctant to support independence because of those concerns. Peruvians had already witnessed a major Amerindian uprising in the Túpac Amaru rebellion in the 1780s. Mexico's initial independence movement, led by Miguel Hidalgo y Costilla, was perceived by many elite to escalate into a peasant mob in 1810. As a result, independence armies in those areas gained momentum only slowly, while regions without a large concentrated indigenous or black population, such as the Southern Cone, achieved independence earlier.

South American liberator Simón Bolívar traveled to Haiti in 1815 after he was forced to flee VENEZUELA. With royalist forces closing in on his struggling insurgency, Bolívar sought refuge in the Caribbean and was welcomed by Haitian president ALEXANDRE PÉTION (1806–18). Pétion was a mulatto who had participated in the Haitian Revolution. He offered Bolívar logistical and material support in exchange for Bolívar's guarantee that slavery would be abolished in the new nations after independence. Royalist and insurgent armies throughout Latin America attempted to attract recruits by offering freedom to slaves who fought in the independence struggle. Bolívar imposed emancipation decrees in the regions of South America that he liberated in the 1820s. He also attempted to set up local juntas to collect taxes and purchase the freedom of slaves in GRAN COLOMBIA. But, when Bolívar was driven from power in 1830, many areas reverted back to earlier slave-holding practices. Most governments in the other former Spanish colonies passed "laws of free womb," which stipulated that all children born of slaves would be born free. Such laws were intended to allow for the gradual abolition of slavery. Emancipation procedures often set up a period of "apprenticeship" for slaves that extended their service obligations for years or even decades. Full emancipation was not legally established and was not successful in all

of the former Spanish colonies in South America until the 1850s.

### ABOLITIONIST PRESSURES

While the wars for independence were being fought in Latin America, abolitionist efforts intensified in Europe. British groups inspired by Enlightenment ideas and religious morality formed abolitionist societies starting in the late 18th century and campaigned the British government to take legal action against slavery and the slave trade. In 1807, the British Parliament passed measures that made it illegal for British citizens to engage in the slave trade. The United States followed suit in 1808, and the British pressed Spain and Portugal to agree to the gradual abolition of the slave trade. But, with the shift in sugar production from Haiti to Brazil and the Spanish Caribbean, demand for labor was great, and even a gradual ban on the slave trade was difficult to enforce. Through its powerful Royal Navy, the British government attempted to enforce a complete ban on the Atlantic slave trade throughout the 19th century.

Legislation in Great Britain in 1833 abolished slavery completely in the British Empire. Slaves in British colonies were granted their freedom, and compensation was paid to slave owners. British abolitionist groups and government leaders then expanded their efforts by pressuring other nations to abolish slavery. The Spanish agreed to abolish the slave trade to its remaining colonies by 1820. The Portuguese had also been in negotiations with the British to end the slave trade, but when Brazil declared independence in 1822, those negotiations shifted to the new Brazilian government. Finally, in exchange for British recognition of its independence, the Brazilian government entered into an agreement in 1826 to end the slave trade by 1830. But, the full ban on the slave trade was also difficult to enforce. Smuggling of slaves continued for several decades while the British Navy attempted to police the Atlantic.

Abolitionists in Europe had hoped that ending the slave trade would eventually lead to the end of slavery in the Americas, but the enormous worldwide demand for sugar, coffee, and other commodities created a need for labor in the plantation economies of the region. Even while the gradual ban of the slave trade went into effect, large numbers of slaves reached Cuba, Puerto Rico, and Brazil, and the slave populations in those regions grew. Cuban smugglers continued to import slaves until the U.S. Navy intervened in the 1860s to enforce the treaties the Spanish had signed in earlier decades to ban the slave trade. Abolitionist groups in Spain gained momentum throughout the decade as liberal leaders put increasing pressure on the government to reform political and social systems. The MORET LAW was passed in 1870 calling for freedom for all slaves born after July 4 of that year and for all slaves over the age of 65. The law also established an apprenticeship system to facilitate the gradual emanci-

pation of all other slaves within the Spanish Empire. The onset of the TEN YEARS' WAR delayed the full enforcement of the Moret Law in Cuba until the 1880s. Complete abolition was finally achieved in 1886.

The British eventually reacted to the Brazilian government's refusal to enforce the ban on the slave trade by blockading several Brazilian ports in 1850. Those external pressures combined with a growing internal abolitionist movement to compel the government to enforce the ban, and slave imports into Brazil ceased in the 1850s. Even though the slave trade came to an end, slavery continued unabated in Brazil for at least another decade. The Brazilian plantation economy shifted to coffee production in the late 19th century, and an internal slave trade evolved to meet the demand for labor. Slaves became more valuable, and urban slavery declined as coffee plantations began to monopolize the labor supply. The internal abolitionist movement strengthened in the 1860s and coincided with pressure by positivist intellectuals to abandon monarchy and establish a republic. In 1871, Brazilian monarch PEDRO II passed the LAW OF THE FREE WOMB, which granted freedom to all children of slaves born after that date. The law was intended to allow for a gradual emancipation process and a transition period for the Brazilian economy. Nevertheless, abolitionist pressures accelerated during the 1880s, and the government eventually abolished the internal slave trade. Incidences of runaways and other forms of slave resistance increased throughout the decade as Ceará became a free state in 1884 and an underground railroad network emerged to help slaves escape to freedom. Higher rates of escape together with large numbers of slaves purchasing their freedom led to a precipitous decline in the total slave population in the last half of the decade. The Brazilian government finally passed a law calling for complete abolition in 1888, making Brazil the last area in the Americas to end slavery (see SLAVERY, ABOLITION IN BRAZIL OF).

Slavery had a lasting effect on Latin America. It created a deeply rooted system of racial inequality, and the transition from slave to free economies created conflicts in many areas that lasted well into the 20th century.

See also ENLIGHTENMENT (Vol. II); MINEIRO CONSPIRACY (Vol. II); MULATO (Vols. I, II); PLANTATIONS (Vol. II); SLAVERY (Vols. I, II); TÚPAC AMARU II (Vol. II).

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**slavery, abolition in Brazil of** The abolition of SLAVERY in BRAZIL was a long and gradual process. Brazil's colonial ECONOMY had become reliant on large numbers of slaves to work primarily on SUGAR plantations. As Latin American nations gained independence in the early decades of the 19th century, the former Spanish colonies began abolishing slavery, and most nations had ended the practice by the 1850s. But, Brazil maintained close connections to its colonial past and showed little sign of abandoning slavery.

Abolitionist ideas in Brazil were impeded by the recent history of HAITI, which had initiated its independence from France in 1791 in a protracted and violent war that began as a slave insurrection. Brazilian *fazendeiros*—or the planter class—feared a similar uprising would occur if Brazil broke too abruptly with institutions from the colonial period (see FAZENDA/FAZENDEIRO). Additionally, demand for Brazilian sugar increased substantially in the early decades of the 19th century, as abolition in Haiti had brought about a collapse of that country's sugar production. Brazilian sugar planters had grown reliant on slave LABOR and were reluctant to invest in new technologies to modernize production. The British ended the transatlantic slave TRADE in 1807 and attempted to enforce a ban on slave transports for the next several decades. Bowing to diplomatic pressure from the British and in exchange for recognition of its newly gained independence, the Brazilian government agreed in 1826 to end the importation of slaves by 1830. But, demand for plantation labor continued, creating a black market for slaves, who were smuggled in from Africa for the next two decades. It was not until 1850 that the trade ceased completely.

In the last half of the 19th century, important changes took place in the Brazilian ECONOMY. Agricultural production had shifted away from sugar in the northeast in favor of COFFEE in the south (see AGRICULTURE). Coffee planters were less reliant on slave labor and were more inclined to experiment with new technologies and new labor

sources. Many coffee plantations hired European immigrants, and *fazendeiros* invested in new technologies to reduce the need for manual labor (see MIGRATION). At the same time, an internal abolitionist movement began to surface, led largely by Brazil's LIBERAL PARTY. Opponents of slavery began to pressure the government to adopt policies to allow for the emancipation of Brazil's slave population, which had reached more than 1.5 million. Some of those arguments were made on moral grounds as abolitionists pointed to the cruel and oppressive nature of slavery. Others argued that slavery was an antiquated system that was preventing the nation from achieving modernity. Still others made racial arguments, insisting that ending the practice would create a "whitening" of Brazilian society.

In 1871, the Brazilian legislature passed the LAW OF THE FREE WOMB, which declared that all children born to slave mothers after it went into effect would be free. Since the external slave market had been cut off, lawmakers intended to phase out slavery gradually. Nevertheless, by 1880, intellectuals and liberal politicians had renewed their antislavery agitation. JOAQUIM NABUCO founded the BRAZILIAN ANTI-SLAVERY SOCIETY in 1880, which was devoted to producing antislavery propaganda. Finally, the national legislature passed the Golden Law of 1888, which freed all remaining slaves. Brazil was the last American nation to end slavery.

See also BRAZIL (Vol. II); PLANTATIONS (Vol. II); SLAVERY (Vols. I, II).

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***Slum, The*** (*O Cortiço*) Published in 1890, *The Slum* is considered one of Brazilian writer Aluísio Azevedo's (b. 1857–d. 1913) greatest works. The novel is an example of the modernist and naturalist style in Latin American LITERATURE (see MODERNISM). Set in a slum of RIO DE JANEIRO, it chronicles the plight of a disparate set of characters whose stories come together through poverty, violence, and human tragedy.

Azevedo was a writer, artist, and journalist who lived for years in Rio de Janeiro, where he observed the spirited nature of Brazilian life and used those observations as inspiration in his works. When writing *The Slum*, Azevedo spent time in the many *favelas*, or "shantytowns," that had appeared throughout Rio as a result of industrial expansion and urbanization (see INDUSTRIALIZATION). The slums of Rio de Janeiro often brought together diverse groups of people and provided a fertile landscape for sketching a portrait of BRAZIL'S emerging national character. The novel's characters

represent the rising white sector of Brazilian society, as well as the Afro-Brazilian and the mulatto mixture of races. Azevedo carefully caricatured the European temperament as hardworking, judicious, and upright while portraying "Brazilianness" as carefree, sensual, and idle. The conflicts that arise between the characters are the consequences of poverty, overcrowding, and lawlessness—social problems that resulted from the rapid rate of urban growth in late 19th-century Brazil.

While Azevedo retired from writing shortly after completing *The Slum*, the novel grew in popularity and became a classic representation of social problems and daily life in Rio de Janeiro at the turn of the century.

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**Social Darwinism** Social Darwinism was a sociological concept that became popular around the world in the late 19th century. It applied Charles Darwin's ideas on biological evolution and natural selection to societies. British intellectual Herbert Spencer (b. 1820–d. 1903) created the term *survival of the fittest* to describe how Darwin's evolutionary theories applied to societies. Spencer is generally considered to be the founder of Social Darwinism. The theory quickly took on racist undertones as a way to offer a biological explanation for why populations of color were frequently in inferior social and economic positions.

Social Darwinism was a favored theory among Latin American positivists in the late decades of the 19th century. Many Latin American leaders ascribed to the theory of POSITIVISM and believed that societies underwent a natural process of deterministic progress from the prehistoric to the scientific. They believed that the elite and educated white population was ready to pass into the final stage of development, while the uneducated, poor, colored population was holding society back. Social Darwinism legitimized some of those theories by suggesting that there was a biological explanation for the apparent inability of the black and indigenous peoples of Latin America to "progress."

Social Darwinism in Latin America in the late 19th century was most evident in areas with large Amerindian populations. Positivist leaders and intellectuals in MEXICO were particularly swayed by the "survival of the fittest" theory. During the dictatorship of PORFIRIO DÍAZ (1876–80, 1884–1911), the *científicos*, or positivist advisers to Díaz, advocated a number of policies aimed at dealing with what they argued was a large and weak indigenous population. The *científicos* wanted to attract foreign investment to speed Mexico's path toward prog-

ress and took steps to hide or disguise Mexican NATIVE AMERICANS who still lived a traditional lifestyle. Porfirian laws prevented the indigenous from entering areas of cities where foreigners were likely to stay. Many cities passed CLOTHING laws requiring the indigenous to wear more “modern”—meaning Western—attire when they were likely to be seen by foreigners.

*Científicos*' belief in Social Darwinism had an even more nefarious impact as industrialists used the theory to justify the harsh exploitation of the poor working class. In Mexico and elsewhere, attempts to promote rapid INDUSTRIALIZATION and economic growth in the late 19th century often occurred at the expense of the larger populace. Social Darwinism proposed that people who were naturally better suited to “succeed” would move forward and that the success of the more capable would ultimately benefit society as a whole. The theory complemented the popular model of LAISSEZ-FAIRE economics, which allowed market forces to find a natural balance rather than inviting government control over the ECONOMY. As a result, many national leaders paid little attention to working conditions or LABOR exploitation. Some government leaders, such as those in ARGENTINA and URUGUAY, attempted to attract immigrants from Europe to fill the workforce, believing that European workers were naturally more capable than the poor at home (see MIGRATION). Even then, however, the exploitation of workers continued. During a period of impressive economic growth in Latin America, the gap between rich and poor widened.

Social Darwinism also provided a justification for suppressing DEMOCRACY during the era of LIBERAL OLIGARCHY in Latin America. In the early and middle decades of the 19th century, liberal politicians had pushed for political reforms ostensibly designed to provide greater individual freedoms and equality. But, by the late decades of the century, many supposedly liberal leaders were convinced that the majority of people were not yet ready for full democracy. Governments that were nominally liberal—such as the Díaz administration in Mexico—often rose to power claiming to promote democracy but then failed to implement meaningful democratic reform, arguing that the illiterate and rural indigenous populations were unprepared to make responsible political decisions and that democracy would develop as society evolved. Leaders in the Southern Cone looked to EDUCATION and immigration to further progress, while others resorted to repression and tyranny in the interest of maintaining an illusion of stability.

The theory of Social Darwinism also helped justify imperialist tendencies in western Europe and the United States at the end of the 19th century. Social Darwinists believed that people of color in Africa and Latin America had been subjected to colonialism in earlier centuries because they were biologically inferior. As the structures of formal colonialism began to break apart in the 19th century, the British, in particular, aimed to exert a more

informal but equally domineering system of economic and cultural control in many parts of the world. Other European powers followed suit, and an imperialist competition among European powers developed in the second half of the 19th century. European interest in Latin America was primarily economic, although the French attempted to establish an empire in Mexico in the 1860s, and at the same time, the Spanish tried to recolonize the Dominican Republic. In the final decades of the 19th century, the United States also participated in the grab for imperial control in Latin America, with some U.S. leaders rationalizing their policies using notions of biological inferiority. The theory of Social Darwinism began to fall from favor as populist politicians and progressive intellectuals called for a variety of social reforms.

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**Solano López, Francisco** (b. 1826–d. 1870) *dictator of Paraguay* Francisco Solano López was the leader of PARAGUAY during the disastrous WAR OF THE TRIPLE ALLIANCE (1865–70) against ARGENTINA, BRAZIL, and URUGUAY. Solano López was known for his irrational and at times delusional behavior, and he is largely blamed for the devastating defeat, which cost Paraguay hundreds of thousands of lives and incalculable destruction of property.

Solano López was born in Asunción on July 24, 1826, the eldest son of dictator CARLOS ANTONIO LÓPEZ (1841–62). The elder López groomed his son to be his successor from a young age. Solano López served in important MILITARY command posts and represented his father's government on diplomatic missions in Europe. While in France, Solano López met Irish courtesan ELISA ALICIA LYNCH, who later joined the political leader in Paraguay as his mistress and first lady. Although they never married, Lynch and Solano López lived together as husband and wife and had numerous children. Lynch benefited enormously from Solano López's power and wealth, amassing a fortune in landholdings, cash, and other valuables.

After his father's death in 1862, Solano López assumed power, as stipulated in the late dictator's will. The Congress elected him president later that year, and Solano López immediately set the nation on a collision course with its powerful neighbors. The Paraguayan dictator hoped to bring his country greatness by expanding its territorial boundaries and securing more reliable access to the sea. He believed that Southern Cone politics had traditionally placed the smaller countries of Paraguay and Uruguay at the mercy of larger nations



such as Brazil and Argentina. In 1864, Brazilian emperor PEDRO II intervened in Uruguayan politics and in 1865 overthrew Atanasio Aguirre (1864–65), member of the BLANCO PARTY and ally to Solano López. The Paraguayan leader reacted by capturing several Brazilian ships and sending an invasion force north into Brazilian territory. As hostilities escalated, Solano López expanded his attack southward, through Argentina and into the Brazilian province of Río Grande do Sul. The presence of Paraguayan forces on Argentine soil prompted that nation's president, BARTOLOMÉ MITRE, to form an alliance with Brazil and with the ruling COLORADO PARTY in Uruguay. The three nations formed the Triple Alliance and prepared for all-out war against the Paraguayan military, which initially far outnumbered the combined forces of the three allied nations.

Solano López's advantage in the War of the Triple Alliance did not last long, however. An early naval victory by the Alliance forces cut off Paraguay's access to outside supplies. His poorly trained army suffered devastating losses, and over the next several years, the arrogant and improvident dictator forced all able-bodied males—some as young as 10 years old—into military service. As the war reached a stalemate, both sides committed shocking atrocities, not the least of which were committed by Solano López himself. Convinced that he was surrounded by conspirators, the dictator ordered the execution of thousands of Paraguayan citizens, including several members of his own family.

By 1869, the tide of the war had turned in favor of the Triple Alliance, and Solano López fled into the jungle, where he continued to wage guerrilla warfare for more than a year. Francisco Solano López was killed on February 14, 1870, after being captured by the Brazilian military.

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**Soto, Marco Aurelio** (b. 1846–d. 1908) *president of Honduras* Born in Tegucigalpa, Soto studied in HONDURAS and GUATEMALA, earning a law degree in 1866 from the Universidad de San Carlos. Among his fellow students was JUSTO RUFINO BARRIOS, who governed Guatemala from 1873 to 1875. Soto accepted an invitation to join the Barrios administration as secretary of foreign relations and secretary of public education and public worship. The Guatemalan experience sharpened Soto's liberalist views and strengthened his opposition to Honduras's conservative leadership. Aligned with the Liberals, who ousted President Ponciano Leiva (b. 1821–

d. 1896) on February 22, 1876, Soto was appointed provisional president the following August and became constitutional president on May 30, 1877.

Soto's liberal program paralleled that of other Central American liberal leaders at the time. He supported the expansion of telegraph lines across the country and founded the national mint (Casa de Moneda), which also performed the functions of a national bank. He established Tegucigalpa as the permanent national capital, created a national postal service, directed the construction of a national library, and instituted free public EDUCATION. In keeping with the liberal platform, Soto separated the MILITARY from national politics. He ensured that a clearly defined military institution remained, under the control of civilian political leaders. These and other liberal ideas found expression in the 1880 constitution. While the upper and middle classes benefited, however, this was at the expense of lower socioeconomic groups, which remained poor, uneducated, and outside the political arena.

Soto also opened the country's doors to foreign investment, particularly in the banana and MINING sectors. The former took root along the Honduran north coast, where the Vacarro brothers and Tropical and Standard Fruit Company commenced operations, although not until the 20th century would the exportation of bananas become a mainstay of the Honduran ECONOMY. Soto placed new emphasis on SILVER mining. The U.S.-based ROSARIO MINING COMPANY was among those that benefited from the various laws passed to foster their development.

In 1883, two years following his reelection as president, the Soto-Barrios connection splintered as the latter sought to revive the Central American federation with himself at the head. Soto openly opposed the union and through a series of pamphlets, attacked Barrios for attempting to revive the Central American union. Under pressure from Barrios and other unionist supporters, Soto resigned the presidency on October 15, 1883, and was replaced by another liberal, Luis Bográn Barahona (b. 1849–d. 1895).

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**Soulouque, Faustin (Faustin I)** (b. 1782–d. 1867) *president and emperor of Haiti* Faustin Soulouque was born a slave in Petit-Goâve in 1782. He was freed by his owner, French abolitionist Léger-Félicité Sonthonax, in 1793. Soulouque became a career MILITARY officer and fought in the Haitian Revolution. He advanced in the Haitian army to the rank of lieutenant general and was named supreme commander of the presidential guards under President Jean-Baptiste Riché (1846–47).

After Riché's death, Soulouque was elected president in 1847 by HAITI's mulatto elite, who believed him to be

weak and malleable. At first, he appeared a good choice, preserving the bulk of the Riché cabinet and carrying out their will. Soulouque waited until the appropriate time to assert his power. In the meantime, he covertly built a paramilitary gang, the *zinglins*, which he then used as both secret police and a personal army to purge the military and legislature of mulatto control.

In 1849, Soulouque proclaimed himself Faustin I, emperor of Haiti. Concerned with national security and the unification of the island of Hispaniola, he made several failed attempts to take control of SANTO DOMINGO. These military failures undermined his power, which allowed a conspiracy led by General FABRE-NICHOLAS GEFFRARD to force him to abdicate on January 15, 1859. Soulouque and his family went into exile in Jamaica. In 1867, Soulouque returned to Haiti, where he died on August 6. He was buried at Fort Soulouque.

Soulouque is believed to be the second-strongest ruler in Haiti after JEAN-JACQUES DESSALINES (1804–06) and the “model” for the 20th-century dictator François Duvalier.

See also DUVALIER, FRANÇOIS (Vol. IV).

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## Spanish–American War See WAR OF 1898.

**sports and recreation** Recreational activities have long been an important part of Latin American culture. The types of activities that people engage in often reveal important distinctions of ethnicity and social class. The elite had more opportunities, money, and leisure time to allow them to participate in sports and recreational activities. Particularly as organized sports developed in the late 19th century, the ability to enjoy those activities was almost exclusively limited to the elite. But, the urban poor and rural peasantry created their own systems of recreation. From informal sports to public festivals, a variety of recreational activities had emerged throughout Latin American society by the end of the 19th century.

Organized sports and recreation tend to develop in stable and prosperous societies. Participating in sports requires physical strength that may be in short supply for people who engage in arduous manual LABOR. Organized sporting activities also require disposable income to cover the cost of special equipment for participants and to pay the cost of admission for observers. The civil wars and political strife that plagued new nations in Latin America



Nicaraguan peasants enjoy a Sunday afternoon cockfight, circa 1902. (*Library of Congress*)

throughout the first half of the 19th century prevented the development of formal, professional sports. But, the political stability created after the consolidation of liberal oligarchies in the late decades of the century was often accompanied by the emergence of new sports and recreation activities.

During the PORFIRIATO, Mexican elite embraced cycling as a healthful and enjoyable form of transportation, especially in the nation’s growing cities. Bicycles were imported from Europe and the United States starting in 1869 and quickly became a symbol of modernization and sophistication. Avid cyclists organized formal clubs and regular competitions were taking place by the 1880s. Mexican elite also enjoyed a variety of other recreational activities imported from abroad during this time. One such activity was horse racing, which Mexican elites watched regularly in the capital city in the late decades of the 19th century. In 1881, the Jockey Club was formed as a meeting place for Mexico City’s wealthy citizens.

The trends surrounding bicycling and other activities in MEXICO coincided with positivist social theories that influenced Latin American leaders in the 1880s and 1890s (see POSITIVISM). Many Latin Americans viewed Europe and the United States as world leaders in achieving modernity and progress. Emulating leisure activities from those regions became a way to try to force foreign definitions of progress on to Latin America. Elite leaders also tried to limit recreational activities that were not considered “modern.” Bullfighting—a traditional and ritualistic sport originally imported from Spain and enjoyed for centuries in Mexico—remained popular with both the elite and the larger populace throughout most

of the 19th century. But, the administration of PORFIRIO DÍAZ attempted to pass regulations prohibiting bullfights in areas of the country frequented by foreigners. Those attempts were motivated by concerns that foreign visitors would find the practice barbaric and backward.

Baseball was also introduced in many areas of Latin America in the late 19th century. It quickly grew in popularity, particularly in regions in close contact with the United States. The sport appeared in Mexico, CENTRAL AMERICA, and the Caribbean in the final decades of the century. Baseball attracted fans from all socioeconomic levels, but the way that different sectors of society participated in the sport varied. Many poor urban workers played “street ball,” which required only the most basic equipment. Players used makeshift balls and bats, and pickup games did not require large spaces in the increasingly crowded streets of Latin America’s growing cities. Formal baseball clubs emerged as a precursor to the professional and semiprofessional leagues that developed in the 20th century.

The end of the 19th century also saw the initial introduction of soccer, or *fútbol*, by the British. The sport became enormously popular throughout Latin America within a few short decades. Soccer evolved in a similar way as baseball, with people in cities playing informal street games for recreation and more formal professional leagues emerging as well. Soccer is one of the most important sports in Latin America. It enjoys a stronger monopoly in South America, while in Central America and the Caribbean it competes with baseball.

In addition to sports, other recreational activities grew in popularity in Latin America throughout the 19th century. Public festivals have long been an important cultural expression in the region. Many of those festivals commemorate religious holidays, and they vary from one small village to the next. Festivals bring local communities together and help instill a common sense of identity. Some of the common public festivals in 19th-century Latin America include local saints’ days, pre-Lenten carnival celebrations, and Good Friday Judas burnings.

See also SPORTS AND RECREATION (Vols. II, IV).

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**Squier, Ephraim George** (b. 1821–d. 1888) *U.S. journalist and diplomat in Central America* Appointed chargé d’affaires to CENTRAL AMERICA in April 1849 by the Zachary Taylor administration, Squier arrived in León, NICARAGUA, in June 1849, immediately after

his predecessor, ELIJAH HISE, completed a treaty with Nicaragua. Because Hise no longer officially represented the United States at the time, Squier had reason to negotiate a new agreement. Save for two important exceptions, the Squier Treaty differed little from that of his predecessor. Under the Squier Treaty the United States would defend the route but not Nicaragua’s territorial integrity should concessions be granted for an interoceanic canal, and if granted, the concessions would go to a U.S. company (see TRANSISTHMIAN INTERESTS). Squier also negotiated an agreement that provided for Cornelius Vanderbilt’s ACCESSORY TRANSIT COMPANY to construct a river-lake-road transit route connecting Nicaragua’s Caribbean and Pacific coasts. While the Nicaraguans were pleased with both proposed agreements because they checked British advances on their territory, the Costa Ricans and Guatemalans, both friendlier toward Britain, were not.

From Nicaragua, Squier moved on to HONDURAS, where he persuaded the government to cede to the United States Tigre Island in the Gulf of Fonseca, which had long been considered the obvious western terminus of a Nicaraguan canal. The cessation so infuriated the British minister to Central America, Frederick Chatfield, that he ordered a British naval ship into the gulf. Cooler heads prevailed in Washington, D.C., and London. The Squier Treaty arrived in Washington in October 1849, one month after Secretary of State John M. Clayton (b. 1796–d. 1856) commenced negotiations with the British minister, Sir Henry Lytton Bulwer, which resulted in an 1850 treaty that temporarily neutralized both countries’ interests in Central America (see CLAYTON-BULWER TREATY).

Squier remained in Honduras for several years, during which time he wrote extensively about the region and was a partner in the failed effort to build a railroad across the country.

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**Stephens, John Lloyd** (b. 1805–d. 1852) *U.S. author, explorer, and diplomat to Central America* An outstanding student, Stephens graduated first in his class from Columbia University at age 17. After practicing law in New York City for two years, Stephens embarked on an eight-year tour of Europe and the Levant region, about which he authored several popular books. On his return to the United States,

Stephens became interested in the indigenous civilizations of Mesoamerica, leading him to seek and gain appointment as minister to the UNITED PROVINCES OF CENTRAL AMERICA in 1839. He arrived in Guatemala City to find the federation had already collapsed. Stephens, along with architect and draftsman Frederick Catherwood (b. 1799–d. 1854), then embarked on a four-year investigative tour of several Maya cities, including Copán, Palenque, and Uxmal. Stephens's descriptions and Catherwood's etchings became *Incidents of Travel in Central America, Chiapas and Yucatán*, first published in 1841 and reprinted several times in the 20th century.

Subsequently, Stephens assisted William H. Aspinwall in securing a concession from COLOMBIA for the construction of a railroad across the Isthmus of Panama and served as vice president and president of the PANAMA RAILROAD COMPANY, from 1849 until his death in 1852 (see TRANSISTHMIAN INTERESTS).

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**Sucre, Antonio José de** (b. 1795–d. 1830) *independence leader and president of Bolivia* Antonio José de Sucre was an independence leader in South America who worked closely with Simón Bolívar to liberate present-day VENEZUELA, COLOMBIA, PERU, and BOLIVIA. He served as president of Bolivia and worked to maintain unity among the former Spanish colonies. He is revered today in many South American countries as one of the great heroes of independence.

Sucre was born on February 3, 1795, in Cumaná, New Granada (part of present-day Venezuela). Sucre came from a FAMILY with a long tradition of MILITARY service, and at the age of 15, he joined the Venezuelan independence movement of Francisco de Miranda (b. 1750–d. 1816). Even as the liberation movement struggled in its early years, Sucre made a name for himself helping to keep the movement alive. In 1818, Sucre joined Bolívar's forces in Angostura, and the two remained close allies throughout the rest of the independence struggle. In 1820, Bolívar promoted him to the rank of general, and Sucre led forces to GUAYAQUIL and QUITO to liberate present-day ECUADOR. After Bolívar joined forces with Argentine liberator José de San Martín (b. 1778–d. 1850), Sucre aided in the independence movement in Lower Peru (Peru) and Upper Peru (Bolivia), also known as Charcas. In 1824, he participated in the Battle of Junín and commanded liberation forces in the Battle of Ayacucho to oust the final holdouts of royalist forces from Peru.

Bolívar left his ally in charge of newly independent Upper Peru, and in 1825, Sucre convened a constituent assembly to determine the future of the region. Delegates voted to form an autonomous nation and signed a declaration of independence stipulating that the new nation was to be named the Republic of Bolivia in honor of the Liberator. The assembly selected Bolívar to serve as president, but in 1826, he stepped down in favor of Sucre. Later that year, Sucre promulgated the BOLIVARIAN CONSTITUTION and was elected the nation's first constitutional president.

Sucre's presidency was marked by turmoil and instability. The independence leader attempted to impose a number of liberal reforms such as expropriating church properties and abolishing the Amerindian tribute tax. Sucre's social reforms outraged local elite, and opposition to his government began to mount. To make matters worse, the country, which had been plagued by 15 years of war, showed no signs of economic recovery. Sucre faced numerous uprisings within his own army throughout 1827 and into 1828. Finally, Peruvian general AGUSTÍN GAMARRA invaded Bolivia, and Sucre resigned on July 6, 1828.

After resigning the presidency, Sucre retired to Ecuador, but he returned to Bolívar's aid in 1829 to defend GRAN COLOMBIA from an invading force led by General Gamarra. He spent his final months trying to negotiate a compromise to keep Gran Colombia from disbanding. Sucre was assassinated on June 4, 1830, ostensibly on the orders of future president of New Granada (Colombia) José María Obando (b. 1795–d. 1861).



Portrait of Antonio José de Sucre, hero of independence in Bolivia, and the country's first president (Private collection)

See also BOLÍVAR, SIMÓN (Vol. II); MIRANDA, FRANCISCO DE (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II); SAN MARTÍN, JOSÉ DE (Vol. II).

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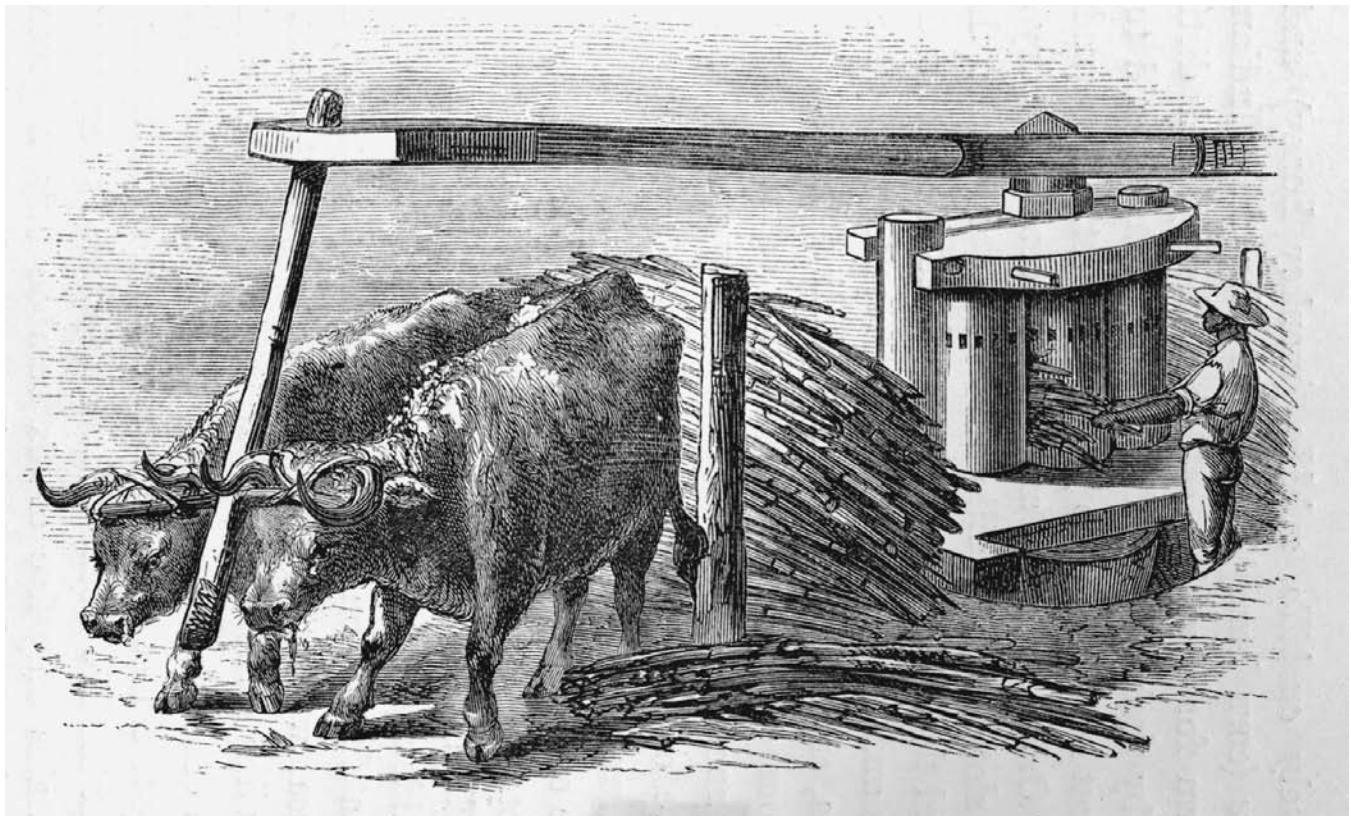
**sugar** Sugar is a sweetening substance made from sugarcane and sugar beets. The cultivation of sugarcane originated in India and quickly spread throughout Asia and the Middle East. By the 15th century, the Spanish were cultivating sugarcane on the Canary Islands, and the profits created by the crop convinced agricultural entrepreneurs to expand production to the Americas.

The Portuguese soon discovered that the tropical climate of BRAZIL was ideally suited to sugarcane. In the 16th century, Portuguese planters developed a sugar plantation ECONOMY in Brazil. To fill the demand for manual laborers on the plantations, a transatlantic slave TRADE evolved, and Brazil quickly became the largest importer of African slaves in the early colonial period. By the 18th century, sugar cultivation had taken off in Caribbean colonies such as the British West Indies, Saint Domingue,

and CUBA, as well as in coastal regions of the mainland (see CARIBBEAN, BRITISH; HAITI). The development of a sugar economy helped to create a land-owning elite who wielded enormous influence in the British, French, and Spanish Caribbean and Brazil (see CARIBBEAN, FRENCH). In all of those areas, the labor-intensive sugar industry relied heavily on African slaves to plant, cultivate, and process sugarcane. In later years, sugar mill operations became more automated, but the production of sugar continued to rely on a large supply of manual LABOR. In much of Latin America, sugar plantation AGRICULTURE became synonymous with SLAVERY.

Throughout the 19th century, the Brazilian economy moved away from sugar cultivation in favor of COFFEE production. After the British abolished slavery in their Caribbean colonies in 1833, those economies also shifted away from their heavy reliance on sugar. Haitian independence and the subsequent abolition of slavery on the island of Hispaniola led to a precipitous decline in sugar exports in an economy that had previously been dominated by sugar cultivation. As a result of these factors, Latin American sugar production in the 19th century shifted to the remaining Spanish Caribbean colonies of Cuba and PUERTO RICO.

Although the Spanish were negotiating with the British to end the slave trade to the Americas, the emerging and powerful planter elite on the island of Cuba suc-



Drawing of an animal-driven sugar mill in Brazil, circa 1870 (From *The Andes and the Amazon or Across the Continent of South America*, by James Orton. New York: Harper & Brothers, 1870, p. 63)

ceeded in guaranteeing a continued supply of slave labor. Cuba saw a more than fourfold increase in its slave population between 1800 and 1860 as the Spanish resisted pressure by the British to end the slave trade. During the same period, the United States emerged as the primary market for Cuban sugar, and U.S. interest in the island grew as well. Southerners in the United States began to advocate annexing Cuba to tip the balance of influence in favor of slave states over free states. U.S. investors bankrolled a number of technological improvements in the Cuban sugar industry, and by the end of the century, many U.S. interests were strongly tied to the island's economy. Those connections to Cuban sugar compelled many Americans to support the Cuban independence movement, which had been gaining momentum in the late decades of the 19th century. Cuban sugar eventually played a role in pulling the United States into the WAR OF 1898, which secured Cuban independence from Spain and situated Cuba firmly under informal U.S. imperialism in the 20th century.

See also PLANTATIONS (Vol. II); SUGAR (Vols. I, II).

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**Suriname (Dutch Guiana)** Suriname is a former Dutch colony located along the northeastern coast of South America. Until the 20th century, Suriname was more commonly known as Dutch Guiana. It is bordered by FRENCH GUIANA to the east, BRAZIL to the south, and GUYANA to the west. Suriname is a small country, encompassing less than 65,000 square miles (168,349 km<sup>2</sup>). Historically, it was a plantation ECONOMY, producing primarily SUGAR and COFFEE, with a large slave population.

The northern region of South America that is home to Suriname and the other Guianas was originally inhabited by small groups of NATIVE AMERICANS. The indigenous population successfully held off the earliest Spanish and Portuguese explorations and foiled attempts by other European expeditions to establish viable permanent settlements. Colonization of the region began in the 17th century by the English and the Dutch. In 1667, England ceded the small territory to Dutch control in the Treaty of Breda. Dutch settlers established a thriving plantation economy, relying largely on African SLAVERY in the labor-intensive cultivation of sugar, COTTON, coffee, and other commodity products. The small Dutch colony

had a slave population of roughly 30,000 by the 1670s, and that population had more than doubled by the end of the 18th century. Suriname became the main hub of other Dutch colonies in the Caribbean (see CARIBBEAN, DUTCH). A small white planter population attempted to control a population that was more than 75 percent slave. There were few urban centers, and most settlements were clustered along the coast.

Suriname's large slave population and the colony's interior of dense and unsettled jungle meant that slave rebellions and isolated escapes were relatively common. Suriname's interior was home to maroon communities of escaped slaves by the beginning of the 19th century. Thousands of escaped slaves populated large maroon communities, and Dutch authorities were forced to reach formal peace accords with the communities after failing to bring them under control. According to the terms of the treaties, the maroon communities isolated themselves and closed off access to new arrivals of escaped slaves. In the early decades of the 19th century, their numbers grew from approximately 6,000 to more than 8,000 by the 1840s.

Suriname saw a short-term increase in export agricultural production from sugar and coffee plantations after Haitian independence resulted in the abolition of slavery in the former French colony (see HAITI). But, the escalating demand for sugar did not sustain the Dutch colonial plantation system for long. The Dutch abolished the transatlantic slave TRADE in 1814, and Suriname's slave population declined sharply over the coming decades. Dutch planters attempted to make the transition to wage LABOR. Colonial officials sought to incorporate the maroon communities into the mainstream wage-earning population, and there were some attempts to attract low-wage immigrant workers from other regions of the Americas. The Dutch government made the revitalization of Suriname and the other Dutch Caribbean colonies a priority, and for several decades, colonial officials attempted several schemes to overcome the impending economic decline. In 1828, the Dutch Crown reorganized the administrative system in the Americas and placed Suriname and the Dutch islands under one governing unit. Suriname became the capital of all the Dutch colonies in the Americas, but that power shift caused more problems than it solved. Communication and TRANSPORTATION were slow and cumbersome between Suriname and Curaçao, the main Dutch island colony. Furthermore, the economies of the two regions were vastly different, and the colonial government had a difficult time devising laws that met the needs of both areas. The Dutch government also devised a policy that encouraged MIGRATION from the Netherlands to Suriname. The plan attracted only a few hundred immigrants, most of whom did not find the South American tropics to their liking.

The abolition of slavery in the British Empire in 1834 had significant repercussions in Suriname, as did

the abolition of slavery in the French colonies. British Guyana to the west and French Guiana (Cayenne) to the east provided havens for escaped Surinamese slaves. Facing a dwindling slave population and under increasing pressure from international abolitionist movements, the Dutch government looked for ways to emancipate slaves in the Dutch colonies without disrupting the local economies. Colonial officials also feared alienating the elite planter class in Suriname. Nevertheless, the Surinamese governor pushed for a series of laws in 1851 to regulate the treatment of slaves in the colonies. Abolitionist pressure continued until the Dutch abolished slavery completely in 1863. After a brief period of apprenticeship, many former slaves abandoned plantation labor altogether. The plantation economy fell into decline, and many planters sold off their properties, believing the Surinamese economy was irreparably damaged. In the final decades of the 19th century, the Dutch followed the lead of other Latin American nations and instituted a system of indentured servitude to maintain an agricultural workforce on its once-thriving plantations. In 1870, the Dutch entered into an agreement with the British that allowed for the migration of Hindustani from the British colony in India. Generally, Indian immigrants entered into five-year contracts in exchange for TRANSPORTATION to the Americas plus medical care and a wage once they arrived. More than 30,000 Indians migrated to Suriname under this agreement in the late 19th and early 20th centuries. Many of them stayed after their tenure of service expired, and the descendants of Indian Hindus have become an important part of the demographic makeup of present-day Suriname.

For their part, former slaves often relocated to the cities to look for wage labor. The Surinamese capital city of Paramaribo experienced a period of population growth as it absorbed the majority of former slaves who wanted to leave the countryside. Some former slaves remained in rural areas and became small-scale farmers. By the end of the 19th century, plantation crops were being replaced by the production of tropical fruits and other agricultural activities. The colony also experienced an increase in the MINING of GOLD and other minerals. Suriname's present-day economic activities continue to reflect the changes that took root in the late 19th century.

See also PLANTATIONS (Vol. II); SURINAME (Vols. II, IV).

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**Syllabus of Errors** Syllabus of Errors was an addendum to the papal encyclical *Quanta Cura* issued by Pope Pius IX on December 8, 1864. The Syllabus of Errors contained a condemnation of 80 ideas that were

contrary to the teachings of the CATHOLIC CHURCH. It was issued largely as a reaction to conflicts that had been emerging throughout the 19th century between the Catholic Church and liberals. In Latin America, liberal policies had aggressively challenged the traditional power and influence of the church. The Syllabus of Errors was embraced by conservative elite, while many liberals pointed to its pronouncements as further justification for their anticlerical stance.

Throughout the colonial period, the Catholic Church had held considerable power through its vast economic holdings and its political influence with the Spanish and Portuguese Crowns. After independence, liberal leaders throughout Latin America sought to curb the power of the church as part of a broader plan to lay the foundation for modern, sovereign nations. The conservative elite, favoring traditional ways and wanting to safeguard the power of the church, challenged liberal movements, and decades of civil wars and other internal strife ensued (see CONSERVATISM). By the middle of the 19th century, liberal governments had consolidated power in much of Latin America. They introduced reforms that were often inspired by liberal movements in 19th-century Europe, divesting the church of its landholdings and eliminating its influence in the political system. As a result, the Catholic Church found itself in a substantially weakened position both in Latin America and around the world. In response, Pius IX published the Syllabus of Errors.

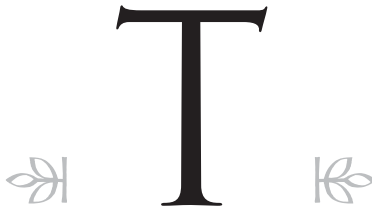
Many of the theories that sparked the Enlightenment and POSITIVISM came under fire in the Syllabus of Errors. Pius IX denounced the notion that human reason, not God, is the source of truth and knowledge. He also rejected claims that any RELIGION can provide a path to salvation and that Protestantism was equal to Catholicism. Numerous liberal tenets advocating the separation of church and state came under fire in the document, as did liberal arguments for dismantling of church properties.

The Syllabus of Errors epitomized the rancorous debate between liberal intellectuals and the Catholic Church that was prevalent not only in Latin America but around the world in the 19th century. By the end of the century, the liberal position had become entrenched throughout most of Latin America, and the Catholic response changed accordingly. In 1891, Pope Leo XIII issued his *RERUM NOVARUM*, which took a different approach to combating LIBERALISM. Instead of denouncing the philosophies that had transformed social and economic interaction, Leo XIII presented the Catholic Church as the defender of the poor and others believed to be harmed by liberal policies.

See also ENLIGHTENMENT (Vol. II).

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**Ten Years' War** (1868–1878) The Ten Years' War was CUBA's first major independence movement. The war was initiated by CARLOS MANUEL DE CÉSPEDES and lasted from 1868 to 1878. The main objectives of Céspedes and other leaders were to achieve complete independence from Spain and to end SLAVERY in Cuba. Even though the war failed to achieve those aims, the fact that the war attracted so many supporters indicated that many of the island's inhabitants were ready to challenge Spanish authority. A number of participants in the Ten Years' War went on to lead Cuba in the subsequent independence movement that culminated in U.S. intervention, in the WAR OF 1898.

The causes of the Ten Years' War are varied and complex. Cuba had been a Spanish colony for more than 300 years and had silently witnessed the empire's mainland colonies fight wars of independence between 1810 and 1820. The island's lucrative SUGAR industry and its reliance on slave LABOR convinced many of the white planter elite that it was in their best interest to remain loyal to Spain. Elite creoles, however, resented the autocratic nature of Spanish rule, which enforced a system of social inequality among Spanish and Cuban whites. Cubans also began to demand greater political participation in Spain's relatively closed system. Tensions mounted around these issues throughout the middle decades of the 19th century.

By the 1860s, new economic strains were visible among some of the planter class. Larger and wealthier plantations had been able to afford to continue purchasing slaves, even though the slave TRADE had been officially prohibited since 1817. The larger planters also had invested in new technologies that modernized sugar production. Those advantages allowed the wealthier

est planters to profit even more in the booming sugar ECONOMY. Smaller and poorer plantations had fallen behind, and some began considering rebellion as a way to position themselves better. Some sought to take over the lands of the wealthier planters, while others envisioned transforming the socioeconomic and labor system completely.

Céspedes was one of these planters struggling on a smaller and less profitable plantation located in the eastern provinces of the island. On October 10, 1868, Céspedes proclaimed his GRITO DE YARA, with a litany of grievances against the Spanish Crown. Céspedes called for Cuban independence and an end to slavery and freed all of his own slaves to make up a fighting force. Within a month, dozens of planters in the region had joined the revolt, and the rebel army had grown to more than 10,000. The movement quickly gained momentum, and by the end of the first year, Céspedes was leading a revolutionary government based in the eastern provinces. Céspedes's insistence on ending slavery caused some dissent among the planter leadership, many of whom wanted independence but pushed for maintaining the traditional labor system. Rivals overthrew Céspedes in 1873, and leadership passed to Salvador Cisneros Betancourt (b. 1828–d. 1914).

The rebellion experienced impressive success in the early years of the war, and a number of local heroes rose to prominence as leaders of the movement. ANTONIO MACEO, a mulatto farmer-turned-soldier, rose from the rank of private to lead the revolutionary force. Maceo was known for his bravery and discipline on the battlefield and earned the nickname "Titan of Bronze." Despite the revolutionaries' successes, most of the fighting was restricted to the eastern portion of the island, and rebel armies relied primarily on guerrilla tactics.



After 10 years, the war reached a stalemate. In February 1878, the *TREATY OF ZANJÓN* called for a cease-fire and offered amnesty to all rebels who agreed to lay down their arms. The treaty also granted freedom to slaves who had fought in the conflict but did not end the institution of slavery on the island. Maceo rejected the treaty and fled to New York, where he attempted to resurrect the independence movement. One year later, he returned to Cuba and attempted to incite a new revolt. That effort failed miserably, and Maceo once again fled into exile to bide his time until Cubans were ready to embrace another war for independence. Maceo resurfaced in 1895 as one of the dominant leaders in Cuba's later independence movement.

The Ten Years' War came to an end in 1878, but its consequences could be felt for years afterward. The conflict had made it clear that many on the island wanted an end to slavery. By 1880, the Spanish government was forced to introduce new laws to phase out slavery over the next six years. The war had also created an economic crisis on the island, which was exacerbated by a decline in the world sugar market in the 1880s. The Spanish government faced growing challenges in Cuba, and a new independence movement would surface just 15 years later.

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**Terrazas family** The Terrazas were a wealthy land-owning FAMILY led by patriarch Luis Terrazas Fuentes (b. 1829–d. 1923) in northern MEXICO. Terrazas became governor of the state of Chihuahua in 1860, and through his relationship with PORFIRIO DÍAZ, the family's influence and wealth grew significantly during the PORFIRIATO. With the marriage of one of Terrazas's daughters to Enrique Creel, the son of a U.S. diplomat and landowner, the newly formed Terrazas-Creel clan eventually owned most of the arable land in Chihuahua. The family came to represent the abuses, corruption, and unequal distribution of wealth that defined the Porfiriato.

Luis Terrazas began building his landed empire when he took over the estate of a French sympathizer after the defeat of Maximilian and the end of the FRENCH INTERVENTION in 1867. He continued his political career, serving several times as governor over the following decades, while at the same time continuing to increase his landholdings, eventually acquiring more than 50 haciendas. In 1880, Terrazas married his daughter Angela to

Creel, who was building his own career as a landowner and industrialist. The marriage was characteristic of the way the Terrazas family expanded its own reach by conjoining with other wealthy and influential families.

Terrazas and Creel partnered in many business ventures and took advantage of land laws and other policies of the Porfiriato to build the family empire. Together, they owned more than 8.7 million acres (3.5 million ha) of agricultural land in Chihuahua (see AGRICULTURE; *LATIFUNDIO*). They also became involved in the growing industrial sector by buying into textile and FOOD plants and investing in infrastructure development (see INDUSTRIALIZATION).

Revolutionary hero Francisco Villa targeted the landholdings of the Terrazas-Creel clan in early cattle rustling, before the outbreak of revolution. During the Mexican Revolution, Villa confiscated property from the Terrazas family and other elites to finance his operations. Today descendants of the Terrazas-Creel clan are active in business and politics and hold many influential positions in the national government.

See also MEXICAN REVOLUTION (Vol. IV); VILLA, FRANCISCO (Vol. IV).

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#### Texas revolution (Texas war of independence)

(1835–1836) The Texas revolution began in 1835 and lasted for more than a year as U.S. settlers in Texas fought to secede from MEXICO. Texas had been a province in colonial Mexico when Spain ruled the empire. It was only sparsely populated until entrepreneur Moses Austin (b. 1761–d. 1821) and his son Stephen F. Austin (b. 1793–d. 1836) negotiated a deal with the Spanish Crown to allow 300 U.S. families to settle in the area in 1819. At the same time, Mexico was waging its war of independence from Spain, and by 1821, Stephen Austin was forced to renegotiate with the newly independent nation's government. The provisions of these early land grant arrangements included stipulations that required all settlers to convert to Catholicism and become Mexican citizens (including learning Spanish and adopting Spanish surnames). U.S. settlers in Texas were also subject to Mexican laws, such as the abolition of SLAVERY. Amid the near-constant political turmoil in Mexico's early years of independence, many of these provisions were not fully enforced. As Mexican leaders established a republic under the CONSTITUTION OF 1824, Texas became part of the larger state of Coahuila y Tejas.

Austin received permission to bring an additional 900 families into the region between 1824 and 1828. Along with these legal settlers, other migrants without

government approval trickled into Texas (see *MIGRATION*). With growing numbers of Americans moving there, U.S. presidents John Quincy Adams and Andrew Jackson attempted to purchase Texas from Mexico in 1827 and 1829, respectively. It was becoming increasingly evident that American settlers were beginning to dominate the region and that the U.S. government was keenly interested in acquiring the territory. Mexican leaders tried to curb those trends by passing the Bustamante Decree in 1830. The laws revoked certain settlement grants and imposed measures to encourage Mexican families to migrate to the region. The decree also imposed *TRADE* restrictions and new systems of taxation. The Mexican *MILITARY* presence in Texas also increased. Although the laws were repealed a short time later, they are credited with having provoked the discontent that eventually triggered the move for Texan independence.

Signs of dissatisfaction were present among Texans throughout the 1820s and early 1830s, but revolt was improbable until 1833 when ANTONIO LÓPEZ DE SANTA

ANNA—who had been elected as a liberal president in favor of a federalist political system—abruptly changed his political position and imposed a highly centralized dictatorship. Santa Anna rejected Austin's request to make Texas a state, separate from Coahuila. A short time later, Santa Anna had Austin imprisoned on suspicion of subversion. The dictator abolished the Constitution of 1824 and replaced it with his *SIETE LEYES* (Seven Laws) in 1835. Among other things, the new series of laws dissolved state legislatures, disbanded state militias, and even replaced states with departments under strict control of the dictator.

Several Mexican states rebelled in response to the *Siete Leyes*, and Santa Anna saw the need to deter further unrest by putting down those revolts aggressively. The large Anglo population in Texas made it an easy target for his harsh discipline. War officially broke out when a group of Texas militia fired on a contingent of Mexican military that had been sent to retrieve a canon. Austin, Sam Houston (b. 1793–d. 1863), and other Texas leaders



Artist's rendition of the 1836 Battle of the Alamo, when Mexican forces defeated Texan revolutionaries (*Library of Congress*)

put together a provisional government and a strategy for escalating the war.

Santa Anna led an army of 6,000 to put down the insurgency in Texas. His forces took a strong stand at San Antonio de Béxar (present-day San Antonio) in an offensive aimed at retaking the Alamo fortress, which had been lost to the rebels. In March 1836, Santa Anna surrounded and sealed off the Alamo in a siege that lasted nearly two weeks. In the end, all Texan defenders of the Alamo were killed, including Jim Bowie, William Barret Travis, and Davy Crockett. The provisional government had refrained from sending reinforcements to help the defenders, seeing little strategic value in the fortress. Nevertheless, the men's heroic efforts became a rallying cry for later battles. On March 2, while the Alamo lay under siege, the Texas provisional government signed the Texas Declaration of Independence.

After his victory at San Antonio de Béxar, Santa Anna divided his troops into small, mobile units in an aggressive campaign to put down the rebellion. His army retook Goliad and enjoyed several other victories, while the rebels, under the leadership of Houston, found themselves on the defensive. In April 1836, Santa Anna aimed to bring the war to a quick end by going after the provisional government. Unexpectedly, the Texas rebel army halted its retreat and fought the Mexican army at the Battle of San Jacinto. Santa Anna was captured and was forced to sign the Treaties of Velasco to avoid being executed. The treaties ended hostilities and theoretically recognized the independence of Texas. While he was in captivity, political forces in Mexico removed Santa Anna from office, and the new leadership refused to abide by the treaty. Although Texas was officially a republic from 1836 to 1846, the Mexican government never recognized its independence. These unresolved conflicts partially contributed to the onset of the U.S.-MEXICAN WAR in 1846.

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**textiles** See CLOTHING; COTTON; INDUSTRIALIZATION.

**Thirty-three Immortals (Thirty-three Orientals, Thirty-three Easterners)** Thirty-three Immortals were a group of rebels led by JUAN ANTONIO LAVALLEJA who revolted against the Brazilian occupation of the BANDA ORIENTAL. Their actions eventually resulted in the CISPLATINE WAR, which in turn led to the creation of present-day URUGUAY.

During the late colonial period, the Banda Oriental was a region within the Viceroyalty of Río de la Plata. When the viceroyalty was dissolved, it became the far eastern province of the United Provinces of the Río de la Plata, but the region broke away in the years following independence. By 1820, the Banda Oriental had been annexed by BRAZIL and renamed the Cisplatine Province. For the next several years, Lavalleja attempted to incite a revolt against Brazilian forces and was forced to flee into exile in 1822. The rebel returned to the Banda Oriental in 1825, along with 32 followers. The group attracted support throughout the countryside and won several important battles against the Brazilians. Lavalleja received recognition and assistance from the government of BERNARDINO RIVADAVIA (1826–27) in BUENOS AIRES, prompting the Brazilian emperor PEDRO I (r. 1822–31) to declare war on the United Provinces. The Cisplatine War dragged on for three years before arbitration by British mediators produced the Treaty of Montevideo in 1828. Under the peace agreement, leaders in Brazil and the United Provinces agreed to recognize the independence of the Eastern Republic of Uruguay. Even though the rebellion started by Lavalleja's group escalated into a conflict between Brazil and the United Provinces, the Thirty-three Immortals are considered the true heroes of Uruguayan independence.

See also BANDA ORIENTAL (Vol. II); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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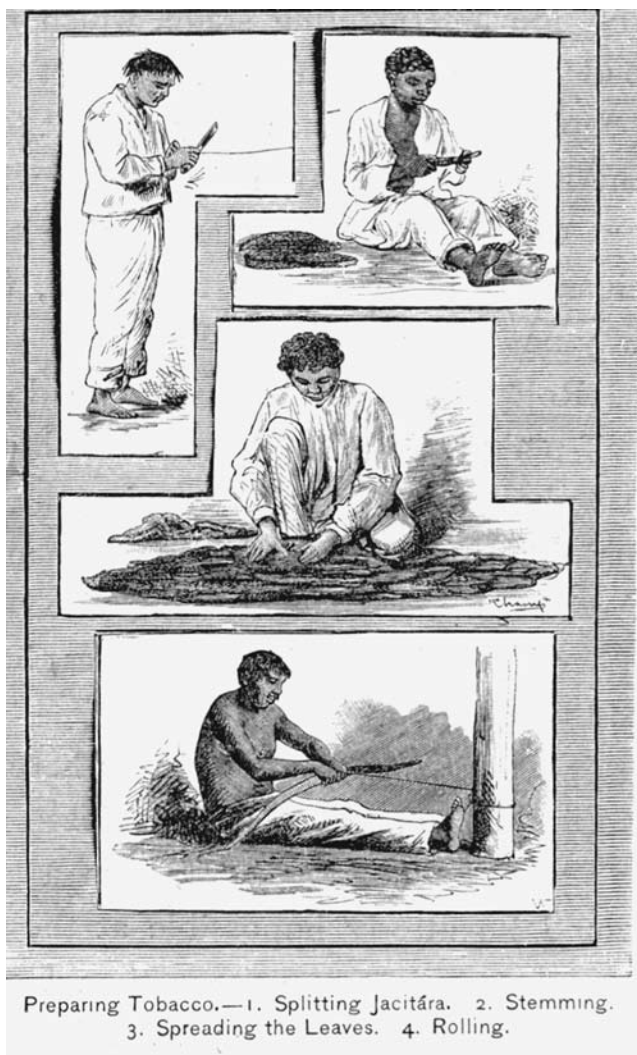
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**Thousand Days' War** See WAR OF THE THOUSAND DAYS.

**tobacco** Tobacco is a plant native to the Americas, whose leaves are processed and used primarily for smoking. Tobacco was widely used by pre-Columbian civilizations. Spanish conquistadores described tobacco use in indigenous religious rituals and medicinal practices. The product quickly made its way across the Atlantic Ocean, and tobacco smoking spread throughout Europe in the 16th century. As demand increased, tobacco plantations began appearing in the Spanish Caribbean. By the end of the colonial period, the Spanish Crown had established a royal monopoly on the lucrative tobacco industry.

Tobacco was an important agricultural product in many coastal areas of mainland Latin America and in the Caribbean throughout the colonial period and into the 19th century. Tobacco enjoyed a large portion of



Sketches illustrating the process of tobacco preparation (From Brazil, the Amazons and the Coast: Illustrated from Sketches by J. Wells Champney and Others, by Herbert H. Smith. New York: Charles Scribner's Sons, 1879, p. 157)

market share in the Caribbean in the 17th and 18th centuries but was replaced by other plantation commodity products such as COFFEE and SUGAR in the 19th century. Nevertheless, a viable tobacco industry did develop in countries such as CUBA and the DOMINICAN REPUBLIC in the 19th century in their attempts to diversify agricultural output. The rise in tobacco production in the Caribbean corresponded with increased cigar smoking in Europe and the United States in the last half of the 19th century. Caribbean tobacco quickly became associated with quality cigars, and the incipient Cuban and Dominican industries began to thrive.

Although sugar production continued to dominate the Cuban economy throughout the 19th century, tobacco production increased substantially. Cuba became known not only for its tobacco leaves, but also for its cigar rollers. Several U.S. tobacco companies imported Cuban tobacco seeds and attempted to imitate the qual-

ity of Cuban tobacco products. Tobacco also played an important role in the Dominican Republic in the late 19th century. There, the government implemented policies favorable to the cultivation of sugar, but local farmers feared that the island's ECONOMY would become too closely tied to U.S. investors. Farmers in the CIBAO region cultivated tobacco in an attempt to maintain a sense of autonomy and to diversify local AGRICULTURE.

Other areas of Latin America also saw growth of the tobacco industry in the 19th century. U.S. soldiers returning from the U.S.-MEXICAN WAR had developed a preference for the taste of tobacco grown in the tropical southern climates. In the 19th century, tobacco production was an important economic activity in MEXICO, BRAZIL, and CENTRAL AMERICA. As cigarette production became common in other countries in the 20th century, Latin American tobacco became more closely associated with cigar smoking.

In the second half of the 20th century, the United States imposed an embargo on Cuban tobacco following the revolution led by Fidel Castro. Today, the United States imports most of its cigars from the Dominican Republic, followed by Mexico and Central America.

See also CUBAN REVOLUTION (Vol. IV); PLANTATIONS (Vol. II); TOBACCO (Vols. I, II).

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**trade** Trade networks in 19th-century Latin America went through a series of sweeping changes. Trade and commerce were limited during the colonial period, but independence brought new governments and economic models to the region. Trade networks opened up significantly among neighboring countries and between Latin America and the rest of the world. By the end of the 19th century, the free trade models that had emerged linked Latin American economies to the global market.

Colonial trade networks in Latin America were defined by a mercantilist economic structure. Under that system, colonies traded almost exclusively with the mother country, providing raw materials from the AGRICULTURE and MINING sectors to Spain and Portugal. The manufacture of most finished goods took place in Europe, and colonies imported those products from the mother country. In the Spanish Empire, trade was tightly regulated by the Crown to prevent the colonies from engaging in unregulated trade with the British, French, or other European powers. Intercolonial trade from one region of the empire to another was also limited. The

desire for more open trade compelled some colonial merchants to support the movement for independence in the early 19th century. Independence was achieved, and the colonial mercantilist economic system was dismantled by the 1820s.

New governments in most Latin American nations moved away from the mercantilist system and instead adopted LAISSEZ-FAIRE-based economic models. Under laissez-faire, nations engaged in more open trade with fewer government controls and specialized in producing goods according to their COMPARATIVE ADVANTAGE. Latin American nations produced agricultural goods and mining products comparatively well in relation to the economies of western Europe and the United States. Many Latin American governments therefore adopted policies intended to develop the raw material export sectors of their economies and pursued favorable trade arrangements with western European nations and the United States.

While the European countries and United States had entered the industrial revolution and were developing large manufacturing sectors, throughout the first part of the 19th century, most Latin American countries were not able to develop an industrial sector. Furthermore, decades of political conflict and civil wars created an unstable economic environment, which dissuaded potential investors. Additionally, there was little of the infrastructure necessary to support the development of industry. The export of raw materials therefore remained the mainstay of Latin American trade. British merchants were the first to trade with the newly independent Latin American nations, and finished goods from Great Britain flooded markets in ARGENTINA, BRAZIL, and other countries in the region in the early decades of the 19th century. In later decades, French and U.S. merchants also provided manufactured goods to Latin America.

Generally, Latin American exports suffered in the first half of the 19th century, as nearly all economic indicators reached a standstill. Production had slowed during the independence era and the political instability that followed, but by mid-century, the economic sector in many countries began to recover, and government leaders pursued free trade networks more aggressively. Commodity agricultural products such as COFFEE, SUGAR, and TOBACCO made up the bulk of economic production in countries with existing and former plantation economies such as Brazil, COLOMBIA, VENEZUELA, and the Caribbean. Rising demand for commodity foodstuffs in the industrializing economies of western Europe and the United States fueled demand for those products. The growth potential of Latin American agricultural sectors attracted the attention of some foreign investors. U.S. agribusinesses began investing in landholdings in CENTRAL AMERICA, and the production and export of tropical fruits—chiefly bananas—became the leading economic activity in those countries. By the end of the century, U.S. investors were playing an increasingly active role in MEXICO, CUBA,

and the DOMINICAN REPUBLIC as well. Investments in improved production technologies resulted in greater output and fueled the growth of the export market.

The Latin American mining sector experienced a similar recovery and expansion. Foreign investors provided funding to improve mining operations in CHILE and Mexico. Mining output increased particularly in the last half of the 19th century, and the vast majority of that production was exported to the industrial markets of western Europe and the United States. Early mining interests focused on the extraction of precious metals in the SILVER mines of Mexico and other Latin American countries. By the end of the century, new developments in the global ECONOMY fueled demand for other mining products. COPPER mines in PERU and Chile provided the materials for wiring as industrializing nations began adopting electrical power. BOLIVIA exported large amounts of tin in the late decades of the 19th century. The mass production of tin cans for use in the processed FOOD industry increased in the last half of the century, and tin had become Bolivia's number-one export within a few decades. Large nitrate deposits in the Atacama Desert provoked a border dispute between Chile, Bolivia, and Peru. The three countries fought the WAR OF THE PACIFIC from 1879 to 1884, with Chile emerging from that conflict with control over the rich nitrate region. Nitrate exports dominated the Chilean economy at the turn of the century and allowed for impressive economic growth.

As export markets expanded in the last half of the 19th century, so did the need for more developed TRANSPORTATION and communications infrastructure. The liberal oligarchies that took over the leadership of many Latin American countries in those decades prioritized modernization and export-oriented growth (see LIBERAL OLIGARCHY). National leaders created favorable investment climates for foreign businesses in order to attract resources for improving production technologies as well as to expand the infrastructure necessary for trade. While some infrastructure expansion was financed by local entrepreneurs, foreign investors provided most of the money to build railroad lines throughout Latin America in the late 19th century. Tens of thousands of miles of rail lines were added in the geographically largest countries of Argentina, Brazil, and Mexico. Other countries experienced a smaller but equally impressive expansion of the rail industry. Most rail lines were built to connect the large cities and other major production centers with coastal ports. The nature of railroad construction reflects the export-oriented nature of Latin American economies by the turn of the century.

By the end of the 19th century, leaders in some of the larger Latin American nations were changing their trade policies in an attempt to develop an industrial sector. Mexico, Argentina, Brazil, and Chile led this trend. Raw materials and commodity exports still made up the bulk of national economic production, but governments

in those countries simultaneously encouraged INDUSTRIALIZATION in consumer goods sectors and in some basic heavy industry. Industrialization policies still relied heavily on foreign investors and required imports of capital goods and heavy equipment from abroad.

Latin America's shift from mercantilism to a more laissez-faire trade structure in the 19th century did bring the appearance of economic growth in the short term. But, 19th-century trade networks in Latin America largely prioritized the export of raw materials and commodity products. Most nations suffered a trade imbalance as they imported many luxury goods and finished products from abroad. Relying on commodity exports also left many Latin American nations vulnerable to international market fluctuations. Populist leaders in the early 20th century attempted to move away from the trade models established in the 19th century, but export economies still defined the region for several decades. The onset of the Great Depression in 1929 brought significant changes to Latin American trade policies.

See also TRADE (Vols. I, II, IV).

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**transisthmian interests** In 1513, the Spanish conquistador Vasco Núñez de Balboa marched across the isthmus at PANAMA and discovered that only a narrow strip of land separated the Caribbean Sea from the Pacific Ocean. Balboa's fellow conquistador Hernando Cortés suggested that a canal be constructed across the isthmus, and in 1524, King Charles V of Spain commissioned the first official survey of the area. Nothing more was done, and it would be nearly 400 years before a canal across the Panamanian isthmus would open to world traffic. Although Panama remained a land transit route throughout the Spanish colonial period, its importance declined as colonial control weakened in the 1700s.

Interest in a transisthmian TRANSPORTATION route was rekindled during the Latin American wars for independence. In an effort to attract support for Venezuelan independence, in 1797, General Francisco de Miranda offered a canal concession to Great Britain in return for assistance to his revolutionary movement. As U.S. minister to France, Thomas Jefferson showed interest in a transisthmian canal, but his country was isolation-

ist and was more interested in westward expansion in North America, which prevented any follow-through. In 1811, Alexander von Humboldt's (b. 1769–d. 1859) *Political Essay on the Kingdom of New Spain* suggested nine potential canal sites, three of which lay in Panama. Simón Bolívar placed the canal issue on the agenda for the 1826 PANAMA CONGRESS, and U.S. secretary of state Henry Clay instructed the U.S. delegates to discuss the issue. In 1830, a Dutch effort was abandoned by the revolution in Holland. Two years later, a French plan fell victim to monarchical machinations. In 1835, Guatemalan Juan Galindo (b. 1802–d. 1839) arrived in Washington, D.C., with canal proposals in response to British expansion in present-day BELIZE. None of these proposed canal projects envisioned any government participation, only that of private entrepreneurs. Although U.S. president Andrew Jackson only expressed concern about any transisthmian canal being opened, on an equal basis, to all nations of the world, he did dispatch Charles Biddle to the isthmus in 1836 to make a detailed analysis of the suggested canal routes. In Panama, Biddle determined that the anticipated cost prohibited the construction of a canal there for several generations. Jackson henceforth ignored the canal issue, and for the next 10 years, U.S. political dynamics focused on westward expansion, not a transisthmian canal. When the United States rekindled its interest in the mid-1840s, it found the British had expanded their territory along the ill-defined MOSQUITO COAST that ran from northern NICARAGUA south to the mouth of the San Juan River on the border with COSTA RICA, which had for long been considered the most likely Caribbean terminus of an isthmian transit route.

In 1846, the United States and COLOMBIA completed the Bidlack-Mallarino Treaty, which provided unrestricted transit of U.S. passengers and cargo across the isthmus by whatever means possible, provided the United States guaranteed the route's neutrality and Colombia's sovereignty over Panama. The U.S. Senate ratified the treaty in 1848. In 1849, the outgoing president, James K. Polk, dispatched ELIJAH HISE and then the subsequent president, Zachary Taylor, sent EPHRAIM GEORGE SQUIER to Central America to check British expansion. Each signed agreements with Nicaragua, but these were never ratified by the U.S. Congress because each committed the United States to defend transit routes. While the British minister to Central America, Frederick Chatfield, wanted to challenge the U.S. advances, the British foreign secretary, Lord Palmerston, confronted with European problems, preferred a peaceful solution. The upshot was the 1850 CLAYTON-BULWER TREATY, under which the United States and Great Britain pledged not to assume dominion over any part of Central America. In effect, the ambiguous wording prevented the United States and Great Britain from undertaking a canal project or maintaining any canal system by themselves. Owing to French, German, and Russian machinations in Europe and the battle over westward expansion and the civil

war in the United States, the Panama canal question was pushed into the background until 1872, when U.S. president Ulysses S. Grant (b. 1822–d. 1885) unilaterally declared the Clayton-Bulwer Treaty void and appointed the Inter-Oceanic Canal Commission (see U.S. CIVIL WAR AND CENTRAL AMERICA). When it reported its findings four years later, the commission recommended the San Juan River site over Panama because of its shorter distance and cheaper construction costs.

When the French developer of the Suez Canal (completed in 1869) Ferdinand de Lesseps undertook the canal project at Panama in 1879, he demonstrated the failure of both the 1846 Bidlack-Mallarino Treaty and the 1850 Clayton-Bulwer Treaty from preventing another nation from undertaking a canal project through Panama. Significantly, the de Lesseps project prompted a public outcry in the United States, which continued for the remainder of the 19th century. In his annual message to Congress in December 1880, President Rutherford B. Hayes set the tone when he declared in favor of a transisthmian canal to be built, controlled, and defended by the United States. Every succeeding president repeated the demand through 1900. Writing in *The Nation* in 1881, State Department consular John A. Kasson warned that if de Lesseps completed his project, the Caribbean Sea would become an American Mediterranean, a reference to the continued European conflict in that body of water. Chambers of commerce and boards of trade in major cities across the country predicted the trade benefits of a U.S.-controlled canal at Panama. Led by Admiral Alfred T. Mahan, advocates of the “large policy,” or U.S. global commercial and naval policy, pointed to the increased security a U.S.-owned canal offered.

As the call for a U.S.-owned and operated canal became louder, de Lesseps continued to plod along until his project’s failure in 1889. The final private endeavor to construct a transisthmian canal was made by the Maritime Canal Company, formed by former U.S. civil engineer A. G. Menocal. For three years, from 1887 to 1890, Maritime spent \$4 million and labored at the mouth of the San Juan River and, like others before, made little progress in constructing a transisthmian canal before going bankrupt.

In the 19th century, each of the Latin American states involved in the canal imbroglio—that is, Colombia, the department of Panama, Costa Rica, and Nicaragua—anticipated prosperity and modernization as a result of a canal running through its territory. Furthermore, the elite Panamanian administrators blamed the government at BOGOTÁ, not foreigners, for failing to bring the canal to fruition. In the United States, a growing cadre of politicians and business leaders came to the conclusion that the U.S. government needed to intervene in the tumultuous politics of Central America and to construct and defend a transisthmian canal. In the early 20th century, these advocates would have their way, and they found the British more supportive of the U.S. cause. The rising

German MILITARY and naval power challenged Britain’s international hegemony and forced the London government to cast about for new friends. The British found such a friend in the United States and contributed to the abrogation of the 1850 Clayton-Bulwer Treaty, which helped ensure PANAMANIAN INDEPENDENCE in 1903.

See also BALBOA, VASCO NÚÑEZ DE (Vol. I); BOLÍVAR, SIMÓN (Vol. II); CORTÉS, HERNANDO (Vol. I); MIRANDA, FRANCISCO DE (Vol. II); PANAMA CANAL, CONSTRUCTION OF (Vol. IV).

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**transportation** Transportation in Latin America was relatively archaic and underdeveloped at the beginning of the 19th century. The evolution of internal and external transportation networks reflect important trends in national development in many Latin American nations. Highways, ports, and eventually railroads emerged as TRADE networks arose, and economic developments in the 19th century can often be traced through transportation lines. Transportation networks also played an important role in the internal and external conflicts that afflicted most Latin American nations in the 19th century. In the late decades of the century, the modernization policies of many Latin American governments focused on developing the transportation infrastructure.

During the colonial period, formal transportation networks in Latin America were limited. Transatlantic shipments were tightly regulated by the Spanish Crown, and for most of the colonial era, those shipments were allowed to depart only from select ports, namely, Cartagena de Indias, in present-day COLOMBIA; Veracruz, in present-day MEXICO; and Nombre de Dios, in present-day PANAMA. Only in the late 18th century did the Spanish begin to develop alternative ports, opening BUENOS AIRES and other areas to trade. Trade and transportation became sluggish during the wars for independence, and in many areas, those trade networks were slow to recover. Eventually, traditional ports were revived, and new ports emerged as Latin American governments moved toward LAISSEZ-FAIRE trade policies. For example, VALPARAISO became a major shipping outpost in CHILE in the middle of the 19th century.

Overland transport was also fairly meager in colonial Latin America, with small roads crossing rough terrain. Most road travel was on foot since roads were often too treacherous for draft animals, while only the elite could afford to travel by horse and carriage. The basic road system connected MINING and AGRICULTURE centers with urban areas and coastal ports. Inland roadways were slow

to develop in the first half of the 19th century. The wars of independence and subsequent internal warfare damaged much of the transportation network in Latin American nations, and continued political instability made infrastructure development difficult. By the mid-19th century, however, many Latin American governments were devoting resources to improving internal roadways that connected major cities to coastal ports. The Chilean government began developing an internal road system to connect SANTIAGO DE CHILE with agricultural and mining sectors. Inland roads also extended into neighboring ARGENTINA to facilitate trade. In Mexico, a long-standing road connecting MEXICO CITY to Veracruz was improved during the administration of BENITO JUÁREZ in the 1860s. Juárez also established the *RURALES* security force to prevent crime and banditry along Mexico's rural roadways.

River transport was the basis of much of the trade and travel in South America. The Río de la Plata and the Paraná shaped transportation networks in Argentina and URUGUAY, and the Orinoco River did the same in COLOMBIA and VENEZUELA. By the end of the 19th century, the Amazon River had become a vital transit route. River transport accelerated in mid-century with the introduction of steamboats in many areas of Latin America. Technological improvements continued in the

last half of the 19th century, and the transportation of goods and people into and out of the interior regions of Latin American countries through river transport became increasingly efficient.

One of the most significant transportation developments in 19th-century Latin America was the expansion of railroads, particularly in the final decades of the century. Many government leaders believed Latin America had fallen behind the rest of the world and actively pursued modernization policies in an effort to promote progress. Leaders throughout the region devoted national resources to developing transportation infrastructure and also invited foreign investors to expand transit networks. British financiers were instrumental in backing the construction of thousands of miles of railroads in Argentina, BRAZIL, and Chile. European and U.S. companies were involved in Mexico and CENTRAL AMERICA. Foreign owners of mining companies and commercial agricultural endeavors often invested in railroad expansion as a way to ensure reliable transport of their products. Even more than overland roads, railway transport facilitated internal and external trade. Latin American exports of raw materials expanded considerably in the last half of the 19th century, and that growth was directly tied to more efficient railroad transportation.



New rail lines facilitated trade and became a marker of modernization in the late 19th century. This 1882 illustration shows the impressive bridge over the Gorge of Metlac in Veracruz, Mexico. (Time & Life Images/Getty Images)



Modernization programs in the late 19th century often coincided with rapid urbanization in many large Latin American cities. New industries emerged in large urban areas, and those industries became an important part of the export-oriented markets that dominated the region's economies. Urbanization was facilitated by the advances in transportation infrastructure in the final decades of the 19th century. Internal transport networks allowed MIGRATION from rural provinces into urban areas. Swelling populations in Latin American cities compelled many governments to invest in public works, including widening and expanding city streets and introducing public transportation systems. Most Latin American governments attempted to emulate European progress. Urban streets in Mexico City, Buenos Aires, and CARACAS were modeled after European boulevards. In Mexico City, middle-class and elite residents even adopted bicycle riding as an easy and healthy way to navigate the city's busy streets.

The importance of external trade networks was evident by the end of the century, and moving shipments between oceans had long been a concern. Interoceanic shipments traditionally had crossed the Isthmus of Panama on the PANAMA RAILROAD, which had started operating in the 1850s. The other alternative was for ships to sail around the tip of South America. European countries expressed early interest in constructing a canal across the isthmus to connect the Atlantic and Pacific Oceans and allow for more efficient interocean transit (see TRANSISTHMIAN INTERESTS). French engineers began a canal-building project in the 1880s, and several companies pursued the venture for the next 20 years. French investors went bankrupt and abandoned the project, but the United States under President Theodore Roosevelt stepped in and took over canal construction in 1904. The Panama Canal officially opened to ocean-going traffic in 1914.

See also PANAMA CANAL, CONSTRUCTION OF (Vol. IV); TRANSPORTATION (Vols. I, II, IV).

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**Trinidad** See CARIBBEAN, BRITISH.

**Trinitaria, La** La Trinitaria was a secret movement formed by Juan Pablo Duarte (b. 1813–d. 1876) in 1838 to consolidate resistance to the HAITIAN OCCUPATION OF SANTO DOMINGO (present-day DOMINICAN REPUBLIC). Duarte was born to an affluent FAMILY in the capital city of SANTO DOMINGO. In 1822, Haitian president JEAN-PIERRE BOYER ordered his army to invade the eastern portion of the island of Hispaniola. Between 1828 and 1833, Duarte's family sent the young student to study in Europe. He traveled throughout France, Spain, and Britain, where he was exposed to emerging ideals of LIBERALISM and DEMOCRACY.

Inspired by liberal tenets, Duarte returned to Santo Domingo and began organizing an anti-Haitian resistance movement with Matías Ramón Mella (b. 1816–d. 1864) and Francisco del Rosario Sánchez (b. 1817–d. 1861). The triumvirate called their movement La Trinitaria (The Trinity) in honor of the three-man leadership structure and as a tribute to the Holy Trinity. Since HAITI's army had attempted to stifle Spanish traditions and diminish the importance of the CATHOLIC CHURCH, the movement's nomenclature made a strong symbolic statement of resistance.

For five years, La Trinitaria recruited supporters, and its strength grew. Then, in 1843, Duarte formed an alliance with a Haitian opposition movement led by CHARLES RIVIÈRE-HÉRARD. Their two simultaneous rebellions succeeded in driving Boyer from power, but soon after, a rift with their former Haitian allies caused La Trinitaria's leadership to flee, while the island remained under Haitian control. In 1844, a new opposition movement, also called La Trinitaria, successfully rebelled against the Haitian MILITARY. A governing junta declared the independence of the new nation of the Dominican Republic. Duarte returned from exile, but within six months, he and other leaders of La Trinitaria had been ousted, and the new nation fell under the tyrannical leadership of CAUDILLOS.

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**unitarios** The *unitarios* were members of a group that eventually became a political party—the Partido Unitario—in ARGENTINA in the decades immediately following independence. *Unitarios* tended to support liberal economic and social policies but also a centralist form of government that favored the interests of *porteños*, or residents of BUENOS AIRES (see CENTRALISM). With much of their membership drawn from intellectual circles, the *unitarios* prided themselves on their high levels of EDUCATION and sophisticated cultural outlook. In the immediate aftermath of independence, it became clear that *unitario* politicians would clash with regional CAUDILLOS, who made up the competing political group of *FEDERALES*.

BERNARDINO RIVADAVIA became one of the first leaders of the *unitarios* while serving in the administration of Buenos Aires governor Martín Rodríguez (b. 1771–d. 1845) in the 1820s. Throughout that decade, *unitario* leaders implemented a vast array of reforms, such as abolishing SLAVERY and expanding the system of higher education. At the same time, Rivadavia, who became first president of the United Provinces of the Río de la Plata in 1826, led attempts to enhance the economic power of Buenos Aires and to rein in the power of local caudillos. *Unitario* control over national politics came to an end after Rivadavia was forced into exile in 1827 and JUAN MANUEL DE ROSAS came to power in 1829.

Rosas formed strong alliances with other federalist caudillos in the provinces. During his tenure as governor of Buenos Aires, Rosas ruled as a quintessential caudillo, coopting many would-be opponents into his circle and relying on his security force, LA MAZORCA, to inflict violence when persuasion was not effective. Many of the *unitario* leaders were persecuted under Rosas, and others fled into exile. A number of exiled *unitarios* gathered in

Montevideo and worked to restore their movement and bring down the Rosas dictatorship from abroad. *Unitario* resistance inspired the formation of a new group of young anti-Rosas intellectuals who became known as the Generation of '37. Operating both as a political movement and a literary circle, the Generation of '37 attracted such notable members as JUAN BAUTISTA ALBERDI and DOMINGO F. SARMIENTO, who published a scathing critique of caudillo rule in Argentina in 1845. Another member, ESTEBAN ECHEVERRÍA, waged an aggressive anti-Rosas propaganda campaign from Montevideo.

Many members of the Generation of '37 became national leaders in Argentina after the fall of the Rosas regime, and the basic *unitario* liberal ideology that had been introduced in the decades following independence was still visible. In particular, Sarmiento and Alberdi introduced new educational programs and attempted to attract strong immigrant populations to the country in the last half of the 19th century. Although the *unitarios* ceased to exist as a political entity, the political legacy of the party endured in liberal policies and in continued factionalism between Buenos Aires and the provinces.

See also UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II).

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**United Provinces of Central America** The geopolitical entity of the United Provinces of Central America was an attempt to unify the five modern-day

Central American states of COSTA RICA, EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA into a federation after their independence from MEXICO in 1823. Beset by internal problems, the federation fell apart in 1839.

During the colonial period, the *audiencia* (court) of Central America fell under the responsibility of the Spanish viceroy sitting in MEXICO CITY, and in 1821, a council of elite men, meeting in Guatemala City, voted to continue that linkage. Two years later, on July 1, 1823, another group of elite Central Americans meeting in Guatemala City voted for their countries' independence from Mexico and for the establishment of the United Provinces of Central America (Provincias Unidas del Centro de América). Honduran José Cecilio del Valle (b. 1780–d. 1834) played a major role in writing the constitution for the federation in 1824, which went into effect in August 1825.

Based on Spain's Constitution of 1812 and showing the influence of the U.S., French, and British documents, this liberal constitution established Roman Catholicism as the official RELIGION but limited the clergy's role in politics, established a unicameral legislature and a weak executive, and guaranteed civil liberties. It was considered a progressive document for its time, but its implementation fell victim to the liberal-conservative political struggle that characterized postindependence Latin America (see CONSERVATISM; LIBERALISM). While both groups came from the elite and shared the common desire to retain political power, they differed on Central America's future direction. The Liberals favored a more decentralized government, foreign TRADE, immigration, and a rejection of Hispanic values in favor of those found in the United States and western Europe. In contrast, the Conservatives wanted a strong central government, a privileged CATHOLIC CHURCH, and the maintenance of Hispanic values. This argument played out in each of the individual states and between the states and the central government located in Guatemala City.

International attention came briefly to Central America during the federation. In 1825, a Treaty of Friendship, Commerce and Amity opened the door to commerce with the United States, but little came of it. With British, Dutch, and French groups already showing an interest, in 1835 Guatemalan Juan Galindo (b. 1802–d. 1839) arrived in Washington, D.C., with plans for a transisthmian canal. Although nothing materialized at the time, it proved to be the first of many such schemes promoted later in the 19th century (see TRANSISTHMIAN INTERESTS).

Salvadoran MANUEL JOSÉ ARCE, a Liberal, captured the United Provinces' first presidential election, but he soon carried favor with Guatemala's Conservative elite and found himself at odds with Guatemala's Liberals. The conflict resulted in a three-year civil war, from 1826 to 1829. Honduran FRANCISCO MORAZÁN followed Arce to the presidency in 1829 and quickly introduced liberal

reforms that encouraged agro-exports; moved to integrate NATIVE AMERICANS into society; introduced penal and judicial codes, including trial by jury; and in 1834 moved the federal capital to San Salvador. The exile of prominent Conservatives served only to fuel the fires of discontent. The conflict was exacerbated by additional liberal reforms by Guatemalan governor MARIANO GÁLVEZ. The liberal programs triggered violent protest throughout the United Provinces, but these became most pronounced in Guatemala when the charismatic swine herder RAFAEL CARRERA capitalized on a cholera epidemic to lead an indigenous rebellion against the government. He finally defeated Morazán's army in 1840, but Costa Rica, Honduras, and Nicaragua had already withdrawn from the federation. For the next generation, Conservative leadership characterized each of the Central American governments.

A temporary union came about as a result of WILLIAM WALKER's incursions in Nicaragua in 1855 and 1856. A U.S. filibusterer, Walker and his small band of MILITARY followers arrived in Nicaragua in May 1855 at the behest of Nicaraguan Liberals, who sought to wrest control of the country from the ruling Conservatives. Walker accomplished that objective within five months of his arrival, but he also had his own ambitions to govern the country himself and impose a Central American union under his direction. His personal plan brought together the Conservative leadership in the other four Central American republics to oust Walker in a battle at La Virgen on March 1, 1856. Following Walker's defeat, however, the five Central American republics returned to their individual machinations.

Beginning in the 1860s, Liberals returned to political power across Central America, and at the same time, President Ulysses S. Grant rekindled U.S. interest in a transisthmian canal. The two forces—the Liberal vision of Central American unity and U.S. canal interests—came together in 1880, one year after the Frenchman Ferdinand de Lesseps commenced construction of a canal route at PANAMA. The U.S. minister to Central America, Cornelius A. Logan, found Guatemalan president JUSTO RUFINO BARRIOS receptive to a Central American union under his leadership that would secure the region from foreign penetration under the MONROE DOCTRINE but also provide the United States the opportunity to build and secure a transisthmian canal. The idea passed into history when Barrios sent a special negotiator to Washington, D.C., where it was rebuffed by the Rutherford B. Hayes administration. Hayes set a policy precedent by declaring in favor of a U.S.-owned and -operated canal.

The U.S. canal euphoria continued. In 1884, Secretary of State Frederick T. Freylinghuysen completed a treaty with the Nicaraguan minister to the United States, Joaquín Zavala, that provided for a U.S.-constructed and -operated canal through Nicaragua in return for a U.S. guarantee of Nicaraguan territorial integrity. Fearful

that the Guatemalan leader might force Nicaragua to obtain approval for the treaty from the Central American union, the Nicaraguan legislature rapidly approved the FRELINGHUYSEN-ZAVALA TREATY. Not anxious to become embroiled in Central American political affairs, U.S. president Grover Cleveland refused to submit the treaty to the Senate for its consideration. Again, plans for both the canal and Central American unity efforts collapsed.

In 1895, El Salvador, Honduras, and Nicaragua, prompted by nationalistic Hondurans who threatened to engulf the region in conflict and suspicious of the growing presence of U.S. entrepreneurs, formed a loose federation, the Greater Republic of Central America. As in the past, none of the governments was willing to surrender its autonomy to a central government. In 1898, El Salvador withdrew from the republic, bringing the venture to an end. This final 19th-century attempt at Central American unity confirmed the century-long U.S. impression that the region's ruling elite only talked about isthmian unity but were unwilling to take any measures to implement it. U.S. policy became evident at the 1907 and 1923 Central American conferences at which U.S. policymakers refused to include the unity question on the agendas. The Central Americans finally came together in 1960 with the formation of the Central American Common Market.

See also CENTRAL AMERICA (Vols. II, IV); CENTRAL AMERICAN COMMON MARKET (Vol. IV); CENTRAL AMERICAN CONFERENCES IN 1907 AND 1923 (Vol. IV); CONSTITUTION OF 1812 (Vol. II).

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**University of Buenos Aires** The University of Buenos Aires was founded in 1821 by BERNARDINO RIVADAVIA, who was serving in the administration of Buenos Aires governor Martín Rodríguez (b. 1771–d. 1845) at the time. It served as BUENOS AIRES's main provincial university throughout most of the 19th century and became a national university in 1881. The university was part of Rivadavia's plan to usher in liberal reforms in the years immediately after ARGENTINA's independence (see EDUCATION; LIBERALISM).

Throughout the colonial era, the CATHOLIC CHURCH-operated University of Córdoba had been the region's main institution of higher learning. Rivadavia estab-

lished the University of Buenos Aires as a government-sponsored institution, independent of church control. Antonio Sáenz (b. 1780–d. 1825) became the first rector of the university, and under his leadership, the University of Buenos Aires developed preeminent programs in the arts, sciences, MEDICINE, and law. In the early years of its operation, Rivadavia secured government funding for the university and ensured that the institution had a well-stocked library and other necessary resources.

Even though many intellectual pursuits were stifled during the dictatorship of JUAN MANUEL DE ROSAS (1829–32, 1835–52), the university continued to operate. Deprived of full government support, enrollment declined during the 1840s. After the overthrow of Rosas, the University of Buenos Aires played a central role in the educational reform programs of Presidents BARTOLOMÉ MITRE and DOMINGO F. SARMIENTO. In the late decades of the 19th century, the university grew substantially and became one of the top universities in Latin America. Many of the nation's economic and political leaders who shaped the nation's development into the 20th century were educated at the University of Buenos Aires.

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**University of Chile** The University of Chile is located in SANTIAGO DE CHILE and is one of the nation's premier educational institutions. It was founded in 1843 by Venezuelan native ANDRÉS BELLO during an era of nation-building and progressive intellectual thought. As a writer and diplomat, Bello had spent time in London and introduced a number of European intellectual trends to CHILE when he moved to Santiago in 1829. Among those innovative ideas was a new emphasis on the role of higher EDUCATION in the creation of national identity. As Chile entered a period of stability and prosperity in the 1830s, Bello and other intellectuals formulated a strategy for advancing higher education.

During the colonial period, higher education in Chile was dominated by CATHOLIC CHURCH-run institutions and the Royal University of San Felipe. The CONSTITUTION OF 1833 provided a legal foundation for the establishment of a national university. In 1841, President Manuel Bulnes (b. 1799–d. 1866) and Minister of Education Manuel Montt (b. 1809–d. 1880) charged Bello with drafting a law to create the University of Chile. Bello created a program modeled after the ideas of Polish geologist and future university rector Ignacio Domeyko (b. 1802–d. 1889). Chilean leaders envisioned secular higher education that would provide a broad general foundation of humanistic training. Bello and Domeyko believed such training would create wise, responsible, and cultured leaders for the new nation. The University

of Chile opened in 1843 as a supervisory institution over the nation's education system as a whole. In later decades, the institution's functions evolved to include instruction and training as well.

The university program was intended for the elite and did not address the education of the larger population. Nevertheless, the establishment of the University of Chile marked a clear shift toward state-controlled, secular education and was an important first step in educational reform for the rest of the 19th century.

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**Uribe Uribe, Rafael** (b. 1859–d. 1914) *Colombian writer and Liberal politician* Rafael Uribe Uribe was a writer, Liberal politician, and MILITARY leader in COLOMBIA who became an important voice in the radical faction of the LIBERAL PARTY in the late 19th century. He played an important role leading Liberal forces in the WAR OF THE THOUSAND DAYS (1899–1902). In the 20th century, he continued his political career, serving in Congress and holding diplomatic posts.

Uribe was born on April 12, 1859, on his family's HACIENDA, El Palmar, in the Antioquia region. In his youth, his FAMILY supported the Liberal Party in numerous local conflicts, and at the age of 17, Uribe joined the local Liberal army in Cauca to fight in a regional skirmish against Conservatives. By all accounts, Uribe was a brave and able military leader and rose to the rank of captain. After helping secure a Liberal victory, he relocated to BOGOTÁ to study law and political science. Upon receiving his degree, Uribe took a position as professor at the University of Antioquia. There, he founded a newspaper to pursue his preference for political writing and practiced law. He earned a reputation as a defender of the *gólgota*, or radical, faction of the Liberal Party (see *GÓLGOTAS*). Conflict erupted in Antioquia once again in 1885 in reaction to the conservative reform of the Regeneration movement led by President RAFAEL NÚÑEZ. Uribe led the local Liberal army and was eventually captured and imprisoned.

Uribe spent the several years after his release from prison overseeing numerous agricultural pursuits. He studied various ways to modernize COFFEE cultivation and became even more convinced that the liberal notion of agrarian reform should be the basis of the Colombian ECONOMY. The 1890s found Uribe back in Bogotá, where he supported various failed uprisings against the Conservative government. His family connections helped him avoid government reprisal for those actions, and in 1896, Uribe was elected to Colombia's Congress. Now with increased political clout, he began plotting with other radical

Liberals and eliciting support for a rebellion against the Conservative government.

Uribe had long opposed the economic policies being pursued by the Conservative government. Nationalist president Miguel Antonio Caro (b. 1843–d. 1909) had imposed an export tariff on coffee shipments in an effort to rejuvenate the flagging national treasury. Economic decline worsened as the central government printed excess paper money, causing inflation and other problems. Uribe and his Liberal allies actively sought ways to force the government to reverse such policies and became increasingly convinced that armed insurrection was their only recourse. Caro did not run for reelection in 1898, but his fellow Nationalists Manuel A. Sanclemente (b. 1813–d. 1902) and José Manuel Marroquín (b. 1827–d. 1908), won the presidency and vice presidency, respectively. Uribe and the *gólgotas* saw little hope for compromise with the hard-line Nationalist wing of the CONSERVATIVE PARTY still in power.

Uribe plotted an insurrection, based primarily in the Liberal stronghold of Santander. Hostilities broke out in fall 1899, and the deadly conflict that would become known as the War of the Thousand Days began. Uribe himself directed military campaigns in cooperation with General Benjamín Herrera (1853–1924), and the two Liberals achieved a decisive victory at the Battle of Peralonso in December 1899. The tides turned against them in the coming months, however, and the government victory at the Battle of Palonegro in May 1900 marked the end of the Liberal army's viability as a major fighting force. The crushing defeat depleted Liberal manpower, arms, and supplies, and the extent of their losses demoralized the movement. Uribe fled to VENEZUELA and then to New York, seeking aid and support. Unable to secure any meaningful assistance, the military leader turned his attentions to trying to secure a peaceful resolution to the conflict. Neither Conservative nor Liberal leaders were ready to compromise for peace, and the fighting continued. The Liberal movement was relegated to guerrilla-style warfare, and the death and destruction continued.

By 1902, both sides of the conflict were growing increasingly concerned that the instability and internal divisions that dominated Colombian politics would open the door for the United States to demand unreasonable concessions in the negotiations over a transisthmian canal through Panama. In October 1902, Uribe and Herrera signed a provisional peace accord on the Neerlandia hacienda. A final peace came one month later in the Treaty of Wisconsin, signed on board the U.S. warship by the same name. The peace agreements offered amnesty to Liberal insurgents but included few provisions to address their main concerns.

After the war, Uribe continued to serve in Congress and later received several diplomatic posts. He was assassinated in Bogotá in October 1914.

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**Urquiza, Justo José de** (b. 1801–d. 1870) *military leader and president of Argentina* Justo José de Urquiza was the governor of Entre Ríos Province and one-time ally of dictator JUAN MANUEL DE ROSAS. He is best known for overthrowing Rosas and overseeing ARGENTINA'S transition to constitutional DEMOCRACY in the 1850s.

Urquiza was born on October 18, 1801, in the province of Entre Ríos. He received some EDUCATION in URUGUAY and later in BUENOS AIRES. He returned to Entre Ríos in the 1825 and began consolidating MILITARY and political support, speaking out against the UNITARIOS who dominated the national leadership. In the 1830s, Urquiza met Rosas, and the two formed a strategic but tenuous alliance and agreed to promote a federalist agenda. In 1841, Urquiza became governor of Entre Ríos and implemented a series of reforms to bring stability to the region. He brought military rivals in his province and in neighboring provinces under control. Urquiza also encouraged agricultural and industrial development and began reforming the region's educational system.

It quickly became apparent that Rosas had turned his back on the alliance he had made with FEDERALES in the provinces, as the dictator consistently supported policies that favored the port of Buenos Aires over the interior. In 1851, Urquiza led a group of provincial CAUDILLOS and formed an alliance with neighboring Uruguay and BRAZIL. The coalition rebelled against Rosas and deposed the dictator in 1852. Urquiza assumed control of the national government and immediately convened a constitutional congress to draft a new governing document. The CONSTITUTION OF 1853 quickly won the support of all provinces but Buenos Aires, which withheld approval until 1860.

Urquiza served as president of Argentina from 1854 to 1860. Even after he left office, he continued to lead the national military. He was assassinated in his home province on April 11, 1870.

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**Uruguay** Uruguay is located in the southern half of South America, along the Atlantic coast, east of ARGENTINA and southwest of BRAZIL. It is bordered on the south and west by the Río de la Plata and the Uruguay River. It is a relatively small country with fertile terrain made up of rolling plains known as the PAMPAS in the south and low-lying flatlands in the north. Historically, Uruguay has been primarily an agricultural ECONOMY,

but some modest industry began in the late 19th century (see AGRICULTURE; INDUSTRIALIZATION).

During the colonial era, present-day Uruguay was known as the BANDA ORIENTAL and was the easternmost province in the Viceroyalty of Río de la Plata, formed in 1776 with its capital in BUENOS AIRES. The Banda Oriental was home to numerous Jesuit missions, whose objective was to Christianize the NATIVE AMERICANS in the area. The region was not heavily populated but became economically viable through thriving cattle ranching activities. By the 18th century, settlers from Portuguese-controlled Brazil began encroaching into Spanish territory in South America, and the Spanish Crown enacted a number of reform measures to augment security and protect its territorial claims. To that end, Montevideo was founded in 1726 as a MILITARY outpost and became a buffer zone between the Spanish Empire in South America and Portuguese settlements in Brazil. As a natural port location along the mouth of the Río de la Plata, the city quickly grew as a major center of commerce and TRADE.

**THE STRUGGLE FOR INDEPENDENCE**

When France's Napoléon Bonaparte invaded the Iberian Peninsula in 1808 and set off the independence movements in Latin America, numerous rebellions surfaced in the Viceroyalty of Río de la Plata. In Buenos Aires, the local elite formed a governing junta and began taking steps toward local autonomy. In 1810, the Spanish leadership of the viceroyalty abandoned Buenos Aires and relocated to Montevideo. The junta in Buenos Aires then dissolved the former viceroyalty and formed the United Provinces of the Río de la Plata.

Political divisions began to surface in the Banda Oriental, as some local leaders advocated remaining loyal to Spain, while others pushed to distance themselves from Spanish rule. Local GAUCHO José Gervasio Artigas began a revolt against Spanish authorities in 1811 and formed an alliance with the governing junta in the United Provinces. Artigas won several early battles against the Spanish and laid siege to Montevideo for several months. The gaucho leader eventually withdrew to the interior late in 1811 and spent the next year orchestrating a plan to impose a federalist system in the Banda Oriental. By 1813, Artigas had grown disillusioned with the governing UNITARIOS in the United Provinces, who were pursuing a centralist form of government that privileged the interests of Buenos Aires over those of the provinces. As a champion of FEDERALISM, Artigas abandoned the United Provinces and returned to the Banda Oriental. He quickly dominated the countryside, but military forces from the United Provinces marched on Montevideo. In 1814, Artigas declared independence and began a series of campaigns to take the port city. The following year, he succeeded in driving the *unitarios* out of Montevideo and began organizing a new government. He abolished SLAVERY and began a land redistribution program that

dismantled large HACIENDAS and gave property to mestizos, Amerindians, and freed slaves.

A sense of quietude did not last for long under Artigas's government. Brazilian leaders viewed the gaucho's abolitionist and land reform policies as a potential threat to the still-thriving plantation and slave-based economy next door. In 1816, Brazilian forces began an invasion of the Banda Oriental, and Artigas was forced to flee to neighboring PARAGUAY. Several years of confrontations passed, and by 1820, Brazil had taken over the entire region, renaming it the Cisplatine Province.

In 1825, JUAN ANTONIO LAVALLEJA put together a group of 33 rebels known as the THIRTY-THREE IMMORTALS and began an insurrection against the Brazilian forces in the Banda Oriental. On April 19, the group crossed the Uruguay River and began a series of campaigns aimed at ousting the Brazilian forces from the area. Lavalleja won several early battles and began receiving assistance from the president of the United Provinces of the Río de la Plata, BERNARDINO RIVADAVIA (1826–27). Brazil reacted to the alliance between Lavalleja and Rivadavia by declaring war on the United Provinces, marking the beginning of the CISPLATINE WAR.

The insurrection started by the Thirty-three Immortals escalated into full-scale war between the United Provinces and Brazil. The rival nations competed for control of the Banda Oriental, and within three years, hostilities had reached a stalemate. In 1828, British mediators intervened, and the warring nations agreed to a compromise to bring the war to a peaceful conclusion. In the Treaty of Montevideo, leaders from Brazil and the United Provinces agreed to give up all claims to the Banda Oriental. The peace agreement created a new, independent nation called the Eastern Republic of Uruguay.

### THE EMERGENCE OF POLITICAL PARTIES

Leaders in Uruguay immediately began drafting a governing document for the newly independent nation. On July 18, the CONSTITUTION OF 1830 was ratified by Uruguayan delegates and by the leaders of Brazil and the United Provinces. The document called for a centralized form of government under a strong executive, with relatively weaker legislative and judicial branches (see CENTRALISM). It reaffirmed the abolition of slavery and established Roman Catholicism as Uruguay's official RELIGION. JOSÉ FRUCTUOSO RIVERA, who had supported Lavalleja's insurgency in 1825, was chosen as the nation's first president (1830–34). The initial years of nationhood, however, were marred by instability as land disputes arose in the countryside and regional CAUDILLOS struggled to maintain local autonomy. During Rivera's presidency, Lavalleja made numerous bids for power and attempted several revolts. Rivera managed to put down the insurgencies and was succeeded by his ally and fellow caudillo MANUEL ORIBE in 1835. One year later, that alliance turned to rivalry, and conflict between the two

leaders escalated to violence. Rivera overthrew the Oribe administration in 1838, and war erupted between two emerging political factions. Rivera's supporters became known as the COLORADO PARTY and generally represented the interests of Montevideo and other urban commercial centers. Oribe formed the BLANCO PARTY and drew support from ranchers and other rural interests.

Rivera took the presidency again in 1839, but the *blancos* continued to challenge his authority. Between 1838 and 1851, the *blancos* and *colorados* fought a violent civil war known as the GUERRA GRANDE. Leaders in Argentina and Brazil—who had not lost their interest in the region—became involved in the conflict almost immediately. Oribe formed an alliance with Argentine dictator JUAN MANUEL DE ROSAS, receiving vital support from the neighboring caudillo. Rivera's government received assistance from the French, who attempted to destabilize Rosas by blockading the Río de la Plata. The governments of Great Britain and Brazil also eventually stepped in on behalf of the *colorados*, but not before Rosas and Oribe had driven Rivera into exile in 1843. With Oribe gone, the *blancos* laid siege to Montevideo, and a standoff ensued for the next eight years. The *colorados'* European allies helped defend the city in an attempt to secure more favorable trade conditions. By 1850, it appeared that the *blancos* would gain the upper hand, as Rosas secured a peace treaty that called for the withdrawal of British and French forces. But, before Oribe could claim victory, Argentine caudillo JUSTO JOSÉ DE URQUIZA rebelled against the Rosas dictatorship. Urquiza's revolt successfully overthrew Rosas and left the *blancos* vulnerable. Rivera formed an alliance with Brazil, and by 1852, the *colorados* had forced Oribe to escape into exile in Spain. A peace treaty declared neither side the victor, but the end of the war marked the beginning of the dominance of the Colorado Party in Uruguayan politics for the rest of the century. Brazil's assistance in the Guerra Grande also resulted in a close alliance between the Colorado Party and its neighboring country. A series of peace treaties ending the war included numerous provisions that were favorable to Brazil. These included the right to free navigation on the Uruguay River and the right to intervene in Uruguayan internal affairs. The treaties also stipulated that Uruguay would return escaped slaves to Brazil, an issue that had long caused contention between the two nations.

### THE QUEST FOR STABILITY

With the conclusion of the Guerra Grande, Uruguay began a period of substantial economic growth. In the 1860s, relative political stability resulted in new investments in TRANSPORTATION and communications infrastructure. Montevideo and other urban centers grew as immigrants flooded into the country and the population soared (see MIGRATION). Cattle ranching and sheep herding remained the leading economic activities. The processing of meat and other animal by-products tied the

rural economy to the expanding urban areas. Meat went primarily to *SALADEROS*, or salted meat processing plants, through most of the 19th century. In the final decades of the century, *saladeros* began to decline in importance. Refrigeration was introduced in the early 20th century, and frozen meat largely replaced salted meat.

Despite the peace treaties that brought an end to the Guerra Grande, conflict between the *blancos* and *colorados* continued into the 1850s. Several Colorado presidents attempted to introduce a policy of *fusión* (fusion), indicating that they incorporated the Blanco Party's interests into their government policies. Nevertheless, rivalry continued as the *colorados* secured control over Montevideo, and the *blancos* retained a strong influence in the countryside. On several occasions, the Colorado leadership asked the Brazilian government to intervene to help put down insurrections by the Blanco Party. In 1864, Brazilian forces helped depose the interim presidency of *blanco* Atanasio Aguirre (b. 1801–d. 1875), who was allied with Paraguayan dictator FRANCISCO SOLANO LÓPEZ. Solano López rose to the defense of the Blanco Party, while the *colorados* counted on support from Brazil as well as Argentina.

Tensions mounted between the opposing parties, and hostilities quickly escalated into the WAR OF THE TRIPLE ALLIANCE, which pitted Paraguay against Brazil, Argentina, and the dominant Colorado Party in Uruguay. The war lasted from 1865 to 1870 and was one of the bloodiest and most destructive wars in all of Latin American history. Led by Argentine president BARTOLOMÉ MITRE, the forces of the Triple Alliance blockaded Paraguay almost immediately, cutting off the nation's sea access. Most of the ground fighting took place on Paraguay's territory. Even though Solano López had started the war with an army that far outnumbered the combined forces of his enemies, the Triple Alliance forces quickly demolished much of the Paraguayan army. By the war's end, Paraguay had suffered hundreds of thousands of casualties. Indeed, it had lost nearly all of its adult male population. As a result of the war, Paraguay was stripped of more than 50,000 square miles (129,500 km<sup>2</sup>) of territory, and Argentina became the hegemonic force in the regional politics of the Southern Cone.

The conclusion of the War of the Triple Alliance also had an impact on the political struggle within Uruguay. As the war with Paraguay was winding down, an internal insurrection challenged the presidency of Lorenzo Battle y Grau (b. 1820–d. 1887). Blanco leader General Timoteo Aparicio (b. 1814–d. 1882) launched the Revolución de las Lanzas (Revolution of the Lances), and *colorados* and *blancos* once again wrangled for political control. Eventually, a peace agreement introduced a system of *coparticipación*, or "coparticipation." *Coparticipación* called for a sharing of public offices and congressional seats between the two parties, guaranteeing the *blancos* at least a minority voice in national government. The introduction of the power-sharing system ushered in

an era of virtually uninterrupted Colorado Party rule until well into the 20th century. In 1872, the *blancos* were renamed the National Party, which is the name the party uses today.

A brief period of civilian rule was overturned in 1875 by Colonel Lorenzo Latorre (b. 1844–d. 1916), who initiated a period of military rule that lasted until 1890. Latorre was backed by foreign commercial interests in Montevideo and former military officers. Latorre and his supporters despised the political party system that had privileged the rural caudillos of the *blancos* and the urban intellectuals of the *colorados*. Instead, Latorre intended to dismantle the party system entirely and impose his own vision of political stability. The military man assumed dictatorial powers and used all methods of oppression to bring the countryside firmly under government control. He attempted to rein in the power apparatus of traditional political parties but eventually had to appoint some party leaders to advisory positions within his administration. Latorre stepped down in 1880 and was replaced by another military leader, Máximo Santos (b. 1847–d. 1889). Santos was forced to abandon much of his predecessor's agenda to dismantle the political parties and became leader of the Colorado Party. During his administration and the subsequent administration of General Máximo Tajes (b. 1852–d. 1912), a powerful branch of the Colorado Party gained prominence. Known as the *civilistas* for their opposition to military rule, this faction of the *colorados* managed to secure a number of high-level positions during the era of militarism from 1875 until 1890. During more than a decade of authoritarian rule, Uruguay's economy stabilized, as the military governments brought order to rural areas and ended the nation's long tradition of political infighting.

By 1890, civilian rule had returned to Uruguay, and the Colorado Party controlled the political scene once again as a series of *civilista* leaders rose to power. Julio Herrera y Obes (b. 1841–d. 1912) and Juan Idiarte Borda (b. 1844–d. 1897) restored the dominance of the Colorado Party but also set off a major backlash by the National Party by failing to fulfill the power-sharing promises of *coparticipación*. National Party leader Aparicio Saravia (b. 1856–d. 1904) initiated yet another rebellion against the Colorado government in 1897. Before the revolt could be put down, the Colorado president had been assassinated, and the National Party had won even more concessions from the rival party. The Saravia rebellion also introduced important reform issues into the national political dialogue. Leaders began to consider electoral reforms and measures to secularize Uruguayan society. President Juan Lindolfo Cuestas (b. 1837–d. 1905) wrested social control away from the CATHOLIC CHURCH by creating a civil registry and introduced new electoral legislation that guaranteed even greater representation for the minority party.

While Cuestas ruled in the last years of the 19th century from Montevideo, Saravia maintained a large degree





Late 19th-century photo of the Plaza de la Constitución in Montevideo, Uruguay (*Library of Congress*)

of autonomy in the countryside. The separation of urban and rural Uruguay between the Colorado Party and the National Party (*blancos*) that had defined earlier decades continued into the early years of the 20th century. It was not until the presidency of José Batlle y Ordóñez (1903–07, 1911–15) that 19th-century political divisions gave way to a new era of national unification under populism in the early 20th century.

See also ARTIGAS, JOSÉ GERVASIO (Vol. II); BANDA ORIENTAL (Vol. II); BATLLE Y ORDÓÑEZ, JOSÉ (Vol. IV); RÍO DE LA PLATA, VICEROYALTY OF (Vol. II); UNITED PROVINCES OF THE RÍO DE LA PLATA (Vol. II); URUGUAY (Vols. I, IV).

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**U.S. Civil War and Central America** In the four years preceding the outbreak of the U.S. Civil War in 1861, Great Britain looked beyond the U.S. South for

a source of raw COTTON for its textile industry. CENTRAL AMERICA, and particularly GUATEMALA, benefited from the British initiative. Cotton became an important export for Guatemala, as well as HONDURAS and NICARAGUA, until the 1870s.

With the outbreak of civil war in April 1861, U.S. president Abraham Lincoln determined to deny the Confederacy the legal status that would come through recognition by a foreign government. The Central American republics complied with his request, denying the Confederacy recognition and their privateers access to isthmian ports. Central American leaders were motivated more by local political matters, however, than Lincoln's needs. They rationalized that if they granted recognition to the Confederacy, they only encouraged rebellion at home. Likewise, if they opened their ports to Confederate gun runners, U.S. naval ships would likely respond.

As U.S. leaders moved to abolish SLAVERY, they also considered what to do with the former slaves. In late 1861, Lincoln, persuaded by Secretary of State William H. Seward, proposed that the Central American republics absorb an unlimited number of black freedmen from the U.S. South. Lincoln and Seward rationalized

that the similar climatic conditions of the two areas would aid in the relocation. U.S. ministers in Central America approached the governments to which they were accredited, and in Washington, D.C., Seward met with Central American representatives. The Central Americans rejected the proposal out of hand. U.S. policymakers did not appear to understand race relations in Central America or the impact that WILLIAM WALKER had had upon the isthmian psyche when he proposed to reintroduce slavery to Central America in 1856. Central America housed very few blacks at the time of its independence, and each country had outlawed slavery in the 1820s. Moreover, most blacks who resided in the region had intermarried with mestizos or creoles.

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**U.S.-Mexican War (1846–1848)** The U.S.-Mexican War was fought from 1846 to 1848 between the United States and Mexico. The war officially started as a boundary dispute after the United States annexed Texas, but the eventual resolution of the war reveals that the conflict also involved territorial issues beyond Texas. During the two-year struggle, U.S. forces invaded and occupied many areas of Mexico, including MEXICO CITY. As a result of the U.S.-Mexican War, Mexico was forced to cede nearly half of its national territory to the United States in exchange for \$18.25 million.

The precursor to the U.S.-Mexican War occurred 10 years earlier when U.S. settlers in Texas won independence from the government of ANTONIO LÓPEZ DE SANTA ANNA (see TEXAS REVOLUTION). Subsequent Mexican governments never recognized Texas's secession. Even though many U.S. politicians wanted to annex Texas immediately, others feared that bringing Texas into the Union would inevitably lead to war with Mexico. Over the next decade, U.S. administrations under Andrew Jackson and John Tyler attempted to negotiate diplomatic agreements allowing the United States to annex Texas and to purchase additional territory in Mexico's northern frontier. Mexican leaders, struggling amid internal political crises, also feared external interference by the United States.

In 1844, James K. Polk won the U.S. presidency by promising to expand American territory and annex Texas.

On March 1, 1845, outgoing president Tyler secured a congressional resolution annexing Texas. The Mexican government under President José Joaquín de Herrera (b. 1792–d. 1854) responded by breaking off diplomatic negotiations with the United States, fearing that the Texas annexation would be closely followed by attempts to take additional territory. Those fears were realized when Polk sent John Slidell as the U.S. representative to Mexico City with orders to try to negotiate the purchase of more territory. Slidell's covert instructions were to push for the New Mexico and California territories, the latter to give U.S. shippers access to major ports along the Pacific coast. News of Slidell's secret mission leaked into the Mexican press, and under intense negative public pressure, Herrera broke off negotiations with the U.S. emissary. At the same time, political divisions within Mexico began to surface as General Mariano Paredes (b. 1797–d. 1849) took advantage of tense times and rebelled against Herrera's government. In January 1846, Paredes became president of Mexico. He focused his attention on stabilizing the internal political crisis and refused to see the U.S. diplomatic envoy.

With diplomatic negotiations stalled, Polk sent General Zachary Taylor to the border region to prepare for a possible confrontation. At that point, the unresolved boundary dispute left over from the Texas revolution came into play. Mexico had traditionally considered the southern Texas border to be the Nueces River. Texas and U.S. leaders claimed it was 150 miles (241 km) south on the Rio Grande (Río Bravo). Mexican leaders refused to compromise as the Rio Grande boundary marker effectively doubled the size of Texas. General Taylor marched his men into the disputed territory, and in April 1846, a skirmish broke out between Taylor's troops and a small Mexican cavalry contingent. When Polk received word that U.S. soldiers had been attacked and killed on what he considered to be American soil, he immediately presented Congress with a declaration of war. The declaration passed on May 13, and the U.S.-Mexican War began.

U.S. forces commenced an invasion of Mexican territory from a western and a northern front. Cavalry forces under Stephen W. Kearney spearheaded the invasion on the western front, advancing across New Mexico, Arizona, and eventually reaching California. When rumors of an impending war reached California in June, U.S. settlers rose in revolt in Sonoma. Reinforced by the Pacific naval fleet under John Drake Sloat and led by Commodore Robert F. Stockton, the California Battalion easily took northern California. Seeing the U.S. troops advance, Mexican MILITARY and political leaders fled south leaving the rest of California virtually defenseless. Stockton's forces met local resistance in Los Angeles, where many residents attempted to fight off the invading forces themselves. It was not until January 1847 that Stockton's and Kearney's combined forces of more than 600 finally defeated the 160-man California force.

The Treaty of Calhoun ended the California portion of the U.S.-Mexican War on January 13, 1847.

As events unfolded along the western front and in California, political turmoil continued in the Mexican government. CAUDILLO and military leader Santa Anna, who had previously withdrawn from politics in disgrace, monitored the progress of the war from his exile in CUBA. The former president began negotiating with U.S. leaders, promising to end the conflict peacefully and sell some of Mexico's northern territories if he would be allowed to pass through the naval blockade to reenter Mexico. Once back in his native land, Santa Anna turned on the United States and took up leadership of Mexico's northern defenses.

General Taylor continued his assault from Texas on the northern front. He led more than 2,000 troops across the Rio Grande and took the city of Matamoros. Taylor then proceeded to advance toward Monterrey, where he fought a difficult battle with Mexican troops under General Pedro de Ampudia. Eventually, Ampudia was forced to surrender, and Taylor advanced farther to the city of Saltillo. By February 1847, Santa Anna had managed to put together an army of 20,000 men and marched north to confront Taylor's advancing front. The two armies faced off at the Battle of Buena Vista in February 1847. Santa Anna was forced to withdraw, although he

claimed a victory for his army. His retreat effectively left the U.S. Army in control of most of Mexico's northern territories.

Taylor's successful advance, combined with the U.S. victories on the western front in California, seemed to indicate that U.S. strategies in those regions were bringing the desired results, but the Mexican government was unwilling to negotiate a peace. President Polk was also concerned that General Taylor's military successes could make him a formidable political rival if the army officer decided to run for president in the next election. The U.S. leader decided to change strategies and open up a new front with an invasion into the central heartland of Mexico. On March 9, 1847, General Winfield Scott landed just outside Veracruz with 12,000 soldiers to begin a campaign with the ultimate goal of invading Mexico City. The U.S. Army surrounded the port city of Veracruz, and for nearly three weeks, Mexican military personnel and civilians alike fought to defend the city from Scott's attack. On March 29, Veracruz fell, and Scott began his march toward Mexico City.

Santa Anna immediately set out with his army to confront Scott and defend the nation from the impending invasion. The two military leaders met on April 18 at the Battle of Cerro Gordo. Overpowered, Santa Anna's army was forced to retreat so hurriedly that Santa Anna



Artist's rendition of the bombardment of Veracruz by U.S. troops on March 25, 1847 (*Library of Congress*)

left behind the wooden leg that he used to walk after his leg was amputated in the PASTRY WAR. U.S. troops confiscated the leg as war booty, and their refusal to return it after the war became an issue of diplomatic contention between the nations for decades.

As the Mexican army retreated, Scott advanced and took the towns of Jalapa and PUEBLA. In August, freshly resupplied with newly arrived reinforcements, Scott pushed on toward Mexico City and faced off again with Santa Anna on August 19 and 20 on the outskirts of the capital. After another U.S. victory at the Battle of Churubusco, Scott brought in a diplomatic envoy to attempt to negotiate a peace. After one final major battle and U.S. victory at Molina del Rey, Santa Anna and the majority of the professional army abandoned Mexico City to continue small pockets of resistance from the countryside.

The withdrawal of the Mexican army left the capital virtually undefended. As Scott's forces advanced into the city, only civilians and a small group of cadets from the military academy were left to try to fend off the invading troops. The boys, some as young as 13, bravely defended the city, but U.S. forces quickly overpowered them. In one final confrontation, the last of the defenders leapt to their death from the top of Chapultepec Castle rather than surrender to the enemy army. Today, a monument stands in their honor at the foot of the castle, and the nation commemorates the sacrifice of "los Niños Héroes" (the boy heroes) every September 13.

As the U.S. occupation of Mexico City began, it was unclear who in the Mexican government had the authority to negotiate a peace settlement. Finally, on September

27, Supreme Court chief justice Manuel de la Peña (b. 1789–d. 1850) assumed the presidency and set up a government in Querétaro. Negotiations began in January between the de la Peña government and Nicholas Trist. With Mexico in such a distressed position, U.S. leaders demanded large concessions. In the Treaty of Guadalupe Hidalgo, signed on February 2, 1848, the U.S.-Mexican War ended with Mexico recognizing the U.S. claim to Texas and ceding the California and New Mexico territories for \$15 million. In addition, the U.S. government assumed more than \$3 million in outstanding claims against Mexico.

Shortly after the conclusion of the war, U.S. settlers discovered large deposits of GOLD in California, and the United States began enacting policies to encourage the settlement of the newly acquired lands. Defeat in the war was seen as a national failure for Mexico, yet the political turmoil and infighting that had allowed such an easy U.S. victory continued for several more decades.

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# V

**Valdés, Gabriel de la Concepción** See PLÁCIDO.

**Valparaiso** Valparaiso is CHILE's most important coastal port city, whose prominence was established during

the 19th century. Located along the central coast not far from the inland capital of SANTIAGO DE CHILE, Valparaiso is a transit point for Chilean imports and exports. It has also historically provided a stopping point for vessels en route between the Atlantic and Pacific Oceans.



Late 19th-century photo of milk peddlers in Valparaiso, Chile (*Library of Congress*)

Valparaiso became a major transit port along South America's Pacific in the decades immediately following independence. When Bolivian dictator ANDRÉS DE SANTA CRUZ formed the PERU-BOLIVIA CONFEDERATION in 1836, Chilean leaders worried that the unified territory to the north would compete for coastal dominance with Chilean port cities. Chile went to war and forced the dissolution of the confederation. That victory effectively ensured Chile control of the Pacific coast and positioned Valparaiso as the region's principal port city.

Valparaiso grew quickly as Chile became more involved in global TRADE networks in the 1840s. The port became a popular stopover for ships carrying goods to supply California's gold rush in 1848. It also became the main exit point for Chile's growing nitrate industry. In the 1860s, the city was swept up in the Guano War between Spain and PERU. As Spanish forces invaded Peru's coastal Chincha Islands to secure access to guano, Chile signed a defensive pact with its northern neighbors. When port officials in Valparaiso refused to service Spanish ships in 1865, the Spanish navy blockaded and later attacked the city. U.S. and British officials attempted to intervene, demonstrating the important role Valparaiso played in global trade.

Valparaiso's importance as a stopover port for inter-oceanic traffic declined after the opening of the Panama Canal in 1914. Nevertheless, Valparaiso continued to be an important coastal port and cultural location.

See also PANAMA CANAL, CONSTRUCTION OF (Vol. IV).

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**Venezuela** Venezuela is a country in the northern region of South America, located on the Atlantic coast north of BRAZIL, east of COLOMBIA, and west of GUYANA.

### INDEPENDENCE

Citizens in colonial Venezuela began to entertain the notion of independence a full decade before the formal movements erupted throughout Latin America. A group of creole elite initiated a failed effort to liberate the colony as early as 1797. In 1806, Francisco de Miranda, a MILITARY man and native of CARACAS, attempted to incite an independence rebellion. Failing to inspire Venezuelans to join his cause, however, he escaped to Europe until Simón Bolívar recruited him to assist in a new attempt in 1810.

Bolívar, also a native of Caracas, was from a wealthy family and had been educated in Europe, where he had been exposed to Enlightenment ideas. Motivated by notions of liberty and self-determination, Bolívar began plotting to overthrow colonial officials after Napoléon Bonaparte's 1808 invasion of Spain. In 1810, elite creoles on the Caracas *cabildo*, or city council, formed a resistance

junta and deposed local Spanish government officials. The new ruling junta originally declared loyalty to Spain's Ferdinand VII, but a rift developed between those who advocated independence and those who merely wanted more autonomy. Led by Bolívar, a Venezuelan congress met, and on July 5, 1811, the group officially declared Venezuela's independence and established the First Republic.

Despite the early support for Bolívar's movement, Venezuelan independence was not secured for several years. Even with a new constitution and a seemingly unified stand for independence, infighting erupted almost immediately. Leaders of the new republic failed to address deep-seated social inequalities, and mulattoes (people of mixed European and African blood) and *llaneros* (cowboys or livestock herders, generally of mixed Spanish and Amerindian blood) joined the royalist forces in opposition to independence. A major earthquake struck Caracas in March 1812, and royalist leaders claimed that God was expressing his displeasure with the independence movement. Finally, Miranda, who had been given supreme command, lost a series of battles against royalist forces. After attempting to negotiate a surrender with the royalists, he was captured while trying to escape with the national treasury.

Bolívar continued to push the movement forward and after several major victories declared the Second Republic in 1813. He was granted the title *libertador* upon taking Caracas, but with the restoration of Ferdinand VII in Spain and the arrival of Spanish army reinforcements, patriot forces quickly lost momentum. The Second Republic was crushed in 1814, and Bolívar fled the country. By 1815, the Liberator made his way to Jamaica, where he wrote his famous "Letter from Jamaica" articulating his views of colonialism and independence. A short time later, he went to HAITI and received some support from the newly independent nation's president, ALEXANDRE PÉTION.

In 1816, Bolívar revised his military strategy and revived his attempt to secure independence for Venezuela. He recruited the help of *llaneros* under General JOSÉ ANTONIO PÁEZ and attacked from the interior. With renewed energy and several military successes, Bolívar established the Third Republic. In 1819, he formed the Congress of Angostura and called for the creation of a new constitution. Bolívar urged the congress to select one strong central leader, and the governing body responded by granting Bolívar extraordinary powers. Within months, Bolívar's army expanded its activities into New Granada and enjoyed victory in the Battle of Boyacá. As the last western royalist strongholds fell, the Congress of Angostura created the Republic of Colombia (GRAN COLOMBIA), encompassing the territories that had previously made up the Viceroyalty of New Granada.

### GRAN COLOMBIA

Spain's 1820 Riego Revolt helped seal independence for Bolívar in Venezuela. Many frustrated royalists joined

the independence movement after the restoration of liberal rule in Spain. At the same time, with no new reinforcements arriving, the Spanish army found itself in an increasingly weakened position against Bolívar and Páez's forces. Bolívar's victory at the Battle of Carabobo in 1821 secured the independence of Venezuela, and the leader determined that to protect independence, Spanish forces needed to be removed from the entire South American continent. His army ousted the last royalist forces at Puerto Cabello in 1823, and in 1824, he aided in the final liberation of PERU to the south.

While Bolívar continued to lead independence forces, congressional delegates first in Angostura and then in Cúcuta worked to draft a constitution for Gran Colombia (see CONSTITUTIONAL DEVELOPMENT, VENEZUELA). The document, which was approved in 1821, established a strong central government with Bolívar as the president of the republic. It also called for a number of social reforms such as the abolition of SLAVERY, the elimination of the *mita* LABOR system, and secularization of EDUCATION, although those measures were not fully implemented. Bolívar left governing duties to his vice president, FRANCISCO DE PAULA SANTANDER, while he led the final battles for independence in Peru. As acting president, Santander worked to stimulate the national ECONOMY and implement the various reform measures contained in the constitution. He raised the ire of many influential supporters of the CATHOLIC CHURCH by revamping the nation's education system to include a more liberal curriculum. Furthermore, he financed an expansion of the education system by confiscating church assets. Resentment of social reforms combined with growing financial troubles set the stage for a number of challenges to the new government in its first years.

Instability in Gran Colombia manifested most seriously in antagonism among regional leaders. In particular, the elite in Caracas felt isolated from the center of government in BOGOTÁ and frequently argued that the needs of Venezuelans were being overlooked by that government. In 1826, Páez, one of Bolívar's most trusted military commanders, led a revolt against the government in Bogotá. Bolívar negotiated a peaceful, temporary end to the rebellion, but the Liberator had become increasingly dictatorial and pushed to consolidate power even further under a highly centralized government. He dissolved congress and reversed many of the liberal social measures that had been implemented under Santander. In 1829, Páez led Venezuelans again in revolt, this time declaring formal secession from Gran Colombia. The republic disbanded, and Páez became president of the new republic of Venezuela.

### REPUBLIC OF VENEZUELA

Páez's military background and authoritative leadership style made him a quintessential 19th-century Latin American CAUDILLO. He either ruled as president or exerted his influence behind the scenes in Venezuelan

politics from 1830 to 1848. That time is known as the period of the conservative oligarchy, as many of Páez's allies endorsed a more conservative political platform. Under the caudillo's guidance, Venezuelan leaders worked to provide economic recovery and social stability. Páez began to build a fragile sense of national unity, but an economic downturn in the 1840s combined with preexisting regional animosities provoked an anti-Páez movement in 1848. José Tadeo Monagas (b. 1784–d. 1868), a candidate from the LIBERAL PARTY that had formed in 1840, won the presidential election in 1846. Within two years, the new president had driven Páez into exile.

Monagas held office from 1847 to 1851; was succeeded by his brother, José Gregorio Monagas (b. 1795–d. 1858) from 1851 to 1855; then returned to presidency from 1855 to 1858. As Liberals, the brothers pushed through numerous social reforms, such as the abolition of slavery in 1854, but they also ruled as dictators, suppressing the power of Congress and silencing political opposition. Their heavy-handed tactics infuriated Conservatives and even alienated many within the Liberal Party. When the brothers moved to limit provincial authority, a large group of Liberals defected and joined forces with individuals within the CONSERVATIVE PARTY to overthrow the Monagas brothers.

The unified front presented by Conservatives and Liberals to oust the dictatorial brothers did not last for long. The power vacuum created by deposing the president provided the foundation for a power grab among regional caudillos. Long-standing disagreements over CENTRALISM VERSUS FEDERALISM erupted in a five-year civil war. The FEDERAL WAR—also known as the Guerra de los Cinco Años (Five Years' War), Guerra Larga (Long War), and Revolución Federal (Federal Revolution)—developed as Conservatives struggled to maintain a strong central government with a rigid social hierarchy. Liberals, whose ranks included the largely mixed-race rural and *llanero* population, advocated a more egalitarian social system with substantial regional autonomy. Political rivals waged guerrilla warfare from March 1858 to July 1863. Conservatives tried to gain the advantage by bringing Páez back to power, but even that strategy did not sustain them for long. While Páez became increasingly dictatorial, the Conservative Party fractured. The Treaty of Coche compelled a Conservative surrender, and Liberals moved to implement a federalist political and social system.

Military leader of the Liberal forces in the Federal War, General Juan Crisóstomo Falcón (b. 1820–d. 1870) won the presidency in 1864, with ANTONIO GUZMÁN BLANCO as vice president. Immediately, the two implemented a new constitution that strengthened the federalist system and called for varying degrees of liberal reform. An uprising of Monagas supporters in 1867, known as the Revolución Azul (Blue Revolution), drove Falcón from power and ushered in a brief period of rule (1869–70) by José Ruperto Monagas (b. 1831–d. 1880), son of for-

mer president José Tadeo Monagas. Immediately, ousted vice president Guzmán Blanco began garnering support from fellow Liberals and regional caudillos throughout Venezuela. He led a revolt known as the April Revolution, and in 1870, Guzmán Blanco drove the *azules* (blues) out of Caracas and took over the presidency.

### THE GUZMANATO

Between 1870 and 1888, Guzmán Blanco served as president, dictator, or the power behind the scenes in an era known as the *guzmanato*. Although he was a prototypical liberal and caudillo, Guzmán Blanco's administration was known for its combination of modernization and oppression. The *guzmanato* provided a crucial period of stability that allowed the economy to recover and grow. The nation attracted foreign investors, and the president used the ever-expanding treasury to finance an expansion of TRANSPORTATION and communication infrastructure. He built roads, ports, and railroads to facilitate TRADE and displayed the nation's modernity and progress by constructing grandiose monuments and public buildings. Guzmán Blanco epitomized the Liberal Party platform by curbing the power of the Catholic Church, causing some consternation among the Conservative elite. Although social reform did not rank high among his priorities, the caudillo did expand the EDUCATION system and made primary schooling free and compulsory. He also endeavored to foster a sense of national unity by creating a common national currency, establishing a national anthem, and conducting a national census. The *guzmanato* succeeded in bringing stability and modernity to a once-chaotic society, but such progress came at a cost. The dictator was known for jailing opposition and censoring the press. Aside from modest education reforms, little was done to alleviate the problems of the poor. To the contrary, the general populace was often ruled with an iron fist in the interest of maintaining order.

Guzmán Blanco's dictatorship ended in 1888 when a coup deposed his government and ushered in an era of attempts at civilian rule and continued instability. Juan Pablo Rojas Paúl (b. 1826–d. 1905) was elected president, followed by Raimundo Andueza Palacio (b. 1846–d. 1900) in 1890. When Andueza Palacio took steps to reform the nation's constitution, caudillo and former president Joaquín Crespo (b. 1841–d. 1898) led the Revolución Legalista (Legalist Revolution) in 1892. He wrested power away from the civilian politicians and imposed his own version of constitutional reform. In 1893, Crespo pushed through a constitution that called for direct elections and a secret ballot for the first time in Venezuela's history. He also extended the presidential term from two years to four years and won the new election held in 1894.

Crespo inherited a boundary dispute with Great Britain over the border between British Guiana (present-day Guyana) and Venezuela that had been simmering over the course of the 19th century. The discovery of GOLD in the contested territory further exacerbated the debate

and made a simple and amicable resolution impossible. In 1895, U.S. secretary of state Richard Olney invoked the MONROE DOCTRINE in his Olney Declaration. He stated that the United States had full authority to arbitrate the dispute as an extension of the protective powers stipulated by U.S. president James Monroe in 1823. British leaders initially rejected these claims, but after a brief exchange of strongly worded diplomatic messages, the British agreed to allow the United States to appoint a boundary commission. As the commission worked to determine the border, Caracas erupted once more in civil unrest, and Venezuelan leaders were essentially left out of the negotiations. The final border as determined by the U.S. commission in 1899 corresponded closely to the British claims, and antagonism over the contested territory continued well into the 20th century.

In 1898, Crespo supported fellow Liberal and military general Ignacio Andrade (b. 1839–d. 1925) in his bid for president. Andrade claimed victory in an election marred by fraud and corruption. When opposition candidate José Manuel Hernández (b. 1853–d. 1921) challenged the election, another skirmish broke out among competing presidential hopefuls. Such turmoil in Caracas opened the door for yet another rebellion, this one led by Andean cattleman CIPRIANO CASTRO. Castro, a regional caudillo from the mountainous region of Táchira, had been influenced by liberal politics at an early age. He had gained a reputation for leading local rebellions against ill-favored state politicians. In 1892, he was exiled to Colombia for opposing Crespo's Revolución Legalista. During his seven years in exile, Castro engaged in illegal cattle trading and built a considerable financial empire. His pocketbook, plus his manner of appealing personally to disaffected Venezuelans, helped him raise a powerful army and take power in 1899.

Although Castro began his foray into politics as a typical regional caudillo, his presidency is generally considered a transitory era when Venezuela began to move away from the *caudillismo* of the 19th century toward a more populist system characteristic of the early 20th century. His rebellion became known as the Revolución Liberal Restauradora (Restorative Liberal Revolution), and one of its most notable accomplishments was to allow full inclusion for the first time of the country's Andean region in national politics. Castro built support as a federalist, advocating local autonomy. In later years, his administration became more highly centralized in an effort to subdue internal conflict, but he retained the support of many local leaders. Where previous leaders had failed to rein in the autonomist tendencies of unruly local caudillos, Castro succeeded in harnessing their support to lay the foundation for national progress.

See also ANGOSTURA, CONGRESS OF (Vol. II); BOLÍVAR, SIMÓN (Vol. II); ENLIGHTENMENT (Vol. II); LLANEROS (Vol. II); MIRANDA, FRANCISCO DE (Vol. II); MITA (Vol. II); NEW GRANADA, VICEROYALTY OF (Vol. II); VENEZUELA (Vols. I, II, IV).



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**Victoria, Guadalupe** (José Miguel Ramón Aducto Fernández y Félix) (b. 1786–d. 1843) *independence leader and president of Mexico* Guadalupe Victoria was an independence leader in MEXICO who became the nation's first president, from 1824 to 1829. Victoria was born José Miguel Ramón Aducto Fernández y Félix in Tamazula, Durango, in 1786. He changed his name to Guadalupe Victoria when he joined the struggle for independence in 1811. His name honored the VIRGIN OF GUADALUPE, the symbol adopted by Miguel Hidalgo y Costilla as the patron saint of independence, and the insurgents' assured victory over Spain.

He took up arms under José María Morelos y Pavón and fought first in Oaxaca and then in Veracruz. He was in hiding when VICENTE GUERRERO and AGUSTÍN DE ITURBIDE promulgated the Plan de Iguala, which paved the way for independence. Victoria was unhappy with the conservative compromise outlined in the plan and publicly advocated for a republican form of government rather than a monarchical republic with Iturbide as emperor. When Iturbide began jailing political opposition in 1822, Victoria was detained but managed to escape to Veracruz. He joined ANTONIO LÓPEZ DE SANTA ANNA'S PLAN DE CASA MATA to overthrow Iturbide.

After Iturbide abdicated, Victoria formed the ruling triumvirate with Nicolás Bravo (b. 1786–d. 1854) and Pedro Celestino Negrete (b. 1777–d. 1846). The triad oversaw the drafting of the CONSTITUTION OF 1824, and when the document took effect in October, Congress elected Victoria to serve as the first president of the Mexican republic. Victoria, a liberal and advocate of FEDERALISM, served alongside his conservative vice president, Bravo. Representing both sides of the developing political extremes, the pair maintained a brief period of relative political stability. The temporary hiatus from political turmoil ended in 1827, however, when Bravo unsuccessfully attempted to overthrow Victoria's regime. The president defeated and exiled his vice president and went on to serve his entire term. During that time, Mexico normalized diplomatic relations with the United States and Great Britain, effectively gaining recognition of Mexican sovereignty. Victoria strengthened the nation's financial structure and negotiated important TRADE arrangements with foreign powers. He abolished SLAVERY and began plans to invest in infrastructure projects.

Victoria stepped down from the presidency peacefully, but the nation was immediately beset by instability as competing political factions vied for power. Guerrero succeeded Victoria as president, and Victoria retired from public life. He died in Veracruz in 1843.

See also HIDALGO Y COSTILLA, MIGUEL (Vol. II); MORELOS Y PAVÓN, JOSÉ MARÍA (Vol. II).

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**Vieques Island** Located approximately nine miles (14.5 km) east of mainland PUERTO RICO, the island of Vieques occupies an area of 51.5 square miles (133 km<sup>2</sup>) and during peak months has a population of nearly 10,000 people. It is the largest of Puerto Rico's offshore islands, and its name is derived from the Taino Indian word *bieque*, meaning "small land." Vieques was one of the last strongholds of Taino resistance against Spanish domination in Puerto Rico during the 16th century, and the Spanish sent troops to the island to crush the Taino rebellion but never established a permanent presence there. The lack of a Spanish MILITARY presence on the island led to its use by numerous smugglers and pirates in the region until the 19th century.

In 1811, Puerto Rican governor Salvador Meléndez initiated a series of military actions against the island as part of a formal attempt by Spanish authorities to impose the rule of law upon its criminal residents and officially annex the island to Puerto Rico. Following an accord with the Puerto Rican government, Frenchman Teófilo José Jaime María Le Guillou became the first governor of Vieques in 1832, ushering in a period of economic and social progress previously unseen on the tiny island. In 1843, the first town was founded and given the name Isabel Segunda after the Spanish queen Isabella II (b. 1830–d. 1904). Large SUGAR plantations were established following permanent Spanish settlement of the island, increasing its population through the importation of thousands of African slaves (see SLAVERY). Many of these slaves were brought from the neighboring British island colonies of St. Thomas, St. Croix, and St. Kitts (see CARIBBEAN, BRITISH). Vieques was permanently annexed to Puerto Rico in 1854, and constant ship traffic linked Puerto Rico and Vieques, which largely retained its unique culture and remained more colonial as the main island modernized during the latter half of the 19th century.

Following the dramatic decline of global sugar prices in the 1920s and 1930s, the island's population greatly decreased, leaving just a handful of subsistence farmers. Seizing upon the drop in land prices and the strategic importance of the island to defense of the Atlantic Ocean, the U.S. government purchased nearly two-thirds of Vieques during World War II as an addition to the exist-

ing Roosevelt Roads Naval Station on the eastern coast of neighboring Puerto Rico.

See also PUERTO RICO (Vols. I, II, IV); TAINO (Vol. I); VIEQUES ISLAND (Vol. IV).

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**Virgin of Guadalupe** The Virgin of Guadalupe is the patron saint of MEXICO. Her image became a national symbol during and after the struggle for independence. The image is also revered in other Latin American nations. The Virgin Mary is said to have appeared to a Nahua Indian named Juan Diego in the 16th century as the Spanish were attempting to consolidate power after the conquest. The virgin appeared on the Hill of Tepeyac, previously a site dedicated to an Aztec goddess, and spoke to Juan Diego in his native language. Her image, which miraculously appeared on Juan Diego's *tilma*, or "cloak," was taken as a sign that church leaders should build a temple in her honor at Tepeyac. After her appearance, large numbers of NATIVE AMERICANS were converted to Catholicism. The authenticity of the miracle was called into question from the beginning. Many church leaders rejected it during the colonial period, and questions about its validity were raised in the 19th century. Nevertheless, the CATHOLIC CHURCH erected a monument on the site of the apparition, and in 1709, a large cathedral dedicated to the Virgin of Guadalupe was completed. By the end of the colonial period, the Virgin of Guadalupe had become a major spiritual icon throughout Latin America.

The onset of the Mexican war for independence made the Virgin of Guadalupe a national symbol and a representation of an emerging sense of national identity. Independence hero and Catholic priest Miguel Hidalgo y Costilla summoned the nation to arms with his Grito de Dolores on September 16, 1810, invoking the name of the Virgin of Guadalupe as a guardian for his cause. His call for independence inspired parishioners in his rural village and in surrounding areas, who lined up to follow Hidalgo into battle. The incipient independence army seized a banner of the virgin and carried it as the official standard of the movement. Subsequent independence leaders also invoked the virgin as the spiritual inspiration for the patriot cause. José Miguel Ramón Aducto Fernández y Félix changed his name to GUADALUPE VICTORIA as a patriotic gesture. Victoria became the first president of the Republic of Mexico in 1824.

The Virgin of Guadalupe evolved into a true national symbol in Mexico after independence. In the 1850s, the Mexican government declared the Virgin of Guadalupe the patron saint of the country. The French-imposed Emperor Maximilian and his wife, Carlota, prayed to her on their arrival in Mexico City in 1864 (see FRENCH



Outside view of the Old Basilica of Guadalupe in Mexico City (*The Bridgeman Art Library*)

INTERVENTION). Their homage to the virgin was intended to demonstrate a common spiritual and patriotic identity between the European monarchs and the Mexican people. Despite several attempts to challenge the existence of the image as a grand Catholic conspiracy in the late 19th century, the Virgin of Guadalupe thrived as an expression of nationalism during decades of political and social conflict. On October 12, 1895, tens of thousands of pilgrims joined church leaders from Mexico and around the world for the coronation of the Virgin of Guadalupe. Her image is still on display in the Basilica of Guadalupe in MEXICO CITY, and her feast day, December 12, is a national holiday.

See also HIDALGO Y COSTILLA, MIGUEL (Vol. III); VIRGIN OF GUADALUPE (Vol. I).

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**Vodou (Vaudou [French], Voodoo [English], Voudou, Vodun)** Vodou is an official RELIGION of HAITI; it reflects the complex history of the West Africans who were brought to the Caribbean as slaves and became Catholic during the 16th and 17th centuries.

The Haitian Revolution, said to be inspired by a famous Vodou ceremony at Bois Caïman in 1791, led to the defeat of the French and the colony of Saint Domingue's declaration of independence in 1804. After independence, Haitian society "creolized," meaning it remained fundamentally African but highly responsive to new influences. As a result, African Vodou spirits continued to be transformed and adapted not only through contact with Europeans and their spiritual traditions but also through the experience of SLAVERY, revolution, and independence.

The fundamental concept of Vodou revolves around an understanding that reality consists of coexisting seen and unseen worlds. The human environment and all associated tangible things are examples of the seen, or physical, world. Spiritual entities, or invisibles, are called *lwa* (*loa*), *mystères*, *anges*, and *les morts* and are believed to populate the unseen world.

Vodou is monotheistic. Practitioners recognize a single and supreme god known as Bondye. It is believed that Bondye created both the physical and spiritual worlds, placing the spirits in charge of maintaining humanity and the natural environment. The emphasis in Vodou is on service rather than belief. For this reason, those who practice it are said to be “serving” the spirits rather than “believing” in them.

There are three important categories of spiritual beings in Vodou: the *lwa*, the *marasa* (twins), and *les morts* (the dead). The *lwa* are family spirits as well as forces of the universe, such as good, evil, health, and prosperity. The family spirits encompass all aspects of daily life. They interact with the people of the earth and are known to “possess,” or “mount,” *vodouisants* (practitioners of Vodou) during religious ceremonies. Possession is indicated when a person incarnates a particular *lwa*'s movement, speech, dress, preference for food or drink, and so on. The *marasa*, or twins, represent “sets of contradictions,” such as good/evil and happy/sad. *Les morts* are ancestral spirits and the newly deceased. All of these spirits live in a place called Ginen, which is understood as a “cosmic Africa.”

The central goal of Vodou is to heal or “balance” the energies between people and between people and the spirits of the unseen world. This is achieved through service to a particular *lwa* in the form of prayer or other devotional activities. In return, the *vodouisant* receives health, protection, and good fortune.

The Vodou clergy consists of men (*houngan*) and women (*mambo*) who practice in community centers called *houngfo*. Their functions include healing, performing religious ceremonies to summon or appease spirits, initiation, interpreting dreams, predicting the future, casting spells, and creating protections and potions for such things as love, health, and wealth.

Vodou ceremonies are usually held outside, under a rough roof, around a *poto mitan*, or center pole, which is also understood as a crossroad between the spirit and earth. A *houngan* or *mambo* usually directs the service. Drums are used extensively, and dancing is essential. Anyone present at the ceremony can be mounted, or possessed. Vodou ceremonies involve offerings, often including animal sacrifice. It is believed that when an animal is killed, its life force is released, which rejuvenates the *lwa*.

Vodou is an oral tradition that is perpetuated within extended families. The young inherit familial spirits

and learn important devotional rites from the old. Most knowledge is passed on during initiation rites, such as the *hounsi kanzo* (basic initiation).

There is no centralized hierarchy in Vodou. It is composed of individualized “houses,” the *houngfo*, headed by a *mambo* or *houngan*. For this reason, there is a great deal of diversity among regional *houngfo*. The *mambo* or *houngan* becomes the spiritual parent of her or his initiates, forever responsible for the “children’s” spiritual knowledge, growth, and protection. In return, the initiates owe their *mambo* or *houngan* loyalty and respect.

There are several central *lwa* in the Vodou pantheon. Legba is an old man who acts as the gatekeeper between the physical and spirit world. He is the origin of life and is symbolized by the Sun. Kafou is known as the crossroads. He is the spirit of the night and the origin of darkness, symbolized by the Moon. Papa Ghede is the *lwa* of death and resurrection and is portrayed as comic and erotic. Danbalah is the father figure. He is the source of peace and tranquillity, depicted as the good snake. Danbalah and his wife, Ayida-Wèdo (rainbow), are the characters in the Vodou creation story. Agwe is master of the oceans. Ogou is the warrior summoned for the Haitian Revolution. Ezili is the earth mother, the spirit of love and beauty.

During the colonial period, Vodou was prohibited by the French. Slave owners permitted slaves to hold dances on weekends, however, and many of these festivities were actually Vodou ceremonies. After independence from France was declared in 1804, many of the remaining French in Haiti were killed, including some Roman Catholic priests. As a result, the Vatican broke with Haiti in 1804, and relations were not reinstated until 1860. During this 56-year period, Haitian religion creolized to such an extent that to this day Haitians practice both Catholicism and Vodou side by side.

From the 1860s until the 1940s, the CATHOLIC CHURCH unsuccessfully campaigned against Vodou. In 2003, Vodou was recognized (on equal terms with Catholicism) as an official religion of Haiti.

See also SYNCRETISM (Vol. I).

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**Walker, William** (b. 1824–d. 1860) *U.S. filibusterer and president of Nicaragua* The son of a successful Nashville, Tennessee, businessman, Walker earned a medical degree, practiced law, and dabbled in journalism before going to California, where he became entwined with others who wanted to incorporate Baja California and then all of MEXICO into the United States. In October 1853, Walker led a contingent of 45 men into Baja California and a month later proclaimed the peninsula a republic. In April 1854, Walker entered Sonora State, where in the face of stiff Mexican resistance, he was forced to retreat to the United States, where he was acquitted by a San Francisco court for violating U.S. neutrality laws.

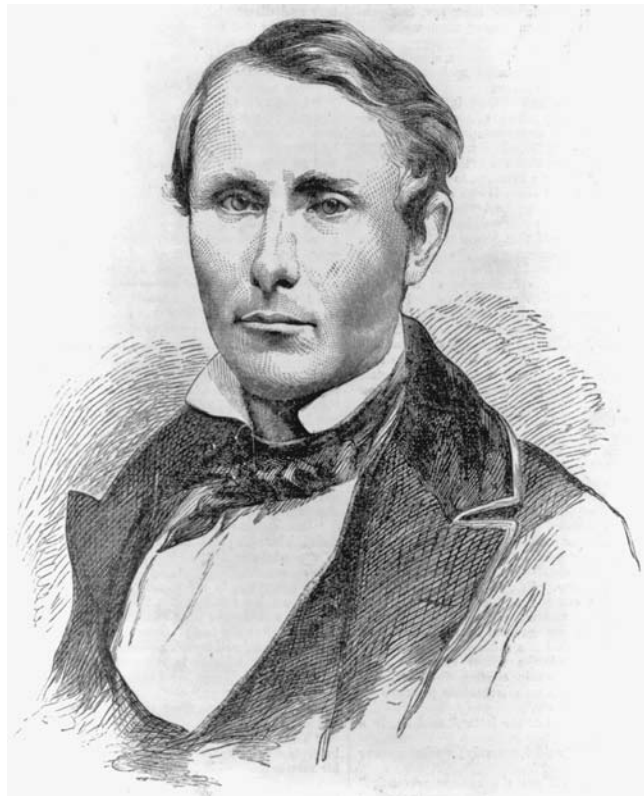
At the same time, the liberal-conservative conflict that characterized Latin American politics at the time manifested in NICARAGUA. The Conservatives, based in the old Spanish capital of Granada, were in constant conflict with the León-centered Liberals. With the Conservatives dominant in 1854, the Liberals cast about for assistance, and through the efforts of Byron Cole, a U.S. mine operator in Nicaragua, arranged for Walker to come to the country in defense of the Liberal cause. In October 1855, five months after his arrival in Nicaragua, Walker governed through his imposed president, Patricio Rivas. But, Walker wanted power in his own right. In June 1856, he engineered his own presidency in farcical elections that violated the Nicaraguan constitution.

Governing as a MILITARY commander, in September 1856, Walker decreed a series of LABOR “reforms” that instituted forced labor for all unemployed people not actively seeking work, legalized labor contracts for unlimited time periods, and rescinded decrees that abolished SLAVERY. He also laid out a complicated system of land registration that led to the confiscation of lands

held by his political enemies. He declared English the official language. Walker’s program intended to bring white North Americans, particularly his Southern supporters, to Nicaragua. In reality, more Northerners came in hopes of making their fortunes through agricultural pursuits. With his program in place in Nicaragua, Walker set out to conquer all of CENTRAL AMERICA. The failure of the U.S. government to shut down his operation seemed to verify the Central American view that Walker was an agent of U.S. expansionist policy.

Neither Walker nor the North Americans who followed him achieved further success. Walker’s “reforms” infuriated both Nicaraguan Liberals and Conservatives, and for the Central American leadership, the imposition of foreign rule was an anathema. Walker had to go, but the Central Americans needed financial support to supply an army to challenge the “green-eyed man of destiny.” U.S. shipping magnate Cornelius Vanderbilt appeared as their benefactor. Vanderbilt, whose ACCESSORY TRANSIT COMPANY had since 1849 enjoyed exclusive rights to the San Juan River, Lake Nicaragua, and a road leading to the western port of Rivas, lost these concessions in 1856 when Walker directed President Rivas to annul the agreement and allow two of his own supporters, Cornelius K. Garrison and Charles Morgan, to direct operations. Vanderbilt turned to Walker’s opponents to impose retribution.

Costa Rican Conservative president Juan Rafael Mora (b. 1814–d. 1860) reacted quickly. Through his minister in Washington, D.C., Mora implored the government to take preventive measures against Walker and, in London, sought British assistance. The British, seeing this as an opportunity to curtail U.S. expansion on the isthmus, provided Costa Rica with military supplies and increased its naval squadron in the Gulf of Mexico (see



Portrait of U.S. filibusterer William Walker (Library of Congress)

TRANSISTHMIAN INTERESTS). Mora took his troops to the battlefield and at La Virgen on March 1, 1856, defeated Walker's army but was then forced to retreat because of a cholera epidemic. Mora's victory inspired the governments of EL SALVADOR, HONDURAS, and GUATEMALA to join the Nicaraguan Conservatives to drive Walker from Central America. In what the Central Americans proudly call their "National War," the region's national armies, supported by Vanderbilt's money, pursued Walker until they besieged him in Rivas on Nicaragua's Pacific coast in March 1857. Two months later, Walker surrendered to U.S. naval captain Charles E. Davis, who brought him back to New Orleans and a vociferous welcome.

Walker organized a second expedition to Central America in 1858 but was interned by the British at Greytown before again being returned to the United States. He returned yet again in 1860, this time to Trujillo, Honduras, where a British naval officer turned him over to the Honduran military command there. He was executed by firing squad on September 12, 1860. Walker's death coincided with a temporary loss of U.S. interest in isthmian affairs, as it turned inward to deal with its own civil war (see U.S. CIVIL WAR AND CENTRAL AMERICA).

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**War of 1898 (Spanish-American War)** The War of 1898 between the United States and Spain resulted in the independence of CUBA and the U.S. annexation of other Spanish colonies. Economic relations between the United States and Cuba had been strengthening throughout the 19th century, and many Americans had become directly involved in Cuba's SUGAR industry. The war followed several earlier independence movements on Cuba, specifically the TEN YEARS' WAR and the War of 1895.

Cuba's and PUERTO RICO's slave-based sugar economies had kept the islands tied to Spain even after the rest of the empire had fought and won wars for independence between 1810 and 1825 (see SLAVERY). Plantation owners feared a massive slave uprising, and few challenges to Spanish authority surfaced until late in the 19th century. In 1868, CARLOS MANUEL DE CÉSPEDES issued the GRITO DE YARA to declare Cuba's independence and sparked the Ten Years' War. Céspedes's movement ended in the TREATY OF ZANJÓN but did not bring about independence. The treaty was supposed to place Cuba on a par with other Spanish provinces, but it quickly became apparent that the island's political status would change very little. Furthermore, the end of the Ten Years' War opened the door for increased U.S. involvement in Cuba's sugar industry, and American businessmen began acquiring land and other holdings on the island. Leaders such as ANTONIO MACEO and MÁXIMO GÓMEZ, who had fled Cuba after the war, eventually joined forces with other exiles to plot a new independence movement.

JOSÉ MARTÍ emerged as a leader of the continued quest for Cuban independence. Martí was a writer and political thinker who had been imprisoned and then banished from Cuba for speaking out against the Spanish government (see LITERATURE). In 1892, in New York, he formed the Cuban Revolutionary Party (Partido Revolucionario Cubano) and began making plans to spearhead another push for independence on the island. In the early months of 1895, Martí issued the Manifiesto de Montecristo and led an invasion force to Cuba. Together with Maceo and Gómez, Martí sparked an insurrection that grew into the War of 1895.

As rebellion spread throughout Cuba, Spain prepared to defend its imperial authority. Martí was killed after just six weeks of fighting, and Maceo succumbed the following year. Nevertheless, Gómez and other leaders kept the revolt alive, mainly by using guerrilla tactics against the Spanish army's larger and more organized force. Spanish forces found it increasingly difficult to

combat the smaller, more maneuverable rebel forces. Revolutionaries hid easily among the civilian population and quickly gained support for their cause. By the end of the first year, the rebels controlled much of the eastern half of the island and had gained several important strongholds in the west. The war, however, left a swath of destruction in its wake, and the U.S. public watched the violence unfold with increasing alarm. Rebel forces often targeted large plantation owners—many of them U.S. citizens—who refused to support the insurgency. Many Americans made early appeals for the U.S. government to intervene, but the administration of President Grover Cleveland issued a declaration of neutrality in an attempt to keep the United States out of the conflict.

Early in 1896, the Spanish government sent Valeriano Weyler, a ruthless military man and decorated general, to lead the Spanish offensive. The government made Weyler governor of Cuba, giving him extraordinary authority to suppress the insurgency. Weyler understood that one of the rebels' greatest advantages was that they blended easily with the civilian population, making it difficult for the Spanish army to discern combatant from noncombatant. In an effort to eliminate that advantage, Weyler introduced a system of concentration camps, forcing civilians to relocate to the camps so as to flush out the rebels. Those who refused to relocate were executed. Anyone caught outside the camps was assumed to be part of the insurgency and suffered the same fate. The MILITARY forcibly evacuated the civilian population, burning homes and entire villages as it did so.

Cubans who willingly complied with the evacuation orders did not fare much better than those who resisted. Conditions in the camps were deplorable, as most suffered from a shortage of vital supplies such as food and MEDICINE, and tropical and other contagious diseases such as dysentery, yellow fever, and cholera ran rampant. Those not affected by disease often suffered from malnutrition. Weyler's brutality and the rebels' attacks on loyalist planters paralyzed the Cuban ECONOMY. Crops and fields were razed, and the island's general infrastructure was destroyed.

As Weyler continued his ruthless tactics, support for the Spanish waned further in the United States. Owners of American periodicals, such as William Randolph Hearst and Joseph Pulitzer, published numerous exposés emphasizing the atrocities of the war and found that the most sensational stories sold the most newspapers and magazines. Hearst and Pulitzer both hired reporters and artists to describe the horrible events of the war and to provide illustrations to eager readers. As the two publishing moguls competed for readership, both resorted to exaggeration and even went so far as to manufacture stories in an attempt to outdo each other. This sensationalistic and exaggerated form of reporting became known as yellow journalism, and the press played a large role in eventually pulling the United States into the conflict. Many Americans began to argue that U.S. leaders

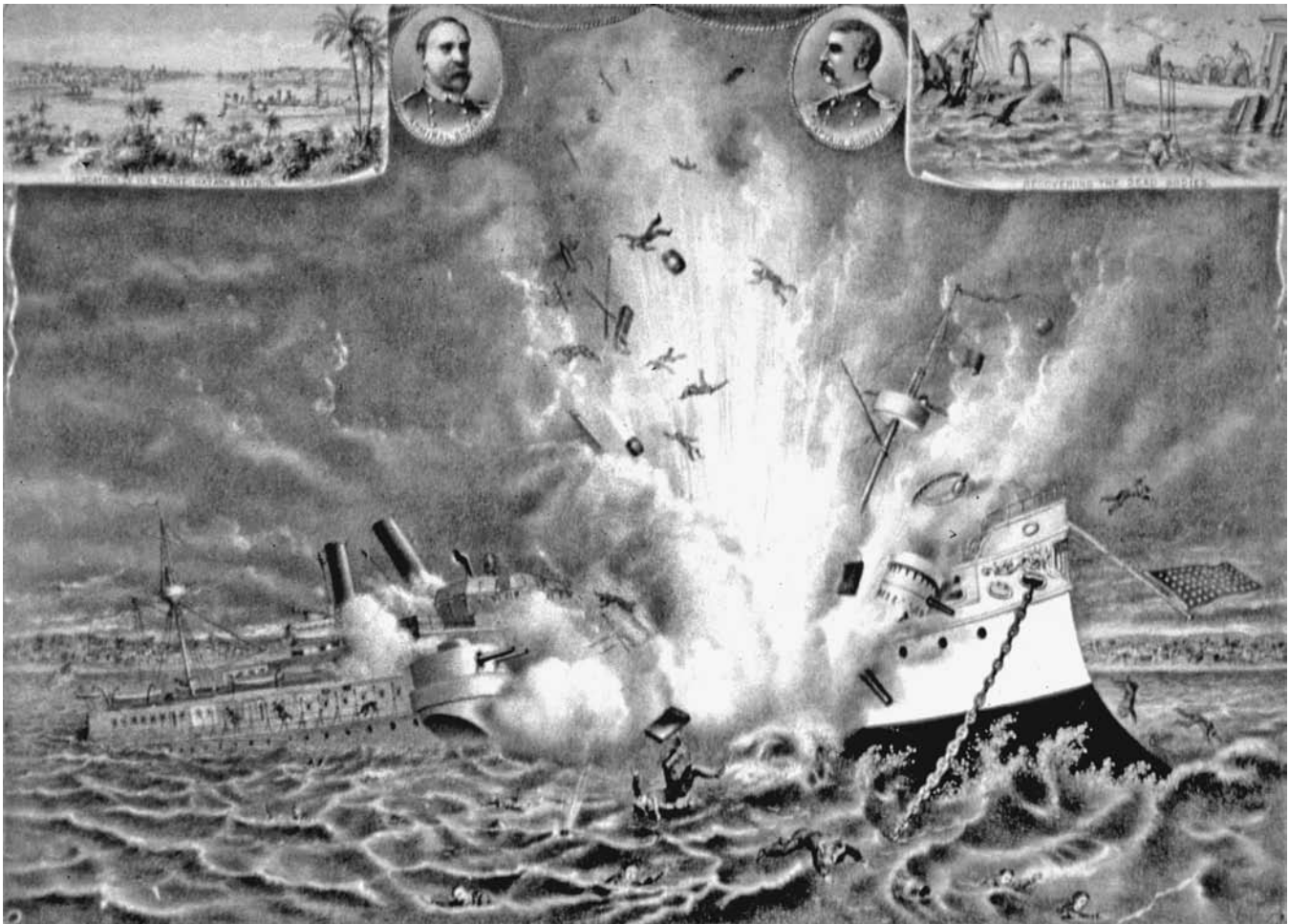
should intervene in the Cuban independence movement to protect the smaller, weaker nation from the evils of European colonialism. Many were also concerned about U.S.-owned property on the island, while others wished to annex Cuba to the United States.

By 1898, newly inaugurated U.S. president William McKinley had abandoned Cleveland's earlier neutral stance. In January, the president sent a naval battleship, the USS *Maine*, to HAVANA harbor to demonstrate that he would use force if necessary to protect U.S. interests. On February 15, the warship mysteriously exploded, killing most of the crew. Yellow journalists in the United States accused the Spanish of mining the harbor and called for an immediate reprisal. In April 1898, Congress passed a resolution authorizing McKinley to send U.S. forces to Cuba and calling for a complete Spanish withdrawal from the island. U.S. congressional leaders also passed the Teller Amendment, which stipulated that the United States would not annex Cuba. Instead, a victory against Spain would guarantee the island's independence. By the end of the month, the United States and Spain were at war.

The first hostilities between U.S. and Spanish forces took place in the Spanish Pacific colonies of the Philippine Islands and Guam. U.S. commodore George Dewey enjoyed a quick and relatively easy victory and captured Manila harbor, preventing the Spanish Pacific fleet from coming to the aid of naval forces in Cuba. U.S. naval leaders thus had an advantage when they led an assault on Cuba in June and July. The combat stage of the War of 1898 was relatively short lived, and both sides suffered more casualties from tropical disease than from actual battlefield wounds. Fighting came to a close in August when U.S. and Spanish leaders signed an armistice. The war officially ended with the signing of the Treaty of Paris on December 10.

The conclusion of the War of 1898 dismantled what remained of the once-great Spanish Empire. The Treaty of Paris stipulated that Spain cede its colonial possessions in the Caribbean and the Pacific to the United States. As a result of the U.S. victory, Puerto Rico, Guam, and the Philippines became U.S. possessions. The peace treaty also required that Spain give up all claims to Cuba. In accordance with the Teller Amendment, U.S. leaders guaranteed the independence of the island.

After claiming victory over the Spanish, the U.S. military occupied Cuba from December 1899 to May 1902. During that time, the Cuban military was disbanded, and the political system was reorganized under a new government. U.S. occupation leaders also took steps to rebuild the island's economic infrastructure, but planters and other landowners looking to rebuild received no assistance. Many lost their landholdings as U.S. agribusinesses moved to purchase the inexpensive, foreclosed properties. In 1901, delegates to the Cuban constitutional convention approved a new governing document that included the Platt Amendment, a provision allowing U.S. intervention as necessary to protect U.S. interests



An artist's rendition of the explosion of the USS *Maine*. The mysterious explosion in Havana harbor was one factor that brought the United States into the War of 1898. (Hulton Archive/Getty Images)

on the island. The U.S. military intervened in Cuba on several occasions in the early decades of the 20th century, fueling a growing nationalistic fervor and leading to anti-American resentment.

See also CUBA (Vol. IV); PUERTO RICO (Vol. IV).

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**War of Reform** (1858–1861) War of Reform was a civil war fought in MEXICO from 1858 to 1861, precipitated by the era known as LA REFORMA. During La Reforma, Liberal politicians instituted numerous reforms that targeted the wealth and power of the CATHOLIC CHURCH and other corporate groups. Conservatives rebelled, and the nation descended into a bloody and protracted civil war that was fought primarily between Liberals and Conservatives, although many unwitting indigenous and poor countrymen were also dragged into the violence.

The antecedent to the War of Reform dates back to the REVOLUTION OF AYUTLA, which ousted the Conservative regime of ANTONIO LÓPEZ DE SANTA ANNA in 1855. Led by some of the most notable Liberal political thinkers of the time, the revolution ushered in an era when Liberal leaders could dismantle many of the traditional economic and social structures that they believed were preventing

the nation from advancing. Politicians such as BENITO JUÁREZ and MIGUEL LERDO DE TEJADA drafted and implemented a series of social and economic remedies known as the Reform Laws. They also oversaw the writing of the CONSTITUTION OF 1857, which encompassed those laws and codified the changes Liberal leaders were trying to initiate. Among other things, liberal reform divested the Catholic Church of its vast landholdings; eliminated corporate privileges, or *FUEROS*, such as the parallel court system; and secularized the registry of vital statistics.

The Constitution of 1857 and accompanying legislation provoked a bitter reaction by church leaders and other Conservatives. Pope Pius IX and bishops throughout Mexico threatened to excommunicate parishioners who were tempted to purchase church land being auctioned by the government, and Conservative leaders declared the constitution invalid. Liberal leaders applied their own pressure to try to force Mexicans to abide by the constitution, and it was quickly evident that the liberal-conservative divide surrounding La Reforma could tear the nation apart.

In 1858, General Félix Zuloaga (b. 1813–d. 1898) issued the Plan de Tacubaya, declaring revolt against the Liberal government. He dissolved Congress and arrested numerous Liberal leaders. Faced with a quickly escalating national crisis, President IGNACIO COMONFORT resigned, and under the new constitution, power theoretically passed to the chief justice of the Supreme Court, Juárez. A number of MILITARY leaders, however, backed the Conservative cause and declared Zuloaga president. Juárez and his Liberal cohorts were forced to flee MEXICO CITY, and the civil war began.

For three years, the War of Reform ravaged the nation. Liberals set up a base in Veracruz, while Conservatives occupied the national capital. Each side appealed to the general populace in an effort to win support. Conservatives emphasized that liberal reforms threatened the spiritual well-being of the nation as a whole by weakening the position of the church. They also pointed out that many of the land reforms targeted *EJIDO* holdings of Amerindian communities. Liberals enjoyed the advantage of having Juárez, a pure-blooded Zapotec Indian, as their leader and through him won considerable indigenous support.

Both sides committed atrocities in the name of their cause. As the fighting became increasingly desperate, the ideologies of the opposing sides also grew more extreme. Liberals declared even more aggressive reforms that were not included in the constitution in an attempt to secularize society further. The new measures included prohibition of religious rituals off church property and strict regulation of religious holidays. They also declared an outright guarantee of religious freedom, opening the door for the first time to non-Catholic religious movements. Conservatives declared the constitution null and void and encouraged countrymen to defy the liberal reforms. In practice, Juárez could only apply the new laws

in Liberal-held territory, and even then, strict adherence to the measures was often impractical. It was simply not realistic to prevent priests from performing sacraments at the deathbed of a loyal parishioner or to expect towns to forgo their traditional religious processions.

The ideological battle was by far overshadowed by the actual bloodshed as the civil war continued. In the process, civilians were caught between the two extremes and often bore the brunt of the chaos, violence, and destruction. Both sides found themselves struggling to finance the nearly incessant hostilities. Liberals briefly considered ceding more territory to the United States or granting foreign investors transit rights across the Isthmus of Tehuantepec. Conservatives pilfered from church coffers and resorted to costly loans from foreign investors, a move that would have devastating consequences for the nation's financial stability in later years.

A breaking point finally came in March 1859 when Conservative forces attempted to take Veracruz and deliver a final blow to the Liberal camp. Instead, the Liberal army enjoyed a resounding victory and chased the Conservatives back to Mexico City. At the same time, infighting among Conservative leaders weakened their position. General Miguel Miramón (b. 1832–d. 1867) deposed Zuloaga and assumed the presidency in the Conservative camp, but his army faced continual challenges from Liberal forces under Ignacio Zaragoza and Jesús González Ortega. In December 1860, Liberals drove the Conservative leadership from the capital, and in January 1861, Juárez retook the presidency uncontested.

The War of Reform officially ended in early 1861, but after three years of fighting, the nation was devastated: *HACIENDAS* and entire villages were destroyed, as was the *TRANSPORTATION* infrastructure. Productive activity in many economic sectors had come to a virtual standstill, while crime and banditry flourished in the countryside (see *CRIME AND PUNISHMENT*). To make matters worse, Mexico owed large sums to foreign lenders, and with a nearly depleted treasury, the government was unable to make the onerous repayments. The Juárez administration attempted to restore order and repair the nation's infrastructure, but it was only a short time before the leader was beset once more. Prompted by the instability created during the civil war, French emperor Napoléon III used Mexico's debt trouble as a pretext to invade and expand the French empire to the Americas. Scarcely a year after defeating the Conservative army in the War of the Reform, Juárez faced a new wartime crisis in the *FRENCH INTERVENTION*.

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**War of Restoration** (1861–1865) The War of Restoration was an anti-Spanish rebellion in the DOMINICAN REPUBLIC from 1861 to 1865. Dominican forces led by JOSÉ ANTONIO SALCEDO rose in revolt after the CAUDILLO PEDRO SANTANA negotiated Spain's annexation of the Dominican Republic. The young nation had faced near-constant instability throughout the first half of the 19th century. Forces from neighboring HAITI had only recently been driven out after the HAITIAN OCCUPATION OF SANTO DOMINGO, which lasted from 1822 to 1844. Dominican leaders struggled for two decades to prevent Haitian MILITARY leader FAUSTIN SOULOUQUE from reinvading. Santana set up the Dominican Republic as a protectorate of Spain in 1861 in an attempt to shield the eastern portion of the island from the belligerent endeavors of its neighbor. Instead of welcoming Spanish protection, many Dominicans protested the foreign incursion on their soil.

Revolts against the Spanish erupted immediately. Some of the most successful opposition was led by supporters of BUENAVENTURA BÁEZ, Santana's political rival. Santana helped put down the early revolts, but he quickly grew discontented with renewed colonial rule and resigned the leadership posts he had been offered by the Spanish government. Sporadic and disorganized fighting continued until Salcedo consolidated the resistance movement under a provisional government and declared independence on September 14, 1863, formally launching the War of Restoration. The Spanish government called on Santana once again to put down this more serious threat, but the caudillo was captured and died in rebel custody.

The Restoration army continued its struggle against the Spanish, and the movement gained momentum. Nationalist leaders promulgated the Constitution of 1865, and the Spanish government found itself unable to contain the growing insurgency. The Spanish abandoned the island in the early months of 1865, but the Dominican Republic did not achieve the political stability its leaders sought. Regional factionalism surfaced in the power struggle that followed the Spanish withdrawal.

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**War of the Confederation** See CHILE-PERU WAR OF 1836.

**War of the Farrapos (Revolução Farroupilha)** (1835–1845) The War of the Farrapos began as a revolt in Rio Grande do Sul in BRAZIL. It eventually spilled into neighboring Santa Catarina and escalated

into a full-scale war for independence between 1835 and 1845. The war represented the provincial turmoil that plagued the period of the REGENCY after the abdication of PEDRO I in 1831.

Conflict in Rio Grande do Sul began nominally as a dispute over TRADE policies, as local *farrapos*—akin to the Argentine GAUCHOS—rose up against local government officials. The incipient revolution quickly became a separatist movement after rebels formed their own government and established the Piritini Republic. The War of the Farrapos was one of the most serious provincial challenges faced by the Brazilian government during the tumultuous middle decades of the 19th century. Southern Brazilians took pride in their strong sense of autonomy, and foreign participants quickly took an interest in the revolt. URUGUAY provided equipment and monetary aid to the rebellion in the hope of gaining territory and/or economic concessions. The famous Italian freedom fighter Giuseppe Garibaldi fought alongside the *farrapos*, as did other foreign mercenaries.

The Brazilian government was operating under the precarious Regency when the War of the Farrapos began. Government leaders were struggling between competing factions over whether to allow provincial autonomy or to reconsolidate the political system under centralized control. Each side vied for control of the Regency and attempted to influence PEDRO II, the young monarch-in-waiting. In 1840, Pedro II was sworn in as the constitutional monarch and began attempts to unite the fragile nation. At the same time, the Brazilian government proposed a peace agreement to end the War of the Farrapos. Rebels rejected the offer and continued to press for autonomy for another five years. The peace treaty finally reached in 1845 offered amnesty to the rebels and reincorporated the secessionist territory into the EMPIRE OF BRAZIL.

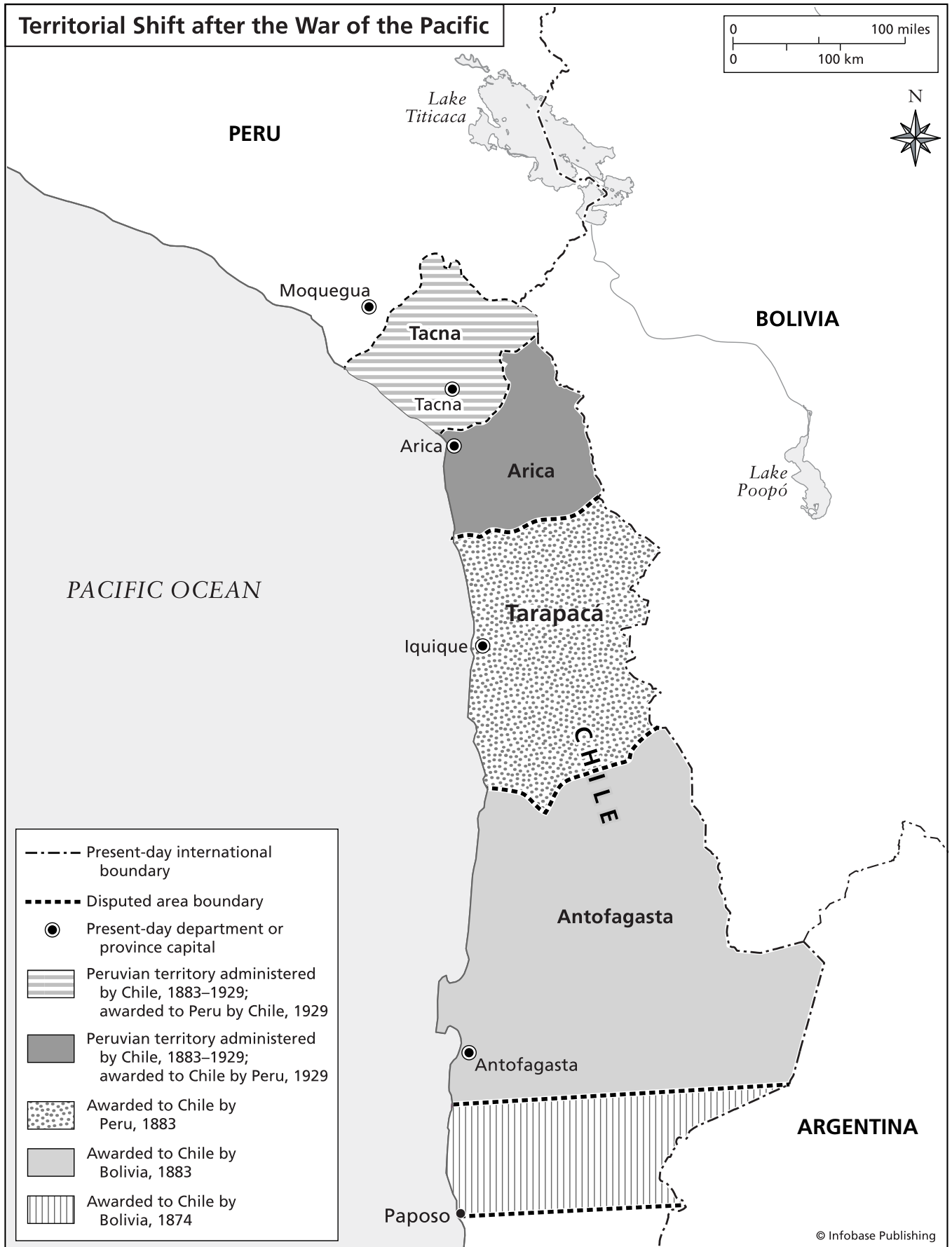
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**War of the Pacific** (1879–1884) The War of the Pacific was fought by CHILE against BOLIVIA and PERU from 1879 to 1884 for control over the nitrate-rich Antofagasta region of the Atacama Desert. As a result of the war, Chile extended its northern territory and gained full control over lucrative MINING activities. The shift in the border blocked entirely Bolivia's access to the sea. Chile emerged from the War of the Pacific as the leading sea power in the region.

National borders in 19th-century Latin America were poorly defined, and competition over natural



resources became a source of conflict among many neighboring countries in the decades following independence. The Antofagasta region technically became part of Bolivia after its independence, but the rugged terrain and limited TRANSPORTATION networks made it difficult to move from the coastal region to the rest of the country. Antofagasta, in fact, was more accessible from Chile, and the two nations had sparred over the territory for several decades following independence. By the middle of the 19th century, vast deposits of guano, nitrates, and other minerals were discovered in the region, and competition for access to the profitable natural resources intensified. Bolivia and Chile entered into a series of treaties in the 1860s in an attempt to define the border. The two countries also entered into a cumbersome resource-sharing agreement, which allowed Chilean companies to operate in the region and provided them special tax exemptions. When Bolivian president Hilarión Daza (b. 1840–d. 1894) unilaterally abrogated the treaty in 1878, Chilean companies protested. The Chilean government of Aníbal Pinto (b. 1825–d. 1884) ordered the invasion of the port of Antofagasta, prompting the Bolivian government to declare war.

Peruvian leaders had entered into a defensive alliance with Bolivia years earlier, thus the neighboring country was soon drawn into the conflict. Chile declared war on both Bolivia and Peru in April 1879. Within a month, the Chilean army had firm control over the Antofagasta region, and the Chilean navy immediately moved to control the coast. Most of the fighting at sea took place between the Chilean and Peruvian navies, and violent clashes continued for months. Peruvian admiral MIGUEL GRAU SEMINARIO is largely credited with stalling the Chilean naval advance by commanding the famous ironclad *Huáscar*. It was not until October 1879 that the Chilean navy managed to defeat and capture the warship. Grau was killed in that battle and is remembered as one of Peru's national heroes.

Chile's naval victory allowed the army to proceed with a ground invasion of Peru in November 1879. Thousands of troops landed along the Peruvian coast at the port of Pisagua and began marching inland. A major confrontation took place at the Battle of San Francisco. The Chilean victory caused the Bolivian MILITARY to withdraw from further confrontations. The Peruvian army was considerably weakened after the battle, and Chilean troops easily took control of Iquique and other strategic locations. Additional invasion forces landed along the coast in the coming months, and the Chilean army cut off large contingents of Peruvian forces from receiving supplies and reinforcements. Chile achieved another major victory at the Battle of Arica in June 1880. Attempts at negotiating a conclusion to the conflict failed in the coming months, and the Chilean military continued to gain ground in Peruvian territory.

In January 1881, Chilean armed forces defeated the last remaining Peruvian troops at Chorrillos and

Miraflores, forcing the surrender of LIMA. Chilean forces occupied the Peruvian capital for more than two years as guerrilla fighting continued in outlying regions and Chilean leaders held out for a peace treaty that would include the ceding of territory. Peace was also delayed after a series of power shifts within the Peruvian government created uncertainty over who was eligible to negotiate on the country's behalf. Meanwhile, Chilean troops destroyed much of the infrastructure they encountered. Throughout the occupation of Peru, the Chilean position strengthened, and Peru was eventually forced to negotiate a peace settlement in Chile's favor.

The War of the Pacific came to an end with the TREATY OF ANCÓN, which was negotiated between acting Peruvian president Miguel Iglesias (b. 1830–d. 1909) and Chilean military leaders and signed on October 20, 1883. Nevertheless, Peruvian military commander and future president ANDRÉS AVELINO CÁCERES did not recognize the treaty's legitimacy until the following year. The Treaty of Ancón forced Peru to cede part of its southern territory of Tarapacá to Chile. Peru also granted Chile temporary access to the provinces of Arica and Tacna. Conflict continued over those two provinces for the next 40 years and was eventually addressed through mediation by the United States in 1929. Bolivia ceded the Antofagasta Province, which was part of the original dispute, and the treaty included specific stipulations for the trade and administration of nitrates and guano.

As a result of its victory in the War of the Pacific, Chile gained control over the lucrative nitrate and guano industries in the Atacama Desert. In the final decades of the 19th century, the country's ECONOMY expanded as the production and export of those commodity products increased. The war also established Chile's role as the leading naval power in South America.

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#### War of the Thousand Days (Thousand Days' War) (1899–1902)

The War of the Thousand Days was a civil war in COLOMBIA between Liberals and Conservatives that lasted from 1899 to 1902. It encompassed conflicts over economic and TRADE policies, as well as disputes over presidential elections. The guerrilla-style warfare destroyed the country's infrastructure and claimed an estimated 100,000 lives. Generally, the war can be considered the result of unresolved conflicts from the Regeneration era (1878–1900) of conservative reform.

The liberal Constitution of 1863 and progressive social and economic policies dominated Colombian politics in the late 19th century. Weaknesses in the Liberal

platform, however, prompted President RAFAEL NÚÑEZ to nullify the constitution in 1884 and begin imposing conservative reforms. The resulting CONSTITUTION OF 1886 called for a highly centralized government, leaving members of the LIBERAL PARTY feeling alienated and increasingly hostile. A faction within the Liberal Party, made up primarily of the radical GÓLGOTAS, began advocating armed revolt almost immediately, and Liberals did attempt to overthrow the Conservative government on several occasions in the 1890s. One such rebellion in 1895 attracted the participation of RAFAEL URIBE URIBE, who later played a prominent role in the War of the Thousand Days. But the Liberal movement was weakened by the fact that many party members did not support armed rebellion. The “peace” faction and the “war” faction of the Liberal Party remained divided throughout the decade.

Complicating matters further, in the 1890s the CONSERVATIVE PARTY split into opposing factions over economic policies. The *históricos*, or Historical Conservatives, disputed an export tax on COFFEE that had been imposed by the Nationalists under longtime Núñez supporter President Miguel Antonio Caro (b. 1843–d. 1909). Liberals, as proponents of free trade and LAISSEZ-FAIRE economics, also opposed the export tariff and hoped to garner support for a revolt among the Historical Conservatives. They saw the rift among Conservatives over economic policy as a way to destabilize the Nationalist government and reclaim power. President Caro, sensing that political turmoil was brewing, attempted to ameliorate the situation and declined to run for reelection. Instead, he supported Nationalists Manuel Antonio Sanclemente (b. 1813–d. 1902) and José Manuel Marroquín (b. 1827–d. 1908) as the presidential and vice presidential candidates in 1898. Under the new administration, the economic decline worsened, and Liberals seized on the opportunity to lead another revolt.

Late in 1899, the prowar faction of the Liberal Party began planning a major rebellion against the Conservative government, citing economic and political grievances. Liberals put together both a land army and a river flotilla force and focused their attentions on the Santander region, an area that had traditionally supported the *gólgota* faction of the Liberal Party. The first major skirmish broke out in October but was easily put down by the central government. In subsequent months, more intense fighting erupted, and Uribe and Benjamín Herrera (b. 1853–d. 1924) emerged as leaders of the Liberal insurrection. The Liberals enjoyed a decisive victory in December 1899 at the Battle of Peralonso, but their fortunes quickly turned as the national government once again gained the upper hand in May 1900 at a major battle in Palonegro. Although the war continued for some time, the Conservative victory at Palonegro was a major turning point that ultimately gave the central government the strategic advantage over the insurrection. The Battle of Palonegro continued for weeks, claiming

upward of 4,000 lives. Liberals left the battle demoralized; they had lost vital arms and other equipment in the struggle, and their army was virtually destroyed.

Other major campaigns were under way along the coast and on the Isthmus of Panama. Throughout the summer of 1900, Liberal forces under the leadership of future Panamanian president Belisario Porras (b. 1856–d. 1942) and local politician Victoriano Lorenzo rebelled against the Conservative army. By July, liberal forces in PANAMA had suffered similar losses to those in Santander. By August 1900, conventional-style warfare gave way to a muddled and disjointed guerrilla war with small skirmishes and pockets of insurrection erupting haphazardly and without clear leadership throughout the country. Political elite on both sides began to fear that the war was descending into anarchy. In some regions with large Amerindian populations, the fighting seemed to turn into a brutal race war.

Even as the war reached a stalemate, factional divisions within both parties continued to thwart the possibility of peace. Historical Conservatives denounced the indiscriminate bloodshed and violence of the war and urged Nationalist president Sanclemente to negotiate for peace. The aged president refused to compromise, and in the late months of 1900, Vice President Marroquín formed a coalition with Historical Conservatives to overthrow him. The pacifists among Historical Conservatives, however, were disappointed, as Marroquín followed much the same line as his predecessor, and the war raged on.

The status of Panama and its role as a major inter-oceanic transit route began to affect the urgency of the war as well. Panama had attracted the attention of foreign powers—the United States among them—since the middle of the 19th century as a suitable site for a trans-isthmian canal (see TRANSISTHMIAN INTERESTS). In 1899, the U.S. Congress created a commission to determine the best location for such a project. By 1902, U.S. canal officials and members of Congress agreed that Panama would provide the best route and began negotiating with the Colombian government for concessions to build a canal. Armed with the knowledge that Panama was a major battleground in the ongoing civil war and that several secessionist movements had emerged in recent years, U.S. negotiators hoped convince Marroquín that coming to an accord with the United States over the canal and welcoming U.S. presence in the region would calm the insurrectionist and secessionist tendencies in Panama. Still beset by a guerrilla war and internal instability, Marroquín correctly sensed that he must bring an end to the war in order to have any negotiating leverage with the United States.

Late in 1902, the Colombian government finally began negotiating seriously with Liberal rebels. The Marroquín administration reached an armistice with insurgents along the coast in October, and one month later, the Treaty of Wisconsin, signed on board a U.S. warship off the coast of Panama, put a final end to

hostilities. The treaty did not redress any of the Liberals' grievances over economic policy and did nothing to bridge the political differences between the two sides. Although the War of the Thousand Days had torn the country apart, destroyed property and infrastructure, and cost more than 100,000 lives, by its end no real structural changes had taken place to appease Colombian Liberals.

The status of Panama, however, did change as a result of the War of the Thousand Days. In the final months of the war, late in 1902, the Colombian foreign minister in Washington, D.C., Tomás Herrán, continued negotiations to grant the United States concessions to build a canal across the isthmus. In January 1903, Herrán signed the Hay-Herran Treaty with U.S. secretary of state John Hay. The treaty gave the United States sovereignty over a strip of land that would become the Panama Canal Zone in exchange for \$10 million plus a \$250,000 annuity. Many in Colombia balked at the agreement, arguing that Colombia should receive more favorable terms for relinquishing such profitable and sought-after property to U.S. investors. Desperate to show unity after the destruction and devastation of the War of the Thousand Days, Historical Conservatives and Nationalists within the government agreed that granting the United States control over such an important piece of Colombian real estate was not in the best interest of the nation.

The Colombian government refused to ratify the Hay-Herran Treaty, and U.S. president Theodore Roosevelt reacted by capitalizing on the fragile state of political affairs in Colombia. In October 1903, Roosevelt supported a local Panamanian uprising against the Colombian government. A U.S. naval force off the coast prevented the Colombian military from reaching Panama in time to suppress the revolt, and on November 6, President Roosevelt recognized PANAMANIAN INDEPENDENCE. A canal treaty was reached with a new Panamanian government just two weeks later.

Although the War of the Thousand Days brought massive destruction and contributed to the loss of Panama, its legacy in the first decades of the 20th century can be viewed in a more positive light. Colombia's political elite learned important lessons from the conflict. In the decades following it, they saw their way to compromise and concessions that allowed for a period of relative peace.

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**War of the Triple Alliance (1865–1870)** The War of the Triple Alliance was fought from 1865 to 1870 between the Paraguayan MILITARY and the army of the Triple Alliance, made up of BRAZIL, URUGUAY, and ARGENTINA. The causes of the war were deeply rooted and complex. At the heart of the conflict was long-stand-

ing enmity between the four nations over control of river TRADE and political hegemony in the Southern Cone. Paraguayan dictator FRANCISCO SOLANO LÓPEZ saw it as his destiny to disrupt the delicate balance of power that had long existed in the region and raise the status of his once-isolated backwater nation in regional politics.

Solano López was, in many ways, a quintessential CAUDILLO. He ruled in an autocratic and often arbitrary fashion. He had an extreme personality with a large ego and ambition to match. Solano López was PARAGUAY'S third strongman dictator, who rose to power after the death of his father, dictator CARLOS ANTONIO LÓPEZ. López and his predecessor, JOSÉ GASPAR RODRÍGUEZ DE FRANCIA, had meticulously guarded Paraguay from the numerous commercial and political conflicts that plagued the region in the early decades of the 19th century. Solano López abandoned such caution, envisioning himself and his deceptively large army as a new mediator in the balance of power between the larger nations of Brazil and Argentina. Solano López grossly misjudged regional diplomatic currents and led his country into a lengthy and destructive war that had devastating consequences on Paraguay's population.

In the years following independence, leaders in Brazil and Argentina (the latter known as the United Provinces of the Río de la Plata until 1826) were in a near-constant struggle for regional dominance. Much of the conflict centered on commerce and tariff rates along the region's rivers. The status of neighboring Uruguay was also a source of contention, as Uruguayan political factions frequently brought the larger powers into internal conflicts. Uruguay's COLORADO PARTY had established ties to Brazil's emperor PEDRO II and to the liberal UNITARIOS in Buenos Aires. The BLANCO PARTY, Uruguay's conservative, rural-based party, had worked closely with Argentine dictator JUAN MANUEL DE ROSAS in earlier years. The *blancos* were removed from power after a bloody civil war, known as the GUERRA GRANDE. The conclusion of the war also strengthened the alliance between the Colorado Party and Brazil. Based on generous treaty concessions, Brazil intervened in Uruguay on several occasions to support the Colorado Party between 1850 and 1864. One such intervention served as the catalyst for a series of reactions that eventually culminated in the War of the Triple Alliance.

In 1864, Pedro II sent a Brazilian military force into Uruguay to depose the Blanco president Atanasio Aguirre (b. 1801–d. 1875). Solano López viewed Brazil's action as a threat to the balance of power in the Southern Cone. The dictator also had expansionist ambitions and envisioned using his growing army to secure a better passage to the sea. Brazil's intervention in Uruguay became the ideal pretext for Solano López to incite a major regional war.

The Paraguayan dictator declared war on Brazil and attacked the neighboring country. He then dispatched another invasion force through Argentine territory with

the objective of securing a stronghold in the province of Rio Grande do Sul. Argentine president BARTOLOMÉ MITRE responded to the violation of his nation's territorial sovereignty by forming an alliance with Brazil and the ruling Colorado Party in Uruguay. The pact between the three nations was formalized in the Treaty of the Triple Alliance, which gave the conflict its name. Brazil, Argentina, and Uruguay scrambled to assemble a fighting force and created the Army of the Triple Alliance, under the command of Mitre. Initially, the Triple Alliance force was seriously outnumbered, with only a fraction of the more than 30,000 troops under Solano López's command. Nevertheless, the superior numbers and other advantages Paraguay seemed to have at the beginning of the conflict soon began to crumble. As the conflict unfolded, the facade of Paraguayan military strength gave way to the harsh reality that Solano López's forces were no match for the alliance between his three neighbors.

Paraguay went on the offensive in the first months of the war, and Solano López achieved several early victories. Two invasion forces marched north into the Mato Grosso Province in Brazil and easily chased out the ill-prepared defenders. A southern force advanced through Argentina but failed to win support from Argentine caudillos. Nevertheless, Solano López continued his advance into Brazil and took several important towns in the south. By the summer of 1865, the Paraguayan military controlled Mato Grosso to the north and a large portion of Rio Grande do Sul to the south.

In the early months of 1865, Solano López appeared to have the upper hand, but as the Triple Alliance began assembling its army, his fortunes quickly changed. Paraguay's military advance initially met little opposition as the Brazilian armed forces scrambled to react. The Triple Alliance sent small units to confront the Paraguayan ground invasion, while naval forces attacked Paraguayan outposts along the Río de la Plata. By the summer of 1865, the Triple Alliance controlled all river transport and communications in and out of the region, effectively cutting Solano López off from outside assistance. Unable to procure arms and other materials from abroad, Paraguay's army began to falter. It quickly became evident that the large fighting force was poorly trained and lacked capable leaders. At the same time, Mitre's Triple Alliance forces had ready access to supplies and personnel to augment the growing army.

By the end of 1865, Solano López had lost more than half of his original force, and the dictator became desperate to turn the war in his favor. Instead, he faced a full-scale invasion of his nation by the Triple Alliance, starting in 1866. Solano López imposed a policy of forced conscription, requiring every adult male to fight in the war. When those measures failed to raise enough troops, he turned to the younger population, recruiting children as young as 10 years old into his army. By 1867, the entire Paraguayan population had been mobilized with every able-bodied male serving in the military and women

working to keep the troops supplied. Solano López could not raise enough troops to match the ever-growing Triple Alliance army, however. Indeed, he could not keep even his smaller army properly supplied. With access to outside supplies cut off, the Paraguayan army suffered shortages of weapons, food, clothing, and MEDICINE. As a result, tens of thousands of Paraguayans died either from wounds suffered in battles for which they were unprepared or from disease and malnutrition. The Triple Alliance forces fared only slightly better, as disease and malnutrition plagued them also. Brazilian leaders eventually introduced a health corps in an attempt to thwart the spread of cholera, but disease continued to claim more lives than battlefield injuries. The Triple Alliance forces suffered numerous losses, but military leaders were able to replace those troops with fresh recruits from the much larger combined population of the three allied nations.

Throughout 1867 and 1868, the war nearly reached an impasse. Solano López had neither the supplies nor the personnel to take the offensive, while infighting among Brazilian and Argentine military leaders prevented the Triple Alliance forces from claiming a quick victory. As time passed, Solano López grew increasingly paranoid and despotic. The dictator became convinced that his inner circle had been infiltrated by traitors who were undermining his chance of victory. As his delusions intensified, Solano López initiated a series of purges that were as destructive to Paraguay as enemy forces. The dictator investigated and executed thousands of military personnel and officials in his own government. Often, the slightest suspicion of misdeed was enough to evoke a death sentence, and no one was safe from the tyrant's wrath. Solano López ordered the deaths of many foreign diplomats and even oversaw the executions of several members of his own FAMILY. Despite his extreme behavior in the late years of the war, most Paraguayans remained fiercely loyal to Solano López. The dictator aroused a strong sense of patriotism as citizens rallied around him in what became a war to the death.

In 1868, Mitre stepped down as leader of the Triple Alliance army and handed command to the Brazilian general, the marquis of Caxias, Luís Alves de Lima e Silva (b. 1803–d. 1880). Under new leadership and with a new strategy, the Triple Alliance army won a series of major battles and, by early 1869, had captured Asunción. Refusing to surrender, Solano López fled with a small fighting force and continued to wage guerrilla warfare for more than a year. The Paraguayan dictator was eventually captured and killed by Brazilian forces in 1870, bringing a final end to the deadly conflict.

The War of the Triple Alliance was the bloodiest and most destructive war fought on South American soil in the 19th century. Casualty figures are unreliable, but estimates give an idea of the disproportionate destruction suffered by both sides. The victorious Triple Alliance forces fared far better than Paraguay but still suffered casualties in the tens of thousands. According to

some estimates, Paraguay lost more than half of its total population and more than 90 percent of its adult male population in the war. And since much of the fighting in the final years took place on Paraguayan soil, the physical destruction left in its wake had a devastating impact on the struggling nation. To make matters worse, Brazil and Argentina forced Paraguay to cede territory at the war's conclusion, and the two larger powers occupied the defeated nation for six years after the war.

The conclusion of the War of the Triple Alliance also had important repercussions outside Paraguay. The victory of the Triple Alliance forces effectively secured the dominance of the Colorado Party in Uruguayan politics for the remainder of the century. The war allowed the Argentine government to modernize its military and bring regional caudillos more firmly under the control of the national government. Brazil also benefited from the outcome of the war, as Pedro II had also expanded and modernized his military. But, the Brazilian emperor also faced unexpected dissent at the conclusion of the war. Members of his own government disapproved of the way he handled the peace treaty, and those politicians broke away to form an opposition party. Furthermore, the abolitionist movement in Brazil pointed to slaves' participation in the Brazilian military in their quest to end the institution of **SLAVERY** in the country once and for all. Finally, Brazil and Argentina moved from having an antagonistic and competitive relationship in the decades following independence to establishing close diplomatic and commercial ties in the late 19th century.

#### Further reading:

William F. Sater. *Andean Tragedy: Fighting the War of the Pacific, 1879–1884* (Lincoln: University of Nebraska Press, 2007).

**wheat** Wheat is a type of grass that yields a grain used to make flour and other **FOOD** products. It originated in the Middle East, and its domestic use in foodstuffs dates back to ancient times. It has been an important part of the European diet for thousands of years. Wheat was introduced into Latin America by Spanish conquistadores in the 16th century.

European settlers preferred the coarse wheat grain to **MAIZE** and other crops native to the Americas. Spanish agriculturalists introduced large-scale farming of wheat and began cultivating it in northern **MEXICO** and the dry prairie lands of South America. Some **HACIENDA** owners attempted to cultivate wheat in other regions, but the soil and climate were often unsuitable. Most wheat production was intended for consumption in urban areas with a large European population, while indigenous populations continued to depend on maize and other local crops. Spanish bakers played an important role in the colonial period in their provision of bread, a staple of the European diet. The **CATHOLIC CHURCH** also favored

wheat during the colonial period as the main ingredient for eucharistic loaves.

Wheat continued to play an important economic and cultural role in Latin America throughout the 19th century. In **ARGENTINA**, expeditions against **NATIVE AMERICANS** in the **PAMPAS** opened up new agricultural lands to European immigrants from 1879 (see **MIGRATION**). Italian and Spanish farmers settled in the fertile plains, and many cultivated wheat to meet the growing global demand. By the turn of the century, wheat had become one of Argentina's main exports and is still an important component of the Argentine **ECONOMY** (see **AGRICULTURE**).

In Mexico, wheat played a more symbolic role in the late 19th century as Liberals and positivists associated the indigenous maize-based diet with cultural and economic inferiority. Using pseudo-scientific arguments in the spirit of **POSITIVISM**, it was argued that eating maize was keeping the poor and indigenous in a state of inferiority. In the same way, many Mexican elite associated eating wheat with higher levels of intelligence and sophistication, a trend that had carried over from the colonial period. During the **PORFIRIATO**, leaders took measures to encourage the entire nation to eat wheat bread rather than corn tortillas, believing that by changing the national diet, they could "civilize" the larger population.

Maize lost its stigma in Mexico by the middle of the 20th century, but wheat remains an important crop there and elsewhere in Latin America.

See also **WHEAT** (Vols. I, II).

#### Further reading:

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**women** The status and roles of women went through a series of transformations in 19th-century Latin America. Acceptable behavior for women had been dictated by Catholic ideals and a long-standing culture of patriarchy throughout the colonial period. Patriarchy is a type of social structure in which males have ultimate authority, and at that time, men also had authority over all members of a household. While patriarchal norms generally kept women in a subordinated position, in reality, gender ideals varied according to race, ethnicity, and social class. After Spanish and Portuguese colonies achieved independence in the 19th century, the established systems of power and authority were called into question. Liberal social and political movements introduced notions of freedom and equality, and women's groups emerged in many areas inspired by those ideas. Even as an incipient women's movement achieved modest reforms through

liberal legal systems, a pervasive tradition of gender difference persisted throughout the 19th century (see LIBERALISM).

Colonial gender norms generally placed women in a passive and subservient position compared to men. It was believed that women needed the guidance and protection of a male guardian. These social expectations limited women's options to marriage or entering the church as nuns. Married women passed directly from the protection and authority of their fathers to that of their husbands. The male head of household was responsible for safeguarding the FAMILY'S honor and reputation. Society generally considered women to be at high risk of damaging the family's honor. As a result, women were to be shielded from the public eye, and they ideally led private lives behind the protective walls of their households. In reality, elite women were the ones who came closest to abiding by such an ideal. Wives and daughters of the wealthiest families did not need to earn an income or perform menial household work to sustain the family and therefore were able to lead more secluded and sheltered lives. Poor women in the cities and the countryside lived their lives in the public sphere because work and household duties did not allow them to maintain privacy and protection.

Women were also expected to maintain their sexual purity and abide by the notion of *marianismo*: Social expectations required that women model their character and behavior after that of the Virgin Mary (see SEXUALITY). According to this idea, women were to play the role of obedient wife and loving mother and were to engage in sexual activity only for the purposes of procreation. The Marian ideal reinforced assumptions about the gender division of LABOR that placed men in the "productive" role of providing for the family and women in the "reproductive" role of mother and caregiver. Patriarchal structures and the demands of *marianismo* have roots in ancient history, but both ideals were formalized and strengthened through the early practices and teachings of the CATHOLIC CHURCH. Those expectations permeated social networks and cultural practices, and they left a lingering impact after the colonial period.

The wars for independence disrupted family life in many areas of Latin America as MILITARY duty called men away from home, and women often stepped up to fill the productive role. In some areas, a small number of women even fought in local militias or served as spies. Even though the demands of wartime allowed some women to challenge the colonial gender system, by the end of the war, most women had returned to their traditional roles. New nations emerged out of the wars for independence, and new constitutions established systems of government that were theoretically democratic. Nevertheless, by most measures, the emergence of independent governments had little impact on the lives of women in the first half of the 19th century. Patriarchy and its gendered divisions of labor continued into the 19th century.

Some women seemed to defy gender expectations in the early 19th century and rose to prominence, often in positions of real or implicit authority. Encarnación Ezcurra, the wife of Argentine dictator JUAN MANUEL DE ROSAS, helped direct political affairs and held considerable power when her husband was away from the capital. Similarly, ELIZA ALICIA LYNCH, the mistress of Paraguayan dictator FRANCISCO SOLANO LÓPEZ, played the role of first lady during Solano López's administration and seemed to revel in defying Latin American gender traditions. She and Solano López never married, yet they had numerous children together. Lynch eventually accompanied her lover into battle as he led the Paraguayan forces in the WAR OF THE TRIPLE ALLIANCE. The stories of these women were not the norm, however, particularly in the first half of the 19th century. Infighting and civil wars between liberal and conservative political factions plagued most newly independent nations, and those internal political battles were largely unconcerned with gender practices (see CONSERVATISM).

Nevertheless, the independence era did leave a lasting mark on Latin American gender practices that became more evident in the last half of the 19th century, when new concepts of citizenship and equality became part of emerging political debates. By the 1850s, liberal movements had taken over in many Latin American countries, and their leaders imposed laws intended to limit the power and authority of the Catholic Church. Long-standing Iberian traditions had allowed the church to govern family law and record vital statistics—such as marriages and births—through the sacraments. Liberal reform movements in the last half of the 19th century aimed to place many of those functions under civil control and to modernize social and legal systems.

Liberal governments throughout Latin America adopted civil codes that were intended to place private and family laws under state jurisdiction. Most Latin American civil codes were modeled after the 1804 Napoleonic Code in France. MEXICO passed its first national civil code in 1870, followed by CHILE and URUGUAY in 1885. Argentine civil codes were introduced in 1888, and PERU gradually implemented a similar system in the early decades of the 20th century. Although the specifics of Latin American civil codes vary by country, some similar characteristics are evident. New civil regulations changed the traditional application of *patria potestad*, or the power of the male head of household over dependents. During the colonial period, husbands and fathers held ultimate authority over wives and children, and there were few mechanisms for individuals to escape *patria potestad*. The civil codes lowered the age of majority from 25 to 21 or 22 in most countries and provided a legal mechanism for adult children to "emancipate" themselves from parental authority. Mothers were granted some legal jurisdiction over children, although wives remained within the same patriarchal structures that had defined earlier centuries.



A more cohesive women's movement emerged in the final decades of the 19th century. The success of liberal political movements allowed some middle-class and elite women to apply basic liberal concepts of equality and individual rights to women. But, unlike the incipient forms of feminism that simultaneously developed in the United States and western Europe, Latin American women's rights leaders did not focus their arguments on equality and suffrage. Instead women in Latin America tended to define their own version of feminism as a movement that reinforced the maternal role of women. Feminist leaders throughout Latin America took up issues such as women's health, poverty, and EDUCATION to argue that sweeping reforms were necessary to allow women to play the natural maternal role of protector.

Early signs that attitudes surrounding women's roles were beginning to shift appeared in areas such as ARGENTINA, Mexico, Chile, and BRAZIL where liberal government leaders increasingly encouraged women to enter the workforce in new ways. Governments supported the establishment of normal schools to train young women to become teachers. Liberal politicians assumed that women's maternal nature made them naturally suited for the education of young people, and they hoped that such programs would promote the nation-building process. While normal schools provided some women with new opportunities to participate in the workforce, they kept women in a role of caregiver.

The turn toward INDUSTRIALIZATION in many Latin American economies by the end of the 19th century brought additional changes for Latin American women. The growth of manufacturing was accompanied by rapid urbanization, transforming the lives of workers and their families. Many women joined the ranks of the urban

working class, finding employment in industries such as textiles, FOOD processing, and other consumer goods sectors. Industrialization also brought large waves of immigration to some areas, such as Brazil and Argentina (see MIGRATION). Those immigrant groups often propelled the feminist movement in the late 19th and early 20th centuries. Other countries such as Mexico and Chile attempted to attract immigrant populations but were less successful.

The initial women's movements that emerged in the late decades of the 19th century created few significant changes in policies and practices toward Latin American women. Nevertheless, they did set the stage for the more sweeping changes, such as suffrage and legal protections for women, that would eventually be achieved in the 20th century.

See also WOMEN (Vols. I, II, IV).

#### Further reading:

- Silvia M. Arrom. *The Women of Mexico City, 1790–1857* (Stanford, Calif.: Stanford University Press, 1985).
- Tanja Katherine Christiansen. *Disobedience, Slander Seduction, and Assault: Women and Men in Cajamarca, Peru, 1862–1900* (Austin: University of Texas Press, 2004).
- June Edith Hahner. *Emancipating the Female Sex: The Struggle for Women's Rights in Brazil, 1850–1940* (Durham, N.C.: Duke University Press, 1990).
- . *Women through Women's Eyes: Latin American Women in Nineteenth-Century Travel Accounts* (Wilmington, Del.: SR Books, 1998).
- Asunción Lavrín. *Latin American Women: Historical Perspectives* (Westport, Conn.: Greenwood Press, 1978).

**Wycke Treaty** See MOSQUITO COAST.



**Zanjón, Treaty of (1878)** The Treaty of Zanjón was the 1878 cease-fire agreement that effectively brought an end to the TEN YEARS' WAR and disrupted CUBA's attempt to achieve independence from Spain. Spanish general Arsenio Martínez Campos (b. 1831–d. 1900) led the efforts to reach a compromise with the rebel troops under MÁXIMO GÓMEZ. Although the treaty brought an end to major hostilities, it did not guarantee Cuban independence, and several revolutionary leaders, such as ANTONIO MACEO, rejected the agreement. The Treaty of Zanjón left many issues unresolved, and another movement for independence erupted in the 1890s.

The Ten Years' War began on October 10, 1868, when CARLOS MANUEL DE CÉSPEDES issued his GRITO DE YARA, proclaiming an end to SLAVERY and declaring Cuba's independence from Spain. Together with fellow plantation owners from the eastern provinces of the island, Céspedes organized a revolutionary government and called for numerous progressive reforms. The insurgents demanded sweeping changes such as free TRADE, fair tax laws, and social equality with Spaniards. The Spanish MILITARY resisted the rebellion, but bands of guerrilla fighters quickly gained the upper hand in the eastern provinces. Maceo, a mulatto farmer-turned-soldier, rose to prominence for his leadership of the revolutionary forces on the battlefield, and the Spanish army was unable to subdue the region. The war raged for 10 years and eventually reached a stalemate as the revolutionary forces found themselves confined to the eastern provinces and Spanish troops could not put down the rebellion.

General Martínez Campos led the Spanish military offensive in the early years of the war and then was named governor of Cuba in 1876. By that time, rifts had started to emerge among the leaders of the revolution.

Céspedes had been deposed a few years earlier, and command of the rebellion had fallen to Gómez and Maceo. Martínez Campos took advantage of dissension among the insurgents and began negotiating a cease-fire. Gómez participated in those negotiations, while Maceo rejected any thought of surrender.

Martínez Campos was finally able to secure a truce in the Treaty of Zanjón. Under the convention, both sides agreed to a cease-fire, and those who had fought for the revolutionary forces were offered amnesty. Slaves who had fought for the insurrection were emancipated, but the institution of SLAVERY in Cuba as a whole remained. The treaty also offered some modest reforms, guaranteeing greater autonomy to Cuba in local affairs. Many revolutionary leaders recognized the treaty, and the independence movement began to crumble. Gómez and Maceo both refused to do so and eventually fled into exile.

Although the Treaty of Zanjón did not result in complete independence for Cuba, it did have a number of ramifications for the future of the island. The role many slaves had played in the war combined with provisions calling for their freedom in the treaty further called into question the validity of the institution of slavery. By 1880, the Spanish government was forced to pass laws that provided for the gradual abolition of slavery. Maceo and others who were dissatisfied with the treaty continued to push for independence. Many of those disillusioned leaders played a prominent role in the later movement for independence in the 1890s (see WAR OF 1898).

**Further reading:**

Ada Ferrer. *Insurgent Cuba: Race, Nation, and Revolution, 1868–1896* (Chapel Hill: University of North Carolina Press, 1999).

# APPENDIX

## PRIMARY SOURCE DOCUMENTS

The following section contains excerpts from a variety of primary documents related to 19th-century Latin American history and culture. These include firsthand accounts from government officials such as national leaders and foreign diplomats. Travelers from the United States and western Europe also frequently recorded and published their observations from their voyages throughout Latin America. Foreign traveler accounts offer a rich source of historical documentation for studying the history of Latin America in the 19th century. They provide valuable descriptions of daily life and local culture that are often not available in government documents.

### James Monroe, Monroe Doctrine, 1823 (Excerpts)

*In 1823, U.S. president James Monroe, in his annual address to Congress, articulated a new foreign policy toward the nations of Latin America that had recently won independence from European colonizers. The Monroe Doctrine states that the United States will endeavor to protect the independence of all nations of the Americas. Many Latin American leaders interpreted the doctrine as a U.S. attempt to exert dominance over the entire hemisphere. The statement became the foundation for U.S. foreign policy in Latin America.*



... At the proposal of the Russian Imperial Government, made through the minister of the Emperor residing here, a full power and instructions have been transmitted to the minister of the United States at St. Petersburg to arrange by amicable negotiation the respective rights and interests of the two nations on the northwest of this continent. A similar proposal has been

made by His Imperial Majesty to the Government of Great Britain, which has likewise been acceded to. The Government of the United States has been desirous by this friendly proceeding of manifesting the great value which they have invariably attached to the friendship of the Emperor and their solicitude to cultivate the best understanding with his Government. In the discussions to which this interest has given rise and in the arrangements by which they may terminate the occasion has been judged proper for asserting, as a principle in which the rights and interests of the United States are involved, that the American continents, by the free and independent condition which they have assumed and maintain, and henceforth not to be considered as subjects for future colonization by any European powers. . . .

It was stated at the commencement of the last session that a great effort was then making in Spain and Portugal to improve the condition of the people of those countries, and that it appeared to be conducted with extraordinary moderation. It need scarcely be remarked that the results have been so far very different from what was then anticipated. Of events in that quarter of the globe, with which we have so much intercourse and from which we derive our origin, we have always been anxious and interested spectators. The citizens of the United States cherish sentiments the most friendly in favor of the liberty and happiness of their fellow-men on that side of the Atlantic. In the wars of the European powers in matters relating to themselves we have never taken any part, nor does it comport with our policy to do so. It is only when our rights are invaded or seriously menaced that we resent injuries or make preparations for our defense. With the movements in this hemisphere we are of necessity more immediately connected, and by causes which must be obvious to all enlightened and impartial observers. The political system of the allied powers is essentially different in this respect from that of America. This difference proceeds from that which exists in their respective Governments; and to the defense of our own, which has been achieved by the loss of so much blood and treasure, and matured by the wisdom of their most enlightened citizens, and under which we have enjoyed

unexampled felicity, this whole nation is devoted. We owe it, therefore, to candor and to the amicable relations existing between the United States and those powers to declare that we should consider any attempt on their part to extend their system to any portion of this hemisphere as dangerous to our peace and safety. With the existing colonies or dependencies of any European power we have not interfered and shall not interfere. But with the Governments who have declared their independence and maintain it, and whose independence we have, on great consideration and on just principles, acknowledged, we could not view any interposition for the purpose of oppressing them, or controlling in any other manner their destiny, by any European power in any other light than as the manifestation of an unfriendly disposition toward the United States. In the war between those new governments and Spain we declared our neutrality at the time of their recognition, and to this we have adhered, and shall continue to adhere, provided no change shall occur which, in the judgment of the competent authorities of this Government, shall make a corresponding change on the part of the United States indispensable to their security.

The late events in Spain and Portugal show that Europe is still unsettled. Of this important fact no stronger proof can be adduced than that the allied powers should have thought it proper, on any principle satisfactory to themselves, to have interposed by force in the internal concerns of Spain. To what extent such interposition may be carried, on the same principle, is a question in which all independent powers whose governments differ from theirs are interested, even those most remote, and surely none of them more so than the United States. Our policy in regard to Europe, which was adopted at any early stage of the wars which have so long agitated that quarter of the globe, nevertheless remains the same, which is, not to interfere in the internal concerns of any of its powers; to consider the government de facto as the legitimate government for us; to cultivate friendly relations with it, and to preserve those relations by a frank, firm, and manly policy, meeting in all instances the just claims of every power, submitting to injuries from none. But in regard to those continents circumstances are eminently and conspicuously different.

It is impossible that the allied powers should extend their political system to any portion of either continent without endangering our peace and happiness; nor can anyone believe that our southern brethren, if left to themselves, would adopt it of their own accord. It is equally impossible, therefore, that we should behold such interposition in any form with indifference. If we look to the comparative strength and resources of Spain and those new Governments, and their distance from each other, it must be obvious that she can never subdue them. It is still the true policy of the United States to leave the parties to themselves, in hope that other powers will pursue the same course. . . .

Source: "Monroe Doctrine (1823)." Our Documents. Available online (<http://www.ourdocuments.gov/doc.php?flash=true&doc=23>). Accessed December 1, 2008.

### Simón Bolívar, "Essay on Public Education," 1825–1826 (Excerpts)

*Simón Bolívar was one of the most important independence leaders in South America. He was inspired by the European Enlightenment, and his ideas on society and governing in Latin America reflect this. Bolívar saw education as a cornerstone of a successful society, and he promoted public education as a way for new nations to build a loyal and responsible citizenry. In the follow essay, Bolívar describes the importance of education and outlines specific prescriptions for developing uniform educational standards.*



Government molds the character of a nation and can set it upon the path to greatness, prosperity, and power. Why? Because it has charge of the basic elements of a society and can thereby organize and direct public education. A people whose principles of education are wisdom, virtue, and discipline will be wise, virtuous, and warlike in character. A nation will be superstitious, effeminate, and fanatical if its educational system develops such attitudes. That is why the illustrious nations have always included education among their fundamental political institutions. For example, Plato's Republic—but why examine theories? Consider Athens, the mother of the sciences and the arts; Rome, the master of the world; virtuous and invincible Sparta; the Republic of the United States, that land of freedom and home of civic virtue. What made them what they have been and what they are at present? In effect, nations move toward the pinnacle of their greatness in proportion to their educational progress. They advance if education advances; if it decays, they decay; and they are engulfed and lost in oblivion once education becomes corrupt or is completely abandoned. This principle, dictated by experience and taught by philosophers and statesmen, ancient and modern, is today so well-established a doctrine that scarcely a man will be found who is not convinced of its truth.

Happily, we live under the sway of an enlightened and paternal government which, amidst the exhaustion and poverty to which the King has reduced us, amidst the trials and turbulence of a war of extermination, although caught in the vortex of its hardships, cast its benevolent gaze upon the people and beheld their sufferings. This government was deeply moved by what it saw, and, though its resources were few, it endeavored to find such remedies as humane considerations might suggest. Out of necessity its attention was focused upon the point of greatest significance, upon the true cornerstone of any nation's happiness—education.

It is not my intention to discuss curriculums, the founding of schools, the cultivation of the arts and sciences, the encouragement and appreciation of literature, or the promotion of the usual arts. The people have seen this system of moral rebirth in practice with their own eyes, and every man has benefited from its salutary effects.

I shall confine myself solely to the school that was opened here on October 1 of this year. What a difference! Bands

of children who were systematically devoted to idleness and formerly the scourge of the streets, the bane of the market place, and a source of anguish for their parents, are today organized into an orderly and decent community. Here they recite learnedly on the history of religion and the elements of arithmetic, drawing, and geography; see them write with elegance, according to the Carver method; behold them, filled with an unquenchable thirst for knowledge and encouraged by the hope for prizes, ignoring the attractions of idleness. Herein, today, we have the object of happiness, one that has the blessing of the people. If there is any man who, at sight of this transformation, fails to experience similar emotions, he must, indeed, be insensible to all good. But I, who am deeply moved, shall reveal my interest in so useful an institution by venturing a few suggestions, which may, perhaps, be found worthy of adoption.

. . . To mold the heart and mind of youth will be the work of the director: that will be his mission. When his understanding and ability have engraved upon the character of the children the cardinal principles of virtue and honor; when he has so disposed their hearts, by means of example and simple demonstration, that they respond more quickly to a symbol that spells honor than to one that promises them a pot of gold; when they have become more interested in the acquisition of knowledge than in the winning of prizes and more concerned about having done a disgraceful thing than about the loss of their favorite playthings and games—then he will have laid the firm foundations of our society. For he will have found the spur wherewith to inspire in youth a noble daring, with the strength of mind with which to defy the allurements of idleness and to engage in hard work. Youth will then make unprecedented progress in the arts and sciences.

Fortunately, our society today is engaged in this progress. Children are concerned with the studies; they speak only of what they have learned, and they are unhappy the day that school closes.

Rewards and moral punishments are the proper motivations for rational beings who are maturing; sternness and the rod should only be used on beats. The former method develops elevation of mind, heightening of sentiments, and decency in behavior. It contributes greatly to the formation of man's moral standard of values, creating within him this inestimable treasure and enabling him to be just, generous, humane, gentle, modest, in short, a man of principles.

Like the director, the pupil must possess certain qualifications at the time he enters the community; to wit, a physical and moral disposition to receive instruction and at least two suits of clothes, a necktie, a hat, and a schoolbook.

Teaching is nothing more, we might say, than the training of a body of troops, except that soldiers are trained physically, and children both physically and morally. And even as the former are drilled from morning until night, giving regularity, precision, order, and timing to their movements and labors so as to achieve a perfect unity, so, too, must the child be instructed and keep on learning at every hour of the day.

The first habit to be inculcated in children is cleanliness. If the results of the observance of this practice by the commu-

nity are examined, its importance is obvious. Nothing is more pleasing to the eye than a person with clean teeth, hands, face, and clothing. If unaffected grace of manner is linked with this quality, it is as if heralds had preceded us to prepare a favorable reception in people's minds. It will therefore be the director's first concern to make a daily inspection with a view to constant improvement in this regard. A prize or distinction rewarding this virtue will be sufficient motivation to cause it to be practiced with enthusiasm.

At the same time, practical instruction should be given in manners and in the ceremonies and the deference to be accorded all persons, in keeping with their station. This is not a trifling matter. It is of such practical importance that its neglect gives rise to quarrels, enmity, and grief. There are people so precise and sensitive respecting this matter, especially foreigners, that they will not forgive the slightest breach. I have seen a person censured for standing too near the table, for smoking at a gathering, or for having his hat on. This is not surprising: it is the feeling of educated men that they have suffered an offense when a breach of good manners occurs in their presence. What shall we say of our parties [*tertulias*] and banquets? What rudeness! What grossness! They should be called gatherings of swine rather than assemblies of rational men.

In this particular, however, one must avoid the opposite extreme of being over-scrupulous in the practice of the rules of behavior, for this produces an affectation that is as offensive as it is absurd, whereby some men seem rather to be ingrained in principles than to have the principles ingrained in them.

As words are the vehicle of instruction, it should be a primary concern of the director to see that diction is pure, clear, and correct, that barbarisms and solecisms are avoided, that due attention is paid to emphasis, and that things are called by their appropriate names and not by approximations.

Once the school community is assembled, it would be wise to divide it into classes, namely, first, second, and third, composed of the beginners, the intermediate, and the advanced, placing at the head of each class a child capable of directing it, who should be named the monitor. Monitors should be elected and should wear special insignia, so as to excite ambition in all the students. The children should be trained in taking part in orderly and impartial elections, in order to accustom themselves to restraint and justice and to the recognition of merit alone.

Children should address each other in the familiar form of *you* [*tú*] and should use *Sir* in addressing the director.

Quintilian preferred the public school to private instruction, because, in addition to the advantages of meeting and associating with persons of varied abilities, it is in the school, he says, that true friendships are made that endure for life. In following this line of thought, I would have each child freely choose another in his community with whom he would have more to do than with any other. The purpose of such an alliance might be that of mutual defense before the director and of mutual assistance in other ways, such as sharing possessions, correcting each other, and being constant companions.

The director should teach whatever time, his ability, and the capacity of the pupils permit. But the principal subjects should be reading, writing, the principles of religion, arithmetic, and geography. I think the easiest method of teaching reading is first to train children in the alphabet, then in the pronunciation of syllables, but without any spelling, and then go on to the reading of suitable books. This method should be accompanied by instruction in the rudiments of Castilian grammar.

For penmanship, I consider the Carver system superior to all others in its simplicity, ease, and beauty. Its practice should include the teaching of spelling and the reading of handwriting.

For the elements of religion and its history of the catechism of Fleurí and Father Astete can be used to advantage.

In arithmetic, the notebook in which the lessons are kept is sufficient.

For teaching universal geography and the geography of the particular country, a complete outline should be prepared. The lessons in the subjects should have a set hour, be simple in presentation, and should last for as long as the average capacity of the pupils permits. Specific tests and comprehensive examinations should be given at fixed intervals, and, finally, prizes should be awarded.

A man of ability, who understands the human heart and can guide it skillfully, and a simple system, with a clear and natural method, are the effective means by which a community can make extraordinary and brilliant progress in a short time. Lacking these prerequisites, precepts and labors may be multiplied in vain only to produce perplexity and confusion.

Children need play and recreation as well as food. Their physical and moral needs alike demand it. But his release must be channeled to some useful and worthwhile purpose. The director should therefore plan and, if possible, supervise all play. The following are known to be useful and constructive games: ball-playing, tennis, tenpins, kite-flying, balloon-tossing, checkers, and chess.

The winning of a prize or any unusual feat of industry, honor, and high sentiment must never allowed to fall into oblivion, but should on the contrary, be remembered forever. Accordingly, a record should be kept of the most outstanding achievements, the names of their authors, and the dates when they were accomplished. This record should be kept by a secretary who, elected by ballot, would enter and attest the facts in a book that should be property adorned and reverently kept in a visible place. On the principal national holidays, let the school community assemble with distinguished citizens present, and let the most eminent of them read aloud the glories and achievements of youth. Let a record of the ceremony be kept, and the cheers and acclamations be given for those whose names are inscribed in this precious register. This would be the day of the community, a day of fiesta and of rejoicing.

Source: Harold A. Bierck Jr., ed. *Selected Writings of Bolívar*, Vol. 2: 1823–1830, compiled by Vicente Lecuna, translated by Lewis Bertrand (New York: Colonial Press, 1951).

## On Great Britain's Formal Recognition of Chile and Peru, 1830 (Excerpt)

*Immediately after Latin American nations secured independence, businessmen and investors from Europe began working to establish trade networks throughout the former Spanish colonies, which had been kept under strict economic control during the colonial period. Those investors appealed to their leaders to recognize the new governments in Latin America so that economic ties could be formalized. In the following excerpt, the anonymous writer dismisses concerns of political instability in Peru and Chile and urges the British government to recognize the new nations.*



Now to prove that it would be expedient to conclude treaties of amity and commerce with Peru and Chile, a few considerations, I think, will be sufficient.

In the first place, it must be considered that the greater part of the goods consumed in these countries are supplied by us. Their consumption is at present limited, but it cannot fail of increasing along with their population and wealth; and, at any rate, what cannot be denied and ought to be attended to, is the fact that we actually import from those countries from ten to fifteen millions of dollars in specie annually, for which we give in exchange the produce of our manufactures. Another fact which deserves attention, is, that we come into competition in those countries with the mercantile nations of Europe and with North America. Here I will state, I know that the idea of making some reduction of duties in favour of those countries which have recognized their independence has been repeatedly suggested in Peru and Chile. This suggestion, it is true, cannot be carried into effect; first of all, because it is in opposition to their own interest, and because it is also contrary to the disposition of the people, who, notwithstanding their complaint respecting our government, look upon England as their best connection. It is also true, that we have many decided advantages over our competitors in the markets of Peru and Chile. Notwithstanding all this, I think that we ought to remove any cause, however apparently remote or insignificant, which may injure or commerce with these countries. The diminution of the consumers of our manufactures is, unquestionably, one of the greatest causes of our present difficulties. We ought, then, to omit nothing that may tend to procure consumers, not only in those populous countries, which are certainly the only ones capable of affording extensive relief, but even in those new States, which, however small their consumption, still purchase something, and are, besides, two of the *very few* likely to remain for a considerable time entirely dependant on foreign manufactures. I say two of the *very few*, because we have taken so much pains in teaching other nations, that there is scarcely any one which does not even now pretend to be a manufacturing country.

In the second place, I think that the debt of these countries to England, amounting to three of four millions of

pounds, deserves some consideration. I am far from being sanguine in my expectations, (though in my opinion they will ultimately pay all their debts) respecting the immediate effects of their recognition, towards improving the situation of their creditor. It is self-evident, that if they have no money, or apply it to objects which, justly or unjustly, call their attention more forcibly, they cannot pay. What I mean is simply this,—that it is natural they should pay more attention to a debt contracted in a country whose government recognizes, and is in communication with them, than to one contracted in a country, the government of which appears not to know of their political existence.

Lastly, if we consider that numbers of our seamen and vessels are constantly entering the Ports of Chile and Peru, that many of our countrymen (with large sums of English capital) are employed in the mines, that many carry on commerce not only in the Ports but also in the interior, that many follow retail businesses, and some have even become possessed of landed property,—if we consider all this, I say, and reflect also that the greater the distance at which British subjects are placed, the greater is the need of affording them protection, it seems to me impossible not to perceive that our consular establishments in these countries ought to be rendered as consistent and free from objections as possible; and to accomplish this, the conclusion of treaties is indispensable.

*Source: On the Formal Recognition of Chile and Peru (London: Effingham Wilson, 1830).*

### Antonio López de Santa Anna, The Texas Campaign, 1833–1836 (Excerpt)

*Antonio López de Santa Anna was one of the most colorful and controversial leaders in 19th-century Mexico. He was the epitome of the 19th-century caudillo, and he led Mexico through some of the most turbulent times in the decades after independence. Santa Anna's memoirs have been published in Spanish and in English. In the following excerpt, the military leader discusses his approach to putting down the rebellion in Texas in 1835. The hints of patriotism and self-aggrandizement present in the document are characteristic Santa Anna's memoir as a whole.*



In 1835, the colonists of Texas, citizens of the United States, declared themselves in open revolution and proclaimed independence from Mexico. These colonists were in possession of the vast and rich lands which an earlier Mexican Congress—with an unbelievable lack of discretion—had given them. In declaring themselves independent, they claimed that other favors, which they demanded, had not been granted them.

They had no difficulty in receiving aid from New Orleans, Mobile, and other parts of the United States. These filibusters combined in such great numbers that the commanding general

of Texas, Martin P. de Cos, found himself imperiled in San Antonio de Bexar and was forced to capitulate, leaving the colonists and filibusters in possession of the entire state.

I, as chief executive of the government, zealous in the fulfillment of my duties to my country, declared that I would maintain the territorial integrity whatever the cost. This would make it necessary to initiate a tedious campaign under a capable leader immediately. With the fires of patriotism in my heart and dominated by a noble ambition to save my country, I took pride in being the first to strike in my defense of the independence, honor, and rights of my nation. Stimulated by these courageous feelings, I took command of the campaign myself, preferring the uncertainties of war to the easy and much-coveted life of the palace.

Congress named General Miguel Barragan to the office of President *ad interim*, while I personally assembled and organized an expeditionary army of eight thousand men in Saltillo. A serious illness confined me to quarters for two weeks, but after my recovery, I resolved not to lose a day. The ox-carts carrying our equipment slowed us down considerably, and we were forced to ford rivers on rafts. Lack of provisions hindered us in our journey across the desert, and plants and wild animals provided the rations for our army. Nevertheless, there were no complaints on the part of the soldiers, and this army well deserves the gratitude of the nation.

Our army's crossing into Texas was the cause of great surprise on the part of the filibusters, for they believed that Mexican soldiers would not cross again into Texas. Frightened by our invasion, they ran into a fortress called the Alamo, a solid fortress erected by the Spaniards. A garrison of six hundred men under the command of Travis, a leader of some renown among the filibusters, mounted eighteen cannons of various calibers. Confident that aid would come, Travis replied to my proposition of surrender, "I would rather die than surrender to the Mexicans!"

The self-styled "General," Samuel Houston, said to the celebrated Travis in a letter we intercepted: "Take courage and hold out at all risks, as I am coming to your assistance with two thousand men and eight well-manned cannons." We did not hesitate to take advantage of this information that fell into our hands.

I felt that delay would only hinder us, and ordered an immediate attack. The filibusters, as was their plan, defended themselves relentlessly. Not one soldier showed signs of desiring to surrender, and with fierceness and valor, they died fighting. Their determined defense lasted for four hours, and I found it necessary to call in my reserve forces to defeat them. We suffered more than a thousand dead or wounded, but when the battle was over, not a single man in the Alamo was left alive. At the battle's end, the fort was a terrible sight to behold; it would have moved less sensitive men than myself. Houston, upon hearing of the defeat of the men at the Alamo, rapidly retreated.

General Jose Urrea's brigade utterly defeated Colonel Fancy [Fannin] near Goliad. Fancy had occupied Goliad and met Urrea with fifteen hundred adventurers and six cannons. Urrea hailed his triumph over Fancy in a dispatch, which ended: "As these filibusters entered Texas with arms to assist

the colonists in their revolt, they were judged outlaws and all prisoners have been shot.” This action was based on a law passed November 27, 1835, in compliance with which the war in Texas was waged “without quarter.”

Source: Ann Fears Crawford, ed. *The Eagle: The Autobiography of Santa Anna* (Austin: Pemberton Press, 1967).

### Jamaica Royal Commission, Testimony on the Morant Bay Rebellion, 1866 (Excerpts)

*In 1865, free blacks in Jamaica rebelled against the white population in the town of Morant Bay. Rebels objected to a series of British economic policies that exacerbated the struggle of the poor in Jamaica. They were also protesting long-standing local practices that prevented the free black population from enjoying political equality. The white militia in Jamaica violently put down the rebellion and hundreds were killed. In the following testimony given to the Jamaica Royal Commission, John Sotddart Gerard—medical doctor and resident of Morant Bay—provides his account of the violence.*



Thursday, 25th January 1866

Dr. John Sotddart Gerard, sworn and examined

Q: What is your occupation?

A: A surgeon

Q: Where is your residence?

A: At Morant Bay, Saint Thomas in the East

Q: Were you at Morant Bay on the 11th October?

A: Yes.

... Q: While you were there, during the morning, did any information reach you with regard to the people approaching the Court-house in a hostile way?

A: They came almost immediately.

Q: Did you hear any noise or cry?

A: There were cries that they were coming.

Q: Did you go out in consequence of that and hear any sounds?

A: We went outside and saw them beating drums and blowing horns, and they were armed with cutlasses, pikes, guns, and some iron things put on pieces of wood, something like pikes, and bills on sticks.

... Q: In what way were they advancing, then?

A: They were brandishing their arms; branding their cutlasses, guns, and other instruments which they had taken from the police station, and those which they had brought themselves.

... Q: How many altogether in round numbers do you think you saw approaching?

A: I should think between 300 and 400 persons.

Q: What did they first do, according to what you saw, not what you have heard?

A: When we went to the front of the Court-house, we asked the Baron to read the Riot Act. The Volunteers were in order in front of the Court-house, facing the people—they came nearer and nearer to the Volunteers, and the Volunteers retreated until they were quite close to the Court-house—then the mob threw stones at the Volunteers, and that the Volunteers called on the Custos to read the Riot Act, and they fired.

... Q: When you got inside the Court-house, will you describe what happened to you and the others, as far as you noticed with your own eyes?

A: We barricaded the doors and rushed into the inner room and barricaded those, and the dead baron, Baron Alfred and myself put our hands to the door, and some other gentlemen began writing off despatches to the Governor. I attended some of the Volunteers who were wounded and were bleeding. The people were firing in at us, and some of the Volunteers were firing at them again—then they threw stones at us; any one that appeared at the window or any opening, they fired at, either with stones or with bullets.

... Q: Will you go on and tell us shortly, what to your knowledge happened after the building had been fired into, and stones had been thrown, and you had barricaded the doors?

A: Soon after it was discovered that the Court-house was on fire, we remained in it as long as we could.

Q: What o'clock was it when you first discovered that?

A: I think we must have left about 5, between 4 and 5 o'clock.

Q: Between 4 and 5, then, you found the Court-house in flames?

A: Yes, the roof was falling in on us, and we could not remain longer.

Q: What became of you then?

A: I got through the window and into the adjoining house where Mr. Price lived.

... Q: When you got into Mr. Price's house what took place?

A: The Baron the offered to go out himself to these people and give himself up to them, which would save the rest our lives; and to save him from that, I and some others asked Mr. Price to go, saying as he was a black man the people might listen to him.

... Q: Where did you go then?

A: As I came out I saw a whole mob of them, and one of the Volunteers clung to me, and they cut him away from me. The next person I saw was Captain Hitchins.

Q: What do you mean when you say they cut him away from you?

A: They knocked him away from me with cutlasses and sticks.

Q: You saw him killed then?

A: He was not killed, there was a man behind me kneeling down, his clothes were half torn from his body, and he was covered with blood, and there was one man still hacking at him, and he left him to see the new arrivals, and



when he saw who it was, he said, "Let go the doctor," and they chopped him away from me. I passed on, and Captain Hitchins crawled up to me and recognized me, he threw his arms over me, and said, "Doctor, I am weak, I cannot stand" and the fellows came back and chopped him up.

Q: You mean stabbed him?

A: Till he dropped from me.

Q: After he had done that did you go away?

A: No, I should state that when I came out I was seen by my servant, named William Donaldson, now a prisoner, he put his arm in mine and took me away. We passed a sentry, a very dark man, he took off my black hat, and said, "You are a doctor, are you not?" I said, "Yes;" he said, "If you had not been a doctor I would have chopped you up like the other people," and he kept his cutlass very near to me.

*Source: British Parliamentary Papers: Minutes of Evidence and Appendix to the Report of the Jamaica Royal Commission, 1866, Vol. 5: Colonies West Indies, Series (Dublin: Irish Academic Press).*

### Charles A. Washburn, Arrests and Conspiracy in Paraguay, 1871 (Excerpts)

*Charles A. Washburn was a U.S. diplomat stationed in Asunción, Paraguay, from 1861 to 1868 during the dictatorship of Francisco Solano López. During his tenure, Washburn witnessed the repression and paranoia that came to characterize Solano López's administration. In his memoirs, Washburn describes seeing government officials and family members of the dictator go missing as Solano López feared that grand conspiracies were unfolding around him. Washburn also describes the interactions between the dictator and his mistress, Eliza Alicia Lynch.*



Colonel Thompson gives the following account of the reward [General José María] Bruguez received for his fidelity and valor: "My room at Lopez's head-quarters was next to that of General Bruguez and he and I were very good friends. One evening, arriving from Fortin, I went into his room to see him, and found that all his things were gone, and other things in their place. There was a boy in the room, and I asked him for General Bruguez; he did not know. I then asked him if he had moved? 'Yes.' 'Where?' 'I don't know.' I then imagined that something must be wrong with him, and asked no further questions; I had asked too many already. Next day I dined with Lopez; Barrios, Bruguez, and the Bishop used always to dine with him, but Bruguez was not there. Lopez's little boy asked where he was, and they told him, with smiles, 'He is gone.' He was, I have since learned, bayoneted to death."

A cheerful prospect for the other guests! Two of those, Barrios and the Bishop, who told the boy with smiles that Bruguez was gone, were shortly after to follow him, and share his fate.

The cause of the sudden fall of Bruguez, I afterwards learned, was this: When Lopez first began torturing people to make them confess to having taken part in the conspiracy, his plan was to subject them to such misery that when they could endure it no longer they would in their agony admit anything. Having confessed their own guilt, the torture was afterwards reapplied to force them to expose their accomplices. As they had never known anything about the conspiracy, of course they could have no confederates; and as the torture was continued till they either denounced others or died, they would accuse at random.

... It was but a few days after the arrest of Bruguez that Barrios was put under arrest. What his offence had been will probably never be known. He had seen the most of those who but little before were highest in the confidence of their common master arrested and horribly tortured. He had known Lopez from a boy, and had been his willing accomplice and assistant long years before, and acted as pander at the time that he attempted an infamous outrage on the beautiful Pancha Garmednia. He had seen so many subjected to the torture, and in many cases had ordered its application, that, brave man as he was on the battle-field, his courage failed him when he was arrested, and he attempted to commit suicide. This was construed by Lopez as evidence of guilt, and he directed that he should be well treated till he could sufficiently recover to endure the *cepo* [stocks] and make confession. His wife, Doña Inocencia, the elder sister of Lopez, was thereupon immediately arrested and questioned as to what she knew of the conspiracy. She could only reply, as did everybody else when first questioned, that she knew nothing. She was then flogged like a felon. Like all the Lopez family she was very fleshy, and for a Paraguayan of very fair complexion.

For the work of flogging the strongest men were always selected and they were given withs or sticks of a very hard and heavy kind of wood, about four feet long, and an inch in diameter at the butt, and tapering to half the size at the other end. Their orders were to lay on with all their might, and, if one of them hesitated or faltered, he was immediately seized and subjected to the same treatment. The flogging of Doña Inocencia, as described by some of the witnesses, was such as to strike them, though familiar with such scenes, as peculiarly savage and brutal. Her endurance and resignation astonished them. Though the flesh was all cut away from her shoulders by the repeated blows, she never uttered a cry or a groan; and when they ceased for a moment, and she was importuned to confess, and thus win the clemency of the kind-hearted President, her reply was, "I know nothing; ask my husband."

... During the time that Lopez was perpetrating his most atrocious acts he affected to be very religious. He had a church built at San Fernando so that he might perform his devotions in public; and while his inquisitors and torturers were engaged in extorting false confessions by means of the *cepo* [stocks], the rack, and flogging, he would be in the church, frequently for four hours at a time, kneeling and mumbling and crossing himself, while between the genuflections the Bishop or Dean Bogado would tell the people of their duties towards him, as he was the anointed of the Lord, set to rule over them, and making devotion to him their first and only duty.

... Madam Lynch, for some purpose of her own, was always trying to increase the natural cowardice of Lopez. She had an abundance of that courage of which he was so greatly in want, and in time of battle would expose herself where the danger was greatest; and it is probably that her object in playing on his fears was to increase her influence over him. When he, at the first sound of a gun from the allied lines, would hasten to gain the shelter of his cave at Paso Pucu, she would move about unconscious of danger, as danger she knew there was none; yet at the same time she would counsel him not to expose to a chance shot his valuable life,—a life on which the hopes, the fortunes, and the liberty of all Paraguayans depended. She was also constantly advising him to greater precautions, telling him that his enemies were thick around him. She saw that such counsels pleased him and increased her own influence, and she would tell him that he was too good, too credulous, too kind-hearted, and too indifferent to danger for his own safety. With her at his side ever whispering in his ear that he was in great danger, that his enemies were plotting his destruction, it is not strange that he was constantly haunted with fear of treachery and assassination. No one else of those around him could venture to tell him that such fears were groundless, without a certainty of being suspected as a traitor and an accomplice of conspirators. To this bad, selfish, pitiless woman may be ascribed many of the numberless acts of cruelty of her paramour. That she was the direct cause of the arrest, torture, and execution of thousands of the best people in Paraguay there is no doubt, and it is equally certain that it was for her benefit and that of her children that so many hundreds were arrested and robbed of their property, and afterwards tortured as conspirators or traitors, and then executed, that they should never, by any contingency of war, survive to reclaim their own.

Source: Charles Ames Washburn. *The History of Paraguay: With Notes of Personal Observations and Reminiscences of Diplomacy under Difficulties*, vol. 2 (1871. Reprint, Boston: Elibron Classics, 2005).

### Herbert H. Smith, *The Curupira*, 1879 (Excerpt)

*Herbert H. Smith was an American naturalist and member of the American Geographical Society who traveled extensively in Brazil in the 1870s. He first published his observations in a series of articles in Scribner's Magazine. Those observations were later compiled and published in a traveler's account, Brazil: The Amazons and the Coast, in 1879. During his many travels, Smith collected numerous folklore tales that were common among the Amazonian Indians. The following tale is one version of the story of the famous curupira, who was believed to live in the forest and used trickery to lead people astray. Brazilian Natives Americans believed there were many curupiras with varying physical descriptions. One common belief was that the curupira's feet were turned backward so that those running away from him would be fooled into running toward him.*



Everywhere on the Amazons one hears of the Curupira, who lives in the forest, and leads people astray that he may destroy them. He is a little, brown man, they say; his feet are turned backward, so that his tracks are reversed, and one who attempts to run away from him along his trail, will but run to destruction. Some say that the curupira is bald, that he has enormous ears, or green teeth; but in these points the descriptions vary. The Indians use the name generically, evidently believing that there are many curupiras, as there are many deer or monkeys.

Old Maria dos Reis, of Santarem, told me the following curupira story, one of many that are found among the Indians:

There was once a man who had a wife and one little child. One day this man went into the woods to hunt, and there he was killed by a curupira. The curupira cut out the man's heart and liver; then he took the man's clothes and put them on his own body, and, thus disguised, repaired to the house where the woman was waiting for her husband. Imitating the voice of the man, the curupira called:

"Old woman! Old woman! Where are you?"

"Here I am," said the woman; and the curupira went into the house.

At first the women took little notice of him, supposing that it was her husband. The curupira said:

"Here is some nice meat that I have brought you; go and cook it for me," and he gave her the heart and liver, which he had cut from her husband's body. She took them and roasted them over the fire; she brought mandioca-meal also, and spread the dinner on a mat, and the curupira sat down with the woman and child, and all ate heartily.

"Now," said the curupira, "I will go to sleep;" and he lay down in a hammock. Presently he called: "Bring the child and lay it with me in the hammock." So the woman brought the child, and laid it on the curupira's arm, and the curupira and child went to sleep.

After awhile the woman came to look at him, and then she discovered that it was not her husband, but a curupira. In great alarm, she began to make preparations to leave the house; she put all the clothes and household utensils into a basket; then softly taking the child from its resting-place, she placed a *pilão* (great wooden mortar) on the curupira's arm, and so ran off with the basket on her back, and the child astride of her hip.

She had run only a little way down the path, when the curupira awoke, and discovered the trick that had been played on him; jumping up, he ran down the path after the woman, calling loudly:

"Old woman! Old woman! Where are you?"

The woman saw the curupira coming, while he was yet a long way off: she ran still faster, but the curupira gained on her, at every step. There was a *munduí* bush by the path: the woman got under this and lay, trembling, until the curupira came up, calling:

"Old woman! Old woman! Where are you?"

There was an *acurão* bird on the branch overhead, and it called "*Munduí! Munduí!*" trying to tell the curupira where the woman was; but the curupira did not understand; so, after searching for awhile, he ran on down the path. Then the

woman got up and ran off through the forest by another road; but in the mean time the curupira had discovered his mistake, and he ran after her, calling:

“Old woman! Old woman! Where are you?”

The woman came to a great hollow tree, with an opening at the base of the branches; on this tree sat a frog, *Curucuná*, which makes a very thick and strong gum.

“O Curucuná!” cried the woman, “I wish that you were able to save me from this curupira!”

“I will save you,” said the frog; “the curupira shall not harm you.”

Then the frog let down a long rope of gum; the woman climbed up this rope into the tree, and the frog put her into the hollow.

The curupira came up, calling:

“Old woman! Old woman! Where are you?”

“Here she is,” said Curucuná.

Then the woman begged the frog not to let the curupira come up; but the frog answered: “Never fear: I will kill the curupira.” And he did as he said; for he had covered the tree-trunk all over with gum, and, when the curupira tried to climb up, he stuck fast, and there he died; and the woman got away with her child and went home.

Old Maria told me that I should take great care when walking alone in the woods, for often the curupira calls from the bushes; when one follows the sound he calls again, farther away, until the rambler is lost; then the curupira kills and eats him. He receives hunters in the same way, by imitating the note of an *inambú*, flying from bush to bush.

*Source:* Herbert H. Smith. “Myths of the Amazonian Indians.” In *Brazil: The Amazons and the Coast*, 561–564 (New York: Charles Scribner’s Sons, 1879).

### Herbert H. Smith, “The Story of Coffee,” 1879 (Excerpts)

*The following is another of Herbert H. Smith’s series of articles first published in Scribner’s Magazine. Smith’s discussion of a Brazilian sugar plantation provides rich details of the sugar cultivation and production process as well as a vivid description of slavery in the late 19th century.*



The breakfast—a very good one—is discussed amid much pleasant conversation. Two or three negro servants stand behind our chairs, but, like most Brazilian house-servants, they are more for show than for use. The dining-room is large and bare; at one side there is a writing-desk, with a few books, most Portuguese or French agricultural manuals, and government reports. Two or three unartistic pictures adorn the walls; the furniture is solid and angular, and badly matched. Retiring to the parlor to smoke our cigarettes, we find the latter apartment very little better. There is a piano, of course; the furniture is rich, but tasteless, and it is placed at right angles to the wall;

there is not a single book in the room, save the agricultural treatises, none are in the house. Our host was expensively educated in Brazil and Paris; he is naturally intelligent and progressive, but, like many other Brazilian planters, he is entirely absorbed in his plantation; beyond the coffee-trees, and the slaves, and the milreis [money] that he may gain from them, he has little interest in the world and its doings.

He discourses of the plantation, and of the improvements that he is introducing. This was one of the old-time estates, that had fallen into negligence and decay. Senhor S. had brought young vigor, and driving management to it; he has abandoned the old tracks, introduced new machinery and new ideas, and his neighbors are astonished to see the wonderful results which he has obtained from apparently worn-out land. There are four thousand acres in the estate, two thousand two hundred of which are under cultivation; the rest is virgin forest. The fields count four hundred thousand bearing coffee-trees, and our host is just planting as many more; large plots, also, are appropriated to corn, beans, etc., with which the two hundred slaves are fed.

In Southern Brazil, a coffee-field seldom lasts more than thirty years. The plantations are made on the fertile hillsides where the forest has been growing thick and strong. But the soil here is never deep; six or eight inches of mould is the utmost. In twenty-five or thirty years, the strong-growing coffee-trees eat it all up.

Most planters simply cut down the forest, and leave the trees to dry in the sun for six or eight weeks, when they are burned. S., more provident, lets the logs rot where they lie, which they do in a year or two; in this way, the ground gets a large accession to its strength.

Back of the house there are two yards, or small fields, together containing perhaps four acres. The ground is covered with earthen pots, set close together, leaving only little pathways at intervals. Each of the two hundred thousand pots contains a thriving young coffee-plant. The ground forms a gentle slope, and water is constantly running over it, so that it is always soaked. The pots, through orifices at the bottoms, draw up enough of the water to keep the roots moistened; the young plants are protected from the sun by mat screens, stretched on poles above the ground. All this system is a costly experiment of Senhor S. Most of the planters take root-shoots at random, from the old fields, and set them at once into unprepared ground. The experiment has probably cost Sr. S. twenty thousand dollars; the pots alone were eleven thousand dollars. But he will make at least fifteen thousand dollars by the operation. In the first place, he gains a good year, in the start that he gives to these young plants. Then, they are not put back in the transplanting; the pots are simply inverted, and the roots come out with the earth; they are set into mould or compost, which has been prepared in deep holes; the tender rootlets catch hold of this at once, and, in a day or two, the plant is growing as well as ever. Dark green and waving are the young plants; they rejoice in their generous fare, with all the fullness of plant joy; drink in the sunshine and the strong air, grow and thrive, and are ready to be generous in their turn.

The nurslings come from selected seeds of half a dozen varieties. Sr. S. has them planted, at first, in small pots. A dozen slaves are at work, transplanting the six-inch-high shoots to larger pots; little, tired children carry them about on their shoulders, working on as steadily as the old ones for they are well trained. Sr. S. wants to make his plants last fifty years; so he is careful and tender with them. The little blacks will be free in a few years; so his policy is to get as much work as possible from them, while he can.

. . . A large plantation, like that of Sr. S., is a little world in itself. There are smithies and workshops; machines for preparing mandioca [manioc, or cassava], a saw-mill, and a corn-mill, and a sugar-cane mill, and a still where the cane-juice is made into rum. At one end of the enclosure there is a brick-kiln, and near by a pottery, where most of the pots in the viveiro [nursery] were prepared. The machinery is moved, partly by a turbine-wheel, but principally by a large steam-engine, which Sr. S. shows with pardonable pride. From the machine-house, he takes us to his stock-yard, which though entirely a subsidiary affair, is by no means insignificant; there are eighty fine oxen, and nearly thirty mules, a hundred swine, and fifty sheep, with turkeys, fowls, guinea-hens, and pigeons—a feathered host. To crown all, there is a zebu ox from India, which Sr. S. bought in Paris, and imported for experiment.

Picturesque groups of washerwomen gather about the great stone basin, where their work is done. Every morning we hear the clatter of a chopping-machine, cutting up sweet cane-tops for the cattle. In the kitchen the slave rations are prepared in great kettles and ovens. Here a blacksmith is busy at his forge; there a carpenter is hammering or sawing. Among all we do not see an idle negro for even the white-haired octogenarians are employed in basket-weaving or other light work, and all children, except the merest babies, must go to the fields with the rest. Only on Sundays, a few of the weaker ones gather about the quarters and indulge in something like recreation.

The negroes are kept under a rigid surveillance, and the work is regulated as by machinery. At four o'clock in the morning all hands are called out to sing prayers, after which they file off to their work. At six coffee is given to them; at nine they breakfast on jerked beef, mandioca-meal, beans and corn-cake; at noon they receive a small dram of rum; at four o'clock they get their dinner, precisely like the breakfast, and like that, served in the field, with the slightest possible intermission from work. At seven the files move wearily back to the house, where they are drawn up to the sound of a bugle. From the tripod at one side a bright fire half illumines, half conceals, the dark figures, sending flashes over the walls beyond, and casting long shadows on the ground. The tools are deposited in a store-house, and locked up; two or three of the crowd, perhaps, advance timidly to make requests of the master; after that all are dispersed to household and mill-work until nine o'clock; then the men and women are locked up in separate quarters and left to sleep seven hours, to prepare for the seventeen hours of almost uninterrupted labor on the succeeding day. On Sunday there is a nominal holiday, which, practically, amounts to but three or

four hours; none of the Catholic holidays are celebrated here, and even Christmas is passed unnoticed.

The Brazilian system of gradual emancipation, however wise it may be in some respects, brings with it an inevitable evil. If a man has unrestrained control of his slave as long as the latter may live, he treats him well, as he would treat his horse well; he does not wish to diminish the value of his property. But if the slave is to be freed in ten or fifteen or twenty years, the policy of the master is to get as much service as possible out of him. A young, able-bodied negro, even if he is overworked and cruelly treated, may reasonably be expected to last twenty years. Humane masters look beyond that, and treat their slaves well; but the majority see the matter simply in a business light.

Source: Herbert H. Smith. "The Story of Coffee." In *Brazil: The Amazons and the Coast*, 514–527 (New York: Charles Scribner's Sons, 1879).

### José Martí, Letter to Gonzalo Quesada, October 29, 1889 (Excerpt)

*José Martí was a Cuban writer and intellectual who became a fierce advocate of Cuban independence in the late 19th century. His writings often reflect a strong sense of nationalism and a disdain for colonialism. Martí was also known for cautioning against a close relationship between Cuba and the United States out of concern that on the island, one imperial power (Spain) would be replaced by another (the United States). In the following letter to fellow revolutionary Gonzalo Quesada, Martí urges a strategy that will protect Cuban sovereignty. Martí's writings inspired revolutionaries in Cuba throughout the 20th century, including Fidel Castro.*



We must not judge this case by our feelings, however. It exists and must be seen for what it is. I believe the International Congress to be clearly dangerous to Our America, or at most useless. And for Cuba I can see only one advantage, considering the friendly relations, in official matters, between nearly all of the republics and Spain, and considering the reticence of this country and its hidden or poorly controlled desires regarding our homeland. It is the advantage of compelling the United States, by means of a skillful yet reasonable proposal, if it allows it to be compelled, to recognize that "Cuba must be independent." Because of my own inclinations, and the suspicion—in my opinion justified—with which I regard the Congress and all that tends to approach or politically identify this country with our Spanish American countries, I never would have thought of setting the precedent of subjecting our fate to discussion in a body where, because of its posture and its influence as a major nation, the United States must play a principal role. But personal preferences, which can stem from the emotions, should give way to general preference, except in matters of honor, so I soon realized that it was inevitable for the Cuban affair to be

presented before the Congress in one way or another, and what had to be decided was how to present it in the best way possible. To my mind no way is good unless it guarantees Cuba its absolute independence. We do not have to put forth any effort at all for the island to fall to North America, because if we fail to take advantage of the little time we have left in which to prevent it, it will become North American through its own disintegration. That is what this country is hoping, and that is what we must oppose. The result to be gained from the Congress, then, was a recommendation by the North American government that would carry a full-fledged recognition of our right to independence, and our capacity for it. But this government in all probability would object to recommending this, or to saying anything that might jeopardize for the future, or compromise because of previously expressed viewpoints, its right to dominate the island. Concerning the nations of Spanish America, we already know everything; our fortunes and freedom lie there. The nation we need to know more thoroughly is the United States, for it stands at our doorstep like an enigma, to say the least. A nation as anguished as ours must solve the riddle, must extract from anyone who might disregard the rights we have acquired through our own enterprise the promise to respect those rights. We need to know the position held by this avaricious neighbor who admittedly has designs on us before we rush into a war that appears to be inevitable, and might be futile, because of that neighbor's quiet determination to oppose it as a means of leaving the island in a state enabling it to lay hands on Cuba at a later date. Short of a political crime, ventured only through some kind of intrigue, it would not be able to throw it upon the island if there was a well-ordered life of freedom there. I bore all this in mind, counting on the fact that the Congress was not lacking in friends to help us clarify our problem, either through sympathy or pity. And since I planned to compose the exposition so well that all opinions would be included, I intended to have José Ignacio and Ponce and all those who truly love their country in various ways to go to the Congress empowered to present it with a petition so modest and skillfully worded that the United States would be forced to receive it, or at least be unable to find a decent way of denying it a definitive reply. Equipped with this power, I intended to fight with greater authority and out in the open. So I promised to obtain the following result from the Congress: the United States, in its own interests, would never again be the ally of Spain in a new Cuban war. I really do not expect anything, because in an open question such as this, which has the island's annexation as one of its goals, the United States will probably cast no vote that in any way runs counter to the objective it most desires. Yet my own goal is a possibility, and pursuing it an immediate political obligation given the difficult, desperate, and almost warlike situation on the island. I was determined to undertake it, and I am still wondering whether it is my duty to do so with others or alone.

Source: Philip S. Foner, ed. *Our America by José Martí: Writings on Latin America and the Struggle for Cuban Independence*, translated by Elinore Randall, Juan de Onís, and Roslyn Held Foner (New York: Monthly Review Press, 1977).

### John R. Spears, *The Gaucho at Home*, 1895 (Excerpt)

*In the 1890s, John R. Spears traveled to the Tierra del Fuego and Patagonia in the far southern regions of South America to write a series of reports for the Sun in New York. He later published his observations in the traveler's account The Gold Diggings of Cape Horn, which provides descriptions of daily life and culture in regions of Latin America that saw few foreign travelers in the 19th century. In the excerpt below, Spears describes the gauchos of Patagonia.*



My first view of a gaucho was had on Flores Island, the quarantine station of Uruguay, a place where nearly all the passengers bound on the English steamers for the River Plate, during the yellow fever season, are obliged to stop for disinfection and observation. We had been on the island a little over a day when a steer was butchered to renew the fresh meat supply. Nearly all the passengers went to see the beast suffer, among the rest a Brazilian naval officer, en route to a station in the Misiones. After a little time he came to my room, asked why I had not been at the killing, and added:

“It is now the best time to go. The killing was nothing—a gaucho put his knife into his throat and it bled to death—but now the gauchos will have an *asado*. Did you ever in your life see an *asado*? It is of the finest of meat. They will roast the ribs of the cow by the fire.”

Near the buildings set aside for the use of the third-class passengers from Brazil we found a number of gauchos preparing to roast the ribs of beef over a small open fire—a fire so small that the coals and ashes occupied no more space on the ground than the ribs would have covered. The rib piece was threaded, so to speak, on a slender but stiff bar of steel five feet long. The bar was thrust into the ground so that the beef was inclined like a shelter tent above the blazing fire, and there it remained for about two hours, being turned occasionally by the gauchos.

Although this was the first time I had seen beef roasted in just that fashion, I was much more interested in the gauchos and certain other things they did than in their roast of beef. Had the officer not told me the men were gauchos I should have very likely have mistaken them for sailors. The Nantucket whaler, fresh from a three years' cruise in the Pacific never showed a sweeter roll in his gait, than did these South American cowboys as they fetched to alongside the fire or veered off in search of fuel to keep it burning. Nor was the resemblance in the gait alone, for every man of them wore a belt with a knife, the handle of which was just where the man's hand would find it in the shortest time. Then, too, the hats of the gauchos were of the nondescript sort, and all worn easily on what a sailor would call the northwest corner or some other corner of the head. The leg-gear, however, was by no means nautical. Jack always loved flowing trousers, but not flowing as these were. At first glance, the gauchos seemed to have brown zouave trousers with white leggings at the ankles, but a closer inspection showed that they

wore rather close-fitting cotton drawers in place of trousers, and that in addition their legs were clothed from the ankles up with a length—say three yards—of wide brown cotton goods. One end of this piece of goods was tucked up through the belt and spread out across the back. Then the other end was brought up between the legs, tucked up under the belt and spread out across the belly until its edges touched or even overlapped the edges of the rear end. That is all there was of it. The stuff bagged down between the legs in a fashion that made the wearer the most ridiculous looking man, in my judgment, on the continent. The nearest approach to it in North America can be found in the trousers with flaps in front, which the good farm wife used to make for her husband in the old days. It is true that the Yuma Indian of the Colorado desert wears a short length of cloth in something after the same fashion, but he draws the ends through the belt until they hang down before and behind, leaving the middle to fit close to the body, in which fashion he appears to be wearing a short skirt.

“What do they wear that cloth bagging between the legs for?” said I to the Brazilian.

“You are to remember,” he replied, “the gaucho lives on the plains where no tailors find themselves in order to make clothes *à la mode*, eh! And the gaucho cannot himself to make trousers and he cannot himself to put what you call them—the patches over the holes in the trousers where he sits in the saddle. But he can to buy cloth and to wear one end between him and the saddle today and the other end tomorrow and another part tomorrow—past tomorrow. Caramba! The cloth never can to wear out in much time, but it can to cover the holes behind in his trousers. Is it not true?”

Caramba is a Spanish word meaning in the American language “gosh.” It is in common use among South Americans of all classes, a fact worth mentioning, perhaps, for the reason that the gauchos have no more forcible word for use even under circumstances that would lead an American cowboy into the most sulphurous depths of profanity.

Source: John R. Spears. *The Gold Diggings of Cape Horn: A Study of Life in Tierra del Fuego and Patagonia* (New York: G. P. Putnam's Sons, 1895).

## ❖ GLOSSARY ❖

- caballerismo*** Governing tactics used by Bernardino Caballero and the Colorado Party in 19th-century Paraguay. These tactics generally included corruption, violations of individual liberties, and stifling democratic systems.
- cabildo*** Governing municipal body or town council in Spanish America during the colonial period and throughout much of the 19th century
- caco*** Black peasant farmers of the Haitian countryside
- caraqueño*** Resident of Caracas
- casta*** Person of mixed-race background
- caudillismo*** A system of political rule under a strongman, charismatic leader. Characteristic of many Latin American nations in the 19th century.
- cholo*** Primarily in 19th-century Bolivia, a person of mixed-race background
- cívico*** Faction within Paraguay's Liberal Party that advocated cooperation with the rival Colorado Party; also a member of this faction
- civilista*** Antimilitary faction within Uruguay's Colorado Party; also a member of this faction
- coparticipación*** Power-sharing system between Uruguay's Colorado Party and Blanco Party introduced in the 1870s
- creole*** Person of pure Spanish descent but born in the Americas
- egusquista*** Faction within Paraguay's Colorado Party that supported President Juan Bautista Egusquiza's policies of cooperation with the rival Liberal Party; also a member of this faction
- estancia*** A large landholding, such as a farm or ranch
- favela*** Urban slum, or shantytown, common throughout large Brazilian cities but typically associated with Rio de Janeiro
- fazenda*** Large landed estate in Brazil
- ley fuga*** Informal policy in late 19th-century Mexico during the dictatorship of Porfirio Díaz whereby prisoners could be shot in the back while supposedly trying to escape
- limeño*** Resident of Lima
- llanero*** Cowboy or livestock herder of mixed-race descent, typically associated with the plains (Llanos) of Venezuela and other regions in northern South America
- mameluco*** Person of mixed-race descent in Brazil
- mercantilism*** An economic system widely used in colonial Latin America whereby the economies of the American colonies were closely controlled by the "mother countries" in Europe. Generally, the colonies provided raw materials and mineral wealth to the European countries in exchange for finished goods.
- moderado*** Moderate faction of Mexico's Liberal Party; also a member of this faction
- paulista*** Resident of São Paulo
- pelucón*** Supporter of Bernardo O'Higgins in 19th-century Chile. The *pelucones* eventually formed the Conservative Party.
- peninsular*** Person of pure Spanish descent born in Spain
- pípiolo*** Member of a group of political leaders in 19th-century Chile who rejected the autocratic rule of Bernardo O'Higgins. The *pípiolos* eventually formed the Liberal Party.
- piquet*** Rural peasant in southern Haiti
- porteño*** Resident of Buenos Aires
- pronunciamiento*** Declaration of military revolt or a coup d'état, generally referring to government overthrows in 19th-century Mexico
- puro*** Member of the hardline faction of Mexico's Liberal Party, which advocated radical reform
- sertão*** The backlands or interior regions of northeastern Brazil

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ENCYCLOPEDIA OF  
LATIN AMERICA

❖ VOLUME IV ❖

The Age of Globalization  
(1900 to the Present)





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THOMAS M. LEONARD  
GENERAL EDITOR AND VOLUME EDITOR

 **Facts On File**  
*An imprint of Infobase Publishing*

**Encyclopedia of Latin America  
Volume IV: The Age of Globalization**

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For information contact:  
Facts On File, Inc.  
An imprint of Infobase Publishing  
132 West 31st Street  
New York NY 10001

**Library of Congress Cataloging-in-Publication Data**  
Encyclopedia of Latin America / Thomas M. Leonard, general editor.

p. cm.

Includes bibliographical references and index.

ISBN 978-0-8160-7359-7

1. Latin America—History—Encyclopedias. I. Leonard, Thomas M., 1937–  
II. Francis, J. Michael (John Michael) III. Burkholder, Mark A., 1943– IV. Rankin, Monica.

F1406.E5155 2010

980'.01303—dc22 2009014594

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Text design by Lina Farinella  
Composition by Hermitage Publishing Services  
Cover printed by Sheridan Books, Ann Arbor, MI  
Book printed and bound by Sheridan Books, Ann Arbor, MI  
Date printed: May 2010  
Illustrations by Patricia Meschino  
Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

This book is printed on acid-free paper.

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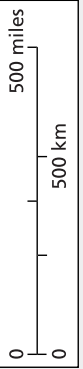
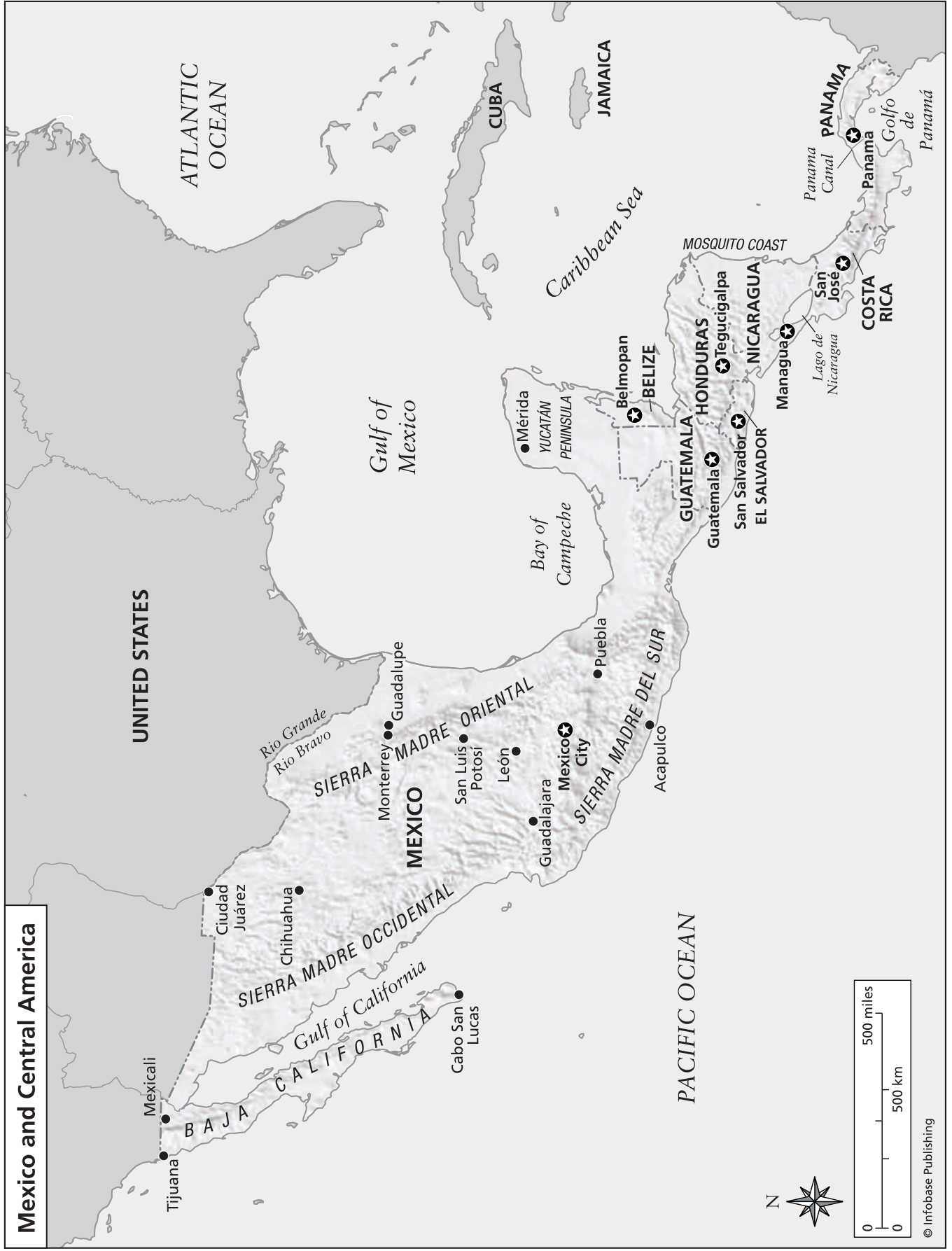
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Windward Passage

Haiti

Port-au-Prince

Jamaica

Kingston

Greater

Antilles

Turks and Caicos Islands (UK)

Virgin Islands (U.S./UK)

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Basseterre

St. John's

Antigua and Barbuda

Lesser Antilles

Roseau

Dominica

Martinique (France)

Castries

St. Lucia

Kingstown

St. Vincent and the Grenadines

Bridgetown

Barbados

Port of Spain

St. George's

Grenada

Trinidad and Tobago

Atlantic Ocean

Caribbean Sea

Nicaragua

Colombia

Venezuela

Panama

Aruba

Netherlands Antilles

Bonaire

Curaçao

0 150 miles

0 150 km

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N

Map of the Caribbean region showing major islands, countries, and geographical features.





# ❧ PREFACE TO THE SET ❧

How does one define Latin America? Geographically, Latin America stretches from the Rio Grande River on the U.S.-Mexican border and Cuba, bordering the Caribbean Sea and the Atlantic Ocean, to Tierra del Fuego at the southern tip of South America. The area is two and one-half times the size of the United States. Brazil alone is slightly larger than the continental United States. Within this vast geographic region there is enormous human and physical variety.

In historical terms, Latin America includes those parts of the Americas that at one time were linked to the Spanish, Portuguese, and French Empires and whose people speak a Romance language (a language derived from Latin, such as Spanish, Portuguese, French, and the derivative Creole). When Napoleon III popularized the term *Latin America* in the 1860s, he implied a cultural relationship between France and those countries of the Western Hemisphere where these language traditions existed: Mexico, most of Central and South America, Cuba, the Dominican Republic, Puerto Rico, Haiti, Martinique, Guadeloupe, and French Guiana. A literal interpretation of Napoleon III's definition would also include portions of the Southwest United States, Florida, and Louisiana; Quebec in Canada; and the islands of St. Pierre and Miquelon off of Newfoundland's coast. English is the first language of most Caribbean islands, and Papiamentu, a form of Creole, is predominant in the Netherlands Antilles and Aruba. Amerindian dialects remain the primary languages in parts of Mexico, Guatemala, Ecuador, Peru, and Bolivia.

The mixture of languages illustrates the diversity of race and culture across Latin America. The Amerindians, or Native Americans, dominated the pre-Columbian time period. In the 21st century, their descendants are still prevalent in Mexico, Guatemala, Ecuador, Peru, Bolivia, and the upper reaches of the Amazon River in the Andes Mountains. Latin America was colonized primarily by the Spanish and to a lesser degree by the Portuguese, first and foremost in Brazil. British, French, and Dutch interlopers followed, and in the 20th century,

the United States had a profound impact across the region. For economic reasons, slavery was practiced most notably in Brazil, along the Ecuadoran coast, and in the Caribbean Islands. Each of these ethnic groups—and the descendants of interracial relationships—produced its own culture with unique religious traditions, family life, dress styles, food, art, music, and architecture. With accelerated globalization throughout the 20th century, Western ideas and culture have had a significant impact upon Latin America.

Geography and climatic conditions also play a major role in the development of societies, their cultures, and economies. Latin America is no exception. For example, the Andes Mountains that traverse the west coast of South America served as the centerpiece of the Inca Empire in the pre-Columbian period, the source of gems and ores during the Spanish colonial period, and the ores and petroleum essential for modern-day industries. The Andes westward slopes and coastal plains provided agricultural products since the earliest of times. The rolling plains, or pampas, of north-central Argentina, southern Brazil, and Uruguay coupled with a Mediterranean-type climate turned those areas into highly productive cattle and grain centers. In contrast, the Amazon rain forest in Brazil, while still home to undiscovered Native American groups, offered little economic advantage until the 20th century, when the logging industry and land clearing for agricultural expansion cut deep into the rain forest's expanse. The tropical climate of the Caribbean and the coastal areas of Central America offered fertile ground for sugar, tobacco, and tropical fruits.

People, geography, language and culture, and economic pursuits transformed Latin America into one of the world's most diverse regions. Yet, the 41 countries and foreign dependencies that make up Latin America share four distinguishable historical time periods: the pre-Columbian period, followed by nearly three centuries of colonial rule; the struggle for national identity during the 19th century; and the quest for modernity since 1900.

The *Encyclopedia of Latin America* takes a chronological approach to the examination of the Latin American experience. Divided into four volumes, each devoted to one of the four time periods that define Latin American history, this unique reference work contrasts sharply with traditional encyclopedias. It provides students and general readers the opportunity to examine the complexity and vastness of the region's development and culture within a given time period and to compare the time periods.

Volume I, *Amerindians through Foreign Colonization*, focuses on the pre-Columbian period from the earliest Native American societies through the arrival of the Spanish conquistadores. Scholars continue to debate the number of Native Americans, or "Indians" as Christopher Columbus labeled them, who resided in the Americas when Columbus first reached the region in 1492. Estimates range from a low of 10 million to a high of slightly more than 100 million. While most scholars agree that the earliest waves of migrants came to the Americas across the Bering Straits land bridge as early as 40,000 years ago, there is continued debate over both the dates of settlement and descent of the earliest settlers. More recent scholarship in Chile and Brazil place the earliest New World migrants to 33,000 B.C.E. and suggest them to be of South Asian and Pacific Islander—rather than Eurasian—descent.

By the time of the European arrival on Latin America's mainland in the early 1500s, three highly organized Native American societies existed: Aztec, Maya, and Inca. Mexico's central valley was home to the rigidly stratified Aztec society, which by the time of the conquest reached southward and eastward to the Caribbean coast. The Aztecs had earned a reputation for their military prowess, for the brutal exploitation of the peoples brought into the empire, and for ceremonial city building, evidenced by its capital, Tenochtitlán, the site of contemporary Mexico City. From Peru's Cuzco Valley, the Inca Empire in South America stretched 3,000 miles (4,287 km) through the Andes mountain chain and inland to the east from Ecuador, in the north, to Chile, in the south. Through a tightly controlled bureaucracy, the Incas exercised control of the conquered communities. The Maya civilization began approximately in 1000 B.C.E. and, through a system of independent city-states, extended from Mexico's Yucatán Peninsula through Guatemala. For reasons not yet fully understood, Classic Maya civilization began its political collapse around 900 C.E., but Mayan society and culture remained intact. Aside from the three major groups, many other Native American societies existed throughout Latin America, such as the Arawaks and Tainos in the Caribbean and the Mapuche and the Guaraní in Argentina, Paraguay, and Chile.

Marked differences separated groups within the larger society and each group from the other. For example, even today, the Mexican government reports nearly 200 different linguistic groups; Guatemala, 26 different Mayan dialects; and an estimated 10 million Native Americans speak some form of the Quechua language in the high

Andes along South America's Pacific coast. Elaborate ceremonies that included human sacrifice characterized the Aztec, Inca, and Maya religions. Agriculture was the primary economic pursuit of all Native American groups, while hunting and fishing were pursued by some groups. Textiles and metalwork usually contained designs peculiar to each indigenous group.

Volume II, *From Colonies to Independent Nations*, focuses on the Spanish colonial period, from the early 16th century through the early 19th century. At the beginning of this time period, the Spanish explored the South and North American continents, laying out an empire in the name of the king and queen of Spain and the Roman Catholic Church. Despite the vastness of the empire, which stretched from Tierra del Fuego at the southern tip of South America to the far reaches of the northwest Pacific Coast, eastward to the Mississippi River and into the Floridas, the Spanish attention focused on the areas of modern-day Mexico and Peru. Both were home to significant Native American societies and rich in mineral wealth, particularly gold and silver. The colonies existed for the benefit of Spain, and the application of mercantilist economic policies led to the exploitation of natural resources, regulation of manufacturing and agriculture, and control of international trade, all of which contributed to a pattern of large land holdings and abuse of labor. In effect, the system drained the colonies of its specie and other wealth and negated economic development and the emergence of a significant entrepreneurial class in the colonies. The Spanish imposed their political and cultural systems on the colonies, including the Native Americans. A highly centralized governmental structure provided little opportunity for political participation by the Spanish colonial residents, except in matters at the local level. The colonial laws and rules were made in Spain and enforced in the New World by officials appointed by the Crown. During the colonial period, the Catholic Church became an entity unto itself. It administered education, hospitals, social services, and its own court system. It tithed its followers and charged fees for religious services. Because the church was exempt from taxes to the Spanish Crown, it emerged as a colonial banker and a benefactor of the Spanish colonial system. The church, therefore, was not anxious to see the system change.

In theory, the Brazilian colonial experience paralleled the Spanish model, but in application, the Brazilian model was much different. The states established on Brazil's Atlantic coast were administered like personal fiefdoms by the king of Portugal's appointed authorities. Because the colony lacked natural resources for mass exploitation and a Native American population to convert to Catholicism, Portugal gave little attention to its New World colony.

Latecomers to the New World, the British, French, and Dutch colonization schemes were confined to the Caribbean region. As with the Spanish and Portuguese,

each island fell victim to the political system of the mother country. Over time, the local governments of the British became more representative of the resident population. The economic focus on sugar production caused the importation of slave labor from Africa.

New World discontent in the mid-17th century led to reforms in the Spanish colonial system, but it took European events in the early 19th century to bring about Latin America's independence by 1826. Only Cuba and Puerto Rico remained under Spanish rule, and the British, French, and Dutch maintained control over their Caribbean island positions. Brazil received its independence on September 7, 1822, but continued to be governed by a member of the royal Portuguese family until November 15, 1889.

The legacies of colonial rule became evident immediately following independence. The establishment of governmental institutions and the place of each nation in the growing global economy that characterized 19th-century Latin America are the subject of volume III, *The Search for National Identity*. In addressing these issues, political and religious leaders, intellectuals, and foreigners who came to Latin America were confronted by the legacies of Spanish colonial rule.

The New World's Spanish descendants, the creoles, replaced the Spanish peninsulars at the apex of the rigid social structure and sought to keep political power confined to themselves. Only conflicting ideologies separated the elite. One group, the Conservatives, remained tied to the Spanish tradition of a highly centralized government, a privileged Catholic Church, and a hesitancy to reach out to the world. In contrast, the Liberals argued in favor of a greater decentralization of political power, the curtailment of church privileges, and greater participation in world affairs, particularly trade. Liberals and Conservatives, however, did not want to share political power or wealth with the laboring classes, made up of mestizos, Native Americans, or blacks. The dispute over the authority of central governments played out in different ways. In Argentina and Chile, for example, Conservatives Juan Manuel de Rosas and Diego Portales produced constitutions entrenching the Spanish traditions. In Central America, it signified the disintegration of the United Provinces by 1839 and the establishment of Conservative-led governments. The contestants for Mexican political power took to the battlefield, and the struggle produced 41 presidents from 1822 through 1848.

The Latin American world began to change in the 1860s with the emergence of Liberal leaders. It increasingly contributed raw materials to industrialized Europe. The heads of state welcomed foreign investment for the harvesting and processing of primary products and for constructing the supportive infrastructure. And, while the Liberals struck against church privileges, as in Chile during the 1880s, they still retained political power and continued to discriminate against the working classes.

Brazil and the colonized Caribbean Islands fell within the same purview as Spanish America. Although Brazil peacefully achieved independence in 1822, it continued its monarchical form of government until 1889. During that same time period, Brazil participated in the world economy through the exportation of sugar, followed by rubber and coffee. Meanwhile, the Caribbean Islands from Cuba southward to Trinidad and Tobago continued to be administered as part of European colonial empires. Administrators from Spain, Great Britain, France, and the Netherlands arrived to govern the island and to oversee the exportation of primary products, usually sugar, tobacco, and tropical fruits.

Latin America's participation in the global economy accelerated in the 20th century, but the new era also brought new players in the region's economic and political arena—the United States and Latin America's lower socioeconomic groups. These concepts form the basis for the entries in volume IV, *The Age of Globalization*.

The U.S. entry into Latin American affairs was prompted by the Cuban struggle for independence from 1895 to 1898 and the U.S. determination to construct a trans-isthmian canal. The U.S. three-month participation in the Cuban-Spanish War in 1898 and its role in securing Panama's independence in 1903 also confirmed long-standing assumptions regarding the backwardness of Latin American societies, owing to the legacies of the Spanish colonial system. More obvious was the need to secure the Panama Canal from foreign interlopers. U.S. policymakers combined the two issues—political and financial irresponsibility and canal security—to justify U.S. intervention throughout the circum-Caribbean region well into the 1920s. U.S. private investment followed the government's interventions and together led to the charge of “Yankee imperialism.”

The entrance or attempted entrance into the national political arena by the middle and lower socioeconomic groups remained an internal affair until after World War II, when they were considered to be part of an international communist movement and again brought the United States into Latin America's internal affairs. Argentina and Chile provide early 20th-century examples of the middle sector entering the political arena while the governments continued to suppress labor. The results of the Mexican Revolution (1911–17) provided the first example of a Latin American social revolution addressing the needs of the lower socioeconomic class at the expense of the elite. In the 1920s and 1930s, small Communist or communist-like political parties or groups emerged in several countries, including Costa Rica, Chile, Brazil, and Peru. While of concern at the time, the presence of communism took on greater importance with the emergence of the cold war in 1945, when the “generation of rising expectations” fused with the Communists in their call for a complete overhaul of the socioeconomic and political structures rooted in Spanish colonialism. In the ambience of the cold war, however, the 1954 presidential

election of Jacobo Arbenz in Guatemala, Fidel Castro's actions in Cuba in 1959 and 1960, the 1963–65 political crisis in the Dominican Republic, the administration of Chilean president Salvador Allende from 1970 to 1973, and the Central American wars during the 1980s were intertwined into the greater context: struggles of freedom against international communism based in Moscow. To "save" these countries from communism, the United States intervened but in so doing restored and propped the old order. The struggle against communism also resulted in a generation of military governments across South America.

Beginning in the 1980s, democratic governments replaced military regimes across Latin America, and each

of the countries experienced the growth of new political parties, mostly left of center. The new democratic governments also accepted and implemented the neoliberal, or free-market, economic model in vogue at the time. By the mid-1990s, many of the free-market reforms were in place, and Latin America's macroeconomic picture had vastly improved. Still, the promised benefits failed to reach the working classes: Half of all Latin Americans remained poverty stricken. In response to their personal crisis, beginning in 1998 with the election of Hugo Chávez as president of Venezuela, the Latin American people started placing so-called leftists in their presidential palaces. Latin America may be at the precipice of another change.

# ❖ HOW TO USE THIS ENCYCLOPEDIA ❖

The *Encyclopedia of Latin America* explores broad historical developments within the context of four time periods that together make up the complete Latin American historical experience. For example, the student or general reader can learn about a given country, when it was a “location” during the pre-Columbian period (volume I), a part of the Spanish colonial empire (volume II), a new nation struggling for its identity (volume III), or in its search for modernity (volume IV). The same can be done with political ideas and practices, economic pursuits, intellectual ideas, and culture patterns, to mention just a few of the themes that are explored across the four volumes. To locate topics in each of the four volumes, the reader should utilize the list of entries in the front matter of each volume. Words set in SMALL CAPITAL LETTERS in the body of a text indicate that an entry on this topic can be found in the same volume. At the conclusion of each entry are cross-references to related entries in other volumes in the set. For further help with locating information, the reader should turn to the comprehensive set index that appears at the end of volume IV.

Within each volume, the entries focus on the time period at hand. Each volume begins with an introduction providing a historical overview of the time period, followed by a chronology. A glossary of terms can be found in the back matter of the book. Each entry is followed by a list of the most salient works on the subject, providing the reader the opportunity to further examine the subject. The suggested readings at the end of each entry are augmented by the select bibliography appended to each volume, which offers a listing of the most important works for the time period. The further readings for each entry and selected readings for the volume together form a comprehensive list of Latin America’s most important historical literature.

Each volume also includes a collection of documents and excerpts to illustrate the major themes of the time period under consideration. Offering eyewitness accounts of significant historical events and personages, they perhaps will encourage the user to further explore historical documentation.

# ❧ ACKNOWLEDGMENTS ❧ FOR THIS VOLUME

Several people are responsible for bringing this volume to fruition. I am appreciative of the opportunity presented by Claudia Schaab, executive editor at Facts On File, and the help of her staff for bringing it to a successful conclusion. Michael Hall, professor of history at Armstrong Atlantic State University, did an excellent job in preparing the Caribbean Basin entries, as did Monica A. Rankin, assistant professor of history at the University of Texas at Dallas, for the entries on Mexico. There is a deep sense of gratitude for the several librarians at the University of North Florida's Thomas G. Carpenter Library and at the University of Florida's

Latin American Collection for giving generously of their time in assisting with tracking down materials and helping to ensure factual accuracy where needed. Mostly, I thank my late wife, Yvonne, who cannot share the joy of this accomplishment but who always gave generous support and encouragement and continues to be a source of inspiration for her family.

—Thomas M. Leonard  
Distinguished Professor  
University of North Florida  
Jacksonville, Florida

# ❧ INTRODUCTION ❧ TO THIS VOLUME

At the dawn of the 20th century, international attention was focused on Latin America. Europeans and North Americans alike viewed the nations from the Rio Grande River south to the Straits of Magellan as a source of raw materials to feed the demands of industrialization and foodstuffs to feed their people; as a market for their manufactured goods; as an investment opportunity for the exploitation of natural resources; and as a region to construct badly needed infrastructure and develop banking and commercial institutions. The British, Germans, and French led the way in the late 19th century. The North Americans were latecomers, but as the 20th century progressed, they became the most influential foreign interloper in Latin American affairs.

Latin America's governing class welcomed the foreign business community, which was viewed as the vehicle to the modernization of their respective countries. In need of capital to exploit, transport, and market their primary products, Latin American governments created an attractive environment for foreigners. Corporations could bring into the countries, duty free, all the necessary equipment, tools, and machinery for their operations. Thus, the British and North Americans shipped rails to Argentina and Mexico, respectively, to construct railroads that reached into the interior of each nation to bring beef and wheat to the international market. The Chileans permitted U.S. companies such as Anaconda, Braden, and Kennecott to bring in heavy equipment to harvest copper and construct railroads to port cities for its shipment abroad. The same was true for the banana industries in Central America and the sugar industries in Cuba, Puerto Rico, and the Dominican Republic. Early in the 20th century, Latin America lacked the managers and skilled workers essential for the administration of these economic pursuits. To fill the void, foreign companies transferred personnel to Latin America, having successfully argued that special privileges would entice them to come. The companies negotiated supplemental

agreements that permitted the duty-free entry of foreign-made clothing, furniture, specialty foods, fine china and jewelry, and even particular Scotch whiskies and U.S. bourbons. The privileges granted to the United States in the 1903 Hay-Bunau-Varilla Treaty paralleled those granted to individual companies, commercial houses, and businessmen.

The economic changes across Latin America in the first half of the 20th century also resulted in demographic changes. Among the most obvious were the growth of cities across the continent. While the rapidity of population growth was most notable in Buenos Aires, Rio de Janeiro, and Santiago de Chile, other cities had similar experiences, including Bogotá, Lima, Veracruz, and Santo Domingo. In urban centers, primary products were processed, ancillary products and some consumer goods were manufactured, and banking and other commercial houses were established. The coastal port cities also benefited from their role in international trade.

The urban centers attracted native rural labor and in some instances, such as Buenos Aires, also European workers looking to improve their own quality of life. Latin American labor laws militated against urban workers, however. The laws did not protect workers from various forms of exploitation, including low wages and poor working conditions, and mitigated against unionization. When workers attempted to organize, as they did in Mexico from 1906 to 1908 and in Buenos Aires in 1919, they were forcefully repressed by their respective governments, and foreign-born labor leaders were deported. Rural labor fared no better. Large estates, or *latifundios*, dominated the production of fruits and vegetables in Chile, bananas in Central America, and sugar in Cuba and the Dominican Republic. Without legal protection, rural workers also were exploited. Additionally, both unskilled urban and rural labor suffered from a lack of health care and adequate housing. Local elites and foreign investors were the only real beneficiaries of this system.

While the lower socioeconomic groups remained a potential source for political change, Latin America's political system remained closed before the 1930s to all but the elite, except in Mexico. The Mexican Revolution (1910–17) was an attack on the privileged landed elite and the country's primary foreign investor, the United States. As a result of the revolution, the Mexican government gained the constitutional right to control land and natural resources and to protect workers' rights and improve their quality of life. The Mexican Revolution was followed by the emergence of a plethora of "leftist" political parties in the 1930s in Latin America that appealed to the lower socioeconomic groups. Political populists such as Argentina's Juan D. Perón, Brazil's Getúlio Vargas, and Panama's Arnulfo Arias emerged and railed against the workers' plight and the elite's privileges.

For two generations following the end of World War II in 1945, Latin America experienced sociopolitical challenges to the traditional order that became entangled in the complex issues of the cold war. These challenges were interpreted either as legitimate nationalist movements for change or as part of an international communist conspiracy. In 1948, José Figueres did not draw much international attention when claiming that he had saved Costa Rica from communism through his victory in a 48-day civil war, but six years later, in 1954, when the U.S. Central Intelligence Agency sponsored the overthrow of Guatemalan president Jacobo Arbenz, the world took notice. Arbenz's land reform program promised to benefit the rural Native Americans and mestizos at the expense of the landed elite and the U.S.-owned United Fruit Company, and he was accused of being a communist. Fidel Castro's Cuban Revolution ran afoul of similar interpretations. Initially viewed as a guerrilla striking out against elitist and corrupt government and U.S. dominance of the Cuban economy, Castro came to be seen as a communist because of his land distribution program, wage controls, and government organization of society and control of economic policy. The same issue surrounded Nicaragua's Sandinista National Liberation Front and El Salvador's Farabundo Martí National Liberation Front in Central America during the 1980s. While these movements can be considered extreme responses to political and social rigidity, the same cannot be said about Chile, with its traditional democratic political system. Chilean governments became so gridlocked after World War II that they failed to adequately address the socioeconomic needs of urban and rural laboring groups, and in so doing, they paved the way for the democratic 1970 presidential election of self-professed Marxist Salvador Allende.

The cold war's leading characteristic—communism versus democracy—brought the United States directly into Latin America's internal affairs, but that involvement did not begin until the beginning of the 20th century. The 1898 Cuban war for independence and the decision to construct a transisthmian canal at Panama

vaulted the United States directly into the internal affairs of the circum-Caribbean region. For the first generation and a half, the United States based its Caribbean policy on securing the Panama Canal from external threats that could come from European gunboats sent to collect overdue debts or from regional political turmoil that could spill into Panama and threaten the canal's operation. The U.S. government pursued policies that sought to bring political and fiscal responsibility to Latin American nations, as seen in the 1902 Platt Amendment that was embedded in the Cuban constitution and at the 1907 and 1923 Central American conferences. The policies failed to bring political and fiscal order, but they did contribute to growing anti-U.S. sentiment across the continent and to the U.S. pronouncement of its good neighbor policy in 1933. Global events, however, contributed to a continued close relationship between the United States and Latin America's elite rulers.

For the most part, Latin Americans cooperated with U.S. policies during World War II, including measures against Axis residents and descendants. The anti-Axis attitude of the Latin American elite quickly transformed into an anticommunist one as the war drew to a close and the ambitions of the "generation of rising expectations" emerged. While the middle sector sought its own participation in the closed political systems, the workers' spokesmen demanded socioeconomic improvements for the wider populace. The elite accepted the small middle sector into the system and in turn received its support to resist workers' "communist" demands. Within the cold war's perspective, U.S. policy makers determined that communist labor leaders were capitalizing on workers' demands to gain legitimate control of governments. Thus, from the late 1940s until the mid-1980s, the United States continued to support the elite's continuation in power. With the exception of the Alliance for Progress, U.S. economic assistance and military programs helped secure the established order. The Latin American elite came to oppose many of the Alliance for Progress's programs—land distribution, creation of a new entrepreneurial class, a transparent legal system, and a broader-based and more open democracy—and therefore contributed to the Alliance's failure because it threatened their privileged position.

Events during the latter part of the 20th and early 21st century suggest that Latin America is on another precipice of change. The path to change began with the winding down of the international cold war that put communism's appeal to rest. In this new era, Latin Americans accepted, as did the rest of the world, the neoliberal economic model that required free market and financial reforms. During the same time period, Latin America became increasingly democratic, which led to a plethora of new political parties, mostly appealing to the lower socioeconomic groups. The two collided in the late 1990s, and this carried over into the 21st century. By the mid-1990s, neoliberal economic reforms were in place,



but workers' quality of life had not improved. In the new democratic climate, workers supported populists such as Venezuela's Hugo Chávez, Bolivia's Evo Morales, Brazil's Luiz Inácio Lula da Silva, and Nicaragua's Daniel Ortega. Mexicans voted for change in 2000 with the presidential election of Vicente Fox of the rightist National Action Party, which ended 70 years of rule by the Partido Revolucionario Institucional. At the same time, as Latin America's political dynamics were changing, so too were its global affiliations.

The implementation of the North American Free Trade Agreement in 1994 that anticipated a Canadian, Mexican, and U.S. free market within a decade, in reality mirrored other regional economic arrangements. Led by Brazil, Latin Americans resisted the U.S. vision for a Free Trade Association of the Americas as a continuation of U.S. hegemonic efforts in the hemisphere. Instead, Latin Americans set out to strengthen their own regional arrangements and to complete trade agreements with other nations.

#### ORGANIZATION AND COVERAGE

The entries contained in this volume convey the wide range of Latin America's internal developments in the 20th century and the region's place in the international community. Broad topical entries on economics, politics, and women, for example, augment the text on individual nations, persons, and events. The entries on significant persons such as Castro, José Carlos Mariátegui, and Perón highlight their contributions to the Latin American experience. Entries reflecting the arts—art, music, and literature—explain the broad parameters of their changing scope throughout the 20th century. Those on inter-

national events, from the independence of Panama in 1903 to treaty discussions between the European Union (EU) and MERCOSUR in the late 20th century, not only discuss the event itself but place it within the larger parameters of hemispheric and global relations.

Users of this volume can expand their understanding of a given entry by referring to the cross-references included in each one. These direct the reader to individuals and topics that relate to the specific entry at hand. For example, to appreciate the stagnation of Chilean politics after World War II and the 1970 election of Allende, the reader should refer not only to the Chile and Allende entries but also to those on political parties and economics. Likewise, for a better understanding of the EU-MERCOSUR linkage, the reader might also refer to entries on economics and trade patterns. The reader might also use the complete list of entries in the front of this volume, as well as the end-of-entry references to cross-volume related entries, to find the historical roots of selected topics.

The readings suggested at the conclusion of each entry are the most germane to the given topic and the most detailed studies of it. The bibliography at the back of the volume provides the reader a further opportunity to explore the tapestry of the Latin American experience by augmenting these specialized works with works of a broader perspective. Meanwhile, the appendix brings together a collection of readings and documents that illustrates the broader themes suggested at the beginning of this introduction: Latin America's challenge to U.S. hegemony in the region and the challenge to the elite's dominance of the internal affairs by the emerging middle and lower socioeconomic groups.

# ❧ TIME LINE ❧

## (CA. 1900–PRESENT)

### 1897

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- General Eloy Alfaro becomes president of Ecuador, setting in motion a 30-year period of Liberal rule and marking the beginning of Ecuador's modern history.

### 1898

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- With assistance from the United States, Cuba wins its war for independence from Spain, and the United States gains permanent control of Puerto Rico.
- The United Fruit Company is established and over the next half century exerts significant economic and political influence in several circum-Caribbean nations, particularly in Central America.

### 1902

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- Cuba becomes an independent nation with Tomás Estrada Palma as its first president after its acceptance of the Platt Amendment, which grants authority to the United States to intervene in its political and fiscal affairs.

### 1902–04

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- European gunboats blockade the Venezuelan coast to force debt repayments to continental financiers.

### 1903

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- With U.S. support, Panama achieves independence from Colombia. Panama then signs the Hay-Bunau-Varilla Treaty, which permits the United States to construct a transisthmian canal through Panama.
- José Batlle is elected to his first term as president of Uruguay. He sets the nation on a socialist course that for the most part remains in place at the start of the 21st century.

### 1904

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- In his annual message to Congress, U.S. president Theodore Roosevelt announces his Corollary to the Monroe Doctrine.
- General Rafael Reyes becomes the first of a series of Conservative presidents who govern Colombia until the Great Depression in 1930.

### 1906

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- U.S. troops begin a three-year occupation of Cuba that results in new electoral laws and the election of José Miguel Gómez as president.

### 1907

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- Meléndez family comes forward to dominate politics in El Salvador until 1931.

### 1908

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- General Juan Vicente Gómez seizes control of the Venezuelan government and begins a 27-year military dictatorship.
- Building on the research of a Cuban doctor, U.S. Army surgeon William Gorgas eradicates malaria in the Panama Canal Zone.

### 1909

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- Following a decade of labor-government conflict, Chilean workers form the Gran Federación de Obreros de Chile.

## 1910

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- With his major opponent, Francisco Madero, jailed, Porfirio Díaz wins his last presidential election; it is followed by an insurgency that marks the beginning of the Mexican Revolution.
- Division of Latin American Affairs is established in the U.S. State Department.

## 1911

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- Porfirio Díaz is ousted from the Mexican presidency and is replaced by Francisco Madero.

## 1912

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- U.S. Marines land in Nicaragua to quell three years of civil disorder following the 1909 overthrow of strongman José Santos Zelaya.
- Argentina implements the Sáenz Peña Law that mandates universal male suffrage and the use of secret ballots in elections.

## 1913

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- Mexican president Francisco Madero is killed during a coup d'état engineered by General Victoriano Huerta.

## 1914

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- Panama Canal opens to world shipping.
- In Jamaica, Marcus Garvey founds the United Negro Improvement Association.

## 1915

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- United States begins its 19-year occupation of Haiti.

## 1916

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- In the midst of the Mexican Revolution, rebel Francisco “Pancho” Villa attacks Columbus, New Mexico.

## 1917

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- A new Mexican constitution is adopted that grants the central government extensive powers over the national economy.
- Brazil becomes the only South American nation to declare war against Germany during World War I.
- Oil is discovered in Venezuela and within 10 years becomes the country's leading export.
- For \$25 million, the United States purchases the Danish Caribbean Virgin Islands.

## 1919

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- In Peru, the 25-year period of relative political peace and economic prosperity known as the “Aristocratic Republic” comes to an end with the start of the “Ocenio,” the 11-year dictatorship of Augusto B. Leguía.

## 1920

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- Through constitutional manipulation, Manuel Estrada Cabrera is removed from the Guatemalan presidency after 22 years in office.

## 1921

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- According to the Thomson-Urrutia Treaty, the United States compensates Colombia \$25 million for its loss of Panama and provides for free transit of Colombian ships through the Panama Canal.

## 1923

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- The Conference on Central American Affairs ends in Washington, D.C., with agreements to withhold diplomatic recognition from revolutionary governments and to replace standing armies with national guards.
- In Mexico, Peruvian Victor Raúl Haya de la Torre establishes the Alianza Popular Revolucionaria Americana.
- Mexican revolutionary Francisco “Pancho” Villa is assassinated.

## 1924

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- Anglo Ecuadorean Oilfields, Ltd., discovers oil on the Ecuadorean coast.
- Following the Dominican Republic's ratification of a financial agreement that establishes a U.S.-controlled customs receivership, marines are withdrawn from that country.

## 1926–29

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- Cristeros conduct a campaign against the Mexican government and the anticlerical provisions of the 1917 constitution.

## 1927

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- In Nicaragua, Augusto César Sandino ignites a six-year guerrilla war against the U.S. presence in the country.

## 1928

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- Following his election victory in November, President-elect Herbert Hoover makes a 10-week goodwill tour of Latin America.

- Through unconstitutional means, Gerardo Machado is reelected president of Cuba and extends his term to six years, setting off a political crisis.

## 1929

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- Chile and Peru settle the territorial Tacna-Arica dispute.
- A global depression commences. It will last until the outbreak of World War II.

## 1930

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- The U.S. State Department publishes the Clark Memorandum, which refutes the 1904 Roosevelt corollary as a legitimate extension of the Monroe Doctrine.
- In Peru, Lieutenant Colonel Luis M. Sánchez Cerro ousts President Augusto B. Leguía, a move that begins a period of economic and political instability.
- In Brazil, a coup d'état elevates Getúlio Vargas to head of state.
- The commander of the Dominican Republic's army, Rafael Leonidas Trujillo, seizes control of the government, marking the start of a 31-year dictatorship.

## 1931

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- Maximiliano Hernández Martínez in El Salvador and Jorge Ubico in Guatemala establish dictatorships that last until 1944.
- Panama's national police assist the nationalistic group Acción Comunal to overthrow President Florencio Harmodio Arosemena, marking the military's entry into national politics.

## 1932

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- Bolivia and Paraguay commence the Chaco War.
- A peasant uprising led by Agustín Farabundo Martí in El Salvador is brutally repressed by the military.
- Tiburcio Carías Andino becomes president of Honduras, commencing a dictatorship that lasts until 1948.

## 1933

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- At the 7th Pan-American conference in Montevideo, Uruguay, U.S. secretary of state Cordell Hull announces the good neighbor policy that forswears further U.S. intervention in the internal affairs of Latin American nations.
- In Cuba, Fulgencio Batista leads the "Sergeant's Revolt" that results in socialist Ramón Grau Martín becoming president.

## 1934

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- Nicaraguan rebel leader Augusto César Sandino is assassinated by government troops in Managua.
- With U.S. encouragement, Fulgencio Batista directs the ouster of Ramón Grau Martín as Cuban president and replaces him with Carlos Mendieta.
- In a new treaty, the United States and Cuba abrogate the Platt Amendment and provide for the continued U.S. occupation and use of its naval base at Guantánamo Bay.
- A new Brazilian constitution extends the presidency of Getúlio Vargas for another four years.

## 1934–40

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- Mexican president Lázaro Cárdenas nationalizes the foreign-owned rail and oil industries and implements a 44-million-acre land distribution program.

## 1935

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- Bolivia and Chile agree to a truce in the Chaco War.

## 1936

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- Anastasio Somoza de García gains control of the Nicaraguan government, establishing a family dynasty that will last until 1979.
- Getúlio Vargas declares a Novo Estado, or "new state," in Brazil that grants government control over a corporate economic state.
- Dominican Republic dictator Rafael Trujillo directs the killing of an estimated 12,000 Haitians in the northern border region of the two nations.

## 1938

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- The Mexican government nationalizes U.S.- and British-owned oil companies.
- The Communist and Socialist Parties form an alliance to create a Popular Front in Chile.
- Integralists fail in their fascist putsch against Brazilian president Getúlio Vargas.
- A peace treaty formally ends the Bolivian-Paraguayan War and grants Paraguay ownership of the disputed Chaco territory.

## 1939

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- Following the outbreak of the European war, the foreign ministers of the Western Hemisphere meeting at Panama declare the establishment of a safety zone around the Western Hemisphere.

## 1940

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- In response to German victories in Europe, the Western Hemisphere's foreign ministers meet in Havana, where they approve a "no-transfer" principle designed to deny Germany access to French, Dutch, and potentially British possessions in the Caribbean.
- A new constitution, considered the most progressive in Latin America at the time, is instituted in Cuba, after which Fulgencio Batista is elected to a four-year presidential term.
- Rexford Tugwell is appointed governor of Puerto Rico and introduces Operation Bootstrap to foster the island's industrial development.

## 1941

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- Mexico and the United States agree to a compensation package for the 1938 nationalization of U.S.-owned oil companies.
- U.S. involvement in World War II begins after the Japanese attack the U.S. naval base at Pearl Harbor, Hawaii. Brazil and Mexico subsequently send troops abroad to fight on the Allied side.
- The Panamanian National Police replace populist president Arnulfo Arias, a critic of the United States, with Ricardo Adolfo de la Guardia, who is sympathetic to U.S. interests in the canal zone.
- Peruvian troops defeat Ecuadorean forces in their ongoing border dispute.

## 1942

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- The Western Hemisphere's foreign ministers adopt measures that place civil rights restrictions on Axis residents in Latin America.

## 1942–45

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- President Manuel Ávila Camacho uses U.S. World War II economic assistance to initiate Mexico's industrialization.

## 1943

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- The Argentine military establishes a dictatorship that includes Colonel Juan Perón as secretary of labor.

## 1944

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- Violent demonstrations and protests and the loss of military support force the resignation of Presidents Maximiliano Hernández Martínez in El Salvador and Jorge Ubico in Guatemala.
- The government-established House of Ecuadorian Culture significantly increases educational, artistic, and scientific opportunities throughout Ecuador.

## 1945

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- Juan José Arévalo becomes Guatemala's first civilian president in 14 years.
- In Peru, José Luis Bustamante y Rivera is elected president with support from the Alianza Popular Revolucionaria Americana, legalized as a political party for the first time since 1932.
- The military forces the ouster of Brazilian president Getúlio Vargas.

## 1946

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- Juan Perón is elected president of Argentina; his subsequent nationalization of foreign-owned industries includes compensation.
- Brazil's first national steel plant, Volta Redonda, is inaugurated.

## 1947

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- Latin American and U.S. delegates meeting in Rio de Janeiro, Brazil, agree to the Treaty of Reciprocal Assistance, or Rio Pact, which calls for cooperation should there be an attack on one of the hemispheric nations.
- Evita Perón spearheads a campaign in Argentina that results in women receiving the right to vote.

## 1948

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- Colombian labor leader Jorge E. Gaitán is assassinated during rioting in Bogotá that contributes to the emergence of guerrilla groups claiming to represent the interests of the nation's poverty-stricken people.
- Organization of American States is established.
- Military coup in Venezuela leads to the dictatorship of General Marcos Pérez Jiménez.
- A 44-day civil war in Costa Rica results in the emergence of José Figueres as a prominent political figure for the next generation.
- Chile's Law for the Defense of Democracy outlaws the Communist Party.
- Ecuador's "banana boom" begins, making the country a major player in the global market.
- Luis Muñoz Marín becomes the first Puerto Rican to be elected governor of Puerto Rico.

## 1950

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- Jacobo Arbenz is elected president of Guatemala, and his administration is characterized by reform, particularly land distribution.
- Puerto Rican nationalists fail in their attempt to assassinate U.S. president Harry S. Truman.

## 1952

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- Guatemalan president Jacobo Arbenz signs into law a sweeping land reform bill that provides for the distribution to peasants of privately held unused land.
- Realizing that he cannot win a fair presidential election, Fulgencio Batista seizes control of the Cuban government.
- Bolivian army caves into public pressure and permits Victor Paz Estenssoro to assume the presidency following his electoral victory. Paz will implement sweeping government-sponsored socioeconomic programs.

## 1953

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- Fidel Castro is sentenced to 15 years in prison for his leadership role in the unsuccessful July 26 attack on the Moncada military barracks in Santiago de Cuba.

## 1954

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- The U.S. Central Intelligence Agency engineers the ouster of Guatemalan president Jacobo Arbenz, paving the way for military rule and nearly 40 years of civil strife.
- General Alfredo Stroessner seizes control of the Paraguayan government, beginning his 35-year dictatorship.
- Brazilian president Getúlio Vargas commits suicide in his office.

## 1955

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- In a general amnesty, Fidel Castro is released from prison in Cuba and flees to Mexico.
- Argentine military ousts President Juan Perón, who flees first to Paraguay and then to Spain.

## 1956

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- Nicaraguan dictator Anastasio Somoza de García is assassinated. His son Luis ascends to the presidency.
- Fidel Castro returns to Cuba and escapes into the Escambray Mountains, where he conducts a three-year guerrilla war against President Fulgencio Batista.

## 1957

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- Construction of Brasília begins. It will replace Rio de Janeiro as Brazil's capital city.
- Great Britain grants internal self-government to Jamaica.
- François Duvalier comes to power in Haiti's first universal suffrage election and subsequently keeps control through a reign of terror.

## 1958

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- During a goodwill tour of Latin America, U.S. vice president Richard M. Nixon meets with Brazilian president Juscelino Kubitschek, who proposes an economic development plan for Latin America.
- Venezuelan military ousts President Marcos Pérez Jiménez. Elections bring civilian Rómulo Betancourt to office.
- Central American foreign ministers agree to the establishment of a Central American Common Market that goes into effect two years later.
- Facing a loss of civilian and military support, on New Year's Eve, President Fulgencio Batista flees Cuba for the Dominican Republic.

## 1959

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- Fidel Castro victoriously marches into Havana to introduce Cuba to a revolutionary and dictatorial regime.

## 1960

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- Venezuela is among the founding members of the Organization of Petroleum Exporting States.
- Amid soaring tensions, the United States imposes a sugar embargo on Cuba that prompts Castro to nationalize U.S.-owned industries on the island; this is followed by a U.S. trade embargo that continues to the present day.

## 1961

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- Before leaving office, U.S. president Dwight D. Eisenhower severs diplomatic relations with Cuba.
- The Sandinista National Liberation Front is established in Nicaragua.
- U.S. president John F. Kennedy announces the Alliance for Progress.
- Fidel Castro's forces repel the U.S.-sponsored invasion of Cuba at the Bay of Pigs.
- Vice President João Goulart becomes Brazil's president following the resignation of Jânio Quadros.
- The family of Dominican Republic dictator Rafael Trujillo flees the country following his assassination.

## 1962

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- At its meeting in San José, Costa Rica, the foreign ministers vote to expel Cuba from Organization of American States activities.
- The United States forces the withdrawal of Soviet missiles from Cuba.

## 1962–83

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- Beginning with Jamaica and Trinidad and Tobago in 1962, Great Britain grants independence to Guyana (1966), the Bahamas (1973), Grenada (1974), Dominica (1978), St. Lucia and St. Vincent and the Grenadines (1979), Belize and Antigua and Barbuda (1981), and St. Christopher and St. Nevis (1983).

## 1963

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- Fidel Castro makes his first visit to the Soviet Union.
- Under the auspices of Alliance for Progress funds, the School of the Americas opens in the Panama Canal Zone to train Latin American military officers.

## 1964

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- Anti-American riots erupt following a failed effort by Panamanian students to fly their national flag at Balboa High School in the canal zone.
- Organization of American States approves a hemispheric embargo against and the severing of diplomatic relations with Cuba.
- With clandestine U.S. financial support, Christian Democrat Eduardo Frei is elected president of Chile, but throughout his six-year term, Frei is unable to deliver on socioeconomic reform promises.
- With tacit U.S. approval, Brazilian military ousts João Goulart, marking the beginning of a 21-year military dictatorship.

## 1965

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- United States sends 40,000 troops to the Dominican Republic in order to prevent an alleged communist takeover of the country.

## 1966

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- Joaquín Balaguer is elected president of the Dominican Republic and rules until 1978.

## 1967

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- Ernesto “Che” Guevara is killed by Bolivian forces in a remote area of the Andes.
- Panamanian military officer Manuel Noriega begins a near 20-year career as an informant for the U.S. Central Intelligence Agency.
- U.S.-based oil giant Texaco-Gulf makes a major oil discovery in Ecuador’s Amazon region that within a decade triggers a period of prosperity.

## 1968

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- Fidel Castro directs the nationalization of the estimated 55,000 private businesses operating in Cuba.
- General Juan Velasco Alvarado seizes control of the Peruvian government and begins a seven-year period of social and economic reform.

## 1969

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- Lieutenant Colonel (later general) Omar Torrijos becomes Panama’s head of state.

## 1970

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- Self-professed Marxist Salvador Allende wins the Chilean presidential election.
- Fidel Castro’s goal of a 10-million-ton sugar crop fails to materialize, bankrupting the Cuban economy and forcing him to turn to the Soviet Union for economic assistance.
- Panama banking laws are changed so that it can become one of the world’s largest “offshore” banking centers.

## 1971

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- Jean-Claude Duvalier succeeds his father as Haiti’s dictator.

## 1972

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- Michael Manley is appointed prime minister of Jamaica.

## 1973

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- Chilean president Salvador Allende is killed during a military coup d’état led by General Augusto Pinochet, who sets in motion a 15-year brutal and nondemocratic regime.
- Amid the country’s economic and political turmoil, the Argentine military permits the return of Juan Perón from Spain to be elected president of Argentina for the third time.

## 1974

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- Colombia’s political violence is replaced by the emergence of warfare between competing drug cartels and the cartels and the government for the next 35 years.

## 1975

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- Argentina’s military government begins an eight-year “Dirty War” against “radicals” that results in uncounted deaths and an estimated 10,000–30,000 disappeared persons.
- Venezuelan government nationalizes the oil industry.

## 1976

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- Isabel Perón, who succeeded her husband to the Argentine presidency in 1974, is ousted by the military.

## 1977

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- U.S. president Jimmy Carter and Panama's head of state, Omar Torrijos, sign the Panama Canal Treaties that provide for the United States to relinquish control of the canal and canal zone to Panama by the end of 1999.
- Cuba and the United States establish “interests sections” in each other's capitals.
- In Argentina, the Mothers of the Plaza de Mayo begin their silent marches in front of the presidential offices to protest the dictatorship and the “disappeared ones,” those unaccounted for in the military's Dirty War to eliminate all leftists from the country.

## 1979

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- Strongman Anastasio Somoza flees Nicaragua, ending a 43-year family dynasty. The Sandinistas take control of the Junta of National Reconciliation that governs the country.

## 1980

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- In El Salvador, the Farabundo Martí National Liberation Front is founded. In San Salvador, Archbishop Oscar Romero is assassinated by a right-wing death squad.
- Approximately 250,000 Cubans flee the country in the Mariel boatlift. Fidel Castro uses the exodus as a means to deport criminals and mentally and physically ill people.
- Anastasio Somoza DeBayle is assassinated in Asunción, Paraguay, by Argentine radicals.
- General Manuel Antonio Noriega succeeds General Omar Torrijos as head of state in Panama following the latter's death in an airplane crash.
- In Peru, the radical guerrilla group known as Sendero Luminoso, or Shining Path, unleashes a “people's war” in Andean indigenous communities that eventually spreads into the cities.

## 1981

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- U.S. president Ronald Reagan terminates U.S. financial assistance to Nicaragua and approves the U.S. Central Intelligence Agency's plan to direct a counterrevolutionary movement against the Sandinistas. Reagan also approves a massive military assistance program to the Salvadoran government to battle the Farabundo Martí National Liberation Front.

## 1982

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- In an eight-week war, British forces defeat Argentine troops to maintain control over the Falkland Islands in the South Atlantic Ocean.
- Mexico's suspension of service payments on its international debt obligations triggers a Latin American debt crisis.

## 1983

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- Pope John Paul's visit to Central America is marred by a confrontation with the Sandinistas in Nicaragua and the execution of six guerrillas in Guatemala.
- The political unrest that follows Argentina's loss to Britain in the Malvinas/Falklands War in 1982 leads to the election of Raúl Alfonsín as president.
- With support from the Organization of Eastern Caribbean States, the United States sends military forces into Grenada to rescue U.S. students on the island but also to prevent the emergence of an alleged communist regime.

## 1984

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- Christian Democrat José Napoleón Duarte defeats right-wing candidate Roberto D'Aubisson in El Salvador's presidential election.

## 1985

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- Alan García becomes the first Aprista candidate to be elected president of Peru.
- José Sarney becomes Brazil's first civilian president in 21 years.

## 1986

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- The inauguration of Vinicio Cerezo as president of Guatemala marks the country's return to civilian government.
- In Ecuador, indigenous groups band together to form the Confederation of Indigenous Nationalities to defend and promote Indian land rights, religion, and culture.
- Haitian dictator Jean-Claude Duvalier and his family flee the country's turmoil, eventually finding haven in France.

## 1987

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- Central American presidents accept the proposed peace plan of Costa Rican president Oscar Arias to end the fighting in Central America.

## 1988

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- Contras agree to terminate their war against the Sandinistas in Nicaragua.



- General Manuel Antonio Noriega seizes control of the Panamanian government and uses the military to crush opposition groups.
- Noriega is indicted by Miami and Tampa, Florida, grand juries on drug trafficking and racketeering charges.
- In a national plebiscite, General Augusto Pinochet loses his bid to govern Chile for an additional eight years.
- Carlos Salinas de Gortari becomes president of Mexico after a contested election. In a break with Mexico's past, Salinas will accept neoliberal economic policies and initiate discussions that lead to the North American Free Trade Agreement.

## 1989

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- The United States initiates Operation Just Cause, which results in the arrest of Panamanian dictator Manuel Noriega and returns him to Miami to face drug charges.
- Government forces defeat an uprising in San Salvador sponsored by the Farabundo Martí National Liberation Front and kill six Jesuit priests and their housekeeper at the Universidad Centroamericana.
- Ousted from office by a military coup d'état, Paraguayan dictator General Alfredo Stroessner flees to Brazil.
- Patricio Alwyn, candidate of the left-of-center 17-party Consternación coalition, becomes Chile's first civilian president in 17 years; the coalition continues to govern the country into the 21st century.

## 1990

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- Violeta Barrios de Chamorro defeats Sandinista candidate Daniel Ortega in Nicaragua's presidential election.
- Political unknown Alberto Fujimori is elected Peru's president. He initiates an economic austerity program and launches an all-out war against the Shining Path.
- A massive demonstration by indigenous groups and sympathizers throughout Ecuador illustrates their importance in the nation's political dynamics.
- U.S. president George H. W. Bush launches the Enterprise for the Americas Initiative that envisages a Western Hemispheric free trade zone.
- For the first time, Cuban trade relations with the Soviet Union are conducted in "hard currency."

## 1991

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- *Peronista* Carlos Saúl Menem becomes president of Argentina, but to the disappointment of his urban labor supporters, he implements neoliberal economic policies.
- Argentina, Brazil, Paraguay, and Uruguay establish the Southern Cone Common Market, or MERCOSUR.

- With the collapse of the Soviet Union, Cuba loses its major benefactor and enters a "special period" of economic hardship.
- Guatemala extends diplomatic recognition to an independent Belize.
- An outbreak of cholera, not seen since the 19th century, symbolizes Peru's decades-old socioeconomic woes.
- Jean-Bertrand Aristide assumes the Haitian presidency but is overthrown by the military eight months later. A crisis follows when the U.S. government refuses the admission of thousands of Haitians fleeing the country.

## 1992

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- The governments of El Salvador and Nicaragua begin the implementation of the Central American Peace Accords.
- In an "*autogolpe*," or self-coup, Peruvian president Alberto Fujimori suspends the constitution and closes Congress.
- Peruvian military capture Shining Path leader Abimael Guzmán in Lima.

## 1993

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- Juan Carlos Wasmosy becomes Paraguay's first civilian president in 40 years.

## 1994

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- North American Free Trade Agreement (NAFTA) goes into effect on January. It establishes a common market between Canada, Mexico, and the United States. On the same day, Zapatista National Liberation Army in Chiapas violently awakens Mexico to protest the government's lack of assistance to the country's indigenous peoples and the implementation of NAFTA.
- U.S. president Bill Clinton hosts the first Summit of the Americas to initiate planning for a Free Trade Association of the Americas.
- Argentine president Carlos Saúl Menem successfully maneuvers a constitutional adjustment that permits his election to a second consecutive term.

## 1995

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- Following the August exodus of an estimated 20,000 *balestros* from Cuba to the United States, the two governments reach an agreement to control immigration across the Florida Straits.
- With 88 percent of the popular vote, René Preval wins the Haitian presidential election and enters office in the first peaceful transfer of power in the nation's history.

## 1996

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- The Guatemalan government concludes a peace agreement with the Guatemalan National Revolutionary Unity to end the country's 36 years of civil strife.
- Pope John Paul II visits El Salvador, Guatemala, and Nicaragua.

## 1997

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- An estimated 2 million Ecuadoreans demonstrate across the country to force President Abdalá Bucaram to resign and flee the country.

## 1998

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- Pope John Paul II becomes the first Catholic prelate to visit Cuba. He publicly denounces Cuba's human rights record and calls on the United States to lift its trade embargo on the country.
- Former Chilean dictator Augusto Pinochet is arrested and detained in Great Britain on a Spanish warrant charging him with responsibility for the death of Spanish citizens residing in Chile during his administration.
- In response to previous government corruption and drastically low living standards, Hugo Chávez is elected president of Venezuela.
- Ecuador and Peru settle their border dispute, a controversy that dated to the Spanish colonial period.

## 1999

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- Mireya Moscoso, the widow of Arnulfo Arias, becomes the first female president of Panama.
- In a mass before 10,000 people at Mexico City's Basilica of Our Lady of Guadalupe, Pope John Paul II rails against the global culture of violence.
- At noon on December 31, the United States formally hands over control of the Panama Canal to Panama.

## 2000

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- General Augusto Pinochet is released from house arrest in Great Britain and returns to Chile.
- Vicente Fox, candidate of the rightist Partido de Acción Nacional, is elected president of Mexico, the first non-member of the Partido Revolucionario Institucional since 1929 to become president.
- In accordance with Venezuela's new constitution, Hugo Chávez is reelected president.
- Peruvian president Alberto Fujimori flees to Japan amid corruption charges.

## 2001

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- Following a financial crisis, the Argentine economy collapses, and its effects spill into Brazil. Economic recovery begins in 2006.

## 2003

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- Former leftist labor leader Luiz Inácio Lula da Silva is elected president of Brazil. Despite his socialist philosophy, he implements moderate socioeconomic programs.

## 2004

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- United States–Chile Free Trade Agreement goes into effect.

## 2005

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- Free trade agreement is concluded between the United States, Dominican Republic, Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua.

## 2006

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- Owing to an unidentified illness, Fidel Castro “temporary” passes Cuban leadership to his brother, Raúl Castro.
- Evo Morales is elected president of Bolivia, the first person of indigenous descent to hold this office.
- Despite growing opposition that included demonstrations, work stoppages, and a national referendum to remove him from office, Hugo Chávez is reelected president of Venezuela.
- Consternación candidate Michelle Bachelet is elected the first female president of Chile.
- Nobel Peace Prize winner Oscar Arias is elected to a second term as president of Costa Rica.
- Sandinista strongman and leader against the U.S.-sponsored Contra War during the 1980s, Daniel Ortega wins Nicaragua's presidential election.
- The Dominican Republic and Haitian governments conclude an agreement to end 200 years of racially motivated conflict between the two nations.

## 2007

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- To meet the needs of larger ships, construction begins on a third set of locks for the Panama Canal.
- Alberto Fujimori returns to Peru from Chile on an extradition warrant to face corruption charges during his presidential administration.
- United States–Peru Free Trade Agreement goes into effect.
- The Venezuelan electorate rejects proposed constitutional amendments that would have tightened Hugo Chávez's grip on government.

## 2008

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- Cuban president Fidel Castro officially resigns, owing to illness, and is succeeded by his brother, Raúl Castro.
- Bolivian president Evo Morales survives a recall referendum.
- Twelve South American nations—Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay, and Venezuela—join to create the Union of South American Nations, modeled after the European Union.
- Brazil's National Petroleum reports the discovery of large oil deposits off its Atlantic coast.
- Russia dispatches ships, planes, and troops to conduct joint military exercises with Venezuela.

## 2009

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- U.S. president Barack Obama promises closer U.S. relations with Latin America at the Summit of the Americas meeting in Trinidad and Tobago.
- On January 12, 2010, an earthquake measuring 7.0 on the Richter scale strikes 15 miles west of Haiti's capital, Port-au-Prince, killing approximately 225,000 and injuring another 300,000.
- On February 27, 2010, an 8.8 magnitude earthquake, followed by aftershocks and tsunami waves, strikes south-central Chile, claiming hundreds of lives and hundreds more injured and missing.

✿ ENTRIES A TO Z ✿





**Acción Comunal** Initially a secret society founded by middle-sector professionals in Panama City, PANAMA, on August 19, 1923, the organization came to represent Panamanian nationalists who challenged the ruling elite and the country's relationship with the United States. Outside the milieu of the traditional Liberal-Conservative elite politics that had dominated Panama since independence in 1903, Acción Comunal represented the small businessmen, engineers, lawyers, medical personnel, and bureaucrats who labored outside the Panama Canal Zone and wanted greater economic and political opportunities. The society was influential in the 1924 election to the National Assembly of Harmodio Arias Madrid and subsequently was responsible for the 1931 coup d'état that vaulted him to the presidency and for the election to the presidency of his brother, ARNULFO ARIAS MADRID, in 1940 and 1949.

Acción Comunal advocated for a greater government role in society and an EDUCATION program that stressed traditional Panamanian values and culture, including the teaching of the Spanish language. It called for government programs to assist Panamanian, but not West Indian, laborers in gaining jobs in the canal zone and to aid the rural poor through land acquisition programs. The founding of the National University in 1935 ensured the education of a new generation of intellectuals imbued with these nationalist concepts, which in turn increased demands for government action. Their nationalist rhetoric blamed the United States and West Indians for all that was wrong in Panama. After World War II, Panamanians throughout the country increased their nationalistic demands for Panamanian control of the canal and found expression in the events leading to the 1977 Carter-Torrijos Treaties (see PANAMA CANAL TREATIES).

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**Act of Chapultepec (1945)** The Act of Chapultepec was a resolution adopted at the Inter-American Conference on Problems of War and Peace convened at Mexico City, Mexico, from February 21 to March 8, 1945, that called for the consultation of American states when one of those states was attacked directly or indirectly or when its political independence or sovereignty was threatened. Following the consultation, the American states would respond in unison, including in taking military action.

The resolution was another in a series of Latin American efforts to limit U.S. unilateral action in the hemisphere and particularly in the Caribbean. In their desire for greater Latin American input in hemispheric policy and actions, the delegates were also concerned that the upcoming San Francisco Conference, scheduled for April 25 to June 26, 1945, to establish the United Nations (UN) would grant that organization the authority to supersede any regional action. The issue was settled with Article 51 of the UN's charter, which provided that regional self-defense action could be taken provided it was immediately reported to the UN Security Council for consideration. Significantly, the article did not obligate the UN to take any action. These restrictions, however, did not prevent subsequent unilateral interventions in the Caribbean by the United States.

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**Adams, J. M. G. M. "Tom"** (b. 1931–d. 1985) *prime minister of Barbados* Born on September 24, 1931, in Spooner's Hill, BARBADOS, John Michael Geoffrey Manningham Adams, better known as Tom Adams, was the only son of Grantley Adams (b. 1898–d. 1971), the founder of the Barbados Labour Party (BLP). After studying at Harrison College in Barbados, Adams earned an M.A. in politics, philosophy, and economics at Oxford University in 1965. After briefly working for the British Broadcasting Corporation, he returned to Barbados in 1966 to pursue a political career. Adams was elected to the House of Assembly in 1966, and in 1971, after his father died, he became the leader of the opposition.

The BLP defeated ERROL BARROW's Democratic Labour Party (DLP) in the 1976 parliamentary elections, and Adams became prime minister (1976–85). One of his first acts was to rename the Seawell Airport the Sir Grantley Adams International Airport. Adams pursued a foreign policy closely aligned with the United States and supported OPERATION URGENT FURY, the U.S.-led invasion of GRENADA in 1983, by sending a contingent of the Barbados Defense Force to accompany American troops. Following the invasion, the United States agreed to expand the infrastructure of the international airport in Barbados and the development of the Regional Security System, based at the Sir Grantley Adams International Airport, to provide security for the eastern Caribbean. The greatly expanded runway made the Sir Grantley Adams International Airport one of the few places in the world where the Concorde made regular flights. The four-hour flight from London to Barbados was especially popular with British tourists.

Adams's decision to support the U.S.-led invasion of Grenada was the subject of intense political debate in Barbados. Barrow, the leader of the opposition, sharply criticized Adams's policy and accused the prime minister of being a puppet of Ronald Reagan's administration. The majority of the Barbadian population, however, eventually supported Adams's initiative in the conflict. Political analysts believed that Adams would easily win the 1986 parliamentary elections. Adams, however, died following a heart attack in Bridgetown on March 11, 1985. He was succeeded by his deputy prime minister, Bernard St. John. In the 1986 elections, St. John lacked mass popular appeal, and Barrow's DLP was swept back into office.

**Further reading:**

Hilary Beckles. *A History of Barbados: From Amerindian Settlement to Caribbean Single Market* (Cambridge: Cambridge University Press, 2007).

**agriculture** Agriculture has long been the primary economic pursuit of working Latin Americans. Pre-Columbian societies cultivated a wide variety of crops including avocados, chili peppers, maize (corn), potatoes, and tomatoes; they also raised guinea pigs and turkeys for domestic consumption. Many of these items remain part of Latin America's traditional diet. In the 15th and 16th centuries, the Spanish and Portuguese brought new food items from Europe to Latin America, including barley and other grains, citrus fruits, and table vegetables. They also brought livestock and subsequently coffee, sugarcane, and bananas from Africa. Over time, the economic interchange transformed the character of pre-Columbian agriculture.

The Spanish economic system also altered landholding patterns. Indigenous community-owned lands (*ejidos*) were replaced by large Spanish-owned tracts known as *encomiendas* (and later haciendas) with the title holder gaining labor rights to the NATIVE AMERICAN tenants. Latin America's independence from Spain did not significantly alter landholding patterns, and by mid-19th century, the term *latifundio* was used to describe large, privately owned estates. Peasants who remained tied to a landowner had little, if any, opportunity to improve their quality of life, and those who drifted deeper into the countryside eked out a living on poor soil without the benefits of mechanization, fertilizers, or other modern



A young woman inspecting growth of coffee beans, a staple export crop of several nations in the circum-Caribbean region and Brazil (*Office of Inter-American Affairs, Photography and Research*)

farming methods. This process also led to a closed political system that was directed by the elites at the expense of the poor.

Advances in technology and TRANSPORTATION again changed the face of Latin American agriculture in the late 19th and early 20th centuries. Europe's industrial revolution resulted in the rapid rise of urban centers that lured rural workers to factories and prompted the overseas search for foodstuffs. Steam-powered and subsequently motorized vessels, along with refrigeration technology, made Latin America's agricultural produce readily available to the world's markets. As a result, Argentine beef, wheat, and wool were exported to Europe. BRAZIL sent sugar, rubber, and most important, coffee. European colonies and other states in the Caribbean produced sugar, coffee, and tropical fruits for foreign consumption. Central American coffee was a common site on the docks at Hamburg, Germany. Two countries, CUBA and MEXICO, became tied to the U.S. market. Although Cuba was still a Spanish colony until 1898, the primary market for its sugar and tobacco was the United States. When Mexican dictator Porfirio Díaz (b. 1830–d. 1915) opened his country to foreign investment in the late 19th century, U.S. businesses invested heavily in the grain and cattle industries to feed both U.S. and European consumers. Two U.S. companies with circum-Caribbean-wide holdings were the United Fruit Company, which specialized in bananas and other tropical fruits, and the Knight Sugar Company. The primary beneficiaries of this system were Latin America's large landowners and foreign agricultural investors. Furthermore, with time's passage, the financial costs of modernization and construction of supporting infrastructure could not be met locally, which created new opportunities for foreign investment. During this same time period, Latin American governments found ways to move the indigenous and peasants off their lands and make them part of the *latifundio* system. The loss of small farms adversely affected the local food supply.

The Great Depression that dominated the 1930s followed by World War II stung Latin America's agro-export sector. Not all countries could strike barter agreements for their primary products, as ARGENTINA did with Great Britain, thus providing a safety valve for its wheat and beef. Germany used the Aski mark, a special currency system of bank credits to purchase Latin American foodstuffs, but Aski marks could only be spent on German manufactured goods. U.S. reciprocal trade treaties had minimal impact, as most Latin American goods already entered that country under most favored nation status. Except for certain primary products, such as Argentine beef and wheat, Brazilian rubber, and Cuban and Caribbean sugar, Latin America's agro-export sector further deteriorated during World War II.

The years immediately after World War II did not improve for agriculture. Latin Americans were advised to await Europe's economic recovery from the war, when that continent could again import Latin American pro-

duce; in fact, European demand for Latin American agricultural products never returned to pre-depression levels, as Europe had found a more amenable trading partner in the United States. Two countries, Brazil and Mexico, used U.S. wartime aid to stimulate industrialization, while others such as Argentina and CHILE used profits from the international sale of their primary products to do the same (see INDUSTRY). In Cuba, an odd combination of legislators representing local sugar interests and Communist-led urban LABOR unions voted against accepting U.S. grants and loans to diversify the postwar ECONOMY. The Cuban sugar growers wanted only to continue the benefits of the wartime economy. They did not accept the fact that the new world sugar producers would come back to the market and instead demanded that the government in Havana seek new markets for the products. The Communists, wanting to maintain their socioeconomic prominence and place in the political system, mistrusted the United States.

In response to the 1959 CUBAN REVOLUTION, the UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT (USAID) promoted rural development and agrarian reform in Cuba in the 1960s and early 1970s. While the United States received much criticism for its loss of interest in the program following President John F. Kennedy's death in 1963, Latin America's elite also created obstacles. They had no interest in sacrificing any of their landholdings to peasants, much less see them provided with the financial credits and supplies to make those holdings successful. Peasants themselves were wary of the unknown. The elite did benefit from USAID's modernization programs, however, which increased production through such things as mechanization and the use of fertilizers. Government and nongovernment organizations sponsored rural development programs were not the only means attempted to bring about change. Revolution was another.

The Mexican, Guatemalan, Cuban, and Nicaraguan upheavals shared the common objective of land redistribution to the rural poor. The Mexican CONSTITUTION OF 1917 provided the legal cover for the government to acquire the country's vast *latifundio* system and to redistribute those lands in small tracts and *ejidos* to peasants. An estimated 44 million acres (17.8 million ha) alone were redistributed in the 1930s. Guatemalan president JACOBO ARBENZ GUZMÁN's land redistribution program led directly to the 1954 U.S.-sponsored invasion of GUATEMALA and restoration of the old order. FIDEL CASTRO RUZ's various initiatives to create farmer's cooperatives never satisfied the local demand for food, while the world market found its sugar elsewhere. The model implemented in NICARAGUA suffered from administrative ineptitude and a 10-year U.S.-sponsored guerrilla war.

From the 1970s onward, Latin American countries experienced mass MIGRATION to urban areas so that by the end of the 20th century, only about one-



third of the workforce labored in the agricultural sector. Nevertheless, agriculture today still employs more people than any other single sector in Latin America, and agricultural exports account for slightly over half of the region's exports. The neoliberal economic model adopted in the 1980s accounts for the increased global demand for certain Latin American products: soybeans and other grains, beef, and forest products, all of which are grown on large estates, including domestic and foreign corporations. During this agro-export growth, urban centers faced food shortages that led to the introduction of urban farming in Brazil, Mexico, Argentina, Cuba, and elsewhere. In the early 21st century, governments across the region were examining ways to open new lands in order to produce foodstuffs for domestic consumption.

See also AGRICULTURE (Vols. I, II, III); COLUMBIAN EXCHANGE (Vols. I, II); LATIFUNDIO (Vol. III).

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Kunio Takase. *Agriculture in Latin America and Global Structural Reform* (Tokyo, Japan: IDCJ, 1997).

Lori Ann Thrupp. *Bittersweet Harvests for Global Challenges in Latin America's Agricultural Export Boom* (Washington, D.C.: World Resources Institute, 1995).

**Alfaro Delgado, José Eloy** (b. 1842–d. 1912) *dominant Ecuadorean politician from 1897 to 1911* Born in Montecristi in Manabí Province, ECUADOR, José Eloy Alfaro Delgado was the son of a Spanish immigrant businessman and a mixed-blood Ecuadorean woman. At age 22, Alfaro became involved in revolutionary politics on behalf of the Liberal cause between 1865 and 1871, after which he fled to PANAMA and became a successful businessman, married, and fathered eight children. From Panama, he disbursed funds to Liberal causes throughout Latin America, earning an international reputation as a stalwart against Conservative governments. He returned to Ecuador in 1895 to led the successful Liberal Revolution. A constituent assembly elected him president in 1897, setting in motion 30 years of Liberal rule. He returned to the presidency in 1906 for a second term. Alfaro initiated many anticlerical measures, including the nationalization of CATHOLIC CHURCH properties, secularization of EDUCATION, limitations on the public activities of the clergy, and establishing state control over marriage and divorce. During his term, U.S. entrepreneur Archer Harman completed the construction of a railroad between Guayaquil and Quito. Alfaro attempted to determine the future of Ecuadorean politics following

the untimely death of President-elect Emilio Estrada (b. 1855–d. 1911) on December 21, 1911. Condemned by the public for attempting to use the government for his own purposes, Alfaro and his followers were taken from a Quito jail by a mob and brutally murdered on January 18, 1912.

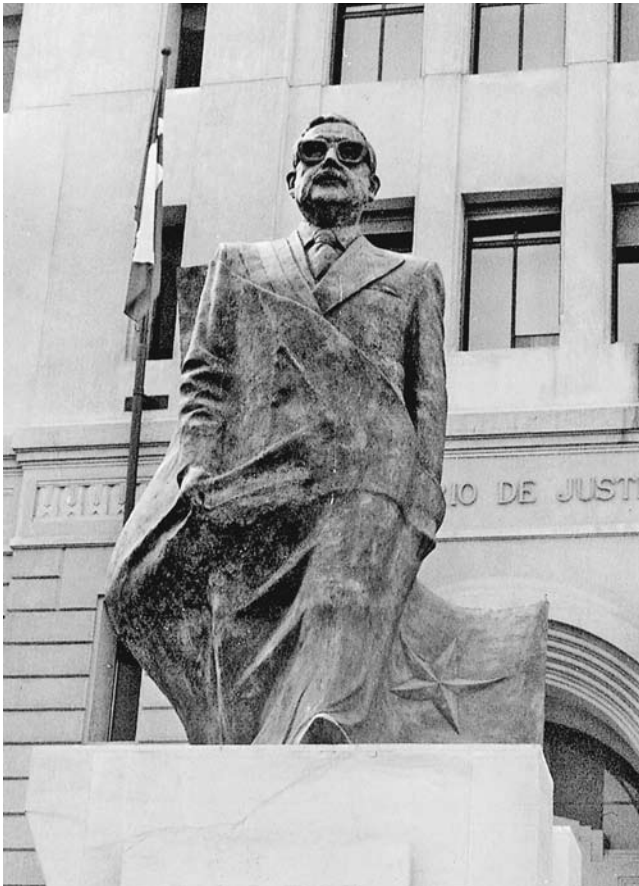
See also CONSERVATISM (Vol. III); LIBERALISM (Vol. III).

#### Further reading:

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**Allende Gossens, Salvador** (b. 1908–d. 1973) *president of Chile* Born into a middle-class family in Valparaíso, CHILE, Salvador Allende Gossens was educated in local public schools and, in 1933, earned a medical degree from the University of Chile, where he was active in student politics and accepted the principles of socialism. With others, including MARMADUKE GROVE VALLEJO, Allende was a leader in the coup that resulted in the 10-day Socialist Republic of Chile in June 1932. A year later, he was a founding member of the Socialist Party, and in 1937, at age 29, he was elected to the Chamber of Deputies. The Socialists became part of the Popular Front that led to the 1939 presidential election of Pedro Aguirre Cerda (b. 1879–d. 1941), who appointed Allende minister of health. Allende was elected four times to the Senate between 1945 and 1969, earning a reputation as an excellent parliamentarian, and was president of the Senate from 1965 to 1969. During his time in the Senate, Allende authored or coauthored many pieces of legislation that displayed his understanding of a government's social responsibilities: New legislation established a medical college; family and pregnancy assistance for the poor; and social security for workers, peasants, widows, and orphans.

Until 1952, Allende also held several offices in the Socialist Party, including that of secretary-general. However, he and some of his colleagues left the party following the decision to support the presidential candidacy of CARLOS IBÁÑEZ DEL CAMPO. Allende's group founded the People's Front and nominated him for the presidency that same year, but he garnered only 4 percent of the popular vote. In 1956, Allende's People's Front joined with the Communist, Socialist, and small leftist parties to form the Popular Action Front (Frente de Acción Popular, or FRAP), which supported Allende's presidential bids in 1958 and 1964. Allende lost to Jorge Alessandri (b. 1896–d. 1986) by only 35,000 votes in the 1958 contest, a result that raised expectations for his next bid. But, changing world conditions by 1964 militated against a FRAP victory. The cold war between the United States and the Soviet Union had reached a peak: After the nuclear arms race that followed the Soviet launching of *Sputnik* in 1957 and the raising of the Berlin Wall in 1961, FIDEL CASTRO RUZ had begun his CUBAN



A statue of President Salvador Allende in Santiago, Chile. Elected on September 4, 1970, Allende served until ousted by a military coup d'état on September 11, 1973. (Thomas M. Leonard Collection)

REVOLUTION, and the subsequent 1961 BAY OF PIGS INVASION and the 1962 CUBAN MISSILE CRISIS not only threatened the world with war but raised the specter of the spread of communism across Latin America.

Allende's 1964 campaign was plagued by these new global conditions, in particular Castro's revolution in Cuba. The Christian Democrats, the CATHOLIC CHURCH, and the traditional Conservative and Liberal Parties, all painted a frightening picture of Cuba. They asserted that if Allende won the 1964 election, the same political tyranny, lack of civil and political rights, attack on the Catholic Church, and depressed ECONOMY would prevail in Chile. The U.S. government agreed: The Central Intelligence Agency (CIA) funneled \$3 million into EDUARDO FREI MONTALVA's campaign. Allende was roundly defeated in the September 4, 1964, elections. Frei captured 55.6 percent of the popular vote, and Allende, 38.6 percent.

At best, Frei had a mixed record of success during his six-year presidency. In the 1970 presidential election, Allende, now running under the Popular Unity (UP) banner, received 36.3 percent of the vote; Conservative Jorge Alessandri, 34.9 percent; and Christian Democrat,

Radomiro Tomić (b. 1914–d. 1992), 27.8 percent. While awaiting congressional approval of the election results in November, there was a significant amount of political maneuvering by Conservatives and the Christian Democratic Party (Partido Demócrata Cristiano [PDC]) to deny Allende the presidency. Additionally, the Conservatives and the United States were linked to coup plots. Amid the uncertainty, rich Chileans began withdrawing their funds from local banks, depositing them abroad for safekeeping. No action was taken to deny Allende his victory, and on November 3, 1970, Congress confirmed him as president of Chile.

Allende's first actions as president only proved to his critics their belief that he was a tyrant. He decreed a one-time wage increase and then a price freeze. He used the funds from Frei's "Chileanization" program to support his own housing, education, and medical assistance programs. For a year, Allende's economic policies appeared successful: Industrial growth increased by 8.3 percent, and agricultural output, by 5.3 percent, and the government was adequately managing the \$315 million balance of payments deficit. The optimism changed to pessimism in 1971 with the nationalization of U.S.-owned businesses such as copper companies, International Telephone and Telegraph (IT&T), Ford Motor Company, W. R. Grace, and the Bank of America. Castro's visit to Chile on November 10–11, 1971, only confirmed the worst fears that Allende belonged to the international communist movement.

The 1970 government mandated that wage increases remain frozen, thus wages did not keep pace with rising prices caused by a shortage of consumer goods and foodstuffs. Unemployment increased, and government revenues decreased following U.S. president Richard M. Nixon's edict to halt U.S. importation of Chilean copper. Nixon also successfully maneuvered to prevent the Inter-American Development Bank and World Bank from extending further credits to the Allende administration. Clandestinely, the CIA provided financial support for antigovernment demonstrations and other forms of protest in Chile and paid truck drivers not to deliver foodstuffs to the cities. By the end of 1972, the Chilean economy hit new lows. Inflation stood at 323 percent, agricultural imports were up 84 percent over 1970, and real wages had dropped by 7 percent in the same period. Allende's proposal to replace Congress with a one-house legislature of the people struck at the heart of the nation's political history of democracy and threatened the elite and middle sectors. By summer 1973, rumors abounded about a possible coup d'état. It came on September 11, when Army Chief of Staff AUGUSTO PINOCHET UGARTE engineered Allende's ouster. Allende died during the fighting, possibly by his own gun. With Allende's death, Chile's socialist experiment came to an abrupt end. Pinochet would replace it with a brutal military dictatorship and a neoliberal, or free market, economy.

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**Alliance for Progress** On March 13, 1961, U.S. president John F. Kennedy pledged that the United States would work to satisfy the basic human needs of all Latin Americans and that these socioeconomic improvements would be carried out within a democratic framework. Kennedy cautioned that “those who do not make evolutionary change possible make revolution probable.” Kennedy’s warning addressed not only the historical roots of Latin America’s socioeconomic and political disparities but also international and local events such as the Russian and Chinese Revolutions, the spread of communism after World War II, and FIDEL CASTRO RUZ’S 1959 CUBAN

REVOLUTION. Occupied with containing communist expansion in Western Europe, Korea, and Southeast Asia, the United States ignored pleas from Latin America’s leadership for a program similar to the 1948 European Recovery Program (ERP), or Marshall Plan, as it was popularly known. Only after the U.S.-sponsored invasion of GUATEMALA in 1954, which restored the old order, did U.S. policy change (see GUATEMALA, U.S.-SPONSORED INVASION OF). In 1956, Brazilian president JUSCELINO KUBITSCHKE DE OLIVEIRA warned U.S. authorities that if it did not support socioeconomic changes, it faced the probability of hemispheric turmoil. A 1959 U.S. congressional report reaffirmed Kubitschek’s view.

Kennedy envisioned a \$20-billion, 10-year U.S. commitment in public and private capital and another \$80-billion effort from Latin American governments, the world’s other industrial nations, and international financial institutions. On August 17, 1961, the Inter-American Economic and Social Council of the ORGANIZATION OF AMERICAN STATES (OAS) met in Punta del Este, URUGUAY, to draft the Charter for the Alliance for Progress, as envisioned by Kennedy and Kubitschek.

The Alliance for Progress’s charter called for long-term economic planning, balanced production, and Latin



“Barrio Alianza” Alianza in Bogotá, Colombia, a housing project constructed with funds provided by the Alliance for Progress (*United States Information Agency*)

American economic integration to bring about price stability, prevent price swings in the commodity markets, and prevent sharp fluctuations in exchange rates that discouraged exports and reduced foreign investment throughout the region. Ultimately, these economic measures would result in a minimum 2.5 percent annual increase in the per capita income.

The Alliance for Progress also called for an extensive agrarian reform program, more equitable distribution of national income, more low-income housing, increased medical services in both urban and rural areas, increased educational opportunities, and a reduction in Latin America's high population growth rates. Kennedy also encouraged cultural exchanges that included bringing Latin Americans to the United States to educate North Americans about Latin America's cultural richness and diversity.

The Alliance for Progress furthermore called on Latin American governments to curtail MILITARY spending and use those funds for socioeconomic improvements. To achieve this objective, the military would take on a new role by conducting counterinsurgency programs designed to alter its traditional brutal image and to build popular loyalty to the state rather than to communists who promised a better world through the destruction of the existing order. Under this program, the military would engage in civic action programs that included providing medical care, constructing health and sanitation facilities, clearing forests and jungles for agricultural purposes, building houses and roads, and conducting literacy and technical skills training. The military would also shift its emphasis from defending against possible border attacks to internal security.

The Alliance for Progress did not achieve its lofty goals for several reasons. Following its initial euphoria, the United States lost interest in the program as it became more involved in the Vietnam War. Despite his Great Society program at home, U.S. president Lyndon Johnson did not share Kennedy's interest in social reform in Latin America and dismantled much of the U.S. government infrastructure that administered the program. President Richard M. Nixon had even less interest in the region. Believing in military solutions to guerrilla conflict, both presidents increased arms sales to Latin America. Although there were some improvements in health, education, and welfare, Latin America's elite and middle sectors opposed using national taxes to go beyond the U.S. expenditures. The elite opposed land redistribution programs and along with the middle sector, resisted the implementation of a progressive tax program. Equally strenuously, the elite and middle sectors refused the democratization requirements that the Alliance for Progress called for, such as broadening the electoral base, ending rigged elections, and holding elections free of intimidation. They had no interest in sharing political power with the lower socioeconomic sector. Instead of democracy, during the 1960s, there were 16 extraconstitutional changes in government throughout Latin America resulting in military regimes. As the decade

progressed, the military also altered its focus from civic action programs to crushing suspected and real guerrilla groups. In that process, the police and military used U.S. military assistance to brutalize the population.

Given these conditions, in 1970, the U.S. Congress began to cut funding for the Alliance for Progress until its closure in 1973. During that three-year period, the UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT transferred many of its activities to a private-sector initiative called Partners for the Americas.

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#### Amazon Regional Cooperation Agreement

(Amazon Pact) (1978) Popularly referred to as the Amazon Pact, the Amazon Regional Cooperation Agreement was signed on July 3, 1978, by representatives of the governments of BOLIVIA, BRAZIL, COLOMBIA, ECUADOR, GUYANA, PERU, SURINAME, and Venezuela to promote the harmonious development of the Amazon region and to share the benefits of that development among the contracting parties. While the pact intended to curtail foreign development of the Amazon region, the member nations lacked sufficient financial resources to develop it on their own. In the mid-1980s, the member states turned to world financiers but faced environmental requirements as prerequisites for loans and grants. This led to the establishment in 1989 of a committee on natural resources and the environment to design environmental projects that would satisfy lenders' requirements. It also led to discussions on economic integration, which resulted in the creation of the ANDEAN COMMUNITY OF NATIONS in 1996.

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#### American Popular Revolutionary Alliance

(Alianza Popular Revolucionaria Americana; APRA; Aprista Party) The American Popular Revolutionary Alliance, or Aprista Party, was founded by Peruvian VICTOR RAÚL HAYA DE LA TORRE on May 1, 1924, while he

was in exile in Mexico City. Originally, Haya de la Torre envisioned a continent-wide organization that would advocate a return of the Panama Canal to PANAMA, stand against U.S. imperialism, and oppose the ruling elites throughout Latin America. While the Aprista Party subsequently did influence several Latin American political parties, most notably COSTA RICA'S NATIONAL LIBERATION PARTY (PLN) and BOLIVIA'S NATIONAL REVOLUTIONARY MOVEMENT (MNR), it is identified with PERU. APRA originally appealed mainly to the sugar workers who had lost their jobs to mechanization in the late 19th and early 20th centuries but subsequently attracted many university students and middle-sector people, who wished to change Peru's closed and corrupt political system. At one time, APRA was populist, anti-oligarchical, reformist, and nationalist. It called for control of foreign capital, agrarian reform, industrialization, and the redistribution of wealth. According to Peru's ruling military-elitist clique, APRA was nothing more than a communist organization that it would never permit to take political power.

Haya de la Torre stood as APRA's presidential candidate in 1931, after which the party was outlawed until 1945 because its leftist orientation challenged Peru's established order. A constant target of the ruling MILITARY, Haya de la Torre was forced to seek refuge in the Colombian embassy in 1948, where he remained for five years. In 1956, he negotiated an agreement with ruling general Manuel A. Odría (b. 1897–d. 1974), under which APRA was permitted to participate in politics in return for “modifying” its position on reform. The pact did not prevent the *apristas* from continuing to oppose government policies.

Finally, APRA's ALAN GABRIEL LUDWIG GARCÍA PÉREZ won the 1985 presidential contest. His administration fell on hard times in part due to global economic conditions adversely affecting his program at home. The economic doldrums also led to the election of ALBERTO KEINYA FUJIMORI. Fifteen years after completing his first term, García returned to the presidency on July 28, 2006, after winning a runoff election against Olineta Humala, candidate of the left-of-center Union of Peru Party.

Throughout its existence, APRA has experienced a significant amount of infighting, with those with more “leftist” or radical tendencies leaving to establish new parties or movements such as the Popular Action Party (AP) in 1956, the Movement of the Revolutionary Left (MIR) in 1965, and the TÚPAC AMARU REVOLUTIONARY MOVEMENT (MRTA) in 1984. Although APRA has held the Peruvian presidency only twice in its existence, its influence in shifting national politics from oligarchic control to more inclusionary democratic regimes has been significant.

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**Andean Community of Nations (Comunidad Andina de Naciones; CAN)** On May 26, 1969, the Treaty of Cartagena formed a trade bloc that included BOLIVIA, COLOMBIA, ECUADOR, PERU, and CHILE. By 2008, members of the Andean Community of Nations (CAN) had a combined gross domestic product of \$745.3 billion and included an estimated 120 million people. In 1976, Chilean president AUGUSTO PINOCHET UGARTE announced the withdrawal of his nation from CAN on the grounds of economic incompatibility, and Chile was quickly replaced by VENEZUELA. In 1993, an operational free trade zone came into being among Bolivia, Colombia, Ecuador, and Venezuela. A 1997 agreement provided for Peru's gradual incorporation into the Andean Free Trade Zone.

Following the initiation of the NORTH AMERICAN FREE TRADE AGREEMENT in January 1, 1994, and U.S. president Bill Clinton's pursuit of a FREE TRADE AREA OF THE AMERICAS (FTAA), several Latin American nations saw a need to band together to counter what they perceived to be another U.S. effort to exert influence in the Western Hemisphere. To resist this, CAN joined with the SOUTHERN CONE COMMON MARKET (MERCOSUR), established in 1992, to unite all of the South American nations before dealing with the United States on an FTAA, and in 2005, each country became an associate member of the others' trade bloc. On September 20, 2006, Chile returned to CAN as an associate member with the stated intention of seeking full membership, which was done a year later. Today, Venezuela's status remains unclear. On April 23, 2006, that country's president, HUGO RAFAEL CHÁVEZ FRÍAS, announced his nation's withdrawal from CAN because Peru and Colombia had completed free trade agreements with the United States, his avowed enemy. Chávez hesitated three days later, when on April 26, 2006, he announced that he would reconsider his decision. Today, Venezuela has not completed the paperwork to withdraw, and its Foreign Ministry says that the process might take five years.

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**Anthony, Kenny** (b. 1951– ) *prime minister of St. Lucia* Born on January 8, 1951, in Laborie, SAINT LUCIA, Kenny Anthony earned a B.S. in government and history from the University of the West Indies in 1976. He returned to ST. LUCIA and began teaching at the Vieux Fort Secondary School. In 1977, he was elected president of

the St. Lucia Teachers' Union. In reward for his support of the St. Lucia Labour Party (SLP), he was appointed minister of education in 1980, a position that he held until 1981. Anthony earned a Ph.D. from the University of Birmingham in England in 1988. He taught law at the University of the West Indies from 1988 to 1996.

In 1996, he returned to St. Lucia and was elected leader of the SLP. He won the 1997 parliamentary elections and became prime minister on May 24, 1997. One of his first acts in office was to break official diplomatic relations with Taiwan and recognize the People's Republic of China. Although Anthony was successful at strengthening the national economy, and especially the tourism industry, the distribution of wealth became more skewed during his tenure. Anthony suffered a surprise defeat in the December 2006 parliamentary elections. Although the United Workers Party (UWP) won 11 of the 17 seats in Parliament's House of Assembly, the popular vote was marginal. Anthony, however, retained his seat representing Vieux Fort South with a substantial majority and continued as leader of the SLP. When Prime Minister John Compton became incapacitated as a result of a series of heart problems in May 2007, Anthony

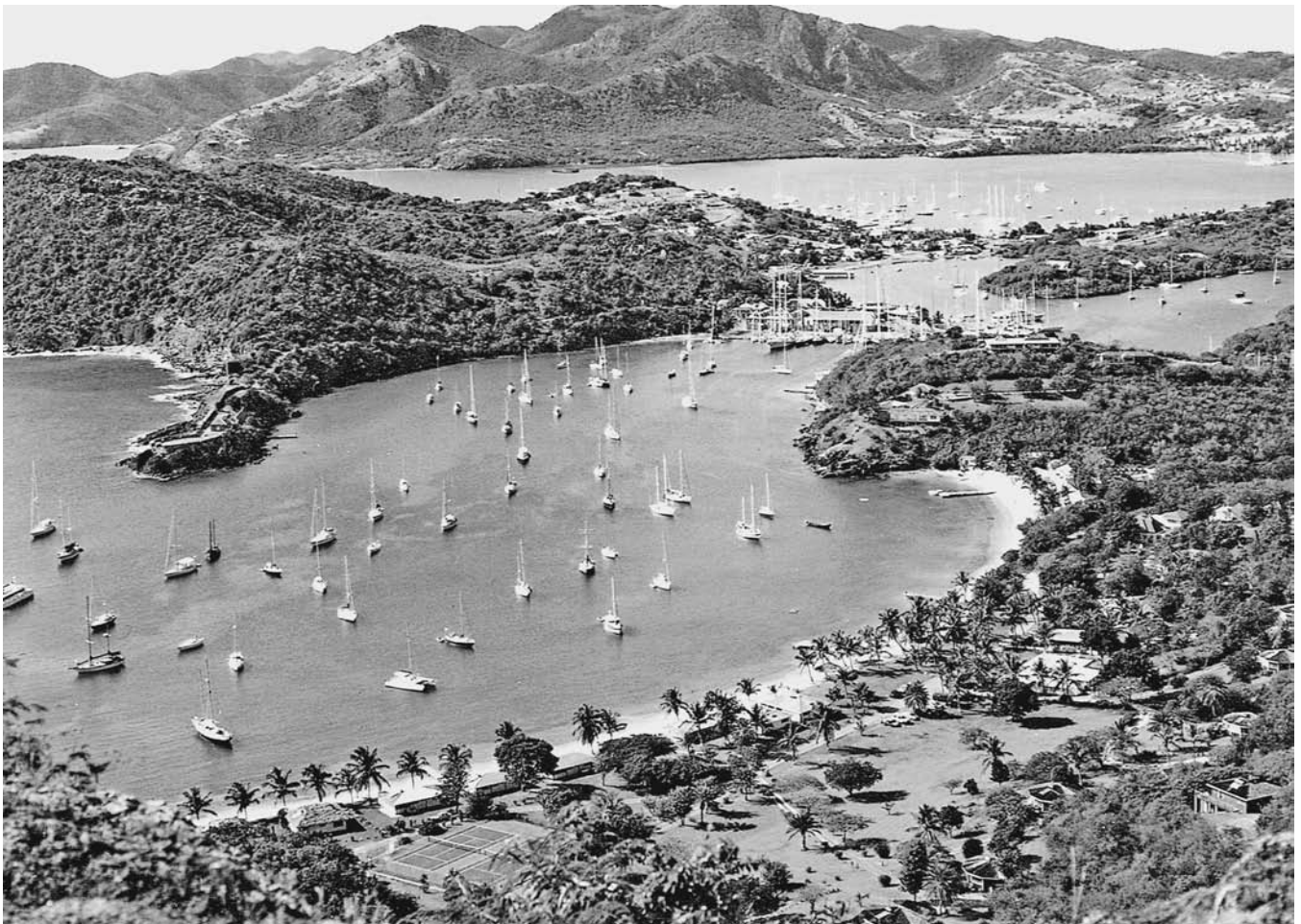
opposed the appointment of Stephenson King (1958– ) as acting prime minister and, in September 2007, as prime minister. Instead, Anthony called for new elections, in which he would be a candidate.

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**Antigua and Barbuda** Located in the Leeward Islands, Antigua and Barbuda achieved independence from the United Kingdom on November 1, 1981. The nation consists of several islands, of which Antigua is the largest and most populous. Barbuda, the other major island, is located to the north of Antigua.

Occupying 171 square miles (443 km<sup>2</sup>) of territory, Antigua and Barbuda is located southeast of Saint Barthélemy, Saint Martin, and Anguilla; east of SAINT CHRISTOPHER AND NEVIS; northeast of Montserrat; and north of Guadeloupe, DOMINICA, Martinique, SAINT LUCIA, and SAINT VINCENT AND THE GRENADINES. The capital and largest city, St. John's, is on the island of



View of Antigua's English Harbour from Shirley Heights (Thomas M. Leonard Collection)

Antigua. More than 90 percent of Antigua and Barbuda's population of 83,000 is composed of people of African or mixed African and European descent. Whereas increasing numbers of Antiguan and Barbudans have left the islands to seek economic opportunities in the United States, over the past 25 years, some 5,000 U.S. citizens have moved to Antigua and Barbuda. The official language of Antigua and Barbuda is English. Antiguan Creole, a blend of West African languages and English developed during the 18th century, is spoken by the general populace. EDUCATION, however, is delivered in standard English. Upper-class Antiguan and Barbudans tend to deny the ability to speak or understand Antiguan Creole.

Christopher Columbus discovered the islands in 1493, naming the larger island Santa María de la Antigua, hence its current name. English settlers arrived in 1632 and quickly set about establishing plantations (see CARIBBEAN, BRITISH). Christopher Codrington, who established the first large sugar estate on Antigua in 1674, leased the island of Barbuda to grow food for his slaves. The only town on Barbuda is named after Codrington. During the 18th century, Antigua was the headquarters of the British Caribbean Fleet. Although the British ended slavery in 1834, the economic opportunities for the freed blacks were limited. In 1939, the British government, in an attempt to improve the plight of the local population, urged the formation of the Antigua Trades and Labour Union (ATLU). The ATLU became the political vehicle for VERE CORNWALL BIRD. Elected president of the ATLU in 1943, Bird was elected to the colonial House of Assembly in 1945. He established the Antigua Labour Party (ALP), which became the majority party in 1951. Bird served as chief minister from 1960 to 1967 and as premier from 1967 to 1971, when he was defeated by the Progressive Labour Movement (PLM), led by George Walter. Bird, however, returned to power in 1976 and served as premier until Antigua and Barbuda gained independence. During the 1970s, internationally renowned cricketer VIV RICHARDS, a native of St. John's, became a hero for the people of Antigua and Barbuda.

Whereas Queen Elizabeth II is the head of state who appoints a governor to oversee the political system, the leader of the main political party in the House of Representatives is the prime minister. Bird served as prime minister from 1981 until he retired from politics in 1994. In the March 1994 parliamentary elections, power passed to Bird's son, Lester Bird, who was prime minister until 2004. The United Progressive Party (UPP), a coalition party formed in 1992 by the PLM, the Antigua Caribbean Liberation Movement, and the United National Democratic Party, led by BALDWIN SPENCER, won 12 of the 17 seats in the House of Representatives in the 2004 parliamentary elections. A significant portion of the Antiguan and Barbudan population felt that the ALP was rife with corruption and nepotism. Antiguan author Jamaica Kincaid compared the Bird family to the Duvalier dictatorship in HAITI in her prose essay *A Small*

*Place*. Tourism, which accounts for more than 50 percent of all government revenue, has declined in the aftermath of the September 11, 2001, terrorist attacks.

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**APRA** See AMERICAN POPULAR REVOLUTIONARY ALLIANCE.

**Arantes do Nascimento, Edson** See PELÉ.

**Arbenz Guzmán, Jacobo** (b. 1913–d. 1971) *president of Guatemala* The son of a Swiss immigrant farmer and a Guatemalan mother who resided in Quezaltenango, Jacobo Arbenz Guzmán received his education at the Guatemalan Military Academy, where, in 1937, he became a social studies instructor. In 1939, he married María Cristina Vilanova, who had socialist sympathies despite her wealthy background.

Arbenz was an active participant in the demonstrations that led to the overthrow of JORGE UBICO Y CASTAÑEDA on July 1, 1944, and in the organization of the December 17–19, 1944, presidential election won by JUAN JOSÉ ARÉVALO. Shortly after Arévalo appointed him minister of defense, Arbenz began maneuvering to become GUATEMALA's next president. Allegedly, both men conspired to have army Major Francisco Javier Arana assassinated on July 18, 1949, in order to remove the last obstacle to Arbenz's election to the presidency, which occurred on November 5, 1950. Arbenz's electoral support came from lower-ranking MILITARY officers, urban labor, students, government workers, and some peasants. His campaign rhetoric, particularly the call to control foreign investment and the need for agrarian reform, could be interpreted as that of a populist, but in the climate of the cold war, the communist label stuck (see COMMUNISM IN LATIN AMERICA).

Once in office, Arbenz proposed the construction of a government-owned Caribbean port at Livingston to challenge the United Fruit Company's (UFCO) operation at Barrios and to break the same's railroad monopoly, the International Railways of Central America (IRCA). Arbenz proposed a government-owned hydroelectric plant to offer cheaper electricity than did U.S. operations. While these proposals struck largely at the primary role of U.S. companies in the Guatemalan ECONOMY, his call for progressive income tax and the distribution of land to peasants stuck at the elite.

The catalyst to oust Arbenz came on June 17, 1952, when the legislature approved his Agrarian Reform Law, which provided for the expropriation of idle land on government and private estates for redistribution to peasants in plots ranging from 8 to 33 acres (3.2–13.4 ha). Under this program, 1.5 million acres (607,000 ha) of land were purchased for \$8.3 million in government bonds and redistributed to an estimated 100,000 peasants. The new owners would pay for the land at a 5 percent rate of the value of their production. These actions alarmed Guatemalan landowners. In March 1953, Arbenz struck at UFCO when the government took over 209,842 acres (84,920 ha) of its uncultivated land and offered \$525,000 in compensation, which was based on the land's value as reported by UFCO to taxing authorities. UFCO claimed that the land was worth \$16 million.

UFCO appealed to Dwight D. Eisenhower's administration in Washington and conducted its own public relations campaign in the United States. The company portrayed Arbenz as a communist, and the Eisenhower administration agreed, particularly after a Swedish shipment of Czech-made small arms was discovered in May 1954. While the U.S. secretary of state maneuvered to gain approval of the ORGANIZATION OF AMERICAN STATES (OAS) for his country's intervention in Guatemala, the U.S. Central Intelligence Agency plotted the attack upon Guatemala with the intention of removing Arbenz from the presidency (see GUATEMALA, U.S.-SPONSORED INVASION OF). The attack came on June 18, 1954, under the leadership of General Carlos Castillo Armas (b. 1914–d. 1957) from bases in HONDURAS. Arbenz resigned on June 27, and Armas assumed the presidency on July 8. Arbenz fled Guatemala and traveled throughout Europe before settling in MEXICO, where he died on January 27, 1971.

See also COMMUNISM IN LATIN AMERICA; GUATEMALA (Vols. I, II, III, IV).

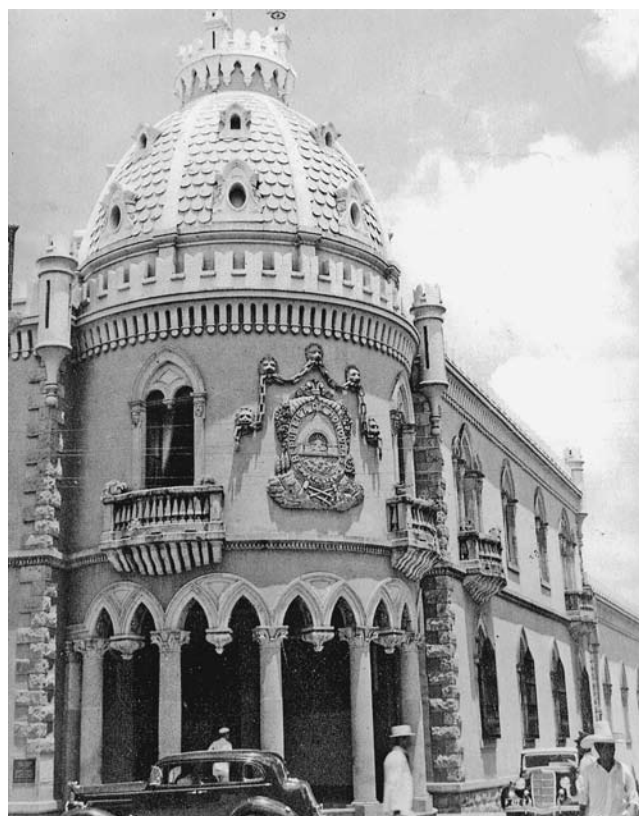
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**architecture** During the first three decades of the 20th century, several trends characterized Latin American architecture: modernism, national restoration, and art deco. The first, modernism, found acceptance in only a few places, such as ARGENTINA, BRAZIL, and MEXICO. As a result, few examples remain today. The second, national restoration, also had few immediate results but was the first attempt at purely American architecture that led to the study of architectural heritage. Art deco led to



The entrance to the Presidential Palace in Tegucigalpa, Honduras, reflects European influence on Latin American architecture in the early 20th century. (U.S. Army Signal Corps)

the development of modern architecture, with its simplification of geometrical designs and use of reinforced concrete.

Modern architecture took hold after World War I in 1919 when native Latin American students went abroad for university study and put their training into practice upon returning home. Leaders in this movement included Chilean Emilio Duhart (b. 1917–d. 1984) and Venezuelan Carlos Villanueva (b. 1900–d. 1975), whose work took root during the 1930s and early 1940s.

Also during the generation following World War II, a sense of rationalization found its way into the modern design of hospitals, housing complexes, educational facilities, and government buildings. From the mid-1960s until the early 1980s, there was greater experimentation with design and construction thanks to new technologies. This was evident in new and larger bank buildings and commercial centers, housing complexes, and research institutes. Latin American architecture suffered from a lack of imagination and creativity during the last generation of the 20th century owing to a more difficult economic climate. CUBA is a unique case. The urban decay seen there is most evident in Havana. "Old Havana," the center of Spanish influence, has been restored to help attract tourists, as have older city hotels, such as the Capri, while new hotels have been



constructed. Havana's once glittering waterfront, the Malecón, is currently under United Nations–sponsored restoration and renovation.

See also ARCHITECTURE (Vols. I, II, III); MODERNISM (Vol. III).

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**Arévalo, Juan José** (b. 1904–d. 1990) *president of Guatemala* BORN in GUATEMALA's Santa Rosa Province, Juan José Arévalo graduated in 1922 from the government's Normal School, a training ground for teachers, and thereafter worked in the Ministry of Education. Following JORGE UBICO Y CASTAÑEDA's election to the presidency in 1931, Arévalo went into exile in ARGENTINA, where he earned a doctorate in philosophy in 1934. He remained in Argentina until shortly after the July 1, 1933, coup that ousted Ubico. The middle-sector coup leaders encouraged Arévalo to return home and supported his successful bid for the presidency in the December 17–19, 1944, election. Arévalo took office on March 15, 1945.

Arévalo's socialistic philosophy and subsequent legislative program challenged Guatemala's traditional oligarchy made up of landowners, the MILITARY, and the CATHOLIC CHURCH. Coming to office at a time when the cold war between the United States and the Soviet Union was beginning, both the Guatemalan oligarchy and U.S. policy makers came to see Arévalo as a communist, though for different reasons. The Guatemalan oligarchy wanted to maintain its privileged position in society, while the United States sought to stop the tentacles of international communism from reaching CENTRAL AMERICA (see COMMUNISM IN LATIN AMERICA).

Designed to improve the quality of life mainly for urban workers, Arévalo's program included a social security law with worker's compensation, maternity leave, and minimum health care. LABOR unions and their right to strike were legalized. Hospitals and clinics were built throughout the country, and a government agency, the National Production Institute (INFOP), provided assistance to small farmers. Legislation in 1949 permitted peasants to rent unused land on large estates and the government to distribute German lands confiscated during World War II to peasants. Diplomatic recognition of the Soviet Union on April 20, 1945, and the subsequent emergence of known local Communists, such as Manuel Gutiérrez Garbín (d. 1966) and José Manuel Fortuny (b. 1916– ), as union leaders sealed the perception that Arévalo was taking Guatemala down the road to communism.

Arévalo came under increasing attack over time. The landed elite and their media spokespeople branded him as a communist. The archbishop of Guatemala, Mariano Rosell y Arellano (b. 1894–d. 1964), spoke out against

Arévalo and instructed the lower clergy to do the same. Arévalo survived 20 known coup attempts. U.S. ambassador Edwin J. Kyle viewed Arévalo's program within the local context. That perception changed in 1947 with the arrival in Guatemala City of a new ambassador, Richard C. Patterson. Patterson and his immediate superiors in the State Department saw Arévalo's programs within the larger Eastern and Central European context. Communism, they believed, had arrived in Central America.

Arévalo completed his term and was succeeded by JACOBO ARBENZ GUZMÁN, who was ousted in a U.S. Central Intelligence Agency–designed and –led coup in 1954 (see GUATEMALA, U.S.-SPONSORED INVASION OF). On the completion of his term in 1951, Arévalo resided in MEXICO. Arévalo's political career came to an end in 1963 when the military prevented his return to Guatemala to seek reelection. He did return in 1981, to reside in Guatemala City until his death on October 7, 1990.

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**Argentina** Consisting of approximately 1.1 million square miles (2.8 million km<sup>2</sup>), Argentina is located on South America's southeast coast, bordered by URUGUAY and the Atlantic Ocean to the east and CHILE to the west. BOLIVIA lies directly north and PARAGUAY and BRAZIL to the northeast. Today, nearly 85 percent of Argentina's 34 million inhabitants reside in urban areas. Nevertheless, its rich fertile lands, known as the Pampas, provided the primary products that gave the country entry into the global marketplace in the late 19th century, when technological advances such as refrigeration enabled Argentina to supply the rapidly industrializing western European nations, particularly Great Britain, with beef, wheat, and wool. For the first couple of decades of the 20th century, this TRADE relationship brought Argentina's landed elite newfound wealth, enabling them to enjoy lavish lifestyles and significantly contribute to Argentina's golden age.

During the same time period, the government opened the country to badly needed foreign capital for the construction of the infrastructure necessary to get the products to market. British and, to a lesser extent French, capital went toward building railroads and highways to connect the interior with the port at BUENOS AIRES, where foreign capital was used to build meat processing plants, warehouses, and port facilities. The British also entered

ancillary businesses in Argentina, such as banking and insurance. Many of the Britons who came to Argentina to manage these investments formed an “informal alliance” with the Argentine elite. Together, the two groups sought to maintain the system that served them well.

The export-based economy also produced a middle-sector group made up of white-collar workers such as managers, accountants, statisticians, skilled labor, and shopkeepers. As the 20th century progressed, the middle sector came to include others who benefited from liberal economic policies, particularly in education, including professors and students, and other professionals such as architects, doctors, lawyers, and journalists. With increasing economic power, this broad-based group sought participation in the political system to secure its own place in Argentine society.

A third group made up of urban laborers began to develop as the country’s economic focus started to shift from agriculture to export and industry. Urban labor subsequently became the largest group in Argentina’s socioeconomic structure. Argentina was never inhabited by large numbers of native Americans and thus lacked a local base from which to draw the labor required to work in the new urban industries. To fill the vacuum, Argentina opened its doors to thousands of European immigrants, mainly from Italy and Spain (see migration). By 1914, these immigrants accounted for approximately three-fifths of Argentina’s working class. However, the labor class lacked a political voice and faced opposition from the upper and middle sectors.

### EXPORT-BASED ECONOMY (1880s–1930)

As elsewhere in Latin America after independence, in Argentina, elite Conservatives dominated the political process until the 1880s, when the Liberals took over. The Liberals opened the country to foreign trade, encouraged and protected foreign investment, and modernized Buenos Aires, which took on a European, and particularly French, atmosphere. Whether Conservative or Liberal, however, the elite had no intention of sharing political power. Argentina was a democracy only on paper until the election of Radical Party candidate Roque Sáenz Peña (1910–14) in 1910. The Radicals also held a majority in Congress and a year later approved Sáenz Peña’s proposal for universal male suffrage, the secret ballot, and compulsory voting, thus satisfying the middle sector’s demand for participation in the political system. In 1916, Hipólito Yrigoyen (1916–22, 1928–30), longtime leader of the Radical Civic Union (popularly known as the Radical Party), captured the presidency. Initially, his administration appeared favorable to labor. That changed in 1918–19, when Argentina experienced high inflation owing to Europe’s increased postwar demand for agricultural products, which in turn led to violent labor strikes, demonstrations, and protests in Argentina over wages. President Yrigoyen used the police and the military to suppress labor activities and intern labor leaders. The

violence also contributed to an antilabor hysteria that the Argentine Patriotic League, a right-wing organization formed at the time, capitalized on. The Patriotic League gave expression to the upper and middle sectors’ dislike and fear of foreign-born laborers and the anarchist, communist, and socialist ideas espoused by their leaders. Fearing repeated labor violence, the Radical Party—which controlled the presidency, the national legislature, and most provincial governments—continued its harsh policies toward labor in the decade preceding the Great Depression. Feuding among its leaders—Yrigoyen and the more moderate Marcelo T. de Alvear—stymied the government’s effectiveness.

### EMERGENCE OF THE MILITARY IN POLITICS (1930–1943)

Argentine politics took a new turn on September 6, 1930, when a coalition of leftist groups ousted Yrigoyen from the presidency, charging that his government was illegal. It also ushered the military into politics. The Argentine military reflected the country’s social hierarchy: Promotion to the upper ranks was based on family status, while those from the middle and lower socioeconomic social sectors could not advance beyond mid-level officerships. The military was also split along ideological lines. General Agustín P. Justo (b. 1876–d. 1943) and his followers wished to turn the clock back to the pre-1910 days of oligarchic rule, while lower-ranking officers who followed General José F. Uriburu (b. 1868–d. 1932) favored the establishment of a corporate state, whereby the government controlled the agricultural, industrial, and labor sectors while permitting private enterprise to continue. In rigged elections, Justo captured the presidency in 1932, and fellow Conservatives followed him to the presidential palace, where they remained until 1943.

Despite the political stagnation, the government introduced important changes in economic policy. Most notable was the 1933 Roca-Runciman Agreement, which continued Argentina’s protected position in the British marketplace, while British goods received preferential treatment in Argentina through lower tariffs, currency manipulation, and quotas. Critics, then and now, argue that the agreement prevented the diversification of the Argentine economy while keeping it dependent on Great Britain. Nevertheless, the Roca-Runciman Agreement enabled Argentina to weather the Great Depression better than other nations. It also encouraged the country’s industrial development. By 1944, Argentina produced at home most of what it used to import from elsewhere.

During the same time period, the state undertook a vast public works program. Air- and seaports, waterworks, railroads, and all-weather roads to the country’s interior were constructed, and the state-owned oil monopoly Yacimientos Petrolíferos Fiscales (YPF) was expanded. The Conservative administrations also introduced modern social legislation, such as government-subsidized housing for the poor, pensions for government employ-

ees, indemnification of dismissal from work, and a five and one-half day workweek. This legislation reflected the growing importance of the urban labor force, which by the 1940s had become increasingly vocal. An estimated 90 percent of workers were literate and understood their political isolation, and they cast about for leadership.

### PERÓN'S POPULISM (1943–1976)

The Conservatives' political corruption, urban labor's frustration, public concern that Argentina might abandon its neutral stance during World War II, and the military's ambition threatened Argentina's fragile political structure. Since the 1930 coup, the military had continued to divide into factions united only by their growing distrust of professional politicians. One such faction was the Group of United Officers (Grupo de Oficiales Unidos, or GOU). On June 4, 1943, in response to "popular demand," the GOU engineered a coup d'état and installed General Arturo Rawson (1943) as provisional president. The coup began a three-year period of military governance. Congress was shut down, political parties were outlawed, and professional politicians were dismissed from the cabinet. The feuding generals, however, lacked a clear vision regarding Argentina's future and slowly granted increased power to Colonel JUAN DOMINGO PERÓN (1946–55, 1973–74), until he became vice president in 1944.

The 49-year-old Perón came from a middle-class background and was a strong nationalist, evidenced by his membership in the Argentine Patriotic League. For his participation in the 1930 coup, Perón was made an aide to the war minister and was subsequently sent to Italy, where he studied with Benito Mussolini's alpine troops. As a reward for his role in the 1943 GOU coup, Perón received his wish to be secretary of labor, and for the next two years, he courted laborers, who came to form his political base. He understood workers' needs for increased wages and improved working conditions. To achieve those objectives, Perón often encouraged workers to strike, and then in his position as labor secretary, he would negotiate a favorable settlement for them. Perón was assisted in his work by his mistress and later wife, MARÍA EVA DUARTE DE PERÓN, popularly known as Evita, who came from the lower socioeconomic class. With labor's support and the public efforts of the U.S. ambassador, Spruille Braden, Perón overcame opposition from Argentina's elite and middle sectors and won the 1946 presidential election with 54 percent of the vote.

As president, Perón capitalized on his charisma to implement a corporate state, uniting the nation's three economic sectors—agriculture, industry, and labor—under government control. He also created the Institute for the Promotion of Trade (Instituto Argentino de Promoción del Intercambio, or IAPI), which purchased the primary agricultural goods from the producers at fixed, below-market prices and sold them globally at mar-

ket prices. Perón used the profits to carry on many of the social programs begun in the 1930s and spread them into the country's interior. Urban labor continued to be the focal point of his politics. Continued strikes resulted in higher wages. Perón's wife, Evita, proved an invaluable ally. Spurned by the elite WOMEN of Argentina, she established the Eva Perón Foundation, which received government aid, as well as forced support from industry and the upper class. She used these funds to improve conditions for the poor, her projects ranging from food distribution to the payment of medical bills. The government also exhibited a strong sense of nationalism. It bought out the British-owned railways, the U.S.-owned International Telephone and Telegraph Company, and the French-owned docks and warehouses in Buenos Aires. Moreover, in July 1947, Perón paid off Argentina's foreign debt. Perón's popularity significantly increased, and he capitalized on this to eliminate political opposition. "*Personalismo*" (the popularity of a person, not his ideology) came to characterize the Perón administration.

Perón's economic program worked well as long as world demand and prices for Argentina's agricultural goods remained high. Ravaged post-World War II Europe needed to be fed, and global demand for beef and wheat spiked again as a result of the Korean War in 1950–51. Despite these periods of demand, several factors contributed to the program's failure and ouster of Perón in 1955. World agricultural productivity increased from 1949, lessening the demand for Argentine goods. Argentina's *estancieros* (large landowners) held back on the production of wheat and beef. Urban labor continued to press for higher wages from industries that were unable to meet their demands. Against this economic backdrop, the Peronists amended the 1853 constitution to make Perón eligible for a second term, but the military and elite successfully resisted his efforts to have Evita run as his vice president. Although Perón understood the need for fiscal orthodoxy in his second term, urban labor did not, and demonstrations became increasingly violent. The death of Evita in 1952 deprived Perón of a strong ally. He infuriated nationalists by granting oil contracts to Standard Oil of California. His attempt to reduce the influence of the CATHOLIC CHURCH by placing its schools under state control and legalizing divorce not only resulted in his and his cabinet's excommunication but fed the violence. With the nation falling into chaos, Conservative military officers acted in September 1955 by forcing Perón to resign the presidency and leave the country. He went first to Paraguay and then to Spain, where he remained until 1973.

Perón may have left the country, but Peronism did not. The Peronists significantly contributed to the election of economics professor Arturo Frondizi (1958–62) as president, and their abstention from the polls enabled medical doctor Arturo Illia (1963–66) to move into the Casa Rosada, the seat of the government, with only 26 percent of the vote. Both were members of the Radical

Party. Their economic policies of fiscal orthodoxy and opening the country to foreign investment did not sit well with urban labor. The workers again resorted to street demonstrations and violence, which resulted in the ouster of Illia in 1966 and the implementation of the military's bureaucratic-authoritarian regime. A succession of three generals managed the country until 1973. By then, Argentina was wracked by stagflation and faced an incipient guerrilla war. Under these conditions, the military permitted Perón to return to Argentina in 1973, after 18 years in exile. His popularity remained.

Perón persuaded the government to permit his third wife, ISABEL MARTÍNEZ DE PERÓN (b. 1931; president 1974–76), to run as his vice presidential candidate in the September 1973 elections, which they won with 62 percent of the vote. This time, however, Perón attempted to restrain the worker's demands, outlawed extreme left-wing groups such as the People's Revolutionary Army (Ejército Revolucionario del Pueblo, or ERP), and continued the policy of fiscal orthodoxy. Furthermore, falling export revenue coupled with rising oil prices negatively affected people's quality of life and inflamed the opposition. When Perón died of a heart attack on July 1, 1974, Isabel Perón replaced him. However, she lacked Evita's charisma and Juan Perón's ability to deal with the conflict among the labor, political, and military sectors. Amid increasing violence and worsening economic conditions, the military ousted Isabel from the presidency on March 24, 1976.

### MILITARY RULE AND NEOLIBERALISM (1976–PRESENT)

General Jorge Rafael Videla's military regime lasted from 1976 until 1981. Its first objective was to eliminate all opposition via a "DIRTY WAR" that resulted in the disappearance of an estimated 10,000–20,000 people. Claiming to be saving the country from communism, the regime eliminated leftist groups such as the ERP and the Montoneros. It also shut down the Congress and judiciary, imposed censorship, and otherwise ignored civil and human rights.

On the economic front, Finance Minister José Alfredo Martínez de Hoz (b. 1925– ) imposed neoliberal economic policies that resulted in wage losses, tightened credit, and lower tariffs on imported industrial goods and directed state and parastatal (semiprivate) industries to be sold. These policies lowered Argentina's inflation rate to 88 percent in 1980 and brought about a surplus in the balance of payments. The situation changed a year later, however. In 1981, industry operated at half its capacity, inflation again accelerated, and real wages dropped to less than those in 1970. Unable to confront these challenges, Videla turned over the presidency to General Roberto Viola (b. 1924–d. 1994) in 1981, who in turn passed it on to General LEOPOLDO GALTIERI (1981–82). Galtieri reasoned that a successful war to reclaim the Malvinas (known as the Falkland Islands in English) would stir Argentine nationalism and

buy the regime time to deal with the economic crisis (see MALVINAS/FALKLANDS WAR).

The British had occupied the Malvinas since 1833, but Argentina rested its claim to them on the original Spanish occupation and argued that with its independence in 1810, ownership of the islands had passed to the government at Buenos Aires. In 1982, Galtieri reasoned that Britain no longer had an interest in the islands some 8,000 miles (12,875 km) from home and that the United States would stand aside because the Argentine military was training the U.S.-backed Nicaraguan Contras in their effort to oust the Sandinista government in Managua. He judged incorrectly on both counts. Initial successes in the Argentine invasion of the islands on April 2, 1982, ended with the arrival of highly trained British troops and sophisticated military equipment. Argentina was forced to surrender in June. The United States provided the British with the Argentine military maneuvers, sophisticated missile weapons, and diplomatic support of the British cause within the international community.

The Argentine people, whipped into an anti-imperialist frenzy by the eve of the war, were disillusioned with its outcome despite the government's control of the media during the conflict. As a result, retired general Reynaldo Bignone (1982–83) replaced Galtieri. Bignone promised a transition to democracy by 1984. Radical Party leader Raúl Alfonsín (1983–89) won the following election with 52 percent of the vote. Alfonsín faced near insurmountable problems: Inflation was at 400 percent, wages had declined by 25 percent between 1981 and 1983, and the government was effectively bankrupt. The public also demanded the immediate prosecution of those responsible for the Dirty War's "disappeared ones." A government commission subsequently verified the death or disappearance of 8,906 people during the Dirty War, and five of the nine military officers charged with crimes received long prison terms after their trials. Faced with a possible military revolt, the government followed a course of inaction beginning in 1987. Alfonsín failed to address the country's economic distress. Despite an austerity program imposed by the International Monetary Fund (IMF) in 1989, inflation continued to plague the economy, gross domestic product (GDP) had dropped 6 percent, and per capita income had declined by nearly 25 percent.

The *peronistas* seized the moment and captured the 1989 presidential elections with CARLOS SAÚL MENEM (1989–99) as their candidate. Argentina reached a potential political watershed: Menem could either roll back the clock or continue on the rocky course of neoliberalism. He chose the latter. State-owned airlines, railroads, subways, ports, the electrical company, coal, natural gas, and a portion of YPF went up for sale. Economy Minister Domingo Cavallo (b. 1946– ) introduced a "convertibility plan" that restricted government expenditures to revenues on hand and, most important, established a one-to-one exchange rate with the U.S. dollar. Cavallo also

continued the IMF-imposed austerity program. By 1994, inflation had dropped from a 1989 high of 4,900 percent to 4 percent, and the GDP rose by 6 percent during the same time frame. The downside, however, proved severe. Due to the overvaluation of the Argentine peso, the trade deficit stood at \$6 billion, and unemployment doubled to 12.5 percent in 1994. One study reported that one-half of the middle class slipped into the lower socioeconomic group in that same six-year period. The working classes took to the streets, only to have their demonstrations and strikes broken by the Menem government. In the international arena, Menem approved Argentina's participation in the SOUTHERN CONE COMMON MARKET (MERCOSUR), an agreement that linked his country with Brazil, Paraguay, and Uruguay in what was hoped would become a common market similar to the European Union. Menem also became a supporter of U.S. global policies by, for example, distancing Argentina from CUBA and supporting U.S. interventions in HAITI and the Balkans. Both actions, however, stoked the fires of Argentine nationalism.

Despite the conflicting economic signals and debatable foreign policy, in 1994, Menem pushed through Congress constitutional changes that enabled him to run for the presidency again. He won the presidential contest a year later with 49.5 percent of the vote. His second administration continued the same economic policies with similar results: increased inflation, higher unemployment, and lower living standards. Government corruption increasingly became a public issue and along with the continued economic decline led to two opposition groups—banded together as the Alliance for Work, Justice, and Education—gaining control of the Chamber of Deputies. The Alliance supported neoliberal economic policies; however, by focusing on government corruption, their candidate, Fernando de la Rúa (1999–2001), won the presidency in 1999. Argentina's economy continued to worsen. Flight capital increased, and foreign investment came to a halt.

De la Rúa instituted several measures to cut the fiscal deficit and instill confidence, and Argentina again received IMF assistance, but nothing stemmed the tide. The government's attempt to halt the run on bank deposit withdrawals led to violence. Argentina's economy collapsed in 2001, and de la Rúa resigned from office in December that year. Eduardo Duhalde became president in January 2002. He brought a degree of economic recovery by ending the one-to-one peg of the peso to the U.S. dollar, freezing utility tariffs, curtailing creditors' rights, and imposing high tariffs on exports. Duhalde also set elections for 2003, which were won by NÉSTOR KIRCHNER (2003–07), who continued the austerity programs that helped pay off IMF loans and revitalize the economy by 2006.

For unexplained reasons, Kirchner did not seek reelection in 2007. Instead, his wife, Cristina Fernández de Kirchner (2007– ), stood as the candidate of the

ruling Front for Victory Party (Frente Para la Victoria, or FPV). She captured the December 10 elections with 44.92 percent of the popular vote, and the FPV gained control of both houses of the national legislature. There will be few, if any, policy changes. President Fernández de Kirchner indicated that she will continue her husband's austerity policies, nor does she intend to pursue the government's recovery of industries that were privatized during the 1990s. She began her presidency confronted by significant socioeconomic issues that have adversely affected the nation's poor: wage differentials, housing, education, and medical delivery systems.

To meet the costs of the social programs, the Cristina Kirchner administration imposed an export tax on agricultural goods that the farming community strongly resisted by cutting production. The situation was exacerbated by a drought that began in 2008 and lasts until today. The situation is so serious that Argentina may have to import wheat in 2010, the first time since records have been kept. Kirchner's party paid the price in the June 28, 2009, congressional elections, losing control of the House of Representatives and its narrow majority in the Senate.

See also ARGENTINA (Vols. I, III).

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#### Argentina, economic collapse in (1998–2002)

Beginning in 1998, the Argentine ECONOMY precipitously worsened to the point where a \$4-billion International Monetary Fund (IMF) bailout in December 2000 could not alter its course. Between 2000 and 2002, worker productivity fell by 15 percent, the Argentine peso lost 75 percent of its value, the official unemployment rate reached 25 percent, and more than half of the population fell below the poverty line. The longer-term origins of the crisis can be traced to 1991, while the immediate contributor was a 1998 international monetary debacle.

To stem the tide of hyperinflation that had plagued ARGENTINA since 1989, on April 1, 1991, President CARLOS SAÚL MENEM (1991–99) implemented a plan designed by his minister of the economy, Domingo Cavallo, which established parity between the Argentine peso and the U.S. dollar. In addition to parity, the new Argentine peso was fully convertible with the dollar and backed by international reserves. In the short term, this “convertibility plan” restored price stability and investor confidence and within a year brought down inflation to single digits. By the end of 1992, economic growth had been rekindled, and the country had gained access to international financial markets.

The initial euphoria over the convertibility plan meant that little attention was given to its flaws until 1998. Until then, Argentine inflation remained well above the U.S. rate. This, in turn, led to an overvalued peso with the associated consequences of making Argentine producers less competitive in the world marketplace, contributing to lower interest rates in Argentina, which made the country less attractive to foreign investors and led to a further borrowing of dollars abroad. In addition, from 1991 to 1998, industrial production plummeted, unemployment soared, and Argentina endured a highly unsatisfactory balance of TRADE. Total external debt doubled to \$140 billion in this seven-year period. Yet, the worst was still to come.

The 1997 Asian financial crisis spread to Russia and BRAZIL in 1998 and prompted the Brazilian government to devalue its currency, making its products cheaper than those of Argentina. This not only negatively affected international trade, but also the Argentine-Brazilian economic connection; the two countries were the largest trading partners within the MERCOSUR trading bloc (see SOUTHERN CONE COMMON MARKET). As the Argentine economy neared collapse in late 1991, its government sought a financial bailout from the United States similar to the one granted to MEXICO in 1994. President George W. Bush refused. He attributed the crisis to irresponsible Argentine government officials and private businesspeople. The IMF advanced Argentina \$8 billion in early 2002, but this was not enough to prevent the country’s economy from collapsing by the end of the year. There was a run on banks, prompting a law that limited withdrawals to 250 pesos per week, while dollar accounts were frozen. Nearly a quarter of all bank deposits were

sent out of the country. Without a tax base, the government cut expenditures, further restricting the social safety net, which in turn led to demonstrations and then riots in the major cities. The statistics in the table below indicate the social cost of Argentina’s economic collapse.

Following a period of intense political confusion in 2001 and 2002 that saw four men move into and out of the presidential residence, NÉSTOR KIRCHNER (2003–07), a minor *peronista* and ex-governor of Santa Cruz Province, was elected president on May 18, 2002. Despite his modest credentials, Kirchner promptly earned popular support by asserting his independence from the *peronista* political machine and condemning the MILITARY’s past human rights abuses. The national economic hardship had reached its nadir, and over the next four years, Kirchner’s policies provided relief from the economic crisis that had beset the country.

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**Arias Madrid, Arnulfo** (b. 1901–d. 1988) *president of Panama* Born into a lower-middle-class rural family, Arnulfo Arias Madrid became one of PANAMA’s most controversial political leaders. He is sometimes erroneously linked to the Arias family that helped gain independence for Panama in 1903. Following his graduation from Harvard Medical School, Arias returned to Panama in 1925 and joined his brother in ACCIÓN COMUNAL, a secret nationalist society that engineered a coup in 1931 that vaulted his brother, Harmodio Arias Madrid (b. 1886–d. 1962), to the presidency a year later. Arnulfo served as minister of agriculture in that administration and subsequently as ambassador to Germany and Italy. Arnulfo won the October 1, 1940, presidential election as a candidate of the National Revolutionary Party (PNR) and immediately directed the writing of a new constitution, which went into effect on January 2, 1941. The new document placed limitations on foreign ownership of commerce and guaranteed employment of Panamanians

### Social Consequences of Argentina’s Economic Collapse, 1998–2002

	1998	2002
Poverty rate	23.6%	51.4%
Poor population	11.2 million	18.2 million
Destitute people	3.2 million	7.7 million
Number of people who became poor daily	2,404	20,577
Number of people who became destitute daily	1,461	16,493

over foreigners. It also strengthened presidential power at the expense of the legislature, extended the presidential term to six years, and extended suffrage to women. Subsequent actions intensified opposition from both the local elite and United States. He forced farmers to sell their produce to the state, hinted at the nationalization of foreign-owned enterprises, and had the National Assembly enact a land reform program and a social security system. He ordered that only Spanish be spoken in public places and that bars be fined for playing foreign music, as well as the censorship of newspapers and the deduction of PNR dues from government employees' pay checks. He also refused to meet U.S. demands for a defense sites agreement in late 1940. Arias was ousted from power on October 9, 1941, while visiting his mistress in CUBA. He spent the remainder of World War II exiled in ARGENTINA.

Arias returned to Panama to run for the presidency again in 1948 as a candidate of the Authentic Panameñista Party (PPA) against Domingo Díaz Arosemena (b. 1875–d. 1949). Representing the elite, Arosemena's supporters resorted to violence to overcome Arias's popularity and suppress his followers following Díaz's alleged victory. The national electoral board turned to Arias when Díaz died in office on July 18, 1949. Arias's short-lived administration was marred by nepotism and corruption. With no sons of his own, he rewarded those of his brother Harmodio with government positions and gave fellow Panameñistas cash and contracts, as well as protection for their gold- and drug-smuggling operations. Political enemies were forced to sell their properties at below-market value. The economic downturn that followed World War II resulted in high unemployment in the canal zone and a generally sluggish Panamanian ECONOMY. Unable to address the country's economic woes, Arias sought to strengthen his hand by abolishing the National Assembly, a proposal that ignited broad-based opposition to him and resulted in his ouster on May 9, 1951. He again went into exile.

In return for the Panameñistas supporting Liberal elitist Roberto Chiari (b. 1905–d. 1981) for the presidency in 1960, Arias's political rights were restored, and he again sought the presidency in the 1964 election, only to lose to another Liberal, Marcos Robles (b. 1905–d. 1990). Robles benefited from the U.S.-sponsored ALLIANCE FOR PROGRESS program that provided benefits to Panama's poor laboring and rural sectors between 1962 and 1964. Still, the number of poor had grown to more than 1 million since the end of World War II, and their needs remained largely unmet. After the election, Arias stirred these people into demonstrations, blaming both Robles and the United States for their plight. He also supported the students and their fellow nationalists in the 1964 flag riots. Elite opposition to Robles emerged after he proposed income tax reforms that were required of recipients of Alliance for Progress assistance. These crosscurrents played into Arias's successful bid for the

presidency in 1968. However, Arias's attempt to manipulate his control over the military backfired, and on October 11, 1968, 10 days after he was inaugurated, the upper echelon of Panama's National Guard ousted him. Arias took refuge in the canal zone before heading into exile in the United States. When he returned to Panama in 1978, a small number of his Panameñista Party had joined the pro-OMAR EFFRAÍN TORRIJOS HERRERA ruling coalition. Those who remained loyal to Arias formed the Authentic Panameñista Party.

In the mid-1980s, Arias became a leading critic of Panamanian strongman MANUEL ANTONIO NORIEGA MORENO and again sought the presidency in the 1984 elections. When exit polls indicated that Arias had a substantial lead, Noriega manipulated the results and had his own candidate, Nicolás Barletta Andino (b. 1938– ), declared the victor. Arias moved to Miami, Florida, where he died of natural causes on August 10, 1988. Five days after his death, his supporters used his funeral in Panama to protest against Noriega, and following the U.S. invasion in 1989, his party resurfaced as the Arnulfista Party and in 2005 assumed its original name, the Authentic Panameñista Party.

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**Arias Sánchez, Oscar** (b. 1941– ) *president of Costa Rica and Nobel Peace Prize winner* Born in Heredia, COSTA RICA, into a FAMILY with a long history of success in coffee planting and political participation, Oscar Arias Sánchez earned his bachelor's degree at the University of Costa Rica in 1966 and his doctorate in 1974 from Great Britain's University of Essex, after which he returned home to teach at the University of Costa Rica. He is married to Margarita Peñón Góngora, with whom he has two children.

Arias first became active in national politics in 1966 when he worked in the unsuccessful presidential campaign of the National Liberation Party (Partido de Liberación Nacional, or PLN). He vaulted into the political spotlight as a leading supporter of JOSÉ FIGUERES FERRER in his successful bid for a second presidential term in 1970. As minister of national planning and political economy from 1971 to 1976, Arias earned a reputation for being fair minded and attempting to de-ideologize social problems. Arias also rose in the PLN party structure, first to international secretary in 1975 and then to general secretary in 1979. Elected to the national legislature in 1978, Arias sought to make the government more accessible and responsive to the general populace. He left that position to help the PLN standard-bearer Daniel Obudar (b. 1921–d. 1991) win the 1982 presiden-

tial election, and in 1984, Arias resigned as PLN general secretary to organize his own presidential campaign for the 1986 election.

Arias won the 1986 presidential contest with 52 percent of the popular vote. In an effort to fulfill his promise to make the government more accessible to the people, Arias frequently drove his own car throughout the country, stopping at cafés and stores to talk with people. He also held a weekly television call-in show. Arias favored an open market ECONOMY, in contrast to many of his party colleagues. He shifted emphasis on coffee and bananas as the primary agricultural exports to nontraditional products such as fruit and flowers. The tourist INDUSTRY was developed and subsequently brought the largest amount of foreign currency into the country. Costa Rica also benefited from the general global prosperity. By 1990, its annual growth rate reached 4 percent, and unemployment dropped to 5.6 percent, the best in the Central American region at the time.

The economic progress was offset by the continuing wars in NICARAGUA and EL SALVADOR, which brought many refugees from those countries into Costa Rica, where they strained the nation's social safety net beyond its financial limit, and in turn, the national debt worsened. For this reason, and out of concern that his country might be dragged into the conflict, Arias sought to bring an end to those conflicts (see CENTRAL AMERICAN WARS). He put forward a peace plan in 1986 that earned him the Nobel Peace Prize the following year and led to the signing of an accord at Tela, HONDURAS, on August 9, 1989. It provided for the demobilization of the guerrilla forces throughout the region and an end to external MILITARY support for them and opened the door to elections in each country.

Arias used the funds from the Noble Peace Prize to establish a foundation that bears his name. The foundation aims to further democratize CENTRAL AMERICA, end gender discrimination, and resolve conflicts. After leaving the presidency in 1990, Arias became an active participant in several nongovernmental organizations designed to resolve conflicts and ensure fair elections around the globe, including the Carter Center, the Gorbachev Foundation, and the Advisory Council of Transparency International.

Arias returned to national politics in 2004. He captured the February 7, 2006, presidential contest by an 18,169 popular vote margin (1.2 percent) over Ottón Solís. Accepting the neoliberal economic model as the means to successful development, on June 1, 2007, he changed Costa Rica's recognition of Taiwan to the People's Republic of China and is working to overcome resistance to the DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT. While the agreement promises to bring badly needed investment capital into Costa Rica to further diversify and develop its economy, the Costa Rican public wants to preserve the country's generous social service system and labor laws and protect its small farmers.

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**Aristide, Jean-Bertrand** (b. 1953– ) *president of Haiti* Born on July 15, 1953, in the popular tourist town of Port Salut, HAITI, Jean-Bertrand Aristide was first educated at Salesian schools in Port-au-Prince. In 1974, he graduated from the Collège Notre Dame du Perpétuel Secours, an all-male secondary school run by the CATHOLIC CHURCH in Cap Haitien. Upon graduation, he took a course in novitiate studies in the DOMINICAN REPUBLIC. After returning to Haiti, Aristide studied philosophy at the Grand Séminaire Notre Dame and psychology at the State University of Haiti, graduating in 1979. He subsequently studied in Italy and returned to Haiti in 1983, where he was ordained a Roman Catholic priest in the Salesian order. Aristide was initially appointed to serve a small parish in Port-au-Prince before being moved to a larger parish in a slum in La Saline. Known for his fiery oratory skills, Aristide was an advocate of liberation theology and became a popular figure. His sermons, which were broadcast on the nationwide Catholic radio station, made him a leading figure of the radical wing of the Catholic Church in Haiti.

In 1990, while still a priest, Aristide ran for and won the presidency with 67.5 percent of the vote. His political vehicle, the National Front for Change and Democracy (Front National pour le Changement et la Démocratie, or FNCD), won the largest block of seats in the Congress, but not a majority. Aristide took office on February 7, 1991, five years after the overthrow of the Duvalier dictatorship, hoping to implement political, economic, and social reforms. Aristide's first term as president, however, was ended by a military coup staged by Raoul Cédras (b. 1949– ) on September 30, 1991. Following massacres of Aristide supporters, tens of thousands of Haitians attempted to flee to the United States, but the U.S. government refused to grant them refugee status. Regardless, the U.S. government placed an economic embargo on Haiti, which, ironically, increased the suffering of the wider populace there. On September 18, 1994, a U.S. delegation led by former U.S. president Jimmy Carter, as part of OPERATION UPHOLD DEMOCRACY, convinced Cédras to resign or face the possibility of a U.S. MILITARY intervention. Cédras resigned, went to live in exile in PANAMA with a generous stipend



from the U.S. government, and Aristide returned from the United States to rule Haiti on October 15, 1994. Aristide disbanded the army and established a civilian police force. Aristide left the priesthood in 1995 and in 1996 married Mildred Trouillot (b. 1963– ), a U.S. citizen born to Haitian parents who had fled the Duvalier regime. They had met while Aristide was living in the United States. Aristide's first term ended in February 1996, and the constitution did not allow him to serve consecutive terms. René Préval (b. 1943– ), Aristide's prime minister in 1991, won the 1995 elections with 88 percent of the vote.

Préval implemented International Monetary Fund economic reforms and began the privatization of state-run industries. In late 1996, Aristide, who strongly disagreed with Préval's economic policies, formed the Fanmi Lavalas, a popular leftist political party that criticized neoliberal economic reforms. In the 2000 elections, Aristide won 91.8 percent of the vote and assumed the presidency for the second time on February 7, 2001.

Aristide's three-year presidency proved tumultuous. From its start, political opposition groups refused to work on Aristide's legislative program. They would accept nothing short of Aristide's resignation. By mid-2003, a campaign of terror reigned as both sides assassinated journalists, politicians, and innocent civilians, with charges that arms were imported from the Dominican Republic. Throughout this period, the economy spiraled downward, and food shortages became common. The situation appeared hopeless. Finally, on February 5, 2004, the National Revolutionary Front for the Liberation of Haiti took control of Gonaives, Haiti's fourth largest city. By February 22, the rebels had taken control of Cap-Haitien, the country's second largest city, and the end of the month were at the outskirts of Port-au-Prince. Aristide has subsequently claimed that U.S. ambassador to Haiti James Foley forced him to resign and exiled him from Haiti. Aristide and his family now live in South Africa. In 2006, President Préval announced that the Haitian constitution does not prohibit Aristide's return to Haiti. For the next three years, Haitian politics descended into turmoil, as the presidency became a revolving door. The national economy flattened, and inflation and scarcity of goods prevailed. By 2008, continued violence resulted in the United Nations posting a 7,000-person military force in Haiti to stem the violence.

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**Arron, Henck** (b. 1936–d. 2000) *prime minister of Suriname* Born on April 25, 1936, in Paramaribo, SURINAME, Henck Arron, a Creole, worked in banks in the Netherlands and in his homeland before entering politics in 1963. Elected prime minister in 1973, Arron participated in the negotiations leading to Suriname's independence. The election of 1973 revealed the ethnic polarization of Surinamese politics. There were no Asians on the government bench and no Creoles on the opposition bench. Following independence from the Netherlands in 1975, thousands of Asian Surinamese, unwilling to lose their Dutch citizenship and fearful of a government controlled by Creoles, migrated to the Netherlands. On independence, Arron became the nation's first vice president and prime minister. Johan Ferrier (b. 1910–d. 2010) became the nation's first president. As the leader of the Suriname National Party (NPS), a predominantly Creole party established in 1946, Arron attempted to lead the new nation. The growing perception that the government was corrupt and inept, however, led to civil unrest.

In February 1980, a military coup led by DÉSI BOUTERSE overthrew Arron. A group of 16 noncommissioned officers, all but one of whom was a Creole, overthrew the Creole-dominated government. In 1985, after Bouterse legalized political parties, Arron was invited to join the MILITARY regime's Supreme Council. In the 1987 elections, Arron's NPS joined the anti-Bouterse coalition known as the Front for Democracy and Development, which triumphed at the polls. Arron returned to political power as vice president and prime minister (1988–90) during the administration of Ramsewak Shankar (b. 1937– ). Following Bouterse's 1990 military coup, Arron lost his position. In 1991, Arron retired from politics for health reasons, having undergone heart-bypass surgery in Houston, Texas. He turned over control of the NPS to RONALD VENETIAAN. Arron died on December 4, 2000, in Alphen aan den Rijn in the Netherlands.

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**art** At the beginning of the 20th century, several trends characterized Latin American art as it moved away from the visual and meticulous realism of the 19th century. Much of new art was highly self-conscious, with an emphasis on aesthetic value rather than subject matter. For example, the Mexican Saturnino Herrán (b. 1887–d. 1919) pictured indigenous life using visible outlines around bright colors, such as bright green. Some Latin American painters, such as the Peruvian Teófilo Castillo (b. 1857–d. 1922), were influenced by European impressionist painters who emphasized human beauty. Castillo's work focused on people of European descent during the

colonial period. Other Latin American artists followed the regionally influenced art emerging in Spain at the time. Cuban painter Leopoldo Romañach's (b. 1862–d. 1951) painting of a young, middle-class woman going to church is often pointed to as an example of this genre. The painting focuses on Spanish traditions in Cuba.

The MEXICAN REVOLUTION prompted artists to focus more closely on the downtrodden, wider populace. On the eve of the revolution, for example, José Guadalupe Posada (b. 1852–d. 1913) mocked the elite's foibles in his zinc and woodcut images, which paralleled photographs of the abuse of indigenous and mestizo workers shown in paper broadsides. More avant-garde than Posada was Diego Rivera (b. 1886–d. 1957), who studied cubism in Europe before returning home in 1915 during MEXICO's social revolution. Rivera's work, such as his *Zapatista Landscape*, depicted the straw-hatted, serape-draped followers of EMILIANO ZAPATA struggling to regain the lands taken from them by the government and the landowning elite, both native and foreign. The Mexican murals produced after the revolution became famous around the world (see MURALISTS, MEXICAN). In 1921, Education Secretary José Vasconcelos (b. 1882–d. 1959) invited Mexican artists to participate in government-sponsored projects to turn the walls of public buildings into didactic inspiration for the people. The three most notable contributors to Mexican muralism were Rivera, José Orozco (b. 1883–d. 1949), and David Siqueiros (b. 1896–d. 1974), whose works can still be seen in MEXICO CITY and Guadalajara. As a result of the mural renaissance, Latin American works, for the first time, had an impact on Western art. During the Great Depression of the 1930s, U.S. government-sponsored painting programs were directly influenced by the Mexican experience. South American countries with a strong background and presence of NATIVE AMERICANS, such as ECUADOR, PERU, and COLOMBIA, followed the Mexican themes.

The nonindigenous countries east of the Andes became more receptive to avant-garde styles from Europe, as seen in the works of Argentine Emilio Pettoruti (b. 1882–d. 1971), Uruguayan Joaquín Torres-García (b. 1874–d. 1949), and Brazilian Tarila de Amaral (b. 1886–d. 1973).

European surrealism, which emphasized the emotional, irrational, and personal, also found a receptive audience in Latin America after 1940. In general, surrealist artists examined the folk arts to reveal the instinctive spirit. For example, the works of Frida Kahlo (b. 1907–d. 1954), who was married to Rivera, illustrate this style. Her *Two Fridas*, a double self-portrait, shows a "proper"

19th-century Western woman on one side and a swarthy indigenous woman on the other. The surrealists also contributed to a revival of indigenous art that took on greater significance after World War II.

European surrealists attracted many Latin American artists to the Continent before World War II. Economic realities and political dictatorships contributed to a greater outmigration of artists in the postwar years. Not until Latin America's return to democracy in the 1980s did a more creative environment and economic opportunity emerge. Today, for example, BUENOS AIRES has more than 60 galleries dedicated to contemporary art and is home to Latin America's major auction house. Only in CUBA are artists denied free expression.

See also ART (Vols. I, II, III).

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**Arthur, Owen** (b. 1949– ) *prime minister of Barbados*  
Born on October 17, 1949, Owen Arthur was educated at the University of the West Indies, where he earned a B.A. in history and economics in 1971 and an M.S. in economics in 1974. After graduation, he worked in JAMAICA at the National Planning Agency and the Bauxite Institute. Arthur returned to BARBADOS to work as an analyst in the Ministry of Finance and Planning in 1981. He subsequently served as chairman of the Agricultural Development Corporation, from 1982 to 1984. The Barbados Labour Party (BLP) supported his appointment to the Senate in 1983 and his election to the House of Assembly in 1984. BLP officials chose Arthur to lead the party in 1993. The BLP won 19 of 28 seats in the 1994 elections, and Arthur became the fifth prime minister of Barbados. The BLP subsequently won 26 seats in the 1999 elections and 23 seats in the 2003 elections.

Since 2003, Arthur, as prime minister, has promoted the idea of replacing British queen Elizabeth II with a Barbadian as official head of state. The majority of the Barbadian population, however, sees no need to make Barbados a parliamentary republic since the queen's role is purely symbolic.

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# B

**Bahamas** An archipelago of more than 700 islands in the Atlantic Ocean, the Bahamas gained its independence from the United Kingdom on July 10, 1973. Located to the southeast of Florida and the northeast of CUBA, less than 40 of the islands that make up the Bahamas are inhabited. More than 4 million tourists visit the Bahamas each year, making tourism the most significant component of the ECONOMY.

The Bahamas occupy 5,358 square miles (13,877 km<sup>2</sup>) of territory. The most important islands are Bimini, located 50 miles (80.5 km) off the coast of Ft. Lauderdale, Florida; Andros, the largest island; New Providence, the site of Nassau, the nation's capital and largest city; Grand Bahama, the site of Freeport, the second-largest city; Great Abaco; Great Inagua, the second-largest island; San Salvador, widely believed to be the first land sighted by Christopher Columbus in 1492; and Mayaguana. While the Gulf Stream provides a pleasant climate conducive to tourism, it also proves to be dangerous in the late summer and early fall when hurricanes pass through the islands.

The first permanent settlers came to the Bahamas from Bermuda in 1647. The British made the Bahamas a crown colony in 1717. Following the American Revolution, more than 8,000 Loyalists (and their slaves) moved to the Bahamas. When the British abolished slavery in 1834, hundreds of runaway slaves from the U.S. South made their way to the Bahamas. Although blacks and mulattoes made up the majority of the population, whites (who never accounted for more than 20 percent of the population) dominated the political scene until 1967. In addition, a group of influential white merchants known as the Bay Street Boys controlled the local economy. In 1953, a group of black politicians formed the Progressive

Liberal Party (PLP) to oppose the power of influential whites. Five years later, white politicians officially formed the United Bahamian Party (UBP). In 1964, the British granted the Bahamas internal self-government. The PLP, led by LYNDEN PINDLING, defeated the UBP, led by ROLAND SYMONETTE, in the 1967 parliamentary elections. Although both parties captured 18 seats in the House of Assembly, one of the two independent representatives chose to sit with the PLP, enabling Pindling to form a government. Pindling, who led the nation to independence in 1973, encouraged tourism, developed the local infrastructure, and initiated numerous social welfare services.

Great Britain's queen Elizabeth II, the head of state, is represented by a governor who oversees the political system. The prime minister, usually the leader of the majority party in the 41-member House of Assembly, is the actual political force in the Bahamas. Pindling was prime minister from 1973 to 1992. Despite allegations of abuse of state-owned companies, nepotism, and involvement in international drug trafficking during the 1980s, Pindling was able to maintain control of the government in free elections. In the 1992 elections, although Pindling retained his South Andros seat in the House of Assembly, his party was defeated by the Free National Movement (FNM), a socially liberal and economically conservative political party formed in 1971 by conservative dissidents from the PLP and former members of the UBP. FNM prime minister Hubert Inghram (b. 1947– ) began privatizing the Bahamian economy, including all of the government-owned hotels, which had fallen into a state of disrepair during Pindling's administration. Inghram lost the 2002 elections to PLP candidate Perry Christie (b. 1944– ). Elections in 2007 returned Inghram to power.

The majority of the 4 million tourists who visit the Bahamas each year come from the United States. Virtually all food and manufactured imports come from the United States. Since Bahamians do not pay income or sales tax, most government revenue comes from import tariffs. The advent of hemispheric free trade zones poses a major challenge for the Bahamian government.

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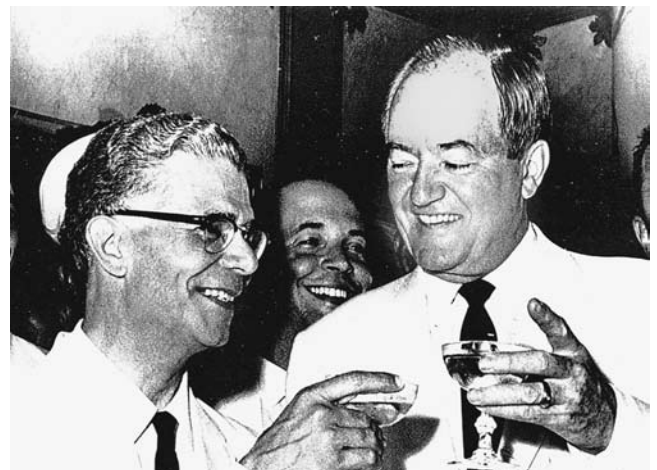
**Balaguer, Joaquín** (b. 1906–d. 2002) *president of the Dominican Republic* Born on September 1, 1906, in Navarrete, DOMINICAN REPUBLIC, Joaquín Balaguer was the only boy in a family of several daughters. He had a strong attraction to LITERATURE in his youth and eventually wrote several books. In 1929, he earned a law degree from the Universidad Autónoma de Santo Domingo. A prominent official during the RAFAEL TRUJILLO dictatorship (1930–61), he held positions in both the Ministry of Education and the Ministry of Foreign Relations. From 1957 to 1960, he was the vice president of the Dominican Republic. He ascended to the presidency in 1960 when Trujillo's brother, Héctor, bowing to U.S. pressure for democratization in the aftermath of FIDEL CASTRO RUZ's 1959 revolution, resigned. After Rafael Trujillo's assassination on May 30, 1961, Balaguer began the transition to democracy.

Following a period of political turmoil, Balaguer went into exile in the United States after a MILITARY coup on January 16, 1962. In April 1965, a leftist-inspired insurrection to bring former president JUAN BOSCH, who had ruled for seven months in 1963, back to power was seen by U.S. officials as counterproductive to U.S. foreign policy goals. To forestall a potential "second Cuba," U.S. president Lyndon Johnson authorized OPERATION POWER PACK, which resulted in the United States sending 23,000 marines to intervene militarily in the Dominican Republic. In 1966, in elections supervised by the ORGANIZATION OF AMERICAN STATES, Balaguer, viewed by U.S. politicians as the candidate most likely to preserve order and protect U.S. hegemony, defeated Bosch.

From 1966 to 1978, Balaguer, who relied more on persuasion than force (notwithstanding the occasional political murder), maintained order and stability while simultaneously protecting U.S. interests in the Dominican Republic. Balaguer's political style can be described as "popular caudillismo." Unlike most of his contempo-

aries, Balaguer did not use public office to enrich himself. As the leader of the Social Christian Reformist Party (Partido Reformista Social Cristiano, or PRSC), Balaguer was able to initiate economic growth and embarked on a massive public works campaign fueled by high sugar prices, a generous sugar quota from the United States, and the MIGRATION of thousands of Dominicans to the United States, which alleviated social pressure at home. A successful manipulator, Balaguer was able to coopt the military and appease foreign investors. By the end of the 1970s, however, the popularity of artificial sweeteners in the United States destabilized the Dominican economy, which was based on sugar exports. Following elections in 1978, Balaguer relinquished power, albeit grudgingly, to Antonio Guzmán (b. 1911–d. 1982) the leader of the Dominican Revolutionary Party (Partido Revolucionario Dominicano, or PRD).

Notwithstanding the PRD's attempts at political liberalization, economic pandemonium and excessive political corruption facilitated Balaguer's return to power in 1986. From 1986 to 1994, Balaguer attempted to revive the Dominican economy while simultaneously paying greater respect to political liberties and human rights. Attempts were also made at agricultural diversification. Investments were made in developing the tourism INDUSTRY, which has since become the largest income generator in the Dominican Republic. Remittances from the hundreds of thousands of Dominicans working in the United States also became a substantial revenue generator. Notwithstanding massive infrastructure projects, fuel shortages generated civil unrest, which resulted in frequent blackouts. The construction of the Columbus Lighthouse in 1992, which cost \$200 million, led to increased criticism of Balaguer's regime. Balaguer, virtually blind but still intellectually alert, won the 1994 election, although most observers considered the contest



Dominican Republic president Joaquín Balaguer (left) and U.S. vice president Hubert H. Humphrey toast each other on July 1, 1966. Balaguer served as president for 22 of the next 30 years. (United States Information Agency)

fraudulent. To quell political tumult, Balaguer agreed to call for early elections in 1996. Prohibited from running in the election and certain that the PRSC could not beat the PRD candidate, who was of Haitian ancestry, Balaguer supported Leonel Fernández (b. 1953– ), the leader of the Dominican Liberation Party (Partido de Liberación Dominicana, or PLD), who won the election. Although blind, Balaguer unsuccessfully ran for president in the 2000 presidential elections. He died of heart failure at the Clínica Abreu in SANTO DOMINGO on July 14, 2002.

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**balseros** *Balseros* is a term used to describe the people who attempted to flee CUBA via raft (*balsa*) to seek refuge in the United States. While an estimated 63,000 *balseros* reached the United States between 1979 and 1994, it was the mass exodus in the summer of 1994 that received most notoriety. Then, approximately 36,000 Cubans found haven in the United States, while countless others were lost at sea. The crisis ended with a U.S.–Cuban agreement on September 9, 1994. Under the terms of the agreement, an orderly process was instituted to permit 20,000 Cubans to legally enter the United States annually. Deliberate delays on the part of the Cuban government, however, mean that the quota has never been fulfilled. Cubans continued their attempts to escape the island. The most famous incident was that of ELIÁN GONZÁLEZ in 1999–2000. He was the sole survivor of a group of *balseros* brought to Miami, Florida, by U.S. fishermen. The case created an international outcry before the U.S. government ordered González's return to Cuba. A second consequence of the 1994 *balsero* crisis was the 1996 Cuban Liberty and Democratic Solidarity Act (Helms-Burton Law), which further tightened the U.S. embargo on Cuba (see CUBA, U.S. TRADE EMBARGO OF).

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**Banzer Suárez, Hugo** (b. 1926–d. 2002) *president of Bolivia* Born into a pure-blood Spanish family in the then sparsely populated town of Santa Cruz, Hugo Banzer Suárez went on to become a respected MILITARY officer and president of BOLIVIA. He was educated at

La Paz Military College and later studied at military academies in ARGENTINA and BRAZIL; the U.S. School of the Americas, which was then located in the Panama Canal Zone; and the U.S. Cavalry School at Fort Hood, Texas. He served as minister of education and culture and later director of the Military Academy during the 1964–69 presidency of General René Barrientos (b. 1919–d. 1969).

Banzer headed a conservative coalition of military officers and landowners who were determined to bring order to Bolivia's chaotic political arena. Banzer engineered the overthrow of President Juan José Torres (b. 1920–d. 1976) on August 21, 1971, and assumed the presidency the next day. For the next seven years, he ruled as a dictator. He banned all left-leaning political parties, suspended the Bolivian Workers Central, and closed the nation's universities. During his term, known as the Banzerato, uncounted thousands of Bolivians left the country, an estimated 3,000 political opponents were imprisoned, at least 200 were killed, and countless others were tortured at the hands of the military.

At the urging of the United States, Banzer severed relations with the Soviet Union in 1972; this was also a requirement for International Monetary Fund assistance and its concomitant required austerity programs. The Bolivian populace rejected these measures. Banzer also introduced a five-year economic plan in 1973 and, thanks to increased global demand and prices for Bolivian oil and tin, along with increased exports of cotton and sugar, the country experienced an economic boom through 1976. The working classes did not benefit from this, however. Having lost popular support, Banzer did not want to risk reelection in 1974 and thus extended his presidency, propped up by the military and members of Bolivia's most prominent families. In an effort to add a sense of legitimacy to the regime, these groups formed the Nationalist Democratic Action Party (Acción Democrática Nacionalista, or AND), which nominated Banzer in his unsuccessful electoral bids for the presidency in 1979, 1980, 1985, and 1993. He finished third in the first two contests and second in the last two.

Finally, on August 6, 1997, at age 71, Banzer began his second and last presidential term. It was marred by popular unrest caused by the U.S.-sponsored drug eradication program, the failure of neoliberal economic reforms to benefit the people, and the loss of the global tin market, which contributed to workers' protests and demonstrations. Diagnosed with lung cancer, Banzer was forced to resign from office on August 7, 2001. He died nine months later on May 5, 2002.

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**Barbados** After centuries of British colonialism, Barbados, the most British of all Caribbean islands, achieved independence from the United Kingdom on November 30, 1966. Completely surrounded by the Atlantic Ocean, Barbados is the easternmost island in the Caribbean.

The pear-shaped island of Barbados, which occupies 166 square miles (430 km<sup>2</sup>) of territory, is also the easternmost of the Windward Islands. Located 270 miles (435 km) northeast of the South American coast, Barbados's island neighbors include TRINIDAD AND TOBAGO to the south, GRENADA to the southwest, and SAINT VINCENT AND THE GRENADINES to the west. The capital and largest city is Bridgetown, in the parish of St. Michael. With 280,000 inhabitants, Barbados is one of the most densely populated nations in the Western Hemisphere. More than 90 percent of Barbadians, locally known as Bajans, are descended from African slaves brought to the island during the colonial era to work on the sugar plantations. Whereas English is the official language, most people in Barbados speak a local Creole known as Bajan. In the aftermath of GUYANA's independence in 1966, thousands of Indo-Guyanese have resettled in Barbados. After the United States and the United Kingdom, the largest expatriate Guyanese community can be found in Barbados.

Early in the 16th century, the Portuguese called the island Ilha dos Barbados (island of the bearded ones),

most likely referring to the long, hanging roots of the bearded fig trees found throughout the island. Unlike many Caribbean islands that changed European masters during the colonial period, from the arrival of the first British colonists in 1627 to independence in 1966, Barbados experienced uninterrupted British control (see CARIBBEAN, BRITISH). British rule was relatively benevolent, and the Barbadians had a great degree of local autonomy, having a House of Assembly since 1639. After the British abolished slavery in 1834, the white population continued to dominate local politics because voting was restricted to those with high incomes. After World War I, black journalist Clennel Wilsden Wickham (b. 1895–d. 1938) published numerous articles in the *Barbados Herald* calling for black suffrage and increased social services for the larger populace.

It was not until the 1930s, however, during the economic dislocation caused by the Great Depression, that the majority of the black population achieved political rights. In 1938, seeking adult suffrage, better housing, and free EDUCATION, a group of black political rights advocates led by Grantley Adams (b. 1898–d. 1971) established the Barbados Labour Party (BLP). A strong supporter of the British monarchy, Adams sought political rights for the disenfranchised black population. In 1942, the British government removed income qualifications as a prerequisite for voting privileges and granted



A biscuit (cookie) factory in Bridgetown, Barbados, that distributes its product throughout the eastern Caribbean region. (Thomas M. Leonard Collection)

WOMEN the right to vote. In 1949, the BLP took control of the local government from the white plantation owners. In 1954, Adams was elected premier. Barbados was a member of the ill-fated WEST INDIES FEDERATION from 1958 to 1962. Adams served as the first and only prime minister of the federation, which was dissolved in 1962 after JAMAICA and Trinidad and Tobago withdrew from the association. In 1961, the Democratic Labour Party (DLP), founded by ERROL BARROW in 1955 as a progressive alternative to the BLP, won the parliamentary elections. Barrow served as premier from 1961 to 1966, when he became the first prime minister of Barbados, following independence from the United Kingdom. While Queen Elizabeth II appointed a governor to oversee the government, de facto power was held by the prime minister, usually the leader of the majority political party in the House of Assembly. During his tenure, Barrow supported many progressive social reforms.

In 1976, the BLP, led by Adams's only son, J. M. G. M. "TOM" ADAMS, returned to power. Tom Adams pursued a foreign policy closely aligned with the United States and supported OPERATION URGENT FURY, the U.S.-led invasion of GRENADA in 1983, by sending a contingent of the Barbados Defense Force to accompany American troops. Barrow, the leader of the opposition, sharply criticized Adams's policy. Adams died of a heart attack in 1985 and the DLP, still led by Barrow, returned to power in the 1986 parliamentary elections. Barrow, however, died in 1987 and was succeeded by ERSKINE SANDIFORD, the deputy prime minister. In 1994, the BLP, led by OWEN ARTHUR, returned to power. Arthur subsequently won elections in 1999 and 2003. Since 2003, Arthur has proposed that Barbados become a republic with a Barbadian as the official head of state, replacing Queen Elizabeth II. But, as the queen's role is purely ceremonial and Barbados and the United Kingdom have friendly diplomatic and economic relations, most Barbadians see no reason for the proposed change.

Since independence, Barbados has transformed itself from an ECONOMY dependent on the sugar industry to one based in tourism. More than 1 million tourists, mainly from the United Kingdom and the United States, visit Barbados each year. The best beaches and hotels are located on the western coast, although the eastern beaches are popular with surfers. Barbados receives generous economic and military aid packages from the United States.

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**Barrow, Errol** (b. 1920–d. 1987) *prime minister of Barbados* Born on January 21, 1920, in the parish of St. Lucy, BARBADOS, Errol Barrow was born into a family of civil rights activists. In December 1939, he won a scholarship to study at Codrington College but chose to decline the scholarship and enlist in the Royal Air Force. Barrow served in the European theater during World War II, flying more than three dozen missions. In 1945, he was appointed personal navigator to William Sholto Douglas, the commander of the British Zone of Occupation in Germany. After the war, he studied law at the London School of Economics, earning a degree in 1950. After returning to Barbados, he joined Grantley Adams's (b. 1898–d. 1971) Barbados Labour Party (BLP) and was elected to the House of Assembly in 1951. Displeased with Adams's laudatory statements about the British monarchy and his preference for a gradual path toward independence, Barrow broke from the BLP in 1955 and formed the Democratic Labour Party (DLP).

Barrow's party won the 1961 parliamentary elections, defeating Adams. Barrow served as premier from 1961 until 1966, when independence from the United Kingdom was achieved. He served as the first prime minister of Barbados from 1966 to 1976. During his tenure, Barrow supported many progressive social reforms. He encouraged industrial development, expanded the tourist INDUSTRY to reduce the island's economic dependence on sugar, introduced national health insurance and social security programs, and expanded free EDUCATION. Barrow, who supported greater political and economic integration in the eastern Caribbean, supported the creation of the CARIBBEAN FREE TRADE ASSOCIATION in 1965.

Following a controversy over a change in the constitution regarding the appointment of judges and an economic downswing, Barrow's party was defeated in the 1976 parliamentary elections by the BLP, led by Adams's only son, J. M. G. M. "TOM" ADAMS. Tom Adams supported OPERATION URGENT FURY, the U.S.-led invasion of GRENADA in 1983, by sending a contingent of the Barbados Defense Force to accompany American troops. Barrow sharply criticized the policy. In 1986, Barrow's party won 24 of the 27 seats in the House of Assembly. As prime minister again, Barrow criticized the administration of U.S. president Ronald Reagan and sought to pursue a foreign policy less subservient to the United States. Barrow's second term as prime minister, however, ended on June 1, 1987, when he collapsed and died at his home in Bridgetown. Subsequently proclaimed a national hero, his portrait was placed on the Barbadian \$50 bill.

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**Batista y Zaldívar, Fulgencio** (b. 1901–d. 1973) *president of Cuba* The son of a railroad worker in Oriente Province, Fulgencio Batista y Zaldívar held several different jobs before joining the Cuban army in 1921. In 1928, he was promoted to sergeant and appointed a stenographer at Havana's Camp Colombia. The frustrated Batista understood that he had little opportunity for further advancement in the MILITARY because the upper ranks were reserved for the sons of CUBA's elite families. By 1933, he and his fellow sergeants were also anguished that they had received no pay increase since 1929. These factors gave Batista and his followers reason to join with students to oust President Carlos Manuel de Céspedes on September 4, 1933, and install RAMÓN GRAU SAN MARTÍN as provisional president. Grau, however, lacked support from Cuba's elite and, more important, from the United States, which did not recognize him. Subsequently, U.S. emissaries to Cuba Sumner Welles and Jefferson Caffrey encouraged Batista to overthrow Grau, which Batista did on January 14, 1934. From then until his own election to the presidency in 1940, Batista was the power behind the scenes.

Batista provided for the election of a constitutional convention that convened in 1940. The resulting 1940 Cuban constitution was considered Latin America's most progressive at the time, as it provided for sweeping government-sponsored social programs. Elected president later that year, Batista and his government benefited from high wartime prices for Cuban sugar and used the increased income to implement many EDUCATION, public health, and social welfare programs. Public opinion turned on Batista, however, because the sugar wealth also led to government graft and corruption. The adverse image was further exacerbated by Batista's recognition of the Communist Party and bringing two of its members into his cabinet as ministers without portfolio. These actions also angered U.S. policy makers and prompted Ambassador Spruille Braden to publically criticize Batista in Havana. The criticisms, however, did not prevent Batista from cooperating with the United States throughout the war.

Because the 1940 constitution prevented Batista from serving a successive second term as president, he permitted his old nemesis, Grau, to assume the office following his 1944 electoral victory. Batista then settled in Daytona Beach, Florida, until elected to the Cuban congress in 1948. Shortly thereafter, he formed his own political party in preparation for the 1952 presidential election. When public opinion polls indicated that he would not win the election, Batista, with military colleagues, engineered a coup d'état against the sitting president, Carlos Prío Socarrás (b. 1903–d. 1977), on March 10, 1952. As a consequence of the coup, FIDEL CASTRO RUZ determined that Cuba's political institutions could be changed only through force under his own leadership. Castro's war on Cuba's past began with the raid on the Moncada army barracks on July 26, 1953. Batista further aided Castro's cause when he rigged his own election to the presidency in 1954.



Fulgencio Batista y Zaldívar, Cuban military and political leader, pictured here as the president of Cuba in 1940 (*Courtesy of the Organization of American States Libraries*)

As president for the second time, Batista's crack-down on alleged pro-communist labor unions satisfied the Cuban elite, U.S. businesses, and the U.S. State Department and contributed to a rise in foreign investment in the country. Batista also initiated a massive public works program to employ sugar workers during the low season. But, government income was insufficient to meet the needs of a growing, largely poor population. The U.S. Commerce Department and the Cuban National Bank understood that Cuba's dependence on income from sugar exports was the root of the problem.

Opposition to Batista increased throughout the 1950s. Not only did he confront Castro's guerrilla forces in the countryside after the latter's return to Cuba in December 1956, but he faced several urban groups that came forward to challenge his dictatorship. In a 1957 attack on the presidential palace, one student group nearly succeeded in assassinating Batista. Batista's brutal reaction to the urban groups only served to intensify the opposition against him and led church officials and Cuban businessmen to call for his resignation in February 1958. Instead, Batista implemented a "final" military offensive against Castro that summer. Rather than fight, the Cuban army melted into the jungle. In late November and early December 1958, U.S. president Dwight Eisenhower's administration secretly attempted to mediate Batista's



resignation, but Batista rejected the proposal. Finally, Batista fled the country on the evening of December 31, 1958, going first to the DOMINICAN REPUBLIC and then to Spain, where he died in 1973.

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**Batlle y Ordóñez, José** (b. 1856–d. 1929) *president of Uruguay* José Batlle y Ordóñez belongs to one of URUGUAY'S prominent political families. His father, Lorenzo Batlle y Grau (b. 1810–d. 1877) served as president from 1868 to 1872. José was also uncle to Luis Batlle Berres (b. 1897–d. 1964), who served as president from 1947 to 1951 and again in 1955–56, and great uncle of Jorge Batlle (b. 1947– ), president from 2000 to 2005.

José Batlle y Ordóñez opposed Uruguay's elitist and MILITARY governments of the late 19th century and used his newspaper, *El Día*, as a mouthpiece for the Colorado Party. Elected to the Chamber of Deputies in 1893 and to the Senate in 1896, Batlle worked to organize party support from among Uruguay's working classes. Immediately after his presidential election on March 1, 1903, Batlle faced a civil uprising led by Blanco Party leader Aparicio Saravia (b. 1856–d. 1904). A period of political tranquillity followed Saravia's defeat on September 1, 1904, at the Battle of Mosoller, leaving Batlle free to focus on measures to improve the lot of the common people.

Batlle came to office at a time of prosperity in Uruguay after the invention of refrigeration facilitated the export of beef to Europe. He continued to promote the agro-export INDUSTRY and through tax incentives opened additional arable land to large landowners at the expense of land distribution in smaller plots to individual farmers. Batlle also expanded the government's role in the banking, insurance, electric, and chemical fertilizer industries. Other reforms included the expansion and improvement of public EDUCATION, including the construction of new primary and secondary schools and the establishment of commerce, agronomy, and veterinary schools at the national university. The death penalty for criminals was abolished, and divorce was legalized. Batlle further separated church and state by banning crucifixes from hospital rooms and references to God in public oaths. Following the completion of his first presidential term in 1907, he spent the next four years traveling throughout western Europe, where he was influenced by government-sponsored social programs. Batlle returned

to Uruguay in February 1911 in time to be elected to a second presidential term on March 1.

During his second term, Batlle achieved social reforms that went far beyond what were the accepted norms in Latin America. An eight-hour workday and retirement programs in both the public and private sectors were implemented. Full legal and civil rights were granted to children born out of wedlock, and WOMEN received the right to initiate divorce. Both capital punishment and cruelty to animals used in the entertainment industry were abolished. Batlle, whose term ended in 1915, directed a new constitution in 1918 that replaced the 1830 document and, with it, the single presidential executive with a nine-member National Council of Administration. Largely through the use of protective tariffs, Batlle encouraged small entrepreneurs to develop manufacturing plants that would serve domestic needs. Owing to the prosperity generated by the agro-export market, Batlle's programs continued throughout the 1920s, but with the onset of the global depression in 1929, the foreign demand for Uruguayan produce rapidly diminished, and Batlle's programs fell under public assault.

Batlle's endeavors left their mark on Uruguayan society well past World War II. Civil and human rights continued to be practiced and defended. Workers' benefits, from wages to pensions, and government-owned or partially owned industries remained a mainstay of Uruguayan life and ECONOMY despite the assault from neoliberal free market economic principles in the late 20th century.

See also BLANCO PARTY (Vol. III); COLORADO PARTY, URUGUAY (Vol. III).

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**Bay of Pigs invasion** (1961) The Bay of Pigs invasion was a U.S.-designed and -supported plan to oust Cuban leader FIDEL CASTRO RUZ. Amid growing U.S.-Cuban tensions over the direction of the CUBAN REVOLUTION, in March 1960, U.S. president Dwight D. Eisenhower approved a Central Intelligence Agency (CIA) proposal to train Cuban exiles in GUATEMALA for an invasion of the island nation. The CIA anticipated that

early successes in the invasion would ignite an internal popular uprising that would topple Castro. This proved to be incorrect.

Newly elected President John F. Kennedy learned of the plan shortly after his election in November 1960. He came to office determined that Castro be removed from office for betraying the ideals of the revolution, which had brought an end to FULGENCIO BATISTA Y ZALDÍVAR's dictatorship in 1959 and, with it, CUBA's old order. In response to Kennedy's request for an assessment of the plan, on March 19, 1960, the Joint Chiefs of Staff reported that it could be carried out without U.S. public involvement but that its success depended on that of the anticipated uprisings inside Cuba. The presidential adviser on Latin American affairs, Arthur Schlesinger Jr., and chairman of the Senate Foreign Relations Committee, J. William Fulbright, cautioned against the plan. They did not think the United States could escape identification with the invasion and that the plan would therefore have a disastrous effect on U.S. relations with Latin America.

The Cuban brigade landed at the Bay of Pigs (Bahía de Cochinos) in the early morning of April 17, 1961, five days after departing by ship from Puerto Cabazes, NICARAGUA. Without additional supplies or air cover, some 1,200 soldiers of the invading force surrendered to Castro's army within two days. Another 114 were killed.

At the time, several reasons were given for the invasion's failure. Castro had long anticipated an attack, and he, like others, had witnessed the brigade being trained in Guatemala on U.S. television newscasts. (On February 1961, CBS news learned about the training site and broadcast pictures of it on Walter Cronkite's evening news.) Additionally, his spies had infiltrated the Cuban community in Miami, who spoke about the plan. In response, Castro rounded up and interned known dissidents across Cuba, thereby limiting the possibility of an internal uprising. On the military side, two diversionary landings scheduled for April 14 and 15 had to be aborted because of bad weather, and an exiled pilot had landed his damaged aircraft at Homestead, Florida, the day before the invasion, where he announced that he and others had strafed Castro's military planes at the Havana airport. Kennedy canceled a follow-up air attack. The remaining Cuban planes kept the exile brigade pinned down until Castro's army arrived at the invasion point. Once the attack began, Cuban shore batteries destroyed two supply ships sitting offshore.

The CIA Inspector General's report, which became public in 1999, placed responsibility for failure at the highest levels of U.S. government for inadequately planning the attack, having no contingency plan or plans, and failing to commit adequate resources to the operation. A second report appeared in 2000. The Taylor



A sign reading "First defeat of Yankee imperialism in Latin America" at Playa Girón, one of the entrance points to the Bay of Pigs, where the Cuban army blunted the 1961 invasion of CIA-sponsored Cuban exiles who hoped to overthrow Fidel Castro (Thomas M. Leonard Collection)

Commission, named after its chairman, General Maxwell Taylor, repeated most of the CIA's findings but placed greater responsibility on those who designed the plan. Significantly, the Taylor Commission reported that the Soviets were fully aware of the plan's details on April 9, 1961. (What those details were remains unknown, as the Soviet documents are not yet available and the only source is the Taylor Commission.) As the Soviets were friendly with Cuba at this time, they did not want to see Castro succumb to U.S. power, thus the commission assumed that they passed the information to Castro.

In the aftermath of the attack, Castro strengthened his hand at home by taking steps to further silence his critics. His international prestige significantly increased, particularly in Latin America, for having thwarted the United States. To other Latin Americans, particularly the upper and middle sectors, Castro's success at the Bay of Pigs and the strengthening of his hand within Cuba served to encourage opponents, including revolutionaries, who opposed the static societies across Hispanic America. This increased threat to the status quo prompted the elite and middle sectors to initially support the ALLIANCE FOR PROGRESS. The international criticism that Kennedy endured did not deter him from continuing to seek the ouster of Castro from power in Cuba. In December 1962, 1,197 members of the Cuban brigade imprisoned by Castro received their freedom in exchange for \$35 million worth of food, medicine, and agricultural equipment from the United States.

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**Belaúnde Terry, Fernando** (b. 1912–d. 2002) *president of Peru* Born into a middle-class intellectual and politically active family in LIMA, Fernando Belaúnde Terry accompanied his father and uncle to Paris when President AUGUSTO B. LEGUÍA banished them from PERU in 1924. There, Belaúnde completed high school and commenced his university training. When his father relocated to Miami, Florida, in 1930 Belaúnde completed his studies in ARCHITECTURE at the University of Texas at Austin. He returned to Peru in 1936, where he became a notable urban architect, urban planning consultant, and university professor.

Belaúnde began his political career in 1944 as a founding member of the National Democratic Party, which led to the presidential election of José Bustamante (b. 1894–d. 1989) in 1946 and Belaúnde's winning a congressional seat. Both served until General Manuel

Odría's (b. 1897–d. 1974) October 29, 1948, coup d'état. Belaúnde vaulted onto Peru's national political scene in 1956 after the electoral board refused to certify him as the presidential candidate of the Democratic Youth Front. Students challenged the MILITARY with massive demonstrations in Lima that were quelled by Belaúnde, who armed with only with a Peruvian flag marched between the two groups during a confrontation. A photo of the scene appeared in publications around the world, making Belaúnde an instant hero as he stood against the military government. His efforts, however, did not prevent Manuel Prado (b. 1889–d. 1967) from becoming Peru's 41st president on July 28, 1956.

Belaúnde immediately capitalized on his newfound fame. He went to Chincheros, in Cuzco State, where he founded the Popular Action (Acción Popular, or AP) party in July 1956. His claim that he wanted to recapture the Inca tradition of community and cooperation in a modern democratic society placed him between the right-wing oligarchy and the left-wing communists. After the party's founding, Belaúnde traversed the country to plead his case to the people and found a responsive chord. In defiance of the military government, Belaúnde presided over the AP's annual convention in 1959, for which he was arrested and jailed. He was held for 12 days before the government caved in to public pressure and released him. This opened the door for Belaúnde's June 10, 1962, presidential bid. Although he lost by some 14,000 votes to VÍCTOR RAÚL HAYA DE LA TORRE, the election was turned over to Congress for a decision because no one candidate received the constitutional minimum of one-third of the vote to win outright. The military again intervened to establish a caretaker government, which ruled until the June 9, 1963, elections were won by Belaúnde.

During his first administration (1963–68), Belaúnde initiated several infrastructure projects including the construction of a highway connecting the Pacific coast enclave Chiclayo with the isolated northern Amazon region, the building of several hydroelectric facilities, and the establishment of the Peruvian National Bank. He also promised a government urban housing program for the poor. While these programs were applauded by most Peruvians, along with the expansion of social services for the poor and initiatives to spur manufacturing, they contributed to inflation and a devaluation of the sol, Peru's currency, in 1967. While Congress emasculated Belaúnde's proposal for agrarian reform, the peasants began to seize land in the countryside, prompting the elites to respond with force and Belaúnde to send government troops into the countryside. The conflict that followed took an estimated 9,000 peasant lives and left another 19,000 homeless and 34,600 acres (14,000 ha) of land destroyed. Also in 1968, controversy erupted over the International Petroleum Company (IPC), which was at the time owned by Standard Oil, which owed taxes to the Peruvian government. In return for the back

taxes, Belaúnde settled the government's claims with the company, granting IPC the right to drill for oil in new locations. The Peruvian public demonstrated against the agreement.

Under these adverse economic conditions, the Peruvian military again intervened, removing Belaúnde from office on October 3, 1968. He took refuge in the United States, where he taught architecture at Harvard University. Belaúnde returned to Peru in 1979 and made a successful bid for the presidency a year later. After a promising beginning, the economic problems left over from 12 years of military rule again came to the fore. Inflation and unfavorable TRADE balances persisted, and unemployment climbed. The 1982–83 El Niño caused widespread flooding in coastal areas and severe droughts inland and wreaked havoc on the fishing industry. Guerrilla activities intensified; in particular, civil and human rights violations by the Shining Path prompted the government to declare a state of emergency in the Ayacucho and Apurímac regions. On the positive side, Belaúnde oversaw the completion of the same highway he had begun during his first administration.

As provided by the 1979 constitution, Belaúnde became a senator for life at the completion of his presidency on July 28, 1985. He died in Lima on June 4, 2002.

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**Belize** The only official English-speaking country in CENTRAL AMERICA, Belize achieved complete independence from the United Kingdom in 1981. Known as British Honduras until 1973, Belize, whose name is derived from the Maya for “muddy water,” is a parliamentary democracy. The only Central American country without access to the Pacific Ocean, Belize is bordered to the north by MEXICO and the west by GUATEMALA. The Caribbean coast is lined with a coral reef and 450 islets. The capital, Belmopan, located 50 miles (80.5 km) inland, was constructed during the 1960s after a hurricane devastated Belize City, the former capital and still the nation's largest city. Initially, foreign governments were unwilling to move their embassies to Belmopan, but, for example, the United States eventually opened an embassy there in 2006.

With just under 9,000 square miles (23,310 km<sup>2</sup>) of territory and less than 300,000 inhabitants, Belize has the lowest population density of any nation in Central America. Nevertheless, it is ethnically and linguistically

diverse. Mestizos, mulattoes, and NATIVE AMERICANS make up roughly 50 percent, 25 percent, and 10 percent of the Belizean population, respectively. The remainder is composed of Asians, North Americans, Europeans, and Garifuna, people of mixed indigenous (Carib and Arawak) and African heritage. Given that Belize was a British colony, the official language is English; nevertheless, the two most widely spoken languages are Spanish and Belizean Creole (a lyrical English-based language), which are spoken by 43 percent and 37 percent of the population, respectively. Almost 300,000 Belizeans live abroad, for the most part in the United States. The majority of those who have emigrated are Creole and Garifuna speakers. Although all religions are tolerated in Belize, half of the population practices Roman Catholicism.

Belize became a self-governing territory within the British Empire in 1964, but independence was delayed because of territorial disputes with neighboring Guatemala, which initially refused to recognize Belize's right to exist as an independent nation. After Belize achieved independence on September 21, 1981, the British government maintained a MILITARY presence there. In early 1993, citing Guatemala's recognition of Belizean independence in 1991, the British announced plans to remove its troops. A June 1993 military coup in Guatemala, however, temporarily renewed Guatemalan demands for Belizean territory. On October 1, 1994, upon the removal of British land forces from Belize, the British established the British Army Training Support Unit Belize (BATSUB) to maintain a military presence in Belize. Although Guatemala recognizes Belizean independence, border disputes continue.

Queen Elizabeth II, the official head of state, is represented in Belize by a governor general. Officially, the cabinet, led by the prime minister, advises the governor general; in practice, however, the prime minister exercises executive authority. The prime minister and the cabinet ministers, most of whom hold elected seats in the House of Representatives, are members of the major political party. The National Assembly is divided into the popularly elected House of Representatives and the Senate, consisting of members appointed by the governor general. GEORGE PRICE, the nation's first prime minister, cofounded the People's United Party (PUP) in 1950. Price was prime minister from 1981 to 1984 and from 1989 to 1993. MANUEL ESQUIVEL, the leader of the United Democratic Party (UDP), was prime minister from 1984 to 1989 and from 1993 to 1998. SAID MUSA took over leadership of the PUP in 1996 and won the majority in parliament in 1998 and 2003.

Belize's ECONOMY is primarily agricultural. Sugar is the main crop and represents half of the nation's exports. The banana industry, however, is the country's largest employer. Recently, the citrus industry has also expanded. The tourism INDUSTRY, enhanced by the 200-mile- (322-km-) long Belize Barrier Reef (the second

longest coral reef in the world), has greatly expanded during the Musa government.

See also BELIZE (Vols. I, II, III).

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**Belize–Guatemala territorial dispute** The territorial dispute between BELIZE and GUATEMALA can be traced to a series of 18th-century British–Spanish agreements under which Spain retained administrative control over modern-day Belize, a then-desolate Caribbean coastal territory, and granted the British logging rights and permission to introduce a black LABOR force to work in the lumber industry. This labor force, brought to Belize by the British, came from southern Caribbean islands where they had become victims of the decline of the Caribbean sugar industry. The 1786 Convention of London affirmed Spanish sovereignty over the territory, but after 1798, Spain made no attempt to reclaim it. By the time Spain lost control of Central America and Mexico in 1821, the British had extended their control inland from the Caribbean coast; they proclaimed the territory as the crown colony of British Honduras in 1871.

With the disintegration of Spain’s New World empire in the 1820s, several of the newly independent nations claimed the right of inheritance to Spanish territories. Thus, Guatemala claimed control over British Honduras and subsequently strengthened this claim under the terms of the 1859 Wycke–Aycinena Treaty. The Guatemalans then agreed to recognize British sovereignty over the crown colony provided the British government completed a road from Guatemala’s northeast Petén region to the Caribbean coast. The road was never built, and in 1884, the Guatemalan government announced that it would terminate the treaty. These matters stood until 1940, when the Guatemalan government declared the treaty void. Five years later, the 1945 Guatemalan constitution declared British Honduras to be Guatemala’s 23rd department. After 1954, Guatemala’s military governments used the controversy to stir national emotions, but this was largely to keep the public mind off their brutal rule and the country’s malfunctioning ECONOMY. Otherwise, Guatemalan authorities had little interest in the underdeveloped state with a large black population.

From 1961 until 1963, British and Guatemalan diplomats attempted to resolve the problem, but elected Belizean officials refused to participate in the talks. Belizean premier GEORGE PRICE rejected any suggestion that would tie his state to Guatemala. Independence from

Britain and international recognition remained Price’s only objectives. In 1965, Britain and Guatemala asked the United States to broker a solution. The latter proposed that Belize be granted its independence with Guatemalan control over its internal security, defense, and external affairs. The proposal did not differ from British colonial control, however, and the Belizeans refused it. They then demanded independence, including control of all defense matters. A series of meetings were held between 1969 and 1972 but abruptly terminated when the British dispatched an aircraft carrier and 8,000 troops to Belize for amphibious exercises. Guatemala took this as a threat to itself and stationed troops along its common border with Belize. The discussions ended, and tensions increased amid the military maneuvering.

As the decade progressed, Belizeans made a concerted effort to gain support from the international community. Belizean leaders appealed to the British Commonwealth of Nations, the Non-Aligned Movement, and the United Nations (UN) to accept the state’s independence and recognition of its border. Finally, in 1980, the UN approved a resolution calling for Belize’s independence and Britain’s defense of the country. The British were prepared to accept this, but the Guatemalans were not. Thus, when Belize received its independence from Great Britain on September 21, 1981, Guatemala refused to recognize it and promised to continue pushing its claim to the territory. Finally, on August 14, 1991, Guatemala accepted the right of the Belizean people to self-determination but also announced that it would continue to press for a final legal solution to the issue. On December 10, 2008, the Belizean and Guatemalan governments agreed to submit their claims to the International Court of Justice in The Hague, Netherlands.

See also BELIZE (Vols. I, II, III).

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**Betancourt Bello, Rómulo Ernesto** (b. 1908–d. 1981) *president of Venezuela* Born into a modest family in the small town of Guatire, east of CARACAS, Rómulo Ernesto Betancourt Bello’s political activism began at age 20 when he joined the “Generation of ’28,” which opposed the dictatorship of JUAN VICENTE GÓMEZ. For this, he was exiled from VENEZUELA. The experience abroad sharpened his democratic ideals and belief that new doctrines were needed to address his own country’s socioeconomic

problems. Betancourt returned to Venezuela shortly after Gómez's death in 1935. Six years later, Betancourt joined with others to found the Democratic Action Party (Acción Democrática, or AD) on September 11, 1941. Betancourt vaulted on to the national scene on October 18, 1945, when a MILITARY coup ousted the sitting president, Isaías Medina (b. 1897–d. 1953), and installed Betancourt in the presidency. During his three-year presidential term, Betancourt provided for universal suffrage, permitted the organization of labor unions, and used oil profits to initiate social programs. He increased taxes on oil companies that effectively prevented them from making greater profits than the Venezuelan government took in via tax revenues. Betancourt earned international acclaim for opening Venezuela to thousands of World War II European refugees. He also called for a constituent assembly that produced a new document on December 5, 1947, containing the framework of a democratic government and for a presidential election in 1948, which was won by another AD candidate, Rómulo Gallegos (b. 1884–d. 1968). Gallegos's presidency lasted only nine months, ending with another coup on November 24, 1948, that set in motion the 10-year military dictatorship of MARCOS PÉREZ JIMÉNEZ.

Betancourt again went into exile, spending time in COSTA RICA, CUBA, and PUERTO RICO and only returned after the overthrow of Pérez Jiménez on January 23, 1958, to successfully capture the December 7, 1968, presidential elections. Another event of equal importance that year was the Pact of Punta Fijo, signed by the leaders of the AD and Social Christian Party (COPEI) on October 31. The pact provided for a sharing of administrative authority between the two parties and remained in place until the 1998 presidential election of HUGO RAFAEL CHÁVEZ FRÍAS.

On taking office on February 19, 1959, Betancourt faced a bankrupt treasury. Despite low prices for oil on the global market and a quota limitation placed on Venezuelan oil by U.S. president Dwight D. Eisenhower, he put the government's financial house in order and continued to implement social programs for the poor. The U.S. quota system that favored Canada and MEXICO prompted Betancourt to initiate talks with other oil producers, which led to the founding of the Organization of Petroleum Exporting Countries at the Baghdad Conference between September 11 and 14, 1960. Betancourt considered his greatest triumph to be the peaceful transfer of the presidency on March 13, 1964, to AD colleague Raúl Leoni (b. 1905–d. 1972), the first such electoral change in Venezuelan history. He declined the AD's invitation to be its presidential candidate in 1973, instead supporting CARLOS ANDRÉS PÉREZ.

Betancourt remained a force within the AD and continued to envision democratic governments throughout Latin America. After suffering a stroke during a visit to New York City, Betancourt was brought home and died in Caracas on September 28, 1981.

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**Bird, Vere Cornwall** (b. 1910–d. 1999) *prime minister of Antigua and Barbuda* Born on December 7, 1910, in St. John's, on the island of Antigua, Vere Cornwall Bird, with no formal EDUCATION beyond primary school, became the president of the Antigua Trades and Labour Union (ATLU) in 1943. Using the ATLU to mobilize political support, Bird was elected to the colonial legislature of ANTIGUA AND BARBUDA in 1945. He subsequently established the Antigua Labour Party (ALP). His biggest battles were fought in the sugar INDUSTRY, where he achieved better wages for workers and recognition of the right of workers to have paid annual holidays. A tall, imposing, charismatic figure, Bird served as the first and only chief minister of Antigua and Barbuda from 1960 to 1967. A supporter of a Caribbean united politically and economically, Bird ardently supported the WEST INDIES FEDERATION. When the British granted Antigua and Barbuda self-government in 1967, Bird became premier. Defeated by the Progressive Labour Movement (PLM) in the 1971 legislative elections, he returned to power in 1976 and led the nation to independence on November 1, 1981.

Bird served as prime minister from 1981 to 1994, when he retired for health reasons. In 1985, in an attempt to secure his legacy, Bird convinced the legislature to rename Antigua's international airport in his honor. He was succeeded by his son, Lester Bird (b. 1938– ), who served as prime minister until the ALP lost political power in 2004. One of Lester Bird's first acts of government was to declare his father a national hero. Antiguan and Barbudan critics of the ALP accuse the Bird family of corruption (which has never been proven in a court of law) and nepotism. In her prose essay *A Small Place* (1988), Antiguan author Jamaica Kincaid compared the Bird dynasty to the Duvalier dynasty in HAITI. Bird died at Holburton Hospital in St. John's on June 28, 1999.

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**Bishop, Maurice** (b. 1944–d. 1983) *prime minister of Grenada* Born on May 29, 1944, to Grenadian parents

in Aruba, Maurice Bishop and his family returned to GRENADA, and in 1957, he won a scholarship to study at Presentation Boys School, a Roman Catholic secondary school. President of the Students' Union, the Debating Society, and the Historical Society, and editor of the school newspaper, Bishop won the Principal's Gold Medal for outstanding academic and overall ability in 1962. Bishop and Bernard Coard (b. 1944– ) cofounded the Grenada Assembly of Youth after Truth, a student group dedicated to political awareness, in 1963. After nine months of hosting weekly talks and seminars, Bishop went to London University to study law, while Coard went to Brandeis University to study economics. While in London, Bishop married Angela Redhead, a nurse. Bishop returned to Grenada with his wife in 1970 and began to practice law. In 1972, Bishop and several urban professionals, including his future girlfriend Jacqueline Creft, established the Movement for Assemblies of the People (MAP), a political organization influenced by Tanzania's Julius Nyerere's brand of socialism, which advocated grassroots organizations to increase the political awareness of the larger populace.

On March 11, 1973, Bishop's MAP merged with the Joint Endeavor for Welfare, Education, and Liberation of Unison Whitman (1939–83) to form a leftist alternative to Premier ERIC GAIRY's Grenada United Labour Party. The New Jewel Movement (NJM) called for a program to raise the standard of housing, living, education, health, food, and recreation for all people. The Manifesto of the New Jewel Movement (1973) stated: "The people are being cheated and have been cheated for too long—cheated by both parties, for over twenty years. Nobody is asking what the people want. We suffer low wages and higher costs of living, while the politicians get richer, live in bigger houses, and drive around in bigger cars." In addition, the NJM called for the nationalization of all foreign-owned hotels. In 1976, Bishop won a seat in the House of Representatives and became leader of the opposition.

On March 13, 1979, while Gairy was out of the country, the NJM staged a virtually bloodless revolution and established the People's Revolutionary Government (PRG). Although the NJM called for a form of popular socialism based on grassroots, democratic local councils, it suspended the constitution, ruled by decree, arrested the political opposition, closed newspapers, and rapidly militarized the nation. Bishop obtained MILITARY assistance from the Soviet Union and CUBA and enlisted Cuban aid in constructing an international airport. Whereas Bishop claimed that the airport was being built to expand the tourism INDUSTRY, U.S. president Ronald Reagan believed that it was a potential Cuban-Soviet air base. On October 18, 1983, the NJM imploded. Minister of Finance Coard, who wanted to pursue a more pro-Soviet, anti-U.S. policy, overthrew Bishop with the support of the army. Bishop and many of his closest associates, including his girlfriend Creft, were arrested and executed

the next day. On October 25, 1983, Reagan unleashed OPERATION URGENT FURY, a U.S. military intervention supported by BARBADOS, JAMAICA, and several members of the ORGANIZATION OF EASTERN CARIBBEAN STATES, which defeated Grenadian and Cuban resistance and overthrew Coard's government. Pro-Bishop survivors of the 1983 coup organized the Maurice Bishop Patriotic Movement, an insignificant leftist political party that has since virtually disappeared.

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**Bogotá** Bogotá is the capital of COLOMBIA. Founded by the Spanish in 1538, the settlement was originally known as Santa Fe. The city sits on an 8,563-foot (2,610-m) high plateau of the eastern Andes. Approximately 7 million people reside within its limits and another 1.2 million in the greater metropolitan area. In addition to national and city government buildings and operation centers, Bogotá is home to several universities, the oldest being the Universidad Santo Tomás, founded in 1580; followed by the Universidad Nacional de Colombia, founded in 1867; and the prestigious private Universidad de los Andes, established in 1948. Bogotá also has a rich tradition in the arts, LITERATURE, and theater.

Bogotá has more than 1,000 neighborhoods laid out in square grids that date to Spanish colonial times. Affluent neighborhoods are found to the north and northeast; the middle class is located largely in the western and northwestern parts of the city; and the poorer neighborhoods are in the south and southeast. The last include several squatter communities. Given the city's size, its TRANSPORTATION system of buses, a subway, and taxis is today severely strained. The population has grown exponentially since the 1930s when Colombia adopted the Import-Substitution Economic Model and Bogotá developed into a manufacturing center. By 1975, 75 percent of the nation's industrial output was produced in the city. After World War II, the violence that characterized Colombia's rural areas caused many unskilled people to migrate to the city, which contributed to the growth of shantytowns. In the 1980s, Bogotá became known as one of Latin America's crime-ridden cities, but a concerted government effort in the 1990s made it one of Latin America's more secure environments today.

See also BOGOTÁ (Vols. I, II, III).

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**Bogotazo** See COLOMBIA.

**Bolivia** Bolivia is a 424,162 square mile (1.09 million km<sup>2</sup>) landlocked country bounded on the north and east by BRAZIL, the south and east by PARAGUAY, on the south by ARGENTINA, and on the west by PERU and CHILE. It has three distinct regions: the eastern fertile lowlands, the central high plateau (the altiplano), and the central ranges of the Andes, home to some of the highest peaks in the Western Hemisphere. Quechua and Aymara Indians account for 60 percent of Bolivia's 9.1 million inhabitants; mestizos, 25 percent; and whites, 15 percent. Bolivia has long been one of Latin America's most impoverished nations but has developed somewhat economically since reforms were instituted beginning in the 1980s. Today, La Paz is the government's administrative capital, and Sucre serves as the country's judicial headquarters.

The Tiwanaken (near Lake Titicaca) and the Moxo (near La Paz) indigenous peoples can be traced to about the second century B.C.E. but had been replaced by the Quechua by the time the Spanish conquistador Diego de Almagro passed through what is now Bolivia in 1535. During most of the Spanish colonial period, the territory was known as Charcas or Upper Peru and was administered by the viceroy at Lima through the Audiencia of Charcas, the contemporary city of Sucre. The mines at Cerro Rico (rich mountain) produced about 90 percent of the silver discovered by the Spanish in South America and made Potosí the largest city in the Western Hemisphere at that time. While NATIVE AMERICANS had used coca as a stimulant prior to the arrival of the Spanish, its use was encouraged among indigenous laborers who worked in the mines. Bolivia's independence on August 6, 1825, was anticlimactic following the fall of Peruvian rebel forces earlier that year. The country was named after the famous South American liberator, Simón Bolívar.

Political instability plagued Bolivia from the time of its independence in 1825 well into the 20th century, as seen in the nearly 200 political coups and countercoups. Three issues have prevented a cohesive nation from developing out of diverse components: 1) the failure to incorporate indigenous peoples into the nation's political and economic systems, 2) the emphasis on an export-based ECONOMY at the expense of internal development, and 3) the failure of creole political leaders to extend government control over its frontier. Discrimination against the indigenous dates to the Spanish colonial period, while territorial losses came with Bolivia's failure in the War of the Pacific (1879–84) with Peru and Chile and in the CHACO WAR (1932–35) with Paraguay.

Although the mines had long been overworked, silver continued to be Bolivia's major export until the start of the 20th century, when it was replaced by tin. The MINING industry was dominated by three national companies until 1952. Silver mining brought prosperity to the northern sector of Bolivia but also encouraged the Liberal Party to

sell off indigenous communal lands during the first part of the 20th century. These were then purchased by the elite to use as collateral in buying shares in silver-mining ventures. During the 1920s, Conservative governments slowed these land sales but permitted the expansion of privately owned haciendas into indigenous and peasant communities. This process also occurred in Bolivia's eastern, rubber-tree rich sector. The MILITARY brutally suppressed indigenous protests. The only exceptions before 1952 came during the two-year administration (1937–38) of DAVID TORO RUILOVA and his immediate successor Germán Busch (b. 1904–d. 1938), which also set the stage for the 1952 revolution. Beginning in 1940, the POLITICAL PARTIES became more sharply divided and radical and moderate leftist groups emerged, including the Party of the Revolutionary Left (Partido de la Izquierda Revolucionario, or PIR), the Revolutionary Workers Party (Partido Obrero Revolucionario, or POR), and the NATIONAL REVOLUTIONARY MOVEMENT (MNR). PIR and POR addressed rural issues, calling for an end to indigenous servitude and the *latifundio* (a large tract of land, privately held) system through the nationalization of haciendas. Based on European fascist principles, the MNR focused on the establishment of a corporate state. All groups called for the nationalization of the tin mines.

On December 20, 1943, General Gualberto Villarroel (b. 1908–d. 1946) engineered a coup and placed himself in power. In cooperation with the MNR and POR, Villarroel permitted the formation of a national miner's union under the leadership of JUAN LECHÍN OQUENDO. Villarroel subsequently decreed an end to unpaid LABOR services that kept the indigenous bound to haciendas, as well as the building of schools in the Indian communities. While these decrees were not implemented, the tin miners' union later became a potent political force. In 1945, Villarroel convened a national congress to hear Native Americans' complaints. While attracting thousands of Indians from around the country, it stirred the ire of the Conservative elite, who encouraged the president's ouster. An angry crowd hanged Villarroel from a lamppost on July 21, 1946. Conservative governments followed thereafter, but they could not dampen the ever-increasing leftist opposition.

The MNR grew sufficiently strong for its candidate, VICTOR PAZ ESTENSSORO, to win the May 15, 1951, presidential election. Nevertheless, the military prevented Paz from taking office. Not to be denied, the MNR organized its followers, particularly miners, who stormed La Paz on April 12, 1952. Three days later the military relented, and Paz assumed the presidency. Over the next four years, Paz Estenssoro implemented a social revolution by decree. A 1953 land reform program led to the expropriation of large and medium-size landholdings, particularly in the altiplano, for redistribution to the Indians. The indigenous were also tied to the MNR through rural labor syndicates. As landowners,



they became conservative about many social issues and therefore were willing to support government attempts to dampen tin miners' demands. Their new status also led these indigenous groups to withhold support for the Cuban revolutionary ERNESTO "CHE" GUEVARA when he arrived in 1967 hoping to foment a national uprising. In the eastern lowlands, the large landowners held on to their estates and, in fact, benefited from U.S. economic aid that stimulated sugar and cotton production rather than assist in the relocation of Native Americans from the overcrowded highlands.

The MNR remained in power until November 5, 1964, when General René Barrientos (b. 1919–d. 1969) assumed the presidency. He remained in office until his death on April 27, 1969, in a helicopter accident. From then until 1993, Bolivia endured a series of military governments or civilian administrations whose fate depended on the military. Whoever governed relied on a combination of political parties to remain in power. Throughout this period, successive Bolivian governments were condemned by the international community for denying the people their civil rights and for human rights violations. The country experienced economic advancement in the mid-1970s largely as a result of government policies including the expansion of agricultural exports and the development of infrastructure including airports and roads. However, when tin prices dropped precipitously in the 1980s, the economy spiraled downward. By 1985, inflation had reached 40,000 percent annually.

Paz Estenssoro returned to the presidency on August 6, 1985, but this time as a neoliberal. He opened the country to foreign investment, dismantled the state mining company (Comibol), and broke the miner's unions by relocating many miners and their families to subtropical lands. Others moved to the Chaparé region, where they joined local farmers in the growing of coca, a crop that grew in importance with the explosion in global drug trafficking (see DRUGS). With U.S. assistance, in the 1990s, the Bolivian government conducted a program to eradicate the crop. It was sufficiently successful that by 2001, Bolivia had won economic assistance and debt forgiveness from the United States, the International Monetary Fund, and the World Bank. Nonetheless, Bolivia's widespread poverty and concomitant social problems were not relieved either by these monetary changes or by the nationalization of the country's hydrocarbon industries in 2004.

Playing on the plight of the indigenous, JUAN EVO MORALES AYMA of the Movement Toward Socialism Party (Movimiento al Socialismo, or MAS) won the December 18, 2005, presidential election, with 54 percent of the votes. On May 1, 2006, he increased the amount of land to be used for legal coca growing from 30,000 acres (12,000 ha) to 50,000 acres (20,000 ha) and in November 2006 completed contract renegotiations with hydrocarbon companies to increase the Bolivian share of their

profits by 82 percent. While the new contracts satisfied Morales's domestic supporters, they have created problems with Bolivia's MERCOSUR neighbors who have TRADE agreements for the purchase of its natural gas (see SOUTHERN CONE COMMON MARKET). A recalcitrant congress coupled with regional resistance to the increased power of the central government have blunted Morales's plans for further nationalization.

See also ALMAGRO, DIEGO DE (Vol. I); BOLÍVAR, SIMÓN (Vol. II); BOLIVIA (Vols. I, III); CHARCAS (Vol. II); POTOSÍ (Vols. I, II); QUECHUA (Vol. I).

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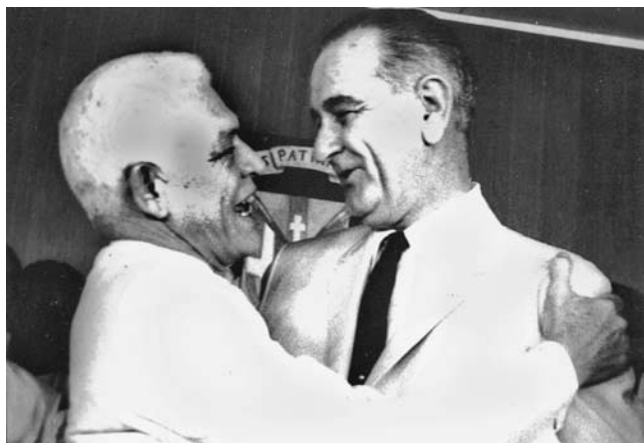
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**Bosch, Juan** (b. 1909–d. 2001) *president of the Dominican Republic* Born on June 30, 1909, in La Vega, DOMINICAN REPUBLIC, Juan Bosch was an early critic of Dominican dictator RAFAEL TRUJILLO. In 1931, he published his first of many books. Although eventually known primarily as a politician, Bosch was one of the most prominent Dominican writers (see LITERATURE). During the early years of Trujillo's dictatorship, Bosch was arrested for conspiracy against the regime and spent three months in jail. In 1938, fearing that Trujillo would try to either bribe or coerce him into supporting the regime, Bosch fled into exile in PUERTO RICO. Spending the next 24 years in exile, he settled in CUBA in 1939 where he founded the Dominican Revolutionary Party (Partido Revolucionario Dominicano, or PRD) with other Dominican exiles. Bosch was an organizer of the ill-fated 1949 Cayo Confites invasion of the Dominican Republic to overthrow Trujillo. After the uprising, Bosch fled to VENEZUELA, where he continued his anti-Trujillo activities. Eventually returning to Cuba, Bosch was jailed after FULGENCIO BATISTA Y ZALDÍVAR led a military coup in 1952. After a brief incarceration, Bosch sought exile in COSTA RICA. He spent the rest of the 1950s traveling throughout Latin America campaigning for democracy.

Concerned that the impoverished populace in the Dominican Republic would find FIDEL CASTRO RUZ's radical approach to social and economic change appealing, U.S. president John F. Kennedy's administration sought to transplant democracy to the Dominican Republic. In 1962, several months after Trujillo's son RAMFIS TRUJILLO fled into exile, Bosch returned to the Dominican Republic to campaign for the U.S.-supervised



On February 7, 1963, U.S. vice president Lyndon B. Johnson (right) congratulates Juan Bosch, the first elected president in the Dominican Republic in 34 years, on taking the oath of office. (*United States Information Agency*)

presidential elections scheduled for December 20, 1962. Bosch won 60 percent of the vote, defeating his rival, Viriato Fiallo (b. 1895–d. 1983), in what many observers called the first democratic elections in the history of the Dominican Republic. Bosch took office on February 27, 1963, and was heralded by the Kennedy administration as a promoter of constitutional democracy. Bosch immediately set out to implement sweeping political, economic, and social reforms, which quickly alienated the Dominican elite, Roman Catholic hierarchy, and MILITARY, as well as U.S. diplomats and businessmen who perceived Bosch as being soft on communism. On September 25, 1963, the Dominican military, with little protest from the Kennedy administration, overthrew Bosch after only seven months in office. Bosch went into exile in Puerto Rico.

In April 1965, a group of pro-Bosch military officers known as Constitutionalists staged a revolt to return the exiled Bosch to power. Loyalists within the army, who were supported by the nation's elites, rallied around General Antonio Imbert (b. 1920– ) one of Trujillo's assassins. On April 28, the United States sent 400 marines to restore order. U.S. president Lyndon B. Johnson, under the initial pretense of humanitarian concerns, eventually sent a further 23,000 U.S. troops. Code-named OPERATION POWER PACK, U.S. military intervention restored order and set the stage for democratic elections in 1966. Bosch was defeated at the polls by JOAQUÍN BALAGUER. Believing that the PRD was not actively pursuing a revolutionary agenda, Bosch subsequently left the party in 1973 and founded the Dominican Liberation Party (Partido de la Liberación Dominicana, or PLD). He ran unsuccessfully for the presidency in 1978, 1982, 1986, 1990, and 1994. Bosch died on November 1, 2001, in SANTO DOMINGO. His protégé Leonel Fernández (b. 1953– ), the current leader of the PLD, has been president of the Dominican Republic since 2004.

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### Bouterse, Dési (Desiré Delano Bouterse)

(b. 1945– ) chairman of the National Military Council and de facto ruler of Suriname Born on October 13, 1945, in Domburg, SURINAME, Dési Bouterse joined the Surinamese MILITARY in 1975. On August 13, 1980, Bouterse was one of 16 noncommissioned officers who orchestrated the military coup that overthrew the civilian government led by Prime Minister HENCK ARRON. Bouterse, as chairman of the National Military Council, soon became the dominant figure in the new regime. Although erroneously welcomed as a reformer, he promptly banned opposition parties, brutally suppressed dissent, suspended the 1975 constitution, and dissolved the legislature.

On December 8, 1982, several prominent citizens in Suriname were arrested in their homes by military authorities. Included in the roundup were Cyril Daal (d. 1982), the leader of the largest TRADE union in Suriname; Kenneth Gonçalves (b. 1940–d. 1982), the dean of the Bar Association; and Gerard Leckie (b. 1943–d. 1982), the dean of the University of Suriname. On December 9, the 15 detainees were executed at Fort Zeelandia. Although the victims of the “December murders” were all shot at close range through the front of the head or chest, Bouterse claimed that they were shot while trying to escape. In 1986, Bouterse brutally repressed an uprising of Maroons (blacks living in their own communities in remote regions) who resisted the government's attempt to relocate them to urban areas. In 1987, Bouterse, in an attempt to obtain economic aid from the Netherlands, allowed democratic elections, which were won by the opposition. Bouterse overthrew that government in 1990 when the president sought a peaceful settlement with the Maroon revolutionaries.

In 1990, after large quantities of cocaine began to arrive in the Netherlands, a Dutch investigation revealed that Bouterse was involved in the export of Colombian cocaine (see DRUGS). The Dutch government suspended their massive aid infusions, which resulted in the removal of Bouterse as commander of the military and democratic elections in 1991. In late 1997, Bouterse was tried in absentia in a Dutch court for drug smuggling and found guilty. Regardless, Surinamese law prohibits Bouterse's extradition. In 2007, Bouterse, who has reinvented himself as a populist political candidate, announced his interest to again seek the Suriname presidency, but those

plans were stymied a year later when preliminary court hearings concerning his role in the 1982 massacre that involved Daal began. The trial itself was postponed in February 2009.

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**Bracero Program** The Bracero Program was a series of agreements from 1942 to 1964 between the United States and MEXICO that provided for the legal entry of Mexican agricultural workers (braceros) into the United States. The program had its origins in World War II, when the United States experienced a LABOR shortage as men were drafted and recruited into MILITARY service and women were drawn to industrial labor. Under the terms of the 1942 agreement, Mexican workers received permits to work in the United States for between four weeks and six months. The permits could be renewed for up to 18 months. The U.S. Agricultural Department administered the program, initially through the War Food Administration. Some 300,000 braceros participated in the program during World War II, and when the program ended in 1964, an estimated 4 million Mexicans had worked in the United States.

As the contractor, the U.S. government paid for the workers' travel expenses to recruitment centers located throughout Mexico and all travel expenses to the work sites, usually in the southern United States. Once located with stateside employers, the braceros signed standardized work contracts under which they were paid the local prevailing wage and were guaranteed work for 75 percent of the time of the contract. During any idle time, the workers received a subsistence wage. U.S. employers also provided free housing, adequate meals at low cost, and medical care. To participate in the program, U.S. private employers, as subcontractors, were required to prove that resident labor was not available and they would pay the braceros as required. At the insistence of the Mexican government, the braceros were not to be subjected to discrimination, and for this reason, none worked in Texas (where all nonwhites were discriminated against at the time) for the first five years of the program.

The braceros labored under several disadvantages. Most contracts were written in English and therefore were easily violated by subcontractors. The language barrier meant that many Mexicans did not fully understand the terms of their agreement. The braceros were most often employed in "stoop labor," which included picking cotton, vegetables, and fruit; thinning sugar beet fields; and, on occasion, repairing railroads. While they had the right to complain about withheld wages and working conditions, the braceros most often did not, fearing deportation if they did so. By the early 1950s, the braceros faced

competition from Mexicans who migrated illegally into the United States and could be employed more cheaply (see MIGRATION). When the Mexican government refused to assist in controlling illegal border crossings, the U.S. government expelled from the program any employer caught using illegal workers. At the same time, the U.S. government deported illegal workers, often by plane to Central Mexico, in an effort to discourage their return.

Despite its problems, the program enabled the U.S. agricultural industry to benefit from cheap labor. For Mexico, the program served as a safety valve for its excess labor force, and the remittances home gave many poor residents badly needed money. Since its termination in 1964, illegal immigration of Mexicans into the United States has become a significant political issue.

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**Bradshaw, Robert** (b. 1916–d. 1978) *premier of St. Christopher and Nevis and St. Christopher–Nevis–Anguilla* Born on September 16, 1916, in St. Paul Capesterre on the island of St. Christopher, Robert Bradshaw was a LABOR activist who sought to politicize sugar workers in SAINT CHRISTOPHER AND NEVIS. The collapse of sugar prices triggered by the Great Depression precipitated the birth of organized labor in St. Christopher and Nevis. Dedicated to the struggle for independence from the United Kingdom, Bradshaw founded the St. Kitts and Nevis Labour Party in 1940. Bradshaw was elected to the Legislative Council in 1946 and dominated the political life of St. Christopher and Nevis for the next three decades.

From 1958 to 1962, St. Christopher and Nevis was a province of the WEST INDIES FEDERATION as St. Christopher–Nevis–Anguilla (the latter island considered to form part of a single political entity). Bradshaw was elected to the Federal House of Representatives and served as the federation's minister of finance. After the dissolution of the federation in 1962, Bradshaw returned to St. Christopher (also known as St. Kitts) from TRINIDAD AND TOBAGO. In 1966, he became the chief minister of St. Christopher–Nevis–Anguilla. The British granted the islands greater local autonomy in 1967, and Bradshaw became the first premier of St. Christopher–Nevis–Anguilla. A major secession movement was immediately launched in Anguilla. Although initially repressed by Bradshaw, Anguilla broke away from St. Christopher and Nevis in 1971 (see BRITISH OVERSEAS TERRITORIES).

Bradshaw nationalized all sugar estates as well as the main sugar mill on St. Christopher. He faced opposition from the former sugar estate owners, who formed the People's Action Movement (PAM), and the people of Nevis, who felt that Bradshaw neglected Nevis and denied it revenue and investment opportunities. Bradshaw ignored their complaints. In 1977, he went to London to engage in independence talks. He died on May 23, 1978, on St. Christopher of prostate cancer. He was succeeded by Paul Southwell, who died on May 18, 1979. The Labour Party suffered a leadership crisis, and PAM won the 1980 parliamentary elections. In 1997, Bradshaw was named the first national hero of St. Christopher and Nevis.

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**Brazil** Brazil is located along the eastern coast of South America, bordering the Atlantic Ocean. Its northern and western borders link it with every other South American nation except CHILE and ECUADOR. With approximately 3.3 million square miles (8.5 million km<sup>2</sup>) of land, Brazil occupies 47 percent of South America's landmass and is the world's fifth-largest nation. Approximately 190 million people reside in Brazil, a nation with a high mortality rate due to AIDS and infant deaths, as well as lower population growth than elsewhere on the continent. While most of the country has a tropical climate, the southeast lies in more temperate zones, a factor that has affected economic development.

Evidence suggests that early humans first inhabited Brazil some 8,000 years ago, although not all archaeologists agree with this date. An estimated 1–2 million NATIVE AMERICANS inhabited the territory when Portuguese explorer Pedro Álvares Cabral landed on the easternmost tip of South America around April 21, 1500. Because the indigenous peoples were nomadic and lived in small clusters, the Portuguese were unable to subjugate them, a fact that led to the subsequent importation of African slaves, as well as immigration from Europe and Asia. Brazil was not as rich in the natural resources that took the Portuguese to Africa and South Asia, thus it received less attention. These same factors—population and resources—contributed to Portugal's defiance of the 1494 Treaty of Tordesillas by which Pope Alexander VI divided the New World between the Catholic nations of Portugal and Spain. If enforced, the treaty would have limited Portugal's claims to the easternmost tip of Brazil, or its "hump," as it is commonly known. Instead, the Portuguese pushed Brazil's borders westward to

the Andes Mountains. Only after independence from Portugal on December 7, 1822, did the ill-defined boundaries become the subject of conflict.

Brazil's political development was haphazard until King John VI's rule. Portuguese king John III (b. 1502–d. 1557) had divided Brazil into hereditary captaincies, each approximately 150 miles (240 km) along the Atlantic coast but without interior lines of demarcation. In addition, the king had appointed Portuguese noblemen as *donatários* to govern each state. The ruling donatary had complete civil and criminal jurisdiction over the territory, including political appointments, land allocations, defense, and conversion of the Native Americans. The system did not work well, as the *donatários* battled each other and contested the Crown's central authority. When King John VI arrived in Brazil in 1808 after fleeing the invading French on the Iberian Peninsula, he attempted to establish a centralized administration, but to no avail. The prevalence of state power was entrenched. King John returned to Portugal in 1821, leaving behind his son Dom Pedro to govern. Pedro declared Brazil's independence on September 7, 1822, and ruled as its emperor. Ultimately Pedro I's incompetence and unpopularity forced him to abdicate on April 7, 1831, in favor of a regent until his own five-year-old son was deemed mature enough to rule as Pedro II, beginning on July 18, 1841. Considered a more astute ruler than his father, Pedro II successfully steered Brazil through the War of the Triple Alliance (1865–70) and the abolition of slavery but drew opposition from Liberals who wanted independence. The MILITARY forced him out on November 15, 1889, a move that ended the Empire of Brazil and commenced its modern history as a republic.

### THE FIRST REPUBLIC, 1889–1930

General Manuel Deodoro da Fonseca, who had led the military coup that ousted Pedro II, became Brazil's first de facto president. A civilian constituent assembly produced a new constitution, which went into effect in 1891. While it largely replicated the U.S. Constitution, suffrage was severely restricted: Only white, literate, landowning males could vote. In effect, only 3.5 percent of the population could vote in 1891, a figure that rose to 5.7 percent by 1930. The assembly also elected Deodoroda Fonseca as the country's first president, with Floriano Peixoto (b. 1839–d. 1895) as vice president. Political instability followed as the new government confronted several unsuccessful revolts. The 1894 elections, won by Prudente de Moraes, set in motion a pattern that lasted until 1930 and provided a sense of political tranquillity at the national level. Moraes, like most of his successors, identified with the republican movement that had led to the end of the monarchy in 1889. For the most part, these men came from Brazil's two most economically important states: São Paulo and Minas Gerais. By the start of the 20th century, both states were leading exporters of coffee and exercised state authority over it. State taxing

policies favored the development of the coffee and ancillary industries, discriminated against interstate TRADE, and imported workers, mainly from eastern Europe, who labored in the fields without the benefit of government or union protection. In effect, the federalist constitution permitted states to become political powers unto themselves. At the local level, the coffee barons, known as the “colonels,” ruled as political bosses and turned out the vote for governors at the national level and, in turn, usually agreed among themselves who would be the “official” candidate in presidential elections.

Opposition to the system increased over time. A small middle sector surfaced with the growth of the export-based ECONOMY. Lawyers, bankers, and other white-collar workers, as well as skilled laborers, were angered by the political corruption. Younger army officers who found the door to promotion closed and who sought greater compensation initiated a series of “barracks revolts” between 1922 and 1924, before being driven far into Brazil’s interior. One of their leaders, Luis Carlos Prestes (b. 1898–d. 1990), later served as leader of Brazil’s Communist Party for some 30 years. All of these groups often issued manifestos calling for free elections, broader suffrage that included WOMEN, and the remedy of various social ills. More practical were the Democratic Party and workers’ organizations. Founded in São Paulo in 1926, the Democratic Party wanted privileges for its members similar to those enjoyed by its European counterparts, including legitimate participation in the political process, an end to corruption, and greater economic opportunity. Workers’ unions had met with little success since 1889 and in the early 1900s, were superseded by anarchists and anarchosindicalist unions that staged several strikes, all of which failed to attain their goals, including improved salaries and working conditions. In 1919, as had occurred in ARGENTINA, these groups became associated with foreign ideas, and many of their leaders were deported. Together, however, these varied groups demonstrated that the old order was under serious political attack by the end of the 1920s.

From the time of its colonization until 1930, Brazil had experienced cycles of economic development that emphasized the exportation of primary products to markets in the Northern Hemisphere. The exportation of brazilwood, the source of the red dye for which the country is named, dominated the early colonial period, but by 1600, the invention of synthetic dyes in Europe had ended the demand for this product. Sugar became the most lucrative economic pursuit in the 1700s and early 1800s for the plantation owners in the northeast of the country. By 1830, it accounted for 30 percent of the nation’s exports but slowly declined thereafter, to just 5 percent by 1900. The cultivation of sugar by the British, Dutch, and French in their Caribbean possessions and the cultivation of sugar beets in the United States and that country’s link to CUBA for sugarcane lessened global demand for Brazil’s product.

Rubber production can be traced to the early 19th century in Brazil’s tropical Amazon region. By 1853, the port of Belém alone exported 2,500 tons of natural rubber, and by 1913, the product accounted for nearly one-third of Brazil’s exports. Owing to rapid industrialization in Europe and the United States, the demand for rubber latex intensified and continued to strengthen on the introduction of the vulcanization process in 1839, which prevented it from getting too sticky in hot weather and too brittle in the cold. The demand for Brazilian rubber declined in the 1920s as the British turned to their Southeast Asian colonies for the product and again during the Great Depression and with the introduction of synthetic rubber by the DuPont company in 1931. World War II accelerated the demand for Brazilian rubber. After the war, however, synthetic rubber replaced natural rubber, and by 1960, the former had replaced the latter as the world’s primary rubber product. The Brazilian rubber INDUSTRY went into permanent decline.

Coffee had been introduced to Brazil from the Caribbean in the early 19th century. It flourished in the southern states of São Paulo and Minas Gerais and subsequently in the state of Rio Grande do Sul. Brazil’s local coffee barons, often referred to as “the colonels,” dominated the socioeconomic-political scene from 1900 to 1930. Europe, particularly Germany, became the country’s major coffee market. The growing foreign demand for coffee increased the need for laborers to satisfy increased production and transport of the coffee crop to the Atlantic coast ports for shipment to Europe. In the late 19th and early 20th centuries, immigrant laborers came mainly from Italy and Spain, with others from eastern and central Europe. Little thought was given to relocating black sugar workers from the Amazon area to the southern coffee region. Northern agriculturalists envisioned a rebirth of their rubber and sugar industries, while southern coffee growers were reluctant to transport blacks southward for racial reasons. On the eve of the Great Depression, coffee was Brazil’s leading crop, accounting for nearly 70 percent of total exports.

Brazil changed in other ways from 1889 to the 1920s. The population increased by 162 percent during the time period, with most of the growth centered in the urban and industrialized coastal cities, such as SÃO PAULO and RIO DE JANEIRO. A nascent LABOR MOVEMENT emerged in the 1920s. Because the national political system served mainly agricultural interests, the state proved unresponsive to the needs of the urban poor. The CATHOLIC CHURCH and private organizations attempted to fill the void with charities, recreational clubs, and the like, but they were incapable of dealing with the problem’s immensity. Brazil stood at the precipice of sociopolitical change.

#### ERA OF GETÚLIO VARGAS, 1930–1964

In 1930, the system that had characterized Brazilian politics since 1894 broke down and provided an opening for the Liberal Alliance to nominate GETÚLIO DORNELLES

VARGAS, from Rio Grande do Sul, to challenge the coffee barons' "official" candidate, Júlio Prestes (b. 1882–d. 1946), from the state of São Paulo. Amid charges of fraud, Prestes won the March 1, 1930, presidential contest but never took office. On October 24, three weeks before the scheduled end of his administration, the military ousted President Washington Luís (b. 1865–d. 1957) and on November 3, installed Vargas as provisional president. The military also shut down the national legislature, enabling Vargas to rule by decree. He immediately dismissed all state governors, replacing them with men loyal to him, and when *paulistas* (people from the state of São Paulo) revolted against the centralization of power, the federal army suppressed them. That same year, 1930, Vargas suppressed the *tenente* movement within the military, a group of younger officers focused on state-sponsored social reform whom Vargas considered a threat. In 1933, Vargas also called for a constituent assembly. A year later, it presented the nation with a new document that provided for the direct popular election of a president and congress. Nationalist provisions placed restrictions on foreign land ownership and immigration. Over the next three years, Vargas quashed two national ideological groups: the Integralists, a middle-class organization supported by naval officers who espoused traditional Brazilian values but were secretly funded by the Italian embassy, and the National Liberation Alliance (Ação Libertadora Nacional, or ALN), a populist coalition of socialists, communists, and other radicals run by the Brazilian Communist Party. The groups militated against each other, and their demonstrations often became violent. Beginning in July 1935, the government directed a military crackdown against both groups, and arrests, torture, and summary trials followed. The violence, however, continued to escalate. Finally, on November 10, 1937, Vargas dissolved Congress and, in a national radio address, promulgated a new constitution that paved the way for a new national government, or *Estado Novo*, that effectively shut down all government institutions save the presidency. Vargas now ruled as a dictator but promised not to stand as a candidate in the next elections, scheduled for 1943. When that time came, Vargas extended his presidency due to the "wartime emergency."

Under the *Estado Novo*, the military had a free hand to suppress all subversives, real or suspected, and these individuals endured torture, long prison terms, and other injustices, without legal recourse. The media was censored, making the government's Department of Press and Propaganda the only source of news.

Vargas moved Brazil toward the Allied cause prior to the outbreak of World War II and declared war on the Axis powers on August 22, 1942. Brazilian troops were sent to fight with the Allies in Italy. Brazil benefited economically from the war, as its natural resources, such as rubber and quinine, were needed by the Allies. The war, however, also caused the loss of European markets

for Brazil's primary products: rubber, quinine, and coffee. Although the European coffee market disappeared with the outbreak of war, the United States engineered a 1941 international coffee agreement that provided growers with a limited northern marketplace and continued income. The Brazilian government subsequently established cartels over the cacao, coffee, sugar, and tea industries in an effort to increase the marketability and price of these products. In exchange for defense sites on Brazil's northeastern "hump," the United States provided for the construction of the country's first steel mill at Volta Redonda. Other Brazilian industries spurred on by World War II included automobiles, airplane engines, and textiles. Industrialization increased the urban labor force, and Vargas moved to control it. The 1943 Labor Code stipulated that only one union was permissible in each plant and that it be sanctioned by the Ministry of Labor, which also supervised its finances. Labor bosses received financial rewards in exchange for their cooperation. Vargas had effectively established a corporate state not much different from Benito Mussolini's Italy or Juan Perón's Argentina.

As World War II moved toward its conclusion in 1945, Vargas attempted to establish an electoral base on the left that included the Brazilian Communist Party. He also edicted laws that granted the government control over future foreign investment in the country. These actions only strengthened opposition to him. State political authorities resented national political control, labor leaders opposed the government control of unions, younger military officers decried the lack of promotion opportunities and pay increases, and the middle sector and other literate persons, stirred by democratic objectives, clamored for an end to the Brazilian dictatorship. Finally, on October 29, 1945, the military forced Vargas to resign, and he returned to his remote ranch in Rio Grande do Sul.

In a clear indication of how much Brazil had changed since 1930, three new political parties immediately surfaced: the United National Democratic Party (União Democrática Nacional, or UDN), the Social Democratic Party (Partido Social Democrático, or PSD), and the Brazilian Worker's Party (Partido Trabalhista Brasileiro, or PTB). Liberal constitutionalists, the backbone of the anti-Vargas forces, dominated the UDN. The PSD consisted of political bosses, bureaucrats, and some industrialists, while the Vargas-based PTB aimed to appeal to urban labor. Vargas supporters contributed significantly to the election of air force general Eurico Dutra (b. 1883–d. 1974) as president on January 1, 1946. Dutra directed the country toward its traditional agricultural roots and oversaw the implementation of a new constitution in 1946 that restored state power at the expense of the national government. Dutra also returned to a reliance on coffee exports at the expense of industrialization. Despite a vast infrastructure program that included the construction of roads and public buildings such as educational facilities and the expansion of electrical and other

transmission systems, Dutra was criticized for failing to modernize and industrialize Brazil.

Vargas returned to national prominence when he won the October 3, 1950, presidential elections on a promise to accelerate industrialization and expand government social services. Because Vargas maintained that private capital had been too slow in the development of the country's energy resources, he directed the establishment of Petrobras, the Brazilian petroleum company, but not without bitter debate. Throughout his second term, Vargas faced corruption charges and military demands for his resignation. On August 24, 1954, he committed suicide in the presidential office. His death, however, did not prevent the movement to the left in Brazilian politics over the next 10 years.

A caretaker government ruled Brazil until the December 15, 1955, election in which the PSD candidate JUSCELINO KUBITSCHKE DE OLIVEIRA came out the winner with only 36 percent of the popular vote. Kubitschek built a congressional working coalition with the PTB and promised to accomplish 50 years of economic progress in five. Instead, when he left office in 1961, Brazil was experiencing rampant inflation and faced huge international debts. Kubitschek gained recognition for two other acts: He oversaw the construction of the futuristic city of Brasília, the country's new capital some 600 miles west of the old capital at Rio de Janeiro, and warned U.S. treasury secretary C. Douglas Dillon in 1957 that if the United States did not address the issue of hemispheric-wide economic and social disparities, all Latin America would soon confront violent social upheaval. The following president, member of the PTB, Jânio Quadros (b. 1917–d. 1992), unexpectedly resigned on August 25, 1961, only seven months after his inauguration. He was succeeded by João Goulart (b. 1917–d. 1976), Vargas's former labor minister, a populist, and an anathema to the conservative military. From the day Goulart took office, the military sought to force him out. Military and political conservatives became increasingly concerned with the radical left, which sought to unionize the rural peasantry and noncommissioned military officers. Lacking congressional votes to impeach Goulart, the conservatives and the United States approved a military coup on April 1, 1964, to save the country from communism. For the next 20 years, a variety of military officers governed Brazil.

#### FROM MILITARY TO NEOLIBERAL GOVERNMENTS (1964–PRESENT)

The military officers who engineered the coup quickly elected one of their own as president. Humberto Castillo Branco (b. 1867–d. 1967) outlawed his political opponents. Peasant leagues and labor unions were dissolved, and in some states, governors were removed from office. The media was placed under strict censorship, while universities were purged of “outspoken” professors and courses on moral and civic education were added to curriculums at the expense of social sciences that emphasized

critical thinking. Old political parties were extinguished and replaced by the Brazilian Democratic Movement (Movimento Democrático Brasileiro, or MDB) and the National Renewal Alliance (Aliança Renovadora Nacional, or ARENA). While the former allegedly represented the opposition and the latter the government, as long as the president had the power to shut down Congress, expel its members, and deny individuals political rights, the parties had little meaning. With expanded powers, the secret police and military courts were granted jurisdiction over political crimes. The denial of civil rights and violations of human rights, including torture, became widespread. Brazil became a pariah country.

The military government also believed in economic expansion through government austerity and by encouraging the accumulation of investment capital in the hands of the elite and through the exportation of manufactured agricultural goods and raw materials. By 1974, their efforts showed great progress and were referred to as Brazil's “economic miracle.” Inflation had dropped to a 20 percent annual rate by 1974, exports rose from \$2.7 billion to \$6.2 billion, and Brazil held \$1 billion in exchange reserves. However, the 1974 global oil crisis contributed to Brazil's economic slowdown for the remainder of the decade, which in turn increased public demand for a return to civilian government.

President Ernesto Geisel (b. 1907–d. 1996) began the “redemocratization” process during his presidential term from 1974 to 1979, and it accelerated under President João Figueiredo (b. 1918–d. 1999) from 1979 to 1985. New political parties emerged, and states were permitted to elect their own governors. The ruling PSD had lost control of the Chamber of Deputies by 1984, and candidates from the new Brazilian Democratic Movement Party (Partido do Movimento Democrático Brasileiro, or PMDB) elected governors in the most significant states, including Minas Gerais and Rio de Janeiro. Tancredo Neves (b. 1910–d. 1985), a longtime opponent of the military government, captured the January 15, 1985, presidential election but died before his inauguration. His running mate José Sarney (b. 1930– ) took office. Since then, presidents have been elected by popular vote.

In the 1991 Treaty of Asunción, Brazil joined with Argentina, PARAGUAY, and URUGUAY to form the SOUTHERN CONE COMMON MARKET (MERCOSUR) with the goal of economic integration by 2005. While progress had been made by 2001, the financial crisis that plagued Argentina and Brazil slowed the process until 2005, when both economies began to recover. While in 1994 the Miami Summit of the Americas had called for the establishment of a FREE TRADE AREA OF THE AMERICAS, most Latin American countries, including Brazil, mistrusted U.S. intentions. Brazil took the lead in organizing all the nations of South America save Chile into a negotiating bloc to deal with U.S. heavy-handedness.

Brazilian politics moved further to the left with the election to the presidency of LUIZ INÁCIO LULA DA SILVA

of the Workers Party (Partido dos Trabalhadores, or PT) on October 27, 2002, and again on October 26, 2006. Lula's victory was attributed to the popular discontent with his immediate predecessors' neoliberal economic policies. The liberalization of Brazil's economy had not brought prosperity to the wider populace, as promised.

Although Lula's victory caused hesitancy among the international financial institutions and businesses in Brazil, the avowed socialist focused on long-term economic development rather than more immediate social reform. Brazil's economy has enjoyed reasonable economic growth since 2003, reaching a 3.7 percent annual growth rate in 2006. Characterized by large and well-developed agricultural, MINING, manufacturing, and service sectors, Brazil's economy outweighs that of all other South American countries and has a growing presence in world markets.

While Brazil is rich in natural resources, agricultural exports still account for the major portion of its gross domestic product (GDP), at 40 percent, and a favorable trade balance in 2006 of \$49 billion. The country's major trading partners are the European Union, the United States, and its MERCOSUR partners. Brazil also signed trade agreements with several other Latin American countries as part of the newly launched South American Community of Nations and with China. Brazil is not without problems: Internal government debt amounts to 50 percent of the total GDP, a shortage in electric power is common due mainly to a lack of rainfall for the hydroelectric system, and the country's rain forests continue to disappear, with far-reaching consequences.

See also BRAZIL (Vols. I, II, III); BRAZIL, EMPIRE OF (Vol. III); CABRAL, PEDRO ÁLVARES (Vol. I); DEODORA DA FONSECA, MANUEL (Vol. III); JOHN VI (Vol. II); MORAIS, PRUDENTE DE (Vol. III); PEDRO I (Vol. III); PEDRO II (Vol. III).

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**Brazil, 1964 coup d'état in** During a three-day period, March 31 to April 2, 1964, Brazilian MILITARY forces ousted elected president João Goulart (b. 1919–d. 1976), allegedly to save the country from communism. The coup established military men as BRAZIL's political rulers for the next 20 years.

The long-term origins of the coup can be found in Brazil's industrialization, which began during World War II and accelerated thereafter, and LABOR's right to organize, as first spelled out in the ESTADO NOVO in 1937 and sanctified in the 1946 constitution. Labor's political influence emerged during the second presidential term of GETÚLIO DORNELLES VARGAS from 1950 to 1954 thanks to the efforts of Vargas and his labor minister, João Goulart. The labor movement gained further strength from the alliance of the Brazilian Workers Party (Partido Trabalhista Brasileiro, or PTB) and the Social Democratic Party (Partido Social Democrático, or PSD), at the expense of rural labor. One of the consequences of the emphasis on urban labor was MIGRATION from the countryside to urban centers, which contributed to mass unemployment and the growth of slums, as well as disease and violence.

The short-term causes of the coup d'état are found in the seven-month presidency of Jânio Quadros (b. 1917–d. 1992), who resigned on August 25, 1961, in a confrontation with the National Congress over the loss of presidential authority to the legislative branch. Vice President Goulart succeeded to the office. He was born into a ranching family in São Borja in the state of Rio Grande do Sul, where he had befriended Vargas on the latter's return following his ouster from the presidency in 1945. Goulart became a PTB activist, and his success in organizing local unions had contributed to his appointment as Vargas's labor minister in 1953. Goulart continued to work on behalf of workers, often intervening in strikes to gain significant wage increases for them. At the time of Quadros's resignation, Goulart was in China; the military and conservative elite used his absence to permit his ascendancy to the presidency, but with limited authority, as cabinet ministers now reported directly to Congress.

Goulart assumed the presidency on September 7, 1961, determined to end the restrictions placed on his role. He had his way in a January 1963 plebiscite, when full executive authority was restored. Once in control, Goulart freed labor unions from government bureaucracy. Their newfound independence contributed to increased demands for wage raises and support for Goulart's proposals for educational and housing reforms. Goulart also proposed land and tax reforms that struck at the power and wealth of the rural elite but found support from rural labor federations that also called for greater political awareness and peasant participation in the political system. The direction of Goulart's program became clear on March 13, 1961, when he signed decrees expropriating privately owned oil refineries and underutilized lands near federal projects. Comparing Goulart's proposals to FIDEL CASTRO RUZ's administration in CUBA, the Brazilian elite and senior military officers feared that another communist revolution was in the making.

Goulart's conspirators also had an ally in the United States, whose opposition to him can be traced to John F.



Kennedy's administration. In 1964, President Lyndon B. Johnson was determined to see Goulart go. Ambassador Lincoln Gordon held discussions with the conspiring officers and on March 27 requested that the United States supply them with petroleum, arms, and ammunition and that a U.S. task force (consisting of an aircraft carrier, helicopter support group, destroyers, and oil tankers) be placed offshore in case civil war erupted. The Johnson administration directed the assemblage of the task force and launched it on March 31 under the name Operation Brother Sam.

Goulart signaled his opponents into action in a March 30 televised speech to a group of sergeants, calling on them to disobey their commanding officers should they feel that their orders were not in the best interest of the nation. In Minas Gerais, an incensed army general, Olimpio Mourão Filho (b. 1900–d. 1972), ordered his troops to move on Rio de Janeiro the following day. Other army commanders, led by General Humberto Castello Branco (b. 1897–d. 1969), joined the movement. Goulart fled to URUGUAY, and by April 2, the coup was complete.

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**British overseas territories** Under British sovereignty but not part of the United Kingdom, the inhabitants of British Overseas Territories have full British citizenship. The term *British overseas territory* was introduced by the British Overseas Territory Act of 2002 and replaced the term *British dependent territory*, coined in the British Nationality Act of 1981. Prior to 1981, these territories were called “colonies” (see CROWN COLONY). All that remains of the once-extensive British colonial empire in the Caribbean are six overseas territories: Anguilla, Bermuda, the British Virgin Islands, the Cayman Islands, Montserrat, and the Turks and Caicos Islands (see CARIBBEAN, BRITISH).

### ANGUILLA

Anguilla, located to the east of PUERTO RICO and north of Saint Martin, consists of the main island of Anguilla and several tiny islets, most of which are uninhabited. The territory is 39 square miles (101 km<sup>2</sup>) and has a population of 14,000. The beautiful beaches along the territory's coastline, in addition to the virtual lack of crime on the island, make Anguilla an ideal tourist

destination. The majority of Anguilla's inhabitants are descendants of African slaves. Only 10 percent of the island's people live in The Valley, the island's capital. Anguilla is an associate member of the ORGANIZATION OF EASTERN CARIBBEAN STATES.

Anguilla was first colonized by English settlers from St. Christopher in 1650. Historically incorporated into a single administrative unit with SAINT CHRISTOPHER AND NEVIS, on February 27, 1967, the British granted the territory of St. Christopher–Nevis–Anguilla the status of associated state in preparation for independence. On May 30, 1967, the Anguillan people, who strongly objected to subservience to the St. Christopher government, evicted the St. Christopher police from the island. The provisional government's request for annexation to the United States was declined. On July 11, 1967, in an island-wide referendum, virtually the entire population voted for secession from the St. Christopher–Nevis–Anguilla federation. Unhappy with British efforts to ameliorate the situation, the local population held another island-wide referendum on February 7, 1969, resulting in a vote of 1,739 to 4 against returning to the St. Christopher–Nevis–Anguilla federation. Local politician Ronald Webster (b. 1926– ) declared Anguillan independence. Although most people did not desire independence, they found it preferable to domination by St. Christopher. Political confrontation between the Anguillan and St. Christopher groups increased. On March 19, 1969, the British militarily intervened to restore order, resulting in a plan that allowed Anguilla to secede from the St. Christopher–Nevis–Anguilla federation in 1971. It was not until 1980, however, that Anguilla formally left the federation and became a separate British dependency. Whereas British officials are responsible for defense and foreign relations, local elected officials are responsible for all internal affairs. Queen Elizabeth II is represented by a governor, appointed by the British government, who oversees the popularly elected House of Assembly. Although appointed by the governor, the chief minister, Osbourne Fleming (b. 1940– ) since 2000, is normally the leader of the majority political party in the House of Assembly. Since the 1980s, the House of Assembly has emphasized a policy of revitalizing the island's ECONOMY through tourism and foreign investment.

### BERMUDA

Bermuda, located in the North Atlantic 670 miles (1,078 km) east of Cape Hatteras, North Carolina, and 690 miles (1,110 km) south of Martha's Vineyard, Massachusetts, is the oldest and most populous of the remaining British overseas territories. Although commonly referred to in the singular, in reality Bermuda is a configuration of 138 islands occupying 20 square miles (52 km<sup>2</sup>) of territory. Main Island, the largest island and the location of Hamilton, the capital, is fre-

quently called Bermuda by tourists. Officially, the name of the territory is the Somers Isles, in honor of George Somers, who established the first English colony in Bermuda in 1609.

During the American Revolution, the British improved the natural harbors and developed Bermuda as its principal naval base guarding North Atlantic shipping lanes. Given Bermuda's geographic location, during the U.S. Civil War, Confederate blockade runners obtained supplies in Bermuda. In the 20th century, wealthy British, Canadian, and U.S. tourists began to visit Bermuda. Bermuda's thriving economy, based on the tourist INDUSTRY and the financial sector, provides the territory's 66,000 people with the world's highest per capita income. The island's population is roughly 55 percent black, 35 percent white, and 10 percent multiracial or Asian. More than 10,000 non-Bermudians, primarily from the United States, Canada, and the United Kingdom, live and work in Bermuda.

Queen Elizabeth II is represented by a governor, appointed by the British government, who oversees the popularly elected House of Assembly. The British control foreign affairs and national defense, while a premier, usually the leader of the majority party in the House of Assembly, is the actual head of government. Ewart Brown (b. 1946– ), the leader of the Progressive Labour Party (PLP), has been premier since the October 2006 elections. Although the PLP supports independence from the United Kingdom, political polls indicate that the majority of people prefer that Bermuda remain an overseas territory. American influence in Bermuda is substantial. The United States is Bermuda's largest trading partner, providing 80 percent of total imports, 85 percent of tourist visitors, and billions of dollars in the Bermudian financial sector.

### BRITISH VIRGIN ISLANDS

The British Virgin Islands, located to the east of Puerto Rico, are part of the Virgin Islands archipelago. Although they are officially the Virgin Islands, since 1917, when the United States purchased the UNITED STATES VIRGIN ISLANDS from Denmark, the British have called them the British Virgin Islands to avoid confusion. The main islands—Tortola, Virgin Gorda, and Anegada—and more than 50 islets, many of which are uninhabited, occupy 59 square miles (153 km<sup>2</sup>) of territory. The largest island, Tortola, is also the location of Road Town, the capital. Approximately 18,000 of the British Virgin Island's 22,000 residents live on Tortola. The British initially occupied the islands during the 17th century for strategic reasons. British colonists, however, developed a plantation economy based on sugarcane production.

In 1950, the British government granted the British Virgin Islands limited self-government. Given the power to administer their own legislative council, the

people of the British Virgin Islands voted against joining the WEST INDIES FEDERATION in 1958. In 1967, the British granted the islands complete local autonomy. Local politicians developed an economic strategy based on tourism and offshore financial services. As such, the British Virgin Islands is one of the world's leading offshore financial centers, providing the inhabitants of the islands with one of the highest per capita incomes in the Caribbean (see OFFSHORE BANKING). Queen Elizabeth II, the head of state, appoints a governor to oversee political affairs. The leader of the majority party in the Legislative Council, Ralph O'Neal (b. 1933– ) since 2007, is the premier.

### CAYMAN ISLANDS

The Cayman Islands, located 150 miles (241 km) south of CUBA and 180 miles (290 km) north of JAMAICA, are a leading offshore financial center and tourist destination. Although the 45,000 inhabitants of the Cayman Islands enjoy one of the highest standards of living in the Caribbean, the islands also have the distinction of being the most vulnerable to Caribbean hurricanes. A three-island archipelago consisting of Grand Cayman (the largest island and the location of the capital, Georgetown), Cayman Brac, and Little Cayman, the islands occupy 100 square miles (259 km<sup>2</sup>) of territory. Significantly, the islands lack freshwater resources and must rely on rainwater catchment and desalination for drinking water. The islands were governed as a single colony with Jamaica until 1962, when Jamaica achieved independence. Notwithstanding the split from Jamaica, more than 40 percent of the population is of Jamaican origin, and more than 8,000 Jamaicans work in the Cayman Islands. Whereas Queen Elizabeth II appoints a governor to oversee the political situation, local affairs are controlled by the Legislative Assembly, led by the leader of government business, William McKeever Bush (b. 1955– ) since 2009. Unlike other British overseas territory constitutions, the governor in the Cayman Islands can exercise complete executive authority if the need arises.

### MONTSERRAT

Montserrat, which means "jagged mountain," is named after a mountain of the same name in Barcelona, Spain. Located between Antigua to the north and Guadeloupe to the south, Montserrat is a pear-shaped island in the Leeward Islands. The 39-square-mile (101-km<sup>2</sup>) island is inhabited by 4,500 people, most of whom are of African descent. Owing to uncertainty about the island's economic future, most of Montserrat's people do not favor independence. Although the British are responsible for defense and foreign relations, local elected officials are responsible for all internal affairs. Queen Elizabeth II, the head of state, is represented locally by a governor who oversees the Legislative Council. The chief minister,

Lowell Lewis (b. 1952– ) since 2006, is normally the leader of the majority political party in the Legislative Council.

In 1958, Montserrat joined the ill-fated West Indies Federation. Beginning in the 1960s, hundreds of British and U.S. citizens began to arrive on the island and build luxury homes. Real estate development and construction became a key component of Montserrat's economy. The dominant figure in Montserrat's political system since the 1970s has been John Osborne (b. 1936– ), whose People's Liberation Movement (PLM) was the largest political presence in the Legislative Council during the 1970s and 1980s. In 1984, Osborne startled the people of Montserrat by suddenly calling for independence. His pronouncement was based on the British government's veto of Montserrat's decision to send a police force to participate in the police action in GRENADA after the 1983 U.S.-organized invasion following the overthrow of Maurice Bishop. Although most of Montserrat's people supported the U.S. invasion of Grenada, they were against independence. Osborne subsequently promised that no decision on independence would be made until a referendum was held. In 1991, Osborne's main rival, Reuben Meade (b. 1952– ), leader of the National Progressive Party (NPP), became chief minister. A reinvigorated PLM returned to power in 2001.

In 1995, the Soufriere Hills volcano began to show signs of volcanic activity. In 1996, minor eruptions led to the evacuation of the southern third of Montserrat, where Plymouth, the capital, was located. Fortunately, all 3,500 inhabitants of Plymouth were evacuated. Subsequent eruptions in August 1997 covered the capital with lava and ash, and the island's only airport was destroyed. More than 8,000 of the island's 11,000 inhabitants fled to neighboring islands and the United Kingdom. A large portion of the island's annual income, therefore, comes from remittances by overseas citizens. In 1998, the British government moved the capital to Brades in the north of the island. Since 1998, thousands of Montserrat's refugees have returned to their homeland. The government's tourist bureau has also made energetic attempts to lure tourists back to Montserrat. The British have implemented a multi-million-dollar recovery program to help reconstruct the economy.

### THE TURKS AND CAICOS ISLANDS

The Turks and Caicos Islands, occupying 161 square miles (417 km<sup>2</sup>) of territory, are inhabited by 32,000 people. Although geographically contiguous to the Bahamas, the islands are a separate political entity. The two island groups forming the territory—the Turks and the Caicos—are separated by the Caicos Passage. Although the Caicos Islands possess 96 percent of the territory and 80 percent of the population, the capital, Cockburn Town, is located on Grand Turk. In 1799, the British

annexed the islands and administered them as part of the Bahamas. In 1848, the islands were placed under the supervision of the British governor in Jamaica. When Jamaica gained independence in 1962, the islands were made a crown colony. A British governor oversaw local politics. In 1980, the People's Democratic Movement (PDM), a proindependence party that controlled the Legislative Assembly, made an agreement with the British government providing for independence in 1982 if the PDM won the 1980 elections. The PDM, however, lost the elections to the Progressive National Party (PNP), which supported continued British rule. Political power subsequently alternated between the PNP and the PDM. In 2003, Michael Misick (b. 1966– ), the leader of the PNP, became chief minister of the Legislative Assembly. In 2006, following the granting of greater autonomy, Misick became the first premier of the Turks and Caicos Islands.

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**Bryan-Chamorro Treaty** (1916) Originally negotiated in 1911 between the U.S. ambassador in Managua, George T. Weitzel (b. 1873–d. 1930), and NICARAGUA's foreign minister, Diego Chamorro (b. 1861–d. 1923), the treaty provided for a one-time payment of \$3 million to the Nicaraguan government in return for U.S. exclusivity to construct a canal across Nicaragua, a 99-year renewable lease on the Corn Islands in the Caribbean Sea, and the right to build a naval base on the Gulf of Fonseca. The projected canal followed the proposed 19th-century route using the San Juan River and Lakes Managua and Nicaragua, with a possible outlet on the Gulf of Fonseca. Owing to U.S. political machinations at the time, the treaty awaited U.S. Senate consideration until a more favorable moment.

The U.S. desire for the treaty grew out of its larger Caribbean policy from 1900 until 1933. Having opted to construct a canal across PANAMA, it also needed to ensure that the Caribbean was safe from European interventions and local political turmoil that might spill into Panama's domestic political arena. Nicaragua was no exception to either policy premise. U.S. bank loans to Nicaragua in 1911, 1913, and 1917 kept the government afloat. U.S. bankers also negotiated a reduction

in the interest owed by the Nicaraguan government to British bankers.

From the time the United States selected Panama over Nicaragua as the canal site, Nicaraguan dictator JOSÉ SANTOS ZELAYA scorned U.S. policy initiatives in the region. In 1908, rumors abounded that he was intending to grant canal construction rights to Japan. Zelaya also endured constant opposition from Nicaraguan Conservatives, who, with U.S. assistance, finally ousted him in 1910. Conservative president Adolfo Díaz (b. 1875–d. 1964) understood the need for a U.S. presence in the country but also that the Liberals would maneuver to oust him from office if he allowed this. Bundy Cole, the manager of the National Bank of Nicaragua, correctly observed that the Díaz administration “would last until the last coach of [U.S.] marines left the Managua station,” and that “Díaz would be on that coach.” Anxious to secure his position, Díaz dispatched a private emissary to Washington, D.C., who hired a friend of Secretary of State William Jennings Bryan, Charles A. Douglas, to lobby for the Nicaraguan cause. Bryan sympathized with the Nicaraguan need for U.S. financial assistance to ward off a European presence and accepted the existence of the Díaz regime as a means to political stabilization and possibly democracy. For these reasons, Bryan accepted an amendment to the treaty similar to the U.S.-imposed PLATT AMENDMENT to the 1903 Cuban constitution granting the United States the right to intervene in Nicaraguan politics. Nevertheless, the U.S. Senate Foreign Relations Committee refused to consider a treaty with such an amendment.

The canal issue moved back to center stage in June 1914 when Germany reportedly offered \$9 million to Nicaragua for canal rights across the country. Anxious to keep Europeans out of the region, the U.S. State Department reopened negotiations in November 1915 and concluded the Bryan-Chamorro Treaty on April 16, 1916, without the intervention amendment. During the U.S. Senate’s public debate on the treaty, attention focused on the legality of the Nicaraguan government and the potential abrogation of the treaty should the Liberals return to power. Only during the executive session in February 1916 did the full Senate discuss the potential security threat from Germany and ratify the treaty. In contrast, the Nicaraguan legislature acted quickly, in anticipation of an economic windfall. The Nicaraguans received only 30 percent of the \$3 million, as the bulk of the funds were used to pay off British debts. The U.S. 100-man legation guard that remained served only to fuel the flames of Nicaraguan nationalism.

COSTA RICA challenged the treaty for granting rights to the San Juan River, which formed part of its border with Nicaragua. HONDURAS and EL SALVADOR protested the granting of U.S. rights in the Gulf of Fonseca, where each of those countries had interests. They took their

complaint to the Central American Court of Justice. Although the court declared on behalf of the plaintiffs, it had no power to enforce its decision. In July 1970, the United States and Nicaragua terminated the Bryan-Chamorro Treaty.

See also CONSERVATISM (Vol. III); LIBERALISM (Vol. III); TRANSISTHMIAN INTERESTS (Vol. III).

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**Buenos Aires** Buenos Aires, ARGENTINA, was founded by the Spanish explorer Pedro de Mendoza on February 2, 1536, in the district today known as San Telmo, south of the city center. Located at the southern end of the Río de la Plata river system, Buenos Aires became an important port and in 1772 the capital of the Viceroyalty of Río de la Plata of the same name. On the eve of independence, in 1816, approximately 40,000 people lived in Buenos Aires. Owing to the expansion of the agro-export ECONOMY and its ancillary industries in the late 19th century, the city had grown to 1.5 million residents on the eve of World War I, in 1914. In 1880, Buenos Aires became a federal city.

From the late 19th century onward, the city was modernized with electric, water, and sanitation systems, TRANSPORTATION facilities, wide boulevards and parks, and museums and theaters. LITERATURE and the arts took root, and Buenos Aires earned the title “Paris of the Americas.” The population initially swelled with the influx of foreign workers to serve the agro-export industry. Starting in the 1930s, rural Argentines flocked to Buenos Aires in search of jobs in the manufacturing sector, which continued to grow well past World War II. Today, nearly one-third of Argentina’s population resides in Buenos Aires. Influenced by the influx of people, the city’s ARCHITECTURE took on a new look with multistory apartment and office buildings. By the 1970s, a well-conceived public transportation system was in place, including a subway system, buses, trolleys, and taxis.

As the seat of national government, Buenos Aires has seen many political demonstrations, which have often turned violent, such as during the era of JUAN DOMINGO PERÓN in the early 1950s and following Argentina’s MILITARY defeat in the 1982 MALVINAS/FALKLANDS WAR. The city remains a vibrant cultural and economic center that Argentines affectionately refer to as “B.A.”

See also BUENOS AIRES (Vols. I, II, III); MENDOZA, PEDRO DE (Vol. I).



Aerial view of Avenida 9 de Julio in central Buenos Aires, Argentina. The 220-foot- (67-m-) high obelisk (*far right*) was built in 1936 to commemorate the 400th anniversary of the city's founding. (Thomas M. Leonard Collection)

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**Burnham, Forbes** (b. 1923–d. 1985) *prime minister of Guyana* Born on February 20, 1923, in Kitty, a suburb of Georgetown, the capital of GUYANA, to middle-class Afro-Guyanese parents, Forbes Burnham earned a law degree from the University of London in 1947. Burnham played a major role in establishing both major political parties in Guyana. He was an initial member of the People's Progressive Party (PPP), established in 1950 by CHEDDI JAGAN. Burnham became the party chairman, while Jagan led the PPP's parliamentary group. By establishing the PPP, Jagan hoped to increase the pace of decolonization in Guyana. Guyana's ethnic conflict, a result of British Guiana's colonial past when European planters imported vast numbers of African slaves and indentured servants from India to work on the sugar plantations, however, threatened to slow the process of decolonization. The PPP, therefore, was initially a

coalition of lower-class Afro-Guyanese and rural Indo-Guyanese. Personal rivalry between Jagan and Burnham, however, led Burnham to split from the PPP in 1955 and form the People's National Congress (PNC). Whereas Jagan advocated a socialist path toward independence, Burnham initially pursued a more moderate path.

During the early 1960s, as the independence movement gained momentum, the United States became increasingly concerned about Jagan's socialist rhetoric. Prior to the 1964 parliamentary elections, the British changed the electoral rules and provided for proportional representation. Although Jagan's PPP won 46 percent of the vote in the 1964 elections, he lacked a clear majority. Burnham's PNC, which won 40 percent of the vote, allied itself with the United Force (UF), a conservative party, which had won 12 percent of the vote. With the UF's votes, Burnham was elected prime minister. In 1966, following independence, Burnham became the first prime minister of Guyana. Although initially viewed as a moderate, Burnham's rule became increasingly authoritarian and leftist. In 1970, Burnham proclaimed the Co-operative Republic of Guyana, thus ending Guyana's status as a commonwealth realm. In 1980, he unveiled a new con-

stitution providing for an elected president and a prime minister elected by the president. Burnham immediately proclaimed himself president. Human rights abuses were rampant during his rule, and elections were viewed as fraudulent. Burnham also nationalized most major foreign and domestic industries in Guyana. In response, U.S. president Ronald Reagan excluded Guyana from participation in the CARIBBEAN BASIN INITIATIVE.

Burnham's authoritarian control over Guyana was placed in the global spotlight following the November 1978 JONESTOWN MASSACRE. While undergoing a throat operation in Georgetown, Burnham died on August 6, 1985. His successor, Vice President Desmond Hoyte (b. 1929–d. 2002), gradually began to disband Burnham's authoritarian excesses, which paved the way for democratic elections, which were won by Jagan in 1992.

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**Bustamante, Alexander (William Alexander Clarke)** (b. 1884–d. 1977) *prime minister of Jamaica* Born on February 24, 1884, in Hanover, JAMAICA, to an Irish father and a mestizo mother, William Alexander Clarke adopted the surname *Bustamante* to honor a man he knew in his youth. Working in a variety of jobs throughout the hemisphere since 1905, he returned to Jamaica in 1932. Bustamante supported LABOR movements and wrote numerous newspaper articles against colonialism. In 1937, he was elected treasurer of the Jamaica Workers' Union. During the 1938 labor riots, Bustamante was a vocal supporter of the workers' demands. In 1938, he

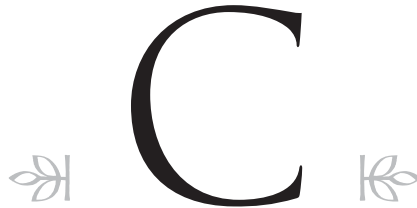
founded the Bustamante Industrial Trade Union. The British government imprisoned him for subversive activities from 1940 to 1942. After his release from prison, he founded the Jamaica Labour Party (JLP) in 1943. His cousin Norman Manley (b. 1893–d. 1969) had founded Jamaica's other main political party, the People's National Party (PNP), in 1938.

The JLP won the 1944 elections, and Bustamante became the minister of communications. In 1953, after the British government granted greater autonomy, Bustamante became chief minister. He served until 1955, when the PNP became the majority party in the legislative assembly. Jamaica joined the WEST INDIES FEDERATION in 1958, a move opposed by Bustamante, who believed that Jamaica would be underrepresented in the West Indies Parliament. Manley, who supported the federation, bowed to local pressure to hold a referendum on September 19, 1961, which resulted in Jamaica's withdrawing from the federation. In a general election on April 10, 1962, the JLP was returned to power with 26 of 45 seats in the assembly, and Bustamante was appointed premier. Jamaica achieved independence on August 6, 1962, and Bustamante became the nation's first prime minister. Bustamante favored close relations with the United States and supported increased foreign investment in the MINING sector. He retired in 1967, but the JLP continued to rule until defeated in the 1972 elections by the PNP. Bustamante died on August 6, 1977, the 15th anniversary of Jamaica's independence.

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**CACM** See CENTRAL AMERICAN COMMON MARKET.

**Calderón Guardia, Rafael** See COSTA RICA; MORA VALVERDE, MANUEL.

**Calderón Hinojosa, Felipe** (b. 1962– ) *president of Mexico* Felipe Calderón Hinojosa was elected president of MEXICO in the summer of 2006. He is a member of the National Action Party (Partido Acción Nacional, or PAN) and is only the second non-Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI) president to be elected since the latter party was formed in 1929.

Calderón was born in Morelia, Michoacán, on August 18, 1962, to one of the founders and leaders of the PAN. He studied economics and public administration and attended graduate school at Harvard University. Calderón rose to prominence within the PAN, holding several leadership positions in the 1990s. He represented his party in Mexico's Federal Electoral Institute and helped push for important electoral reforms during the presidency of ERNESTO ZEDILLO (1994–2000). After 2003, Calderón served as a cabinet minister in the administration of the first PAN president, VICENTE FOX (2000–06). He became the PAN presidential candidate in 2005.

Calderón won the July 2006 election with the closest margin of any president in Mexico's history, with just six-tenths of a percent over his closest challenger, Andrés Manuel López Obrador of the Party of the Democratic Revolution (Partido de la Revolución Democrática, or PRD). López Obrador challenged the election results, and his supporters staged protests in MEXICO CITY, effec-

tively shutting down the city center for several months. In the first years of his presidency, Calderón had to deal with enormous price increases in tortillas—a staple of the Mexican diet—and the issue of immigration reform in the United States. His term expires in 2012.

During the first year of his administration, Calderón garnered sufficient opposition support to legislate pension and fiscal reform but since has been unable to gain legislative approval for improving the nation's aging infrastructure, to modernize labor laws, and to permit private investment into the energy field. The global recession of 2008–09 also adversely affected Mexican imports and cut the number of migrant workers making their way into the United States as illegal aliens. The latter practice significantly cut into the remittances sent home, an important component of Mexico's economy, and also put increased strains upon the government's social services. In addition, Calderón faces growing violence caused by the narco-traffickers that has spilled over into civilian society.

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**Calles, Plutarco Elías** (b. 1877–d. 1945) *revolutionary leader and president of Mexico* Plutarco Elías Calles was born on September 25, 1877, in the state of

Sonora, Mexico. He began an early career as a teacher and eventually became a local politician. Calles joined the MEXICAN REVOLUTION alongside ÁLVARO OBREGÓN against the dictatorship of VICTORIANO HUERTA in 1913. He continued to hold local political offices and then helped lead the revolt that ousted President VENUSTIANO CARRANZA in 1920. After Obregón was elected president later that year, Calles became minister of the interior. He and Obregón defeated the rebellion led by ADOLFO DE LA HUERTA in 1923, and Calles was elected president the following year.

As president, from 1924 to 1928, Calles continued many of the policies initiated by his predecessor, including favoring specific LABOR groups, expanding EDUCATION, and redistributing *ejido* land. He introduced modern social reforms with some success, expanding the nation's road system, making improvements to health care, and creating a network of government inspections in food production and other services.

Calles also implemented anticlerical policies that provoked local insurrections known collectively as the CRISTERO REBELLION by ardent Catholics throughout the country. Calles's administration put down the revolt violently, but tensions were still simmering when Obregón won another term as president in 1928. Before he was inaugurated, however, Obregón was assassinated by José de León Toral, a disgruntled Catholic and follower of the Cristeros. The assassination of the president-elect created a political crisis, which Calles solved by placing three successive puppet presidents in power while he ruled from behind the scenes in an era known as the Maximato. Calles was forced into exile by the newly elected LÁZARO CÁRDENAS (1934–40) in 1936.

Calles was eventually invited back to Mexico in 1941 by President Manuel Ávila Camacho (b. 1896–d. 1955) in an attempt to encourage national unity during World War II. Calles died in Mexico City in 1945.

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**CAN** See ANDEAN COMMUNITY OF NATIONS.

**CANF** See CUBAN AMERICAN NATIONAL FOUNDATION.

**Caracas** Caracas is the capital of VENEZUELA and the Federal District that was created in 1909. Caracas sits in a narrow valley about 15 miles (24 km) long in the country's northern sector. In 2005, 3.1 million people resided in the Federal District and another 1.6 million in the metropolitan area that today encompasses the entire valley. The city's grid was laid out in 1567 by Spanish conquistador Diego de Losada. Approximately 40,000

people resided in Caracas at the time of independence in 1811. In the late 19th century, Antonio Guzmán Blanco, who ruled over Venezuela from 1870 to 1888, directed the architectural modernization of the city.

Venezuela's oil INDUSTRY has continued to expand from the late 1920s, in line with world demand for petroleum. The oil wealth provided for another building spurt in the 1950s and 1960s so that modern skyscrapers now dot the city's skyline. Caracas is divided into four districts. The downtown commercial center is home to Petróleos de Venezuela (PDVSA), the government-owned oil company, and the national stock exchange, banks, and other commercial activities. The arts center, with theaters, museums, and galleries surround the city center. Between the center and the far-flung suburbs of the wealthy (Altamira and La Castellana) are the bustling middle-class residential areas. The city boasts several universities, including the Central University of Venezuela, founded in 1721 and named a World Heritage Site by UNESCO in 2000. Important industries located in Caracas include chemicals, textiles, leather, food, and iron and wood products. Despite the city's affluence, one cannot escape the poverty of its shantytowns, which line the hillsides approaching the city from the international airport located on the Atlantic coast at Maiquería.

See also CARACAS (Vols. II, III); GUZMÁN BLANCO, ANTONIO (Vol. III).

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**Cárdenas, Lázaro** (b. 1895–d. 1970) *president of Mexico* President Lázaro Cárdenas is best known for aggressively implementing revolutionary reforms in MEXICO in the 1930s. He was considered a man of the people, a protector of the poor, and a defender of Mexican nationalism.

Cárdenas was born on May 21, 1895, in Jiquilpán, Michoacán, to a family of modest means. He received a basic EDUCATION and eventually joined forces with PLUTARCO ELÍAS CALLES during the MEXICAN REVOLUTION. Cárdenas remained loyal to Calles during the latter's presidency (1924–28) and throughout the years of the Maximato. He became governor of Michoacán in 1928, and Calles supported his successful bid for the presidency in 1934. However, unlike his three predecessors, who had ruled as puppets of Calles, Cárdenas began devising a strategy for breaking Calles's hold over the nation's political scene. By 1936, Cárdenas had consolidated his own political authority and sent Calles into exile in the United States.

Cárdenas began implementing the social reforms prescribed by the CONSTITUTION OF 1917. He redistributed 49 million acres (19.8 million ha) of land—mostly in the



form of *ejidos*—to Mexico’s rural peasants. He expanded funding for public education and became known for advocating a socialist-style curriculum. Cárdenas also cultivated a close relationship with LABOR groups under the Confederación de Trabajadores de México (CTM) and championed a variety of reforms to benefit Mexican workers. In 1938, Cárdenas took drastic steps when he nationalized the railroad and petroleum industries (see PEMEX). His actions against oil companies produced a surge of nationalism within Mexico but caused years of diplomatic disputes between Mexico and the United States (see U.S.-MEXICAN RELATIONS).

After his presidency, Cárdenas returned to public service when he became secretary of defense after Mexico joined the Allies in World War II. He retired in 1945 and led a quiet life until his death on October 19, 1970. Cárdenas’s son, Cuauhtémoc Cárdenas (b. 1934– ), founded the Party of the Democratic Revolution (Party de la Revolución Democrática, or PRD), served as mayor of MEXICO CITY from 1997 to 1999, and ran for president in 1988 and 2000.

See also *EJIDO* (Vol. III).

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**Carías Andino, Tiburcio** (b. 1876–d. 1969) *president and dictator of Honduras* Born and educated in the Honduran capital of Tegucigalpa, Tiburcio Carías Andino received his law degree in 1898 from the Central University. He subsequently taught law at the university level and to poor children and workers. He became active in the Liberal Party, founded by his father, Calixto Carías, and participated in the political conflicts at the end of the 19th century. In 1903, Carías left the Liberal Party to join Manuel Bonilla (b. 1849–d. 1913) in founding the National Party. Subsequently, he became a skillful political activist and utilized the MILITARY to build and maintain a political machine, a well-disciplined organization led by an authoritarian base. Carías served as a congressman and state governor before making an unsuccessful bid for the presidency of HONDURAS in 1923. He then directed the military to seize the capital and prepare the nation for new elections in 1924, but before that could happen, the United States intervened. This resulted in Miguel Paz Barahona (b. 1863–d. 1967) becoming president. Carías lost his second bid for the presidency in 1928, but defeated Liberal Party candidate José Ángel Zúñiga Huete (b. 1878–d. 1953) in 1932.

Subsequently, by manipulating the constitution, Carías extended his presidency to 1949.

Once in the presidential palace, Carías moved quickly to consolidate his control. While not as brutal as other dictators of the time, he silenced opposition through intimidation, imprisonment, and exile. The national legislature rubber-stamped his programs. Despite the loss of global markets due to the Great Depression, disease among banana plants in the 1930s, and World War II, Carías managed to maintain a debt-free budget, pay off Honduran foreign loans, and make progress in rural road construction and the building of schools and medical clinics.

Carías supported the Allied cause during World War II, including cooperation with the United States in the deportation and incarceration of Nazis, suspected or real (see WORLD WAR II AND LATIN AMERICA). As the United States requested, Carías placed many German-owned properties under government control to keep profits from going back to Germany, but in time, Carías quietly turned these properties over to his political friends. While he received assistance from the United States regarding air TRANSPORTATION, he was very reluctant to permit U.S. officers to train his ground troops. Carías feared that a U.S. command structure might serve as an impetus for Honduran military officers to challenge his own control over them.

In 1944, Carías’s fellow Central American dictators faced increasing opposition. EL SALVADOR’S MAXIMILIANO HERNÁNDEZ MARTÍNEZ and GUATEMALA’S JORGE UBICO Y CASTAÑEDA were forced to resign, and NICARAGUA’S ANASTASIO SOMOZA GARCÍA did not seek the presidency again in 1947. Carías survived the political storm, although he faced WOMEN- and student-led demonstrations in Tegucigalpa and more widespread protests in the northern city of San Pedro Sula. During the next four years, the protests increased, which contributed to Carías’s announcement that he would not seek the presidency again in the 1948 elections. In 1954, Carías made an unsuccessful presidential bid, after which he lived quietly in retirement until his death on December 23, 1969.

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**Caribbean, British** In the post–World War II period, the United Kingdom granted independence to ANTIGUA AND BARBUDA (1981), the BAHAMAS (1973), BARBADOS (1966), BELIZE (1981), DOMINICA (1978), GRENADA (1974),

GUYANA (1966), JAMAICA (1962), SAINT CHRISTOPHER AND NEVIS (1983), SAINT LUCIA (1979), SAINT VINCENT AND THE GRENADINES (1979), and TRINIDAD AND TOBAGO (1962). Only six territories—Anguilla, Bermuda, the British Virgin Islands, the Cayman Islands, Montserrat, and the Turks and Caicos Islands—remain as BRITISH OVERSEAS TERRITORIES in the Caribbean.

While the entire Western Hemisphere experienced European colonialism, the Caribbean islands were subjected to the most pervasive, diverse, and longest-lasting European colonial experience. Since the arrival of Christopher Columbus in the region in 1492, European nations, and the United States after 1898, vied with one other to establish colonies there for a plethora of economic and strategic reasons. The English, interested primarily in developing sugar plantations and constructing naval bases, established a geographically expansive colonial system in the Caribbean. As a result, by 1900, the majority of the people in the British Caribbean were of African descent. People descended from workers brought to the British Caribbean from the Indian subcontinent during the 19th century also made up a significant component of the population in many of the British colonies. During the Great Depression, political and economic unrest in those colonies led the British to begin granting the islands greater internal autonomy. Regardless, in 1945, the entire Caribbean region with the exception of HAITI, the DOMINICAN REPUBLIC, and CUBA was still controlled by the United Kingdom, the United States, France, and the Netherlands.

Following World War II, the British government, continuing to control foreign policy and national defense of its Caribbean colonies, granted those colonies increased internal autonomy in preparation for independence. Universal suffrage was instituted, and local populations were able to elect representatives to parliamentary assemblies based on the British model of government. Cultural norms, such as the English language and cricket, were also grafted on to the Caribbean islands under British control during the colonial era. After contemplating a variety of plans for political unity in the British Caribbean, on January 3, 1958, the British unveiled the WEST INDIES FEDERATION, a political and economic union of 10 British Caribbean territories occupying 24 main islands and more than 200 minor islands, with a total population of 3.5 million people. The 10 colonies—Antigua and Barbuda, Barbados, Dominica, Grenada, Jamaica (which included the Turks and Caicos Islands and the Cayman Islands), Montserrat, St. Christopher–Nevis–Anguilla, St. Lucia, St. Vincent and the Grenadines, and Trinidad and Tobago—were to form a single political unit that would eventually become independent from the United Kingdom. Five British colonies—the Bahamas, Bermuda, Belize, the British Virgin Islands, and Guyana—chose not to join the federation. Issues concerning representation, however, led to the collapse of the West Indies Federation in 1962 when Jamaica withdrew from it.

Within weeks, on August 6, 1962, the British granted Jamaica independence. The Turks and Caicos Islands and the Cayman Islands, however, were severed from Jamaica and remained British colonies. Jamaican independence set the stage for the 11 above-mentioned countries. Independence movements in the six remaining British colonies are negligible. At the time of independence, all 12 of the independent nations chose to join the Commonwealth of Nations. In addition, 11 of the states chose to be Commonwealth realms with Queen Elizabeth II as the official head of state. Dominica, unlike the other former British colonies in the Caribbean, chose to become a parliamentary republic at the time of independence. The queen's power, however, was primarily ceremonial, with de facto power vested in a prime minister. Since independence, two former British colonies have become republics but chose to remain within the Commonwealth of Nations. Guyana became a republic in 1972; Trinidad and Tobago followed in 1976. Notwithstanding that all three of the republics have a president, a largely ceremonial position similar to that previously held by the queen, the prime minister exerts executive power.

On August 1, 1973, Barbados, Jamaica, Guyana, and Trinidad and Tobago established the CARIBBEAN COMMUNITY AND COMMON MARKET (CARICOM) to promote regional economic and political integration in the Caribbean. Currently, all independent nations in the British Caribbean and all of the British overseas territories in the Caribbean are either full members or associate members of CARICOM. The ORGANIZATION OF EASTERN CARIBBEAN STATES was formed on June 18, 1981, by Antigua and Barbuda, Dominica, Grenada, Montserrat, St. Christopher and Nevis, St. Lucia, and St. Vincent and the Grenadines to promote greater economic and political integration in the eastern Caribbean. The British Virgin Islands and Anguilla became associate members in 1984 and 1995, respectively. Although all of the members are former British dependencies, membership is open to all islands in the eastern Caribbean.

See also CARIBBEAN, BRITISH (Vol. III).

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- Roderick A. McDonald, ed. *West Indies Accounts: Essays on the History of the British Caribbean and the Atlantic Economy* (Mona, Jamaica: University of the West Indies Press, 2002).

**Caribbean, Dutch** During the 20th century, Dutch possessions in the Caribbean included SURINAME, which

became independent in 1975; Aruba, which was part of the Netherlands Antilles until 1986 when it became a self-governing part of the Netherlands; and the Netherlands Antilles, which consists of Bonaire, Curaçao, and three Leeward Islands (Saba, Saint Eustatius [Sint Eustatius], and Saint Martin [Sint Maarten]). The Netherlands Antilles was disbanded on December 15, 2008. Curaçao and Saint Martin, like Aruba, will become associated states within the Netherlands. Bonaire, Saba, and Saint Eustatius will become a direct part of the Netherlands as special municipalities.

During the 17th century, the Dutch West India Company established bases for the slave trade in the Caribbean. It also sought to develop tropical agricultural plantations to benefit the Netherlands. By the 20th century, the Dutch established a separate colonial administration for Suriname. In 1954, the six Dutch islands in the Caribbean were granted greater local autonomy and placed in the Netherlands Antilles, an associated state within the Netherlands. The concept of the Netherlands Antilles as a state, however, never gained complete support in most of the islands. Political relations between the six islands were frequently strained.

On January 1, 1986, Aruba, which occupies 75 square miles (194 km<sup>2</sup>) of territory and lies off the coast of VENEZUELA, seceded from the Netherlands Antilles and became an autonomous self-governing part of the Netherlands. Movement toward full independence had been indefinitely postponed. As a constituent country within the Kingdom of the Netherlands, Queen Beatrix of the Netherlands is the head of state in Aruba. The Dutch monarch appoints a governor, but power rests with a prime minister elected by the parliament. The 21 members of Aruba's parliament are elected by direct, popular vote. The Netherlands, the Netherlands Antilles, and Aruba form a commonwealth. Inhabitants share Dutch citizenship and use Dutch passports. Nelson O. Oduber (b. 1947– ) has been prime minister since 2001. Aruba's 105,000 inhabitants enjoy one of the highest standards of living in the Caribbean, primarily because of the island's successful tourism INDUSTRY.

Between 2000 and 2005, each of the five islands in the Netherlands Antilles had a referendum on their future status. The four options for voters were closer ties to the Netherlands, remaining in the Netherlands Antilles, autonomy as a country within the Netherlands, and independence. Significantly, the vote for independence was virtually nonexistent. Saint Martin occupies the southern half of the island of Saint Martin (13 square miles [33.7 km<sup>2</sup>]). It is inhabited by 35,000 people, yet almost 70 percent of the voters chose to make the island a constituent country within the Netherlands. Like Saint Martin, Curaçao, which occupies 138,000 square miles (357,418 km<sup>2</sup>) of territory, also voted, by a similar margin, to become a constituent country within the Netherlands. The 138,000 inhabitants have a high standard of living, primarily because

of oil refining, tourism, and financial services. Saint Martin and Curaçao, therefore, will attain the same political status held by Aruba.

Saba and Bonaire voted for closer ties to the Netherlands. Saint Eustatius was the only island to vote to stay in the Netherlands Antilles. On October 12, 2006, the Netherlands reached an agreement with Saba, Bonaire, and Saint Eustatius. This agreement would make these islands a direct part of the Netherlands as special municipalities. The Dutch province of North Holland has invited the three new municipalities to become officially part of the province. Virtually everyone in Saba voted for closer ties (86 percent) to the Netherlands. The rest of the voters were content with the previous form of government. The smallest island in the Netherlands Antilles, occupying only 5 square miles (13 km<sup>2</sup>) of territory, Saba is occupied by less than 1,500 people. Bonaire, located off the coast of Venezuela, occupies 111 square miles (287.5 km<sup>2</sup>) of territory inhabited by 14,000 people. Together with Aruba and Curaçao, it forms a group known as the ABC islands. Whereas 75 percent of the voters supported either closer integration with the Netherlands or a continuation of the Netherlands Antilles, 25 percent of the voters wanted to become a constituent country like the other ABC islands. Saint Eustatius, which occupies 8 square miles (21 km<sup>2</sup>) of territory, is populated by 2,500 people. Unlike the other islands in the Netherlands Antilles, the overwhelming majority of voters (76 percent) favored a continuation of the Netherlands Antilles, with the remaining voters favoring closer ties. Since support for independence or the establishment of a constituent country was virtually nonexistent, and given that none of the other islands wished to continue the Netherlands Antilles, the people of Saint Eustatius have decided to become a direct part of the Netherlands as a special municipality. These special municipalities will resemble other Dutch municipalities. Residents of the three islands will vote in Dutch and European elections.

See also CARIBBEAN, DUTCH (Vol. III); DUTCH WEST INDIA COMPANY (Vol. II).

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**Caribbean Basin Initiative (CBI)** The Caribbean Basin Initiative (CBI) was initially authorized as an amendment to the 1983 U.S. Caribbean Basin Economic Recovery Act (CBERA) and eventually came to embrace CBERA's extension in 1990 and the 2000 Caribbean Basin Trade Partnership Act (CBTA). The CBI was designed to stimulate economic growth and promote democracy throughout the circum-Caribbean region. It also sought to deter the MIGRATION of people to the United States for

economic reasons. CBI provided an emergency appropriation of \$350 million for currency relief and provided for permanent tariff-free and reduced-tariff entry into the United States for most products shipped by the 24 eligible nations in 1992. In a clear reference to CUBA and NICARAGUA at the time, communist-ruled countries were not eligible for the program. Subsequently, Nicaragua became a participant.

U.S. president Ronald Reagan signed the CBERA legislation on August 5, 1983. CBERA sought to protect U.S. industries from lower-priced competition by excluding from the preferential list such items as footwear, handbags, luggage, cloth materials, work gloves, leather apparel, and canned tuna, as well as certain petroleum products. Fearing job losses, U.S. LABOR unions pressured Congress into jettisoning tax incentives for industries to relocate to the Caribbean. To protect U.S. industries with operations in PUERTO RICO that enjoyed similar tax preferences with the United States, the CBI permitted those manufacturers to establish subsidiaries throughout the membership nations.

Because the Caribbean countries benefit from other U.S. tax programs, such as the 807 tariff code, the Generalized System of Preferences, and the Special Access Program, it is difficult to measure the precise impact that the CBI had on those nations. The “807 industries” became particularly important. They provide for the duty-free import into the United States of clothing and electronic and pharmaceutical goods produced in the Caribbean but made entirely of U.S. components. In effect, U.S. firms built assembly plants in duty-free zones in the DOMINICAN REPUBLIC, EL SALVADOR, HONDURAS, and GUATEMALA, where U.S. components are made into final products and shipped back to the United States for sale. U.S. textile, flat cloth, clothing, and electronic manufacturers have benefited most from this arrangement. The benefits to the host CBI nations have been in job creation and the concomitant wages spent in the local economies.

The U.S. Congress altered the tax code again in 1989, when it replaced the 807 classification with section 980 of the Harmonized Tariff Schedule, which equalized tariffs and tariff exemptions for global manufacturers. Latin America and Asia benefited the most, accounting for 68 percent of the dollar amount imported by the United States in 2001, with MEXICO accounting for 23 percent. Combined, the Dominican Republic, COSTA RICA, El Salvador, and Honduras accounted for another 8 percent.

The Reagan administration used the CBI to drum up support for its policies in the CENTRAL AMERICAN WARS of the 1980s, a fact illustrated by the massive amount of CBI assistance that went to Costa Rica and El Salvador. The CBI countries feared the loss to Mexico of the 807 industries with the implementation of the NORTH AMERICAN FREE TRADE AGREEMENT on January 1, 1994. That did not occur, but the list of 807 industries was not expanded

in the 1990s. Unexpected was the loss of U.S.- and foreign-owned assembly plants in Mexico to cheaper labor markets in China and South Asia. The 2005 DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT (DR-CAFTA) is expected to have little impact on these assembly industries because its focus is to provide for U.S. access to the local markets. DR-CAFTA did not alter any of the TRADE preferences already available to the Caribbean nations.

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### Caribbean Community and Common Market

**(CARICOM)** The Caribbean Community and Common Market (CARICOM) was established by the Treaty of Chaguaramas on July 4, 1973, and was signed by the prime ministers of BARBADOS, GUYANA, JAMAICA, and TRINIDAD AND TOBAGO. A year later, ANTIGUA AND BARBUDA, BELIZE, DOMINICA, GRENADA, SAINT LUCIA, SAINT CHRISTOPHER AND NEVIS, and SAINT VINCENT AND THE GRENADINES became members. CARICOM expanded again in 2004, this time bringing in the BAHAMAS, SURINAME, and HAITI as full members, and Anguilla, Bermuda, the British Virgin Islands, the Cayman Islands, the DOMINICAN REPUBLIC, and the Turks and Caicos as provisional members.

Modeled after the European Economic Community, CARICOM seeks to achieve economic integration by the voluntary removal of duties, quotas, and other tariff and nontariff barriers to free TRADE and to adopt a common external tariff (CET) and common protective policies (CPP). The CET was envisioned as a stimulus to industrial production by lowering duties on imported raw materials and machinery, while the CPP would protect existing industries. By working together, the CARICOM states hoped to overcome the problems of regional competition, economic fragmentation and dependence, and economies of scale and as a unit, to better deal with nonregional trading partners. CARICOM members also agreed to cooperate in advancing educational opportunities and community health services and to pursue a common foreign policy.

While the annual conference of the heads of government serves as the highest decision-making body, a comprehensive infrastructure of committees and councils are assigned responsibility for presenting it with unified policy recommendations. CARICOM’s secretariat is located in Georgetown, Guyana.



United States researchers (William Wilson, Jeffrey Steagall, Stephen Paulson, Thomas Leonard, and Edward Carroll) discuss CARICOM trade issues with the Barbadian permanent secretary for industry and transportation Stanley Bradshaw. (Thomas M. Leonard Collection)

CARICOM's origins can be traced to the immediate post-World War II years as Great Britain prepared to abandon its Caribbean colonies. The London government intended for its former colonies to band together, which they did in the short-lived WEST INDIES FEDERATION, from 1958 to 1962. Individual state nationalism and a lack of historical political and economic relationships among the newly independent islands contributed to the federation's failure. Shortly after its disintegration, Trinidad and Tobago took the lead in bringing about a more clearly defined association, as found in the CARIBBEAN FREE TRADE ASSOCIATION (CARIFTA) established in December 1965. Because CARIFTA suffered from focusing solely on intraregional trade, the more economically advanced member states—Barbados, Guyana, Jamaica, and Trinidad and Tobago—took the lead in forming CARICOM. From this perspective, CARICOM is part of a process that might ideally result in political integration, but this remains an unknown.

CARICOM's 35-year history has produced a sense of solidarity among its members in dealing with nations and agencies external to the region and has produced cooperation in regional EDUCATION, health, and TRANSPORTATION endeavors. For the moment, however, CARICOM's success or failure will rest on its efforts toward economic integration. There now is free movement of people between states for economic reasons, but otherwise, the record is mixed. Intraregional trade has altered little during CARICOM's existence, and significant economic development is yet to occur. Although its primary banana market, the European Union (EU) remains protected by the LOMÉ CONVENTION, trade with other nations is affected by forces beyond CARICOM's control. Large trading blocs such as the EU, the SOUTHERN CONE COMMON MARKET and the NORTH AMERICAN FREE TRADE AGREEMENT aim not only to integrate the markets of

their member states but also to seek foreign export markets. CARICOM also must deal with the impact of the 2005 DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT with the United States. Internally, CARICOM continues to be plagued by parochial national interests, which has resulted in the failure to develop a common policy regarding foreign investment, a monetary union, or common stock market. Surrendering any amount of state sovereignty to a regional authority remains a difficult challenge.

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#### Caribbean Free Trade Association (CARIFTA)

Created under the Dickinson Bay Agreement on December 15, 1965, the Caribbean Free Trade Association, or CARIFTA, came into being on May 1, 1968, with 11 member states divided into two groups: 1) medium developed countries, being BARBADOS, GUYANA, JAMAICA, and TRINIDAD AND TOBAGO; and 2) lesser developed states, being ANTIGUA AND BARBUDA, DOMINICA, GRENADA, Montserrat, SAINT CHRISTOPHER AND NEVIS, SAINT LUCIA, and SAINT VINCENT AND THE GRENADINES. Members pledged to eliminate tariffs and quota systems on one another's products. It was the first realistic effort at integration among the Commonwealth of National Caribbean states.

The initiative dated to the end of World War II, when independence of Great Britain's Caribbean colonies appeared inevitable. The British government anticipated the establishment of a confederation into a single political entity. This led to the WEST INDIES FEDERATION in 1958, but it lapsed four years later largely because the island states lacked any historical precedent and their TRADE was directed toward Britain, not among themselves. The immediate cause for CARIFTA was Britain's flirtation with joining the European Economic Community. If it did so, the islands would lose preferential treatment for their primary exports—bananas and sugar—to Great Britain.

CARIFTA suffered from its concentration on intraregional trade and its reliance on consensus for policy adoption and implementation. It also gave little attention to renegotiating trade pacts with nations outside the agreement. These weaknesses led the more developed member nations to deepen integration. The effort led to the development of the CARIBBEAN COMMUNITY AND COMMON MARKET on July 4, 1973.

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**Caribbean Legion** The Caribbean Legion was a loosely organized group that carried out a series of MILITARY operations against dictators in the circum-Caribbean region after World War II, particularly from 1946 to 1950. The first use of the term was during the 1948 Costa Rican civil war, when a small group of *tico* (Costa Rican) exiles were airlifted from GUATEMALA to seize Puerto Limón on COSTA RICA's Caribbean coast (see CIVIL WAR OF 1948, COSTA RICA). The democratic and human rights principles enshrined in World War II's Atlantic Charter and U.S. president Franklin D. Roosevelt's "Four Freedoms" proclamation served as the ideals of the Caribbean Legion. The legion's spokespersons—such as Guatemala's JUAN JOSÉ ARÉVALO, CUBA'S RAMÓN GRAU SAN MARTÍN and Carlos Prío Socarrás (b. 1903–d. 1977), VENEZUELA'S RÓMULO ERNESTO BETANCOURT BELLO, and Costa Rica's JOSÉ FIGUERES FERRER—argued that democracy, with its commitment to human and civil rights, should be spread throughout Latin America.

Although no trace of a formerly established legion army exists, one could trace its origins to 1946 and Dominican general Juan Rodríguez García (b. 1910–d. ?), who commanded a group of exiles to oust DOMINICAN REPUBLIC dictator RAFAEL TRUJILLO. One of the Caribbean Legion's most publicized efforts came in July and August 1947: After training in Cuba, the exile group launched an unsuccessful attempt to invade the Dominican Republic and overthrow Trujillo. Cuban dictator FIDEL CASTRO RUZ claims to have played a significant role in this invasion, but there is no verification of this. In April 1948, Nicaraguan strongman ANASTASIO SOMOZA GARCÍA appeared ready to intervene in Costa Rica's "civil war" to prevent alleged communists, led by Figueres, from seizing power. The Caribbean Legion also reportedly played a part in the 1949 assassination of the chief of the Guatemalan armed forces, Francisco Arana (b. 1905–d. 1949), and plots against Honduran strongmen TIBURCIO CAÍAS ANDINO and Somoza.

By 1950, the Caribbean Legion's phantom army disappeared for two fundamental reasons. As the cold war intensified, the United States became more interested in political tranquillity throughout the Caribbean region and therefore was willing to tolerate dictatorial regimes. Furthermore, the ORGANIZATION OF AMERICAN STATES imposed on the Caribbean governments a series of principles that severely restricted the activities of political exiles.

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**CARICOM** See CARIBBEAN COMMUNITY AND COMMON MARKET.

**CARIFTA** See CARIBBEAN FREE TRADE ASSOCIATION.

**Carnival in Brazil (Carnaval)** Carnival in BRAZIL is a three-day celebration that begins on Ash Wednesday, which is the first day of Lent, the 40-day fast before Easter. Originally, the MUSIC-and-dance celebration was a mixture of Christian, Egyptian, Greek, and Roman religious feasts; these later combined with those of the African and Amerindian cultures found in Brazil.

Carnival appeared in Brazil in the 1830s and mimicked the festivals of Europe, particularly of Paris. Initially confined to the saloons in urban centers and frowned on by the authorities, it quickly grew in popularity. By the 1930s, street festivals were common. The first were organized by samba clubs, because of the popularity of that dance in Brazil. With the country's modernization in the 1960s, neighborhood groups known as *bloco*s (blocks) determined the floats, dances, and music that would represent each *bloco* in the street festival. While cities throughout Brazil hold their own carnivals, that in RIO DE JANEIRO has received international attention thanks to television.

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**Carranza, Venustiano** (b. 1859–d. 1920) *revolutionary leader and president of Mexico* Venustiano Carranza was born to a wealthy landowning family in the state of Coahuila, MEXICO. He became a MILITARY leader during the MEXICAN REVOLUTION and advocated a return to the democratic principles of the Constitution of 1857. As governor of his home state, Carranza supported the political reform efforts of FRANCISCO MADERO. He assumed leadership of the Constitutionalists when VICTORIANO HUERTA overthrew Madero and installed himself as dictator. Carranza eventually deposed Huerta in 1914 and proclaimed himself "first chief." He made a nominal attempt to bring the various revolutionary factions together in the CONVENTION OF AGUASCALIENTES, but when delegates did not select him as interim president, he withdrew his delegates.

Carranza led his Constitutionalist Army in a bloody civil war against the forces of EMILIANO ZAPATA and FRANCISCO VILLA from 1914 to 1915. The Constitutionalists advocated a simple program of political reform, while the forces of Zapata and Villa—known initially as the "Conventionists"—insisted on more progressive social and agrarian reforms. With the help of military leader ÁLVARO OBREGÓN, Carranza's forces brought much of the country under control and convened a convention to draft the CONSTITUTION OF 1917. Despite Carranza's hopes that the new document would closely resemble the

Constitution of 1857, delegates introduced a wide array of sweeping social reforms. After serving for several years under the title of first chief, Carranza was elected president in 1917. He served until 1920 and ignored many of the most radical aspects of the constitution. Obregón led a revolt against the outgoing president in 1920 when Carranza attempted to name his own successor. Carranza escaped MEXICO CITY with part of the national treasury. He was captured and executed in May 1920.

See also CONSTITUTION OF 1857, MEXICO (Vol. III).

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Douglas Richmond. *Venustiano Carranza's Nationalist Struggle, 1893–1920* (Lincoln: University of Nebraska Press, 1983).

**Castro Ruz, Fidel** (b. 1926– ) *Cuban revolutionary and dictator* Fidel Castro Ruz was a lawyer by training and a revolutionary by profession. Castro led a guerrilla movement that ousted Cuban dictator FULGENCIO BATISTA Y ZALDÍVAR on December 31, 1958. One of seven children born to successful farmers Ángel Castro and Lina Ruz González, Castro was educated at a boarding school in Santiago de Cuba and at Belén High School in HAVANA. In 1950, he earned a law degree from the University of Havana, where as a student he was involved in the often-violent conflicts between student groups. Following graduation, Castro married Mirta Díaz Balart, a member of a prominent Cuban FAMILY. Before their divorce in 1954, they had one son, Fidelito. Subsequently, and despite rumors of Castro's numerous affairs, his revolutionary compatriot Cecilia Sánchez remained closest to him and was his most trusted adviser until her death in 1980.

Castro's university experience brought him into the reality of Cuban politics. A student of political ideologies, he was most attracted to the Orthodox Party (also known as the Cuban People's Party), which called for economic independence from the United States, political liberty, social justice, and an end to government corruption. These concepts were in the tradition of José Martí, and Castro used them when he spoke in his own defense during his 1953 trial for the raid on the Moncada Barracks.

In 1947, Castro joined with others in a failed attempt to oust RAFAEL TRUJILLO, dictator of the DOMINICAN REPUBLIC. A year later, Castro was in BOGOTÁ, COLOMBIA, when the assassination of labor leader JORGE ELIÉCER GAITÁN touched off the riots known as the Bogotazo. Castro took part in the demonstrations. Ideology and violence converged in the coup d'état that brought Batista to power in CUBA on March 10, 1952, and his cancellation of the forthcoming elections, in which Castro was a candidate for the Cuban congress. Castro became convinced that the only way to reform the corrupt Cuban political system was through violent revolution.



Fidel Castro as a young revolutionary (circa 1957) in Cuba's Sierra Maestra mountain range (Thomas M. Leonard Collection)

Following Batista's assumption of the presidency, Castro set about organizing a cell-styled opposition group (an organization made up of different "cells," each not knowing the other's membership but united by one leader, in this case, Castro). The following year, he determined it was time to act. He plotted and carried out armed attacks on the Moncada army barracks in Santiago de Cuba on July 26, 1953. The plan was a complete failure. While the majority of Castro's 160 colleagues were killed either during the assault or shortly after being captured by the Cuban army, Fidel and his brother RAÚL CASTRO RUZ were held for trial. Fidel's self-defense, published later as *History Will Absolve Me*, correctly summarized all that was wrong with Cuba's economic, political, and social structures. For their actions, the Castro brothers were sentenced to 15 years' imprisonment on the ISLE OF PINES (later renamed Isla de la Juventud). Released as part of a general amnesty granted by Batista in 1956, the Castro brothers removed themselves to MEXICO CITY, where they found many other expatriate Cubans who were disgusted with conditions on the island. These others supported Castro financially and helped in the purchasing and storing of arms as he prepared to return to Cuba. The brothers also met the Argentine ERNESTO "CHE" GUEVARA, a medical doctor turned revolutionary,

who earned their friendship for their shared revolutionary ideals.

The Castro brothers and Guevara, along with 81 guerrilla fighters, returned to Cuba on December 6, 1956, in a poorly planned invasion that anticipated a popular uprising in Havana, which never occurred. The three escaped into the Sierra Maestra mountains, where they organized a guerrilla army, which battled against Batista's national army for the next three years. Castro's popular image grew steadily as Batista's army failed to capture the revolutionary. Most damaging to Batista's claims about Castro's failing effort came in February 1958, when *New York Times* reporter Herbert Mathews visited Castro in the mountains of eastern Cuba. The carefully staged interview intensified opposition to Batista. Havana's most influential businessmen and the CATHOLIC CHURCH attempted to mediate a settlement, but Batista refused to compromise. In June 1958, Batista ordered his army to open the "final offensive" against Castro. Within two months, it proved a disaster. The Cuban army melted away into the countryside, and some of its soldiers even joined Castro's army. In early December, U.S. president Dwight D. Eisenhower attempted to mediate a settlement between Batista and Castro, but again, the former refused to compromise. Isolated and deserted by his supporters, Batista finally left Cuba on December 31, 1958.

During the three years after his march into Havana, Castro worked diligently to consolidate his power. He had Manuel Urrutia (b. 1901–d. 1981) appointed president and then Osvaldo Dorticós (b. 1919–d. 1983), while remaining the real power himself. He directed the elimination of Cuba's elite families and Batista loyalists through exile, internment, or execution. Castro's consolidation of power, postponement of elections, and attack on the elite prompted thousands of middle-class Cubans to abandon the CUBAN REVOLUTION and Castro's subsequent political noose. Castro absorbed Cuba's Communist Party into his 26th of July Movement, not because he was a communist, but because he needed the party structure and discipline to impose his will. In 1964, he shut the party down and organized the new Communist Party of Cuba under his own control. Following the failed BAY OF PIGS INVASION in April 1961, Castro further clamped down on opposition, and following the October 1962 CUBAN MISSILE CRISIS, standing alone between the superpowers, he recognized the need for full control over Cuban society. He directed that every sector, from labor and teachers to professionals, artists, the press, and so, be grouped into various organizations headed by people loyal to the revolution. Increasingly, he relied on persons loyal to him rather than creative advisers. With his brother Raúl in charge of the MILITARY, political opposition was silenced. Devoid of political opposition and surrounded with weak advisers, Castro used his charisma to capture the attention of the Cuban population.

In his rush to silence political opposition, Castro permitted many of the Cuban elite to go into self-

exile immediately following Batista's overthrow in 1959. When it became apparent in early 1960 that Castro did not intend to implement the democracy he had promised, members of the middle class fled the island. These two groups included medical personnel, engineers, scientists and other university-trained individuals, business managers and professionals—people essential for administering government and the economy. Recognizing this loss, in 1961 Castro closed the door to mass out-migration and for the next eight years tightly restricted the outflow. Almost all of these people, many who came to the United States, were Spanish whites, or *criollos*, with skills that permitted them to meld into U.S. middle-class society. This was not true of those who came in the 1979 Mariel boatlift and the *balseros* (rafters) who came in the 1990s. These people were mostly nonwhites and of mixed race, and most often without skills that permitted their easy adaptation to U.S. society. Cuba's out-migrations also established the fact that Castro, not the U.S. government, controlled emigration from Cuba.

With the collapse of the Soviet Union in 1991, the fragility of Cuba's socioeconomic structures beamed apparent. Although Castro loosened the economic chains by permitting joint ventures with foreign companies in MINING and tourism, allowing individuals to earn money by hiring themselves out or driving their own cars as taxis or using their homes as small restaurants, Castro never gave up on his goals. "Socialism or Death" became his rallying cry despite food and medical shortages, increased unemployment, and broken-down infrastructure. While international and private organizations donated medical supplies to Cuba, Castro took advantage of loopholes in the U.S. embargo to purchase food from the United States in 2000 (see CUBA, U.S. TRADE EMBARGO OF). Through 2006, the Cuban government paid cash for approximately \$500 million in U.S. foodstuffs. Castro's permissiveness resulted in visits to Cuba by Pope John Paul II in 1998 and former U.S. president Jimmy Carter in 2003. While both men criticized the continuing U.S. embargo, they also chastised Castro for the lack of civil and HUMAN RIGHTS on the island. Some groups, such as gays and lesbians, are harassed and jailed solely for their sexual orientation. Others, such as artists and writers, are singled out because their works express anti-Revolutionary ideas. Their public lectures did not move Castro to loosen the controls. Indeed, the arrests and detentions of notable persons continued.

Since the collapse of the Soviet Union in 1991, widespread speculation emerged over who would succeed Castro. Such individuals as longtime Castro supporters Roberto Alarcón (b. 1937– ) and Carlos Lage (b. 1951) have been suggested, but the Cuban constitution and Castro are quite clear that Raúl Castro stands next in line. When Fidel became ill with what were reported as stomach disorders in July 2006, he announced that Raúl was temporarily taking control of the government reins. A year later, as his health appeared to improve, Fidel still



made no public announcement or showed any intention of returning as Cuba's head of state. Finally, in February 2008, Castro resigned from his political positions, effectively elevating his younger brother Raúl to the Cuban presidency.

See also MARTÍ, JOSÉ (Vol. III).

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**Castro Ruz, Raúl** (b. 1931– ) *revolutionary and president of Cuba* While less athletic, outspoken, and concerned with personal recognition than FIDEL CASTRO RUZ, Raúl Castro Ruz followed his older brother to La Salle Academy in Santiago de Cuba, to Belén High School in HAVANA, and to the University of Havana, where he was drawn to Marxism and joined the Young Socialists, an affiliate of the Moscow-oriented Popular Socialist Party (Partido Socialista Popular). While still a student, in 1953, Castro participated in the Soviet-sponsored World Youth Congress in Vienna, which was followed by a trip behind the iron curtain.

Castro joined his brother Fidel in the ill-planned attack on the Moncada Barracks on July 26, 1953, and, like his brother, was captured and sentenced to 15 years in prison on the ISLE OF PINES. The brothers were released in a general amnesty issued by President FULGENCIO BATISTA Y ZALDÍVAR in 1956. The Castro brothers quickly departed for MEXICO CITY, where they met ERNESTO "CHE" GUEVARA and plotted to oust Batista from CUBA by force. Landing in the swamps along the coast of Oriente Province on December 6, 1956, the Castro brothers, Guevara, and 81 followers proved no challenge for the Cuban army but escaped capture or death by retreating into the Sierra Maestra mountains, where they organized and conducted a three-year guerrilla war against Batista (see CUBAN REVOLUTION).

During the insurgency, from 1956 to 1959, Raúl Castro was put in charge of the Second Eastern Front (Segundo Frente Oriental), which operated throughout northeastern Cuba. Castro battled Batista's army with equal ruthlessness, often to the displeasure of Fidel. For a time after January 1, 1959, Castro ordered the execution of several hundred *batistianos*. His battlefield demeanor and role as executioner, combined with his commitment to Marxism, added to his reputation as a hardliner and brutal Marxist.

Batista fled Cuba on the evening of December 31, 1958, and a week later, Fidel Castro and several of his fol-

lowers marched triumphantly into Havana. Despite the establishment of a temporary ruling council, Fidel Castro quickly emerged as its leader. Among Fidel's initial appointments was Raúl as minister of the Revolutionary Armed Forces, a position he used to organize the guerrilla forces of the 26th of July Movement into a modern army equipped with weapons purchased from Western Europe and the Soviet Union. In the 1970s, Castro directed the dispatch of several thousand Cuban troops to the African war zones in Ethiopia and Angola. Into the 1980s, he made several visits to the Soviet Union to study military tactics and strategy. Over time, Castro acquired additional government assignments: president of the Agrarian Reform Institute, minister of the interior, minister of public health, and secretariat to the president. Castro also served as vice premier and vice president of the Council of Ministers and Council of State during the institutionalization of the revolution in the 1970s and is presently a member of the Politburo and second secretary of the Communist Party.

Following the collapse of the Soviet Union in 1991, Castro became an advocate of limited market incentives for Cuban producers and opening the country to limited foreign investment, actions that contradicted his longstanding image as a hardline ideologue. As designated by the Fifth Party Congress in October 1997, the premiership passed to Castro in July 2006 when Fidel was hospitalized for unknown stomach disorders. A year later, when his health appeared to be improving, there was no talk of Fidel returning to an active leadership role. However, in February 2008, Raúl Castro became president of Cuba.

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**Catholic Church** Today, an estimated 90 percent of Latin Americans are Roman Catholic, having been baptized into that church, a fact often attributed to the Spaniards' imposition of Catholicism on NATIVE AMERICANS, their intolerance of other RELIGIONS, and the special privileges they granted to the church during the colonial period. Over time, many factors led to a variety of beliefs and opinions within the Catholic community. Indigenous, African, and other religious practices and beliefs fused with Catholic theology and practices. Politics often affected the church's position in society. This was most evident in the 19th century, when political conservatives sought to maintain the privileged status of the Catholic Church, while liberals wished to strip it of those privileges. When liberals came to power after the mid-19th century, the church lost its control over keeping vital statistics to civil governments, which also took over establishing public educational systems, hospitals, orphanages, and similar social service institu-

tions that were once the sole province of religious orders. Additionally, ecclesiastical courts lost their right to adjudicate civil issues. This liberal movement conflicted with the teachings of Pope Leo XIII, who administered the church from 1878 to 1903 and is considered the originator of modern Catholic social thinking. A critic of laissez-faire capitalism, he called on political leaders to intervene on behalf of free capital's victims—the workers. For example, he called for just wages and the legalization of workers' unions.

The liberal-conservative conflict had a profound influence on Latin America in the early 20th century. With its privileged position slipping away, the church hierarchy remained outside the political arena in hopes of avoiding further public attacks. Church attendance dwindled, and the number of people entering the church as priests and nuns precipitously declined. Increasingly, church schools and other church social institutions served society's middle and upper sectors. In effect, a wide divide separated the Catholic Church from Latin America's general populace.

In an effort to revive the church, in the 1930s, Pope Pius XI called on every parish to establish a Catholic action group to defend the church and emphasize its doctrine of social justice. Among the important laymen who led such movements were EDUARDO FREI MONTALVA in CHILE, Victor Andrés Belaúnde (b. 1883–d. 1966) in PERU, and Archbishop Sebastião Leme (b. 1882–d. 1942) in BRAZIL. Many of the leaders of these action groups eventually headed Christian Democratic POLITICAL PARTIES. For the moment, however, they organized workers into unions and designed social welfare programs to assist the poor.

During their papacies, from 1939 to 1963, Pope Pius XII and his successor, John XXIII, called on missionaries from Europe and the United States to go to Latin America. Thousands of religious and lay volunteers heeded this call, bringing development and reform agendas with them. The most notable U.S. group was the Maryknoll fathers and sisters, who arrived in 1943. Notable Latin American church reform leaders included several archbishops: Hélder Câmara (b. 1909–d. 1999) in Recife, Brazil, from 1952 to 1999; Manuel Larraín (b. 1900–d. 1966) in Talca, Chile, from 1937 to 1966; Juan Landázuri Ricketts (b. 1913–d. 1997) in LIMA, from 1955 to 1990; and José María Caro (b. 1896–d. 1958) in SANTIAGO DE CHILE, from 1939 to 1958. They and others built medical posts, as well as water and sanitation facilities in the growing urban shantytowns across Latin America during the 1950s and 1960s.

In 1955, the CONFERENCE OF LATIN AMERICAN BISHOPS was established to coordinate pastoral activities on an annual basis. The CUBAN REVOLUTION further awakened the need to address Latin America's socio-economic problems. Although Latin American bishops contributed little to the theological discussions at the Second Vatican Council meeting in Rome from 1962

to 1965, they came away with the understanding that the church had to do much more to reach people across Latin America. The mandate for greater social action came with the 1968 Medellín Bishop's Conference, which directed the clergy to work for social justice for the poor. Influenced by liberation theology, the bishops approved an active church in assisting the poor in improving their quality of life.

This call for change contradicted the church's long-standing support of oligarchic governments. It also brought it into conflict with many of the MILITARY dictatorships that directed Latin America's governments at the time. The clergy's experience in applying the dictates of liberation theology met with varied fates. In Peru, for example, General Juan Velasco Alvarado (b. 1910–d. 1977), who governed Peru from 1968 to 1975, sympathized with the church's social goals. At the same time, in ARGENTINA, the church's hierarchy stood by silently while the military tortured and eliminated progressive thinkers and advocates during the so-called DIRTY WAR, from 1976 to 1983. In Brazil, many clergy paid the ultimate price for challenging military brutality and suppression and calling for a return to democracy. In BOLIVIA, Chile, and PARAGUAY, the clergy played a major role in organizing opposition to the military governments. The Central American clergy clearly illustrated the split among the ruling cardinals and bishops. For example, in EL SALVADOR, Archbishop Oscar Romero (b. 1919–d. 1980) was assassinated during mass on March 24, 1980, allegedly by right-wing death squads for his avowed support for democracy and social change and criticism of the military. The same charges resulted in the deaths of four U.S.-based Maryknoll nuns and laywomen near San Salvador on December 3, 1980, and the killing of 11 Jesuit priests at San Salvador's University of Central America on November 16, 1989. In neighboring NICARAGUA, the clergy were also split. Archbishop Miguel Obando y Bravo (b. 1926– ), criticized both the Somoza regime and the Sandinistas for their excessive use of power. He joined the pope in lashing out against priests such as Ernesto Cardenal (b. 1925– ), Miguel d'Escoto (b. 1933– ), and Fernando Cardenal (b. 1934– ) for taking positions in the Sandinista government.

CUBA's experience paralleled that of Latin America until the arrival of FIDEL CASTRO RUZ in HAVANA on January 7, 1959. Among his early actions was to expel foreign-born Catholic clergy, charging that they did not understand Cuban culture, politics, or history. He withdrew all state financial support for the church and its institutions, such as schools, orphanages and hospitals. Finally, in 1968, Castro declared the country atheistic, although he did not close the Catholic or other churches operating on the island. The impact of such dictates is difficult to measure, particularly when thousands of Cubans turned out to greet Pope John Paul II on his visit to the island nation from January 21 to 25, 1998.

In the midst of this change in Latin America, Pope John Paul II visited the region 14 times, each time advising the bishops and the clergy to steer clear of political activism. The contemporary church is split between liberal-progressive clergy who pressure for socioeconomic reforms and more representative government and more conservative clergy who wish the church to attend strictly to religious affairs. Nevertheless, during his 1998 visit to Cuba, Pope John Paul II held out the promise for a more active role in Cuban affairs and for better relations between the Vatican and Havana. Today, the church continues to be active in Latin American politics by issuing periodic reports and analyses of socioeconomic conditions, while not suggesting concrete solutions. At the parish level, priests continue to press governments for improved services, including water and sanitation facilities, electricity, schools, transportation, and medical clinics.

While research at the end of the 20th century reveals that between 85 and 92 percent of all Latin Americans identify themselves as Catholic, only 10 percent of them regularly attend religious services. At the same time, there is a strain on the number of religious personnel to serve the estimated 250 million Catholics: 1,000 bishops, 53,000 priests, 126,000 religious women, and another 8,500 religious men. Across the hemisphere, on average, one priest serves approximately 7,000 churchgoers. In addition to a dwindling number of practicing Catholics and clergy, during the last generation of the 20th century, Protestants, particularly evangelical religions, have made inroads among Latin America's poor, with the inference that the Catholic Church has not done enough to improve their lives.

See also CATHOLIC CHURCH (Vols. I, II, III); CONSERVATISM (Vol. III); LIBERALISM (Vol. III).

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**Cato, R. Milton** (b. 1915–d. 1997) *prime minister of St. Vincent and the Grenadines* Born on June 3, 1915, on the island of St. Vincent, Robert Milton Cato served in the Canadian army during World War II. After the war, Cato returned to St. Vincent and became involved in politics. An avowed socialist, Cato rejected Marxism. He sought to organize workers and cofounded the Saint Vincent Labour Party (SVLP) in 1955. Cato was elected chief minister when the British government granted SAINT VINCENT AND THE GRENADINES local autonomy in 1967. While St. Vincent and the Grenadines was still a British colony, Cato was elected prime minister in 1969. The British, however, continued to control foreign rela-

tions and national defense. Cato lost the 1972 elections to JAMES MITCHELL, the leader of the New Democratic Party (NDP), but subsequently won the 1974 elections and regained his position as prime minister. With the support of the middle class, he pursued a conservative policy based on law and order.

Cato was prime minister when the British granted St. Vincent and the Grenadines complete independence on October 27, 1979. Elections held shortly after that date reaffirmed Cato's mandate. During the nation's first months of independence, Cato's government, with the MILITARY assistance of BARBADOS, suppressed a Rastafarian-influenced military revolt on Union Island led by Lennox "Bumba" Charles (b. 1946). Although a socialist, Cato distanced himself from socialist governments in CUBA, GUYANA, and GRENADA. He pursued a pro-Western foreign policy and followed a political and economic path similar to the policy followed by such Caribbean states as Barbados. Cato's suppression of TRADE unions and opposition groups, however, cost him political support. He lost the 1984 elections to the NDP, which held power until 2001. He died in the capital, Kingston, on February 10, 1997.

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**CBI** See CARIBBEAN BASIN INITIATIVE.

**CELAM** See CONFERENCE OF LATIN AMERICAN BISHOPS.

**Central America** Central America includes the five countries of COSTA RICA, EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA, totaling approximately 162,669 square miles (421,311 km<sup>2</sup>) and with nearly 38 million inhabitants in 2008. The region is bordered to the north by MEXICO, to the east by BELIZE and the Caribbean Sea, to the west by the Pacific Ocean, and to the south by PANAMA. Central America was once the Spanish colonial administrative unit the Audiencia of Guatemala and the postindependence United Provinces of Central America. Geographers are correct in pointing out that Belize and Panama are within Central America as a geographic region, but because of Belize's historical experience, it is usually placed within the sphere of the BRITISH CARIBBEAN. Panama has been linked to COLOMBIA in the 19th century and during the colonial period to the Viceroyalty of New Granada, and its mod-



Banana plantations were the dominant industry in early 20th-century Central America, prompting the region's nations to be dubbed "banana republics." (*U.S. Army Signal Corps*)

ern history begins with its independence in 1903, and since then, it has been inextricably tied to the United States, which constructed the PANAMA CANAL.

Central America's agro-export-based economies—coffee, bananas, tobacco—which propelled the five countries into the global marketplace in the late 19th century, with its concomitant sociopolitical structures, continued to characterize the five countries in the 20th century. With the exception of Costa Rica, elitist and/or military rule continued to be the norm of government in the other four countries. By mid-20th century, Costa Rica was identified as the "Switzerland of the Central America" with its democratic government and generous social safety nets. The socioeconomic disparities and closed political systems erupted into violence, first in Guatemala in the mid-1950s, followed by Nicaragua, El Salvador, and Honduras from the 1970s to the 1980s. Asserting that it needed to stem the tide of communism, the United States intervened in these conflicts with economic and military assistance (see CENTRAL AMERICAN WARS; GUATEMALA,

U.S.-SPONSORED INVASION OF). These conflicts ended by 1991, and for the most part, the traditional elites returned to power. Also during the 1990s, each country accepted the neoliberal economic model and in 2005 ratified the DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT with the United States.

See also CENTRAL AMERICA (Vol. III); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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### Central American Common Market (CACM)

The Central American Common Market (CACM) is an economic organization established on December 13, 1960, between four Central American countries: EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA. A year later, COSTA RICA joined. During the 1950s, Latin American nations had accepted the precepts of the Argentine economist Raúl Prebisch (b. 1901–d. 1986) and the Economic Commission for Latin America (ECLA [later, ECLAC]) that emphasized increased private and public investment in manufacturing and infrastructure to overcome the dependence on the exportation of primary products. ECLA also encouraged the establishment of common markets and common external tariffs (CETs). Guided by ECLA, the five Central American nations signed two agreements that provided for interregional free TRADE on specified items to be implemented over a 10-year period and for regional integration of protected industries. Although Costa Rica signed the accords, its legislature did not ratify them, making them inoperable. This was followed by the U.S.-encouraged 1960 Treaty of Economic Association (TEA) that committed El Salvador, Guatemala, and Honduras to establish a common market over a five-year period. TEA provided the impetus for a larger region-wide agreement that resulted in the General Treaty of Central American Economic Integration, signed in December 1960, which established CACM. At the time, Costa Rica gave economic reasons for not ratifying the treaty but in reality was acting out its sense of distinctiveness from the other four countries.

In the 1960s and 1970s, CACM recorded significant gains in intraregional trade, with its value rising from \$33 million in 1960 to \$1.1 billion in 1980. Urban industrial growth averaged 5.8 percent a year under CET protection. These figures, however, conceal some major difficulties. The bulk of the intraregional trade consisted of consumer goods, mostly in processed foods. By 1970, food processing accounted for 50 percent of CACM's industrial activities. In the agricultural sector, U.S. assistance provided for increased production per acreage and introduced mechanization that displaced unknown numbers of farmworkers, who made their way to cities in search of jobs. However, industrial development was capital, not LABOR, intensive and centered in El Salvador and Guatemala, CACM's most developed countries. The displacement of rural labor not only strained the urban sector's infrastructure but also prompted some, such as Salvadorans, to seek economic opportunity in Honduras. The influx of Salvadorans strained Honduran society and significantly contributed to the outbreak of the SOCCER WAR in 1969. The war prompted Honduras to withdraw from CACM and to suspend economic relations with El Salvador, acts that contributed to its demise. The CENTRAL AMERICAN WARS of the 1980s further affected regional development. ECLA's scope was broadened in 1984 to include the Caribbean.

CACM languished until the Esquipulas II peace accords in August 7, 1987, brought the Central American

conflicts to an end and laid the groundwork to reignite the economic integration process. On June 15–17, 1990, at the Antigua, Guatemala, summit, the Central American presidents approved an economic action plan that emphasized the insertion of the region into the global marketplace. The plan included the modernization of the region's industrial base and development of nontraditional exports in order to effectively compete in the global market. The CET would be reduced from 40 to 20 percent in order to encourage the importation of current technology and machinery. The European Economic Community established a fund of 120 million euros to assist in the stabilization of trade balances and another 30 million euros to assist with infrastructure development. Panama joined on a limited basis in 1991, and Honduras rejoined the fold a year later.

Optimism characterized CACM's early efforts to enter the global market. Guatemala's recognition of BELIZE in 1991 opened the way for trade discussions with CACM. Negotiations for a free trade agreement with MEXICO began in 1992. In 1993, CACM actively sought participation in the NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA) and with the so-called G-3 (MEXICO, COLOMBIA, and VENEZUELA). The optimism faded as the decade progressed. The structural changes brought about by the acceptance of neoliberalism were in place, but industry was not modernized to a significant degree not only in CENTRAL AMERICA but also across Latin America. Mexico became more concerned with the loss of assembly industries to China and South Asia than with a Central American Free Trade Agreement, while Colombia and Venezuela focused on internal politics rather than foreign relations.

The arrival of George W. Bush at the U.S. White House on January 20, 2001, presented new challenges to CACM. Although firmly committed to NAFTA, Bush had no interest in pursuing the FREE TRADE AREA OF THE AMERICAS as envisioned by his father, President George H. W. Bush, and pursued by President Bill Clinton. Instead, the younger Bush pursued the completion of bilateral or regional free trade agreements, such as the 2005 DOMINICAN REPUBLIC–CENTRAL AMERICAN FREE TRADE AGREEMENT. Not all of Central America's socioeconomic sectors, particularly middle-sector businesspeople, small farmers, and laborers, looked favorably on the agreement. They feared the diminishment of their economic status. In addition to the U.S. presence, China is surveying trade possibilities in the region. And, the assembly industries, particularly textiles, are under constant threat from lower-wage countries, such as China and South Asia. CACM faces a challenging future.

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**Central American conferences of 1907 and 1923** Hosted by the United States government in Washington, D.C., these conferences attempted to stave off domestic political violence that had characterized the five Central American republics—COSTA RICA, EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA—since their independence in 1823. The conferences illustrated the larger U.S. policy toward the entire Caribbean region, which sought political tranquillity and financial responsibility to keep European nations from intervening in the region and potentially threatening the PANAMA CANAL.

The first conference (Central American Peace Conference) resulted from Nicaraguan president JOSÉ SANTOS ZELAYA'S efforts to spread his influence over the region, which were both an affront to his regional presidential colleagues and a threat to regional peace. The Central American heads of state accepted the joint U.S.-Mexican offer to mediate a solution, and their representatives convened in Washington, from November 14 to December 20, 1907. The conference produced several agreements, three of which satisfied the U.S. policy objective. The General Treaty of Peace and Amity provided for the nonrecognition of governments that came to power via a coup d'état and banned the Central American governments from interfering in one another's internal affairs. Another agreement established the Central American Court of Justice, located in San José, Costa Rica, and envisioned as a nonpolitical instrument for settling disputes among the five nations. On paper, the agreements achieved the U.S. objective of regional political stability guaranteed by a treaty system. On the other hand, the Central Americans were more pleased with other treaty provisions that pointed toward a regional union. They considered the establishment of the Central American Bureau as most important because it offered the opportunity for cooperation in modernizing legal systems and educational institutions, improving agriculture and industrialization, and developing regional TRADE. Although the 1907 agreements brought momentary tranquillity to the region, it also demonstrated the differences in objectives between the United States and CENTRAL AMERICA.

Over the next 15 years, U.S. presidents attempted different policies to force constitutionalism on the region, while at the same time the Central American Court of Justice proved ineffective in settling interstate differences. Following World War I, the United States would make another effort to institutionalize Central American political tranquillity and, in the fervor of the time, make

local militaries apolitical and limit their portions of national budgets.

The second Washington conclave came about when the Liberal governments in Tegucigalpa and Guatemala City threatened the Conservative governments in El Salvador and Managua immediately after the overthrow of Guatemalan president Carlos Herrera (b. 1886–d. 1930) on December 10, 1921. Fearing that U.S. Marines might be needed to maintain the peace amid the increasing tensions, Secretary of State Charles Evans Hughes proposed another regional conference (Conference on Central American Affairs), which convened in Washington from December 4, 1922, until February 7, 1923. The conference produced 12 agreements and as in 1907 represented the divergent objectives of the United States and the Central Americans. Five reflected the U.S. policy objective of regional political tranquillity. Additionally, there would henceforth be no recognition of regional governments that came to power through a coup d'état or revolution, even if eventually legitimized by free election. Individuals who could not serve as heads of state under these circumstances included revolutionary leaders, their close relatives, and high-ranking civilian and MILITARY officials who had been in power six months before or after the event. The Central Americans promised not to assist revolutionaries or harbor exiles and again agreed not to interfere in one another's affairs. Furthermore, disputes among states would be settled by internationally appointed commissions or judges if they could not be resolved through diplomatic channels. Election commissions would be appointed to codify procedures, observe the electoral process, and verify the results. In effect, the agreements attempted to address all of the unresolved issues from the 1907 convention.

Influenced by the post-World War I disarmament and the success of the 1922 Washington Naval Disarmament Conference, U.S. policy makers insisted on arms limitation agreements designed to depoliticize Central American militaries and eventually replace them with nonpolitical national constabularies or national guards. In the end, the Central American signatories agreed to a formula that fixed the size of each national army: Costa Rica, 2,000 individuals; Honduras and Nicaragua, 2,500; El Salvador, 4,200; and Guatemala, 4,500.

The treaties met the same disappointing fate as the 1907 accords. None of the Central American governments ratified all the provisions; political exiles found havens in neighboring states from which they launched attacks on their homeland; elections became shams; only El Salvador and Nicaragua established constabularies, but these eventually served dictators; and the United States again found itself intervening in regional political affairs in the late 1920s. Also during the 1920s, U.S. policy toward Latin America underwent a significant change that led to the GOOD NEIGHBOR POLICY in 1933 and to the decertification of the 1923 Central American treaty system two years later.

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**Central American wars (1980s)** In 1977, several factors placed CENTRAL AMERICA'S existing order under severe pressure, but regional analysts in the U.S. State Department did not anticipate any serious problems in the near term. EL SALVADOR, GUATEMALA, and HONDURAS were under MILITARY rule. The Somoza family dynasty was still in power in NICARAGUA. Only COSTA RICA, a social welfare state described as the "Switzerland" of this tumultuous region, maintained a democratic government. Four years later, in 1981, brutal warfare gripped the region and threatened Costa Rica's peaceful ambience.

The 1977 U.S. State Department assessment belied reality, as the region was already in the throes of violence. The majority of Central American analysts place the events of the 1970s and, subsequently, the 1980s, within the region's historical setting. With the exception of Costa Rica, which had a practicing democracy, the other four nations had long histories of elitist governments propped up by the military at the expense of the middle and lower socioeconomic sectors. The initial challenges to this system came in 1944, when the middle sector attempted to oust the dictators and in Costa Rica the people elected a "leftist" president, Teodoro Picado (b. 1900–d. 1960). The reform efforts of Guatemalan president JACOBO ARBENZ GUZMÁN in 1954 led to a U.S.-sponsored invasion of the country and restoration of the old order but also initiated a guerrilla war that was still being fought in 1977 (see GUATEMALA, U.S.-SPONSORED INVASION OF). At the same time, El Salvador and Nicaragua engaged in vicious guerrilla conflicts. When the military reversed the outcome of the February 22, 1972, presidential election reportedly won by a reformist Christian Democrat, JOSÉ NAPOLEÓN DUARTE, many Salvadorans became convinced that the existing system would not permit legitimate political change and concomitant socioeconomic improvement for all. The devastating earthquake on December 23, 1972, that leveled Managua, led to an outpouring of international aid, which ANASTASIO SOMOZA DEBAYLE used to placate the military and elite rather than help the impoverished in Managua, who were most hard hit. In both cases, government opposition groups used these events to strengthen their positions. In El Salvador, the variety of opposition groups coalesced around the FARABUNDO MARTÍ NATIONAL LIBERATION FRONT (Frente Farabundo Martí para la Liberación Nacional, or FMLN), and in



A street poster in San Salvador calling upon the Salvadoran army to immediately release captured revolutionary supporters (Thomas M. Leonard Collection)

Nicaragua, the SANDINISTA NATIONAL LIBERATION FRONT (Frente Sandinista de Liberación Nacional, or FSLN). In addition, throughout the 1970s, the Guatemalan military conducted a brutal campaign to rid the country of several guerrilla groups. Because these groups challenged the existing socioeconomic and political order, the local elites labeled them communists and, in 1981, found an ally in U.S. president Ronald R. Reagan.

A traditional cold warrior, Reagan and his administration viewed the conflict as a Soviet effort to extend communism into Central America via CUBA (see COMMUNISM IN LATIN AMERICA). President Reagan asserted that a communist victory in Central America would spread to MEXICO and hence threaten the United States. Reagan also wanted to restore U.S. global prestige, which he claimed had been greatly tarnished by his predecessor, Jimmy Carter. Initially, the Reagan team believed that a clandestine Central Intelligence Agency operation could topple the Sandinista regime, which had come to power in July 1979 in Nicaragua, and sufficiently strengthen the Salvadoran military to crush the FMLN. The U.S. arranged for the Argentine military to train the Nicaraguan resistance, known as the Contras, in Honduras, from where they would return home to destroy the country's infrastructure and croplands. In 1981, Reagan also asked for and received from Congress

increased military aid for the Salvadoran military to meet the challenges of guerrilla warfare. Guatemala, which did not want a U.S. presence in its battle against the guerrillas, received U.S. military assistance under the guise of battling drug trafficking. Honduras became the storage depot for U.S. military supplies and a training ground for the antiguerrilla forces. The vastness of the effort contributed to its exposure.

The Central American wars touched off debates within the United States and the international community. Those critical of the Reagan policy pointed to the historical internal dynamics of the region that had resulted in socioeconomic disparities and elitist rule. In other words, these guerrilla groups were legitimate movements to correct long-standing ills. The academic community and members of the Democratic Party were among the leading U.S. critics, and they found support from Latin American governments such as BRAZIL, COLOMBIA, Mexico, PANAMA, and VENEZUELA, as well as European governments and socialist parties in Germany, France, and Spain. The Reagan administration justified the 1983 invasion of GRENADA as further proof of Soviet-Cuban expansion in the Caribbean Basin. Rather than win converts to his cause, the invasion intensified the debate over President Reagan's policies in the Caribbean.

The debate's ebb and flow was reflected in congressional support for the war. The December 1982 Boland Amendment forbade the administration from providing any kind of military advice or assistance intended for the overthrow of the Nicaraguan Sandinista government or to provoke a conflict between Nicaragua and Honduras. However, when FSLN leader and head of the Nicaraguan government DANIEL ORTEGA SAAVEDRA visited Moscow in 1985, the U.S. Congress appropriated \$27 million for nonlethal aid to the Contras and a year later, in 1986, with evidence of increased Soviet assistance to Nicaragua, appropriated \$100 million in military aid for the Contras. In addition, members of the Reagan administration arranged for clandestine military assistance to the Contras from ARGENTINA, Brunei, Israel, Taiwan, and private U.S. sources.

On the ground in Central America, it became clear that the Contras could not depose of the Sandinista government in Nicaragua or that the military could eliminate the guerrilla movement in El Salvador. Central American leadership also became nervous. In 1983, Costa Rican president Louis Alberto Monge (b. 1925– ) declared his country's neutrality in the conflict. In 1986 and 1987, the Honduran government of President José Azcona Hoyo (b. 1927–d. 2005), concerned with a possible Nicaraguan invasion to rout the Contras, distanced itself from the United States. Also, in 1986, the Guatemalans elected their first civilian president in 15 years, Vinicio Cerezo (b. 1942– ), who preferred to focus on domestic human rights issues and the presence of the military in politics rather than pursue alleged communist guerrillas in the countryside.

Amid these cross-currents, the Central Americans settled their own conflict. On August 7, 1987, they accepted a plan that had been put in motion by Costa Rican president OSCAR ARIAS SÁNCHEZ that February. It provided for a cease-fire within 90 days, cut off arms supplies to insurgent groups, granted amnesty to combatants who laid down their arms, restituted civil rights, and established commissions of national reconciliation in each of the five republics. Each nation had its own motivation for accepting the peace program. The Sandinistas solidified their position in Nicaragua. The arms cutoff would end El Salvador's guerrilla conflict. Cerezo could now place greater emphasis on limiting the military presence in Guatemalan politics. Honduras would be secure from a Nicaraguan attack and thus reduce the strain on Costa Rica's social safety net from refugees escaping the conflict to the north. The agreement provided the U.S. Congress with the opportunity to momentarily cut military assistance to Central American countries. The final peace accords were signed at the old United Fruit Company compound at Tela, Honduras, on August 7, 1989.

These conflicts took a heavy toll on Central America. Uncounted thousands of civilians (some estimate as many as 200,000) lost their lives, while others remain unaccounted for. Families were disrupted, and thousands of children were orphaned. The national infrastructures of El Salvador and Nicaragua lay in ruins. Costa Rica's generous social system teetered on the brink of bankruptcy. During the 10-year period of the conflicts, 1980–90, the Nicaraguan gross domestic product declined by 43 percent; El Salvador's, 19 percent; Honduras's, 14 percent; and Costa Rica's, 4.7 percent.

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**Chaco War** (1932–1935) The Chaco War was fought between BOLIVIA and PARAGUAY between 1932 and 1935 over the area officially known as the Chaco Boreal, a 100,000-square-mile (259,000-km<sup>2</sup>) region that borders the two nations and over which each historically claimed sovereignty. The territory is a vast scrubland that is rich in the quebracho, a hardwood tree and source of tannin. A portion of the Paraguay River forms its western boundary, and after the loss of its Pacific coast in the War of the Pacific (1879–83), Bolivia desired control of



the Chaco to ensure it had water access to the Atlantic Ocean. Paraguay earned important foreign exchange through the exportation of quebracho bark and cattle hides from the Chaco. Tensions over the region intensified after World War I, when rumors of oil deposits in the region arose.

Border skirmishes had long plagued the northern Chaco boundary, but it was a 22-day siege of Fort Boquerón by an estimated 14,000 Paraguayans (against 600 Bolivian occupants who surrendered on September 29, 1932) that ignited a three-year war between the two nations. Although each side had long prepared for a conflict, their plans ignored the physical and climatic realities of the Chaco. Logistical support became a nightmare, and the dehydration of troops, overwhelming. Bolivia's strategy was significantly hampered by conflicts between President Daniel Salamanca (b. 1879–d. 1935) and the MILITARY command staff, which worsened as the war progressed. In contrast, Paraguayan president Eusebio Ayala (b. 1888–d. 1942) permitted General José Estigarribia (b. 1888–d. 1940) to prosecute the war as he saw fit and in the process become a war hero.

Following the Bolivian surrender at Fort Boquerón in September 1932, Paraguayan forces went on the offensive, driving the Bolivians from the central Chaco and forcing their retreat to their homeland. By early 1935, Estigarribia's forces had captured almost the entire disputed Chaco region and placed the Bolivian town of Villa Montes under siege but in the process overextended their lines. By this time, both sides were physically exhausted, and their treasuries, bankrupt. A cease-fire was declared on June 12, 1935. Total casualties approximated 100,000.

The war also produced some notables. The Bolivians used three Vickers six-ton tanks in the first-ever cross-border armored warfare in the Western Hemisphere, but these were ill suited to the Chaco's terrain and became easy prey for Paraguay's forces. The war also was the first instance of hemispheric air combat, with both sides using outdated, single-engine biplane bombers. Despite a League of Nations embargo, Bolivia purchased German-made Junkers Ju 86 and had their U.S.-made Curtiss C-20 Condors intercepted by PERU. Both models were twin-engine bombers. The Paraguayans capitalized on the native Guaraní language to radio-broadcast military instructions, knowing the Bolivians did not understand the language. They also used trained pigs to transmit handwritten messages between battle groups.

The inter-American system was also put to test during the Chaco War. A 1929 protocol for arbitration had established the Washington Commission of Neutrals (COLOMBIA, CUBA, MEXICO, United States, and URUGUAY) to mediate disputes such as the Chaco, but Bolivia and Paraguay shrugged off the commission's August 2, 1932, call for arbitration of their dispute and announcement that any territory taken by force would not be recognized. The League of Nations offered to fill the void,

which delegates to the Seventh International Conference of American States meeting in Montevideo December 3–26, 1933, agreed to on December 24. The League of Nations appointed a commission consisting of representatives from France, Great Britain, Italy, Mexico, and Spain, whose proposed peace treaty was rejected on May 12, 1934. The League then imposed an arms embargo on Bolivia and Paraguay and appointed a neutral commission of six nations (ARGENTINA, BRAZIL, CHILE, PERU, the United States, and, subsequently, URUGUAY) to supervise demobilization of the two sides. Although Bolivia was receptive to the plan, it prompted Paraguay to withdraw from the League of Nations on February 25, 1935. The League then gave the South American countries until May 20 to diplomatically bring the conflict to an end under the threat of the application of further sanctions. The six American nations convened a conference on the Chaco in BUENOS AIRES, Argentina, that resulted in the peace protocol of June 12, 1935. It was ratified by Bolivia and Paraguay on June 21, and demobilization was completed by October 20. Nevertheless, the disputants could not agree on a territorial settlement.

During the next three years, 18 negotiating sessions of the Chaco Peace Conference were held until the July 21, 1938, signing of the Treaty of Peace, Friendship, and Boundaries, with the proviso that the Chaco boundary be determined by the presidents of Argentina, Brazil, Chile, Peru, and Uruguay. Their decision, announced on October 10, 1938, awarded the Chaco region to Paraguay, the war's victor. The decision put to rest the nonrecognition principle of the August 3, 1932, declaration by the Latin American Commission of Neutrals that land seized by force would not receive legal status. The settlement also made a sham of the League of Nations and the OAS inter-American mediation efforts. Hemispheric confidence in the inter-American security system reached a new low.

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**Chamorro, Violeta Barrios de** (b. 1929– ) *president of Nicaragua* Born in Rivas, NICARAGUA, into a wealthy landowning and Conservative family, Violeta Barrios attended Catholic schools. In 1950, she married newspaperman and harsh critic of the Somoza regime, PEDRO JOAQUÍN CHAMORRO CARDENAL, and together they had two children.

Although Violeta Chamorro, as she is popularly known, supported her husband's attacks on the corruption and tyranny of the Somoza regime, she did not come to the forefront until after her husband's assassination in 1978. Following his death, she took over the editorship of his newspaper, *La Prensa*, and assumed his leadership role



A campaign poster for National Opposition Union presidential candidate Violeta Barrios de Chamorro and her vice presidential running mate, Virgilio Reyes Godoy. They won the election on February 4, 1990, which brought to an end 12 years of Sandinista rule in Nicaragua. (Thomas M. Leonard Collection)

in the middle-class opposition to the government. After the overthrow of ANASTASIO SOMOZA DEBAYLE in July 1979, Chamorro served as a member of the interim Junta of National Reconstruction but in April 1980 resigned from the post because of the SANDINISTA NATIONAL LIBERATION FRONT's (FSLN) dominance of the government and its policies. During the 1980s, Chamorro used *La Prensa* to criticize the Sandinista government and its leader, DANIEL ORTEGA SAAVEDRA. Chamorro supported the U.S.-funded Contras against the FSLN (see CENTRAL AMERICAN WARS). The government censored *La Prensa* by withholding newsprint and forcing the deletion of stories and editorials critical of it. Reportedly, secret U.S. assistance kept the newspaper financially solvent.

The 1989 peace accord that brought the Central American wars of the 1980s to a conclusion also paved the way for elections in Nicaragua in February 1990. Chamorro headed the National Opposition Union (Unión Nacional Opositora, or UNO), a 14-party coalition that defeated FSLN leader Ortega, with 55 percent of the vote. Although the United States heavily supported her campaign, Chamorro distanced herself from Washington, D.C., as a practical matter in war-torn Nicaragua. During her tenure, Chamorro often worked with the leftist FSLN to achieve legislative success, something that angered her conservative supporters. Government appointments were made on the basis of competency, not political affiliation. Through a national reconciliation program, Chamorro brought a sense of calm to a nation torn apart by war. She placed more than 5 million acres (2 million ha) of Caribbean coastal lands under government protection. The government collected

weapons and burned them. The size of the MILITARY was greatly reduced, although its leadership remained under the control of FSLN general Humberto Ortega (b. 1951– ).

Like other leaders in Latin America, Chamorro accepted the neoliberal economic model but during her administration brought little benefit to Nicaragua. In particular, the quality of life for the poor did not improve. Chamorro directed the devaluation of the currency, the cordoba, and had wages lowered by 25 percent to bring runaway inflation under control. The threat of political instability and an inept justice system discouraged foreign investors from pursuing projects in Nicaragua.

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**Chamorro Cardenal, Pedro Joaquín** (b. 1924–d. 1978) *journalist and newspaper editor in Nicaragua* Born into a prominent Conservative family in Granada that had produced four Nicaraguan presidents, Pedro Joaquín Chamorro Cardenal would come to be one of the country's most outspoken critics of the Somoza family regime. He was married to VIOLETA BARRIOS DE CHAMORRO, herself a future president, and together they had four children.

While still a law student in 1944, Chamorro was jailed for making a speech during a demonstration against President ANASTASIO SOMOZA GARCÍA. Subsequently, Chamorro fled to MEXICO, where he remained for two years. Upon his return to NICARAGUA in 1948, he went to work for *La Prensa*, the Managua newspaper his father, Pedro Joaquín Chamorro Zelaya, had founded in 1926. Upon his father's death in 1952, Chamorro assumed the paper's editorship. For the next 26 years, *La Prensa* became the leading media critic of the Somozas, railing against their political intrigue, treatment of political opponents, rigged elections, nepotism, corruption and graft, and control over the ECONOMY. For this, *La Prensa* was often censored but never shut down. During the regime of ANASTASIO SOMOZA DEBAYLE, *La Prensa* often appeared with few columns on its front page and occasionally a blank front page due to government censorship.

Chamorro also participated in several efforts to oust the Somozas by force. In 1948, he founded the short-lived National Union of Popular Action and Justice. He took part in the 1954 attempt to overthrow the elder Somoza, and in 1959, he participated in a Costa Rican-based invasion of Nicaragua for the same purpose. Chamorro paid dearly for his many anti-Somoza activities. He was often jailed and tortured.

Chamorro drew international attention to the wrongs of the Somoza dynasty following the 1972 earthquake that destroyed the capital of Managua and the subsequent corruption by President Somoza and his National Guard in the distribution and misuse of the international aid that poured into Nicaragua. He organized the Democratic Union for Liberation that brought together the middle-class groups opposed to Somoza. On January 10, 1978, Chamorro was gunned down while sitting in his car waiting for a red light to change. The Nicaraguan public dismissed Somoza's explanation that Pedro Ramos, a dissident Cuban American, whose business had come under attack by Chamorro, was responsible for the newspaperman's murder. Instead, *nicas* (people from Nicaragua) looked to Somoza himself as the culprit. An estimated 30,000 people attended Chamorro's funeral, testimony to both him and the country's displeasure with Somoza. A year later, in 1979, Somoza fled Nicaragua and eventually to his own bloody death in Asunción, PARAGUAY. Thirteen years later, on February 25, 1990, Chamorro's wife, Violeta, was elected president of Nicaragua.

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#### Chapultepec, Act of See ACT OF CHAPULTEPEC.

**Charles, Mary Eugenia** (b. 1919–d. 2005) *prime minister of Dominica* Born on May 15, 1919, in Pointe Michel, Saint Luke Parish, in DOMINICA, Mary Eugenia Charles was a member of the so-called colored bourgeoisie. She never married or had children. After attending Catholic schools in Dominica and GRENADA, Charles studied at the University College of the University of Toronto where she earned a B.A. in law in 1946. Charles subsequently pursued graduate studies in London. Returning to Dominica in 1949, she was the first female lawyer on the island. When the Dominica Labour Party (DLP) forcibly tried to limit dissent in 1968 by passing a series of sedition acts, she became active in politics. Charles was one of the founding members of the Dominica Freedom Party (DFP) in 1968. In 1970, after failing to win an elected seat to the House of Assembly, she was granted an appointed seat. In 1975, she won the Roseau Central seat in the House of Assembly and became leader of the opposition. In 1977, Charles was a delegate to the constitutional convention held in London, which paved the way for Dominica's independence in 1978.

After the DFP won the 1980 parliamentary elections, Charles served as prime minister from July 21, 1980, to June 14, 1995. Charles was dedicated to rebuilding the island's infrastructure, which had been destroyed by Hurricane David in 1979. She also initiated economic reform programs. In 1981, Charles staved off an invasion of Dominica launched by former prime minister Patrick John (b. 1938– ), who had secured the assistance of the Ku Klux Klan. Fearful of the growing influence of socialism in the Caribbean, Charles strongly supported the U.S.-led invasion of Grenada in 1983. As chairman of the ORGANIZATION OF EASTERN CARIBBEAN STATES, she appeared on television with U.S. president Ronald Reagan to support U.S. policy. Because of her strong will, journalists quickly dubbed Charles the "Iron Lady of the Caribbean," an obvious reference to British prime minister Margaret Thatcher.

Although Charles encouraged tourism, she was determined to protect Dominica's ecology and national identity. In 1991, she was awarded a damehood by Queen Elizabeth II. Charles retired from politics in 1995 shortly before her party lost the parliamentary elections to Edison James (b. 1943– ), the leader of the Dominica United Workers Party (DUWP). Charles Savarin (b. 1943– ) was chosen to lead the DFP after Charles's retirement. Immediately following the 1995 elections, Charles took a 10-day cruise in Alaska and enrolled as a student at the Johns Hopkins School of International Studies. In a surprise move following the 2000 elections, Savarin allied the DFP with the DLP, which gave the DLP enough votes to form a coalition government. Although Charles continued to take an interest in politics, her mind gradually faded. On August 27, 2005, she fell at home and broke her left hip. Charles was flown to Martinique for hip replacement surgery on August 30. She died there from complications on September 6, 2005.

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**Chávez Frías, Hugo Rafael** (b. 1954– ) *president of Venezuela* The second son of schoolteachers in Sabaneta, VENEZUELA, Hugo Rafael Chávez Frías is of mixed Amerindian, Afro-Venezuelan, and Spanish descent. He attended primary school and high school in Barinas before entering the Venezuelan Military Academy in 1971. Chávez graduated four years later as a sublieutenant and subsequently pursued graduate studies at Simón Bolívar University, where he was attracted to the Liberator's vision of Latin American unity and to

the communist ideas of Karl Marx and Vladimir Lenin. During his 17-year MILITARY career, Chávez rose to the rank of lieutenant colonel, held several staff and command positions, and taught at the Military Academy, where he spoke out against the shortcomings of the Venezuelan government, particularly the corrupt administration of CARLOS ANDRÉS PÉREZ. Chávez sprang to national attention on February 4, 1992, when he led five army units into CARACAS in a failed attempt to overthrow Pérez. For his coup attempt, Chávez was sentenced to two years in jail.

In 1997, Chávez organized the Fifth Republic Movement (Movimiento V [Quinta] República, or MVR) and as its candidate captured the December 6, 1998, presidential elections. Despite pledges to tear down the old order and eradicate government corruption, reform the public sector, and expand economic and social opportunities for the poor, Chávez initially focused on usurping political power. He dismissed the bicameral Congress, then initiated a constituent congress that wrote a new constitution providing all Venezuelans with the right to EDUCATION, housing, health care, and other social benefits while also increasing his own power as president. The constitution also provided for new elections on July 30, 2000, which returned Chávez to the presidency for a new six-year term.

The MVR gained control of the new unicameral legislature (National Assembly) in the elections and on November 7, 2000, the legislature approved an act that permitted the president to rule by decree for one year. Chávez issued 49 decrees during that time, which among other things established the national business federation Fedecámaras, the government-supervised Confederation of Venezuelan Workers (CTV), and the Hydrocarbons Law, which increased the price band for a barrel of oil from \$22 to \$28. The increased government income that resulted from these acts enabled Chávez to reach out to his base support group—the poor—through programs to lower the infant mortality rate, implement a free government health program, and provide free education through university level. During the same time period, the ECONOMY grew at a steady 4 percent annual rate, and inflation was brought down to 12 percent per year, the lowest rate since 1986.

Opposition to Chávez surfaced immediately after he took office on January 10, 2001. Upper- and middle-sector Venezuelans chafed at the concentration of power in the presidency, the intimidation tactics and civil rights violations Chávez used to silence his critics, and his economic and social policies. Organized LABOR, particularly in the petroleum INDUSTRY, vehemently objected to coming under government control. On December 10, 2001, a general business and labor strike failed to persuade Chávez to engage in dialogue on his policies. The protests continued until April 11, 2002, when a combination of military, business, and media sectors forced Chávez to resign. A countercoup led by loyal military officers 47

hours later restored him to power. Chávez charged that the U.S. Central Intelligence Agency (CIA) had assisted in the coup, an assertion denied by the CIA and the U.S. State Department.

Sporadic protests against Chávez continued until December 2, 2002, when the management of the state-owned oil company, Petróleos de Venezuela, S.A. (PDVSA), withheld oil revenue from the government and all workers in the oil industry went on strike, shutting down all oil operations. When the shutdown ended on February 17, 2003, Chávez dismissed approximately 18,000 PDVSA managers and workers and tightened government control over its administration. At the same time, Chávez reached out to the poor, instituting an adult reading program for an estimated 1.5 million illiterate Venezuelans, a remedial program to enable an estimated 5 million high school dropouts to earn their diplomas, and programs for the protection of indigenous culture, RELIGION, and civil rights.

Still undeterred, the opposition to Chávez continued for the next two years. During 2003–04, a volunteer group collected 2.4 million signatures, more than double the number required, to activate the presidential recall provisions contained in the 1999 constitution. An international supervisory committee monitored the August 15, 2004, referendum in which 59 percent of voters called for Chávez to remain in office. Following the referendum, Chávez continued his socioeconomic programs for the poor but placed new emphasis on foreign policy.

Always a critic of U.S. presence in Latin America, Chávez's rhetoric now increased in vehemence, best illustrated by the personal attack on U.S. president George W. Bush before the United Nations on September 20, 2006. Chávez also visited several foreign countries critical of U.S. policies, including Iran. He denounced the U.S.-proposed FREE TRADE AREA OF THE AMERICAS and in its



Venezuelan president Hugo Chávez (*left*) and Brazilian president Luiz Inácio Lula da Silva share thoughts on issues common to both nations: the need for social reforms, the control of foreign investments, and limiting U.S. influence in South America. (AP Photo/Eraldo Peres)

place, on December 14, 2004, announced the launching, in cooperation with CUBA, of the Bolivarian Alternative for the Americas. To curtail dependency on U.S. military assistance, he began to purchase arms from BRAZIL, Russia, China, and Spain. By April 30, 2007, Chávez had withdrawn Venezuela from the International Monetary Fund and World Bank, denouncing them as instruments of U.S. imperialism. His anti-American policy directives have not improved his standing in Latin America, where opinion polls indicate that only 25 percent of people support him.

Chávez nevertheless remained popular at home, receiving 63 percent of the vote in the internationally supervised presidential election of December 3, 2006. His hand was further strengthened when the compliant legislature extended his right to rule by decree for 18 months. On November 2, 2007, the legislature approved 69 amendments to the 1999 constitution that would push Venezuela further toward a socialist state and enhance Chávez's power over the country. Following congressional approval of the measures, they were submitted to the Venezuelan public. The measures were narrowly defeated in a national referendum on December 2, 2007, in which 44 percent of the eligible voters abstained from participation.

With his political ambitions stymied, at least momentarily by the December 2nd referendum, Chávez's domestic social policies were slowed by the 2008–09 global recession that resulted in a decreased demand for petroleum and its products and concomitantly less government income. But these political and economic adversities did not prevent Chávez from continuing his verbal assaults on the United States and taking international actions—continuing friendship with the Castros in Cuba, claiming to be an ally of Iran, hosting a Soviet naval visit—that further distanced Venezuela from the United States.

See also BOLÍVAR, SIMÓN (Vol. II).

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**Chicago Boys** The Chicago Boys were a group of 30 Chilean economists who studied at the University of Chicago under Milton Friedman (b. 1912–d. 2006) and Arnold Harberger (b. 1924– ) during the late 1950s and early 1960s. They returned home to train a generation of Chilean economists at the Universidad Católica

and to implement their economic philosophy during the regime of AUGUSTO PINOCHET UGARTE. Economists from other Latin American countries—ARGENTINA, BRAZIL, COSTA RICA, MEXICO, and URUGUAY—also advocated the implementation of a free market ECONOMY, but none had the opportunity to influence government policy as the Chicago Boys did in CHILE. Neoliberal policy came into vogue throughout the developing world during the 1980s. It advocated an end to government interference in the economy, free and open markets, and privatization of state-owned and parastatal (semiprivate) industries. The unfettered principles of supply and demand would dictate the market, and these changes would ultimately lower inflation and increase employment. Starting in spring 1975, the Chicago Boys implemented their program in Chile. The money supply was contracted, government spending was drastically curtailed, and all but 27 state-owned industries were privatized, as were services, including social security. The market was deregulated and open to free TRADE, and wage demands were contained.

Ever since Pinochet left office in 1989, economists have debated the effectiveness of the program. Supporters point to the expansion and diversification of the Chilean economy owing to extensive foreign investment, the precipitous drop in inflation, and low unemployment. Critics point to the concentration of wealth in the hands of a few, the loss of profits to foreign countries, the loss of a government social safety net, and LABOR's inability to improve wages and the quality of life for workers.

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**Chile** Chile is located on South America's southwest coast. It stretches 2,600 miles (4,184 km) north to south but is no more than 264 miles (425 km) wide at its deepest point from the Pacific coast to the border with ARGENTINA in the Andes. PERU lies directly to the country's north and BOLIVIA to its northwest. Totalling 292,183 square miles (756,750.5 km<sup>2</sup>), including Easter Island and Isla Sala y Gómez, Chile is not quite twice the size of the U.S. state of Montana. As the world's 38th largest country, it is comparable in size to the African nation of Zambia. Chile has five distinct geographic regions. The northern Atacama Desert is rich in natural resources, particularly nitrates and copper. The small Central Valley is the nation's agricultural center. Southern Chile is rich in forests and grazing lands and features a string of volcanoes and lakes, while the southern coast is a collection of fjords, twisting peninsulas, inlets, and lakes. The Andes Mountains form Chile's eastern boundary. Chile also claims 482,628 square miles (776,714 km<sup>2</sup>) of territory in Antarctica. Of Chile's 16.3 million inhabitants, 95 percent are white, 3 percent are Amerindian, and 2 percent are identified as "other."

Nearly one-half of all Chileans live in the Central Valley, which includes the capital of SANTIAGO DE CHILE and the country's main seaport at Valparaiso.

### FROM COLONY TO NATION

The Portuguese navigator Ferdinand Magellan discovered Chile's southern tip in 1520 when attempting to circumnavigate the globe, but it was the Spanish conquistador Diego de Almagro who came south into the Central Valley in 1535. Although Almagro did not find the gold he sought, he discovered hundreds of Mapuche villages. Over the next 125 years, the Spaniards expanded their control over present-day Chile, and in the process, Mapuche and other NATIVE AMERICAN societies were driven farther north and south from the Central Valley. In 1542, Chile became part of the Viceroyalty of Peru administrative unit. The fertile lands of central Chile produced foodstuffs that found their way into marketplaces in Peru and ECUADOR and in the 1840s and 1850s in California.

Chile became an independent nation on February 12, 1818, under the leadership of Bernardo O'Higgins, but independence did not alter the country's sociopolitical structure. The 1833 conservative constitution established a centralized government directed by the Central Valley's wealthy landowners. Like other Latin American nations in the 1870s and 1880s, Chile adopted a liberal political philosophy. Presidents could no longer serve two consecutive terms, cabinet ministers became accountable to Congress, all literate males over age 25 received the right to vote, non-Catholics received the right to establish churches and schools, and the federal government replaced the CATHOLIC CHURCH as the keeper of vital statistics. The primacy of Congress over executive power was reaffirmed in the 1891 civil war. During the same time period, Chile developed an export-based ECONOMY that focused first on nitrates and subsequently copper, two primary products the industrial world needed for its own development. Participation in the world economy also saw a new player enter Chilean politics, this being urban LABOR.

### CONSEQUENCES OF THE EXPORT-BASED ECONOMY

Nitrates had long been important in the production of fertilizers and gun powder and other explosives. Chile's northern nitrate fields were enhanced by its success in the War of the Pacific (1879–83), through which it acquired additional nitrate-rich territories from Bolivia and Peru. Foreign investors, for the most part British, developed not only the nitrate mines but also the supportive infrastructure, including railroads to get the product to port. The demand for Chilean nitrates intensified with expanded AGRICULTURE, urban construction and its ancillary needs, and the warfare that culminated in World War I (1914–19). The invention of synthetic nitrates in the 1920s and the global depression in the

1930s led to a permanent decline in demand for Chilean nitrates. Copper MINING had a more lasting impact on the country. Although copper mining could be traced to pre-Columbian times, global demand for the metal coincided with new mining technology in the early 20th century that made the Chilean copper more accessible. Its primacy in the Chilean economy lasted well into the post-World War II years. Foreign investors, this time from the United States, developed the copper and ancillary industries. By the 1920s, three U.S.-owned companies—Andes Copper, Braden Copper, and the Chile Exploration Company—dominated the INDUSTRY.

While the mining and TRANSPORTATION of nitrates and copper created jobs, these activities did not necessitate the importation of a foreign labor force, as they did in Argentina, for example. Whereas Argentina's percentage of foreign-born workers approached 28 percent in 1914, only 3 percent of Chile's labor force at that time was foreign born. Nonetheless, Chile experienced labor strife. Labor organizations and demonstrations could be traced to the late 1880s, but not until 1905 did these confrontations involve the MILITARY. Violence and bloodshed erupted in the northern city of Iquique in 1907 when troops fired into crowds of striking workers. The violence was repeated in Santiago in 1910, in Puerto Nogales in 1919, and at Magellanes in 1920. During 1919, Santiago faced a series of prolabor rallies that brought out as many as 100,000 protesters. These demonstrations represented a momentary high-water mark in the Chilean labor movement. The government attempted to counter labor's demands with a series of laws. For example, in 1916, Congress approved a workmen's compensation law; in 1917, an employee's liability law; and in 1919, a retirement system for railroad workers. A 1919 executive order known as the Yáñez Decree granted the president authority to mediate labor disputes. He did so over the next two years, usually in favor of the workers. By the end of 1921, however, President Arturo Alessandri (b. 1868–d. 1954) had begun ruling in favor of employers. His 1924 proposal for legislation granting the government control over labor became a victim of the conservative-liberal struggle that characterized congressional politics and led to military intervention in the national political arena between September 1924 and March 1925. The same conflict led to the presidency of Colonel CARLOS IBÁÑEZ DEL CAMPO, who manipulated the political system to rule as a dictator from 1927 to 1931.

The global demand for nitrate and copper decreased until the world economy collapsed in 1929. At this time, labor unions also lost their leverage, the wealth of the Chilean government disappeared, and in 1931, the tenure of the Ibáñez presidency came to an end. The evolution of Chilean politics between 1930 and 1973 can be found in many provisions of the 1925 constitution. It reduced congressional authority over cabinet members by denying Congress the right to depose of cabinet members through a censure vote and by preventing a person from

simultaneously serving as a minister and a member of the national legislature. The president and cabinet became responsible for making annual budgets and directing their spending. The electoral base expanded significantly with the granting of voting rights to all literate males over the age of 21 (a 1949 amendment extended this right to women). The government would henceforth also ensure the protection of labor and industry and guarantee each citizen “a minimum of well-being.” Government would continue to protect private property rights but in accordance with social need. These last provisos were considered advanced by many social analysts at the time. They also set the groundwork for later debate about government-sponsored social welfare programs, although they ultimately fell victim to the new provision for proportional representation of POLITICAL PARTIES in the national legislature. Within Chile’s emerging multiparty system, it would be extremely difficult for any one party to gain control over one-third of the legislature and, hence, enforce its will. Rather, political coalitions, increasingly composed of diverse interest groups, came to characterize Chile’s political landscape. Increasingly, between 1930 and 1970, Chilean politics moved to the left. The dominant Conservative and Liberal Parties dated to the country’s independence in 1818. Representing the elite, the only argument that remained between them concerned the powers of a centralized government. Of most importance to both groups was their retention of political power, particularly in relation to labor groups. In 1966, they merged into the Nationalist Party.

### THE FRAMEWORK OF CHILEAN POLITICS

The Radical Party was the first to challenge Conservative-Liberal dominance in Chile. Founded in 1857, many of its leaders came from the Liberal Party and from the emerging nitrate-mining elite to oppose authoritarian government and call for a secular state. In the 20th century, the Radicals called for state-sponsored welfare programs to end national poverty, which brought them into competition with Chile’s first middle-sector party, the Democratic Party, which emerged in 1887. Considered to be right of the political center, the Democratic Party brought together Santiago’s artisans, small merchants, and skilled laborers to successfully protest a proposed tariff increase on Argentine beef. Thereafter, the party called for laws that would aid workers and for compulsory free EDUCATION and the implementation of democratic procedures in elections. It reached its zenith in the 1932 congressional election, when 13 of its candidates won seats in the Chamber of Deputies. Thereafter, it gradually disappeared from the political arena, its ideas on behalf of labor being absorbed by the Socialist Worker’s Party, which in turn melded with the Popular Action Party in 1957. In the 1930s, there were two other leftist parties: the Communists and the Socialists, each an anathema to the far right and the more centrist moderate parties. In the center was the Christian Democratic Party

(Partido Demócrata Cristiano, or PDC), founded by a group of university students who offered themselves as a viable alternative to the extreme right and extreme left. The PDC advocated that social justice for all Chileans could be attained without sacrificing the constitutional government. In other words, it presented itself as a reasonable alternative to the extremism found on both sides in Chilean politics. In the 1930s and 1940s, all of these parties competed not only in the political arena but also in the effort to organize and lead labor unions.

The movement to the political left was seen in the three presidential elections beginning in 1939, each of which was won by the Popular Front candidate. When founded in 1938, the Popular Front brought together the Confederation of Chilean Workers and the Communist, Democratic, Radical, and Socialist Parties. The Radicals were, in fact, the least radical of these groups, being more concerned with internal and infrastructure development as a means to national prosperity than the communist-socialist call for government control of the economy. The three successive presidents—Pedro Aguirre Cerda (b. 1879–d. 1941), elected in 1939; Juan Antonio Ríos (b. 1888–d. 1946), elected in 1942; and Gabriel González Videla (b. 1898–d. 1980), elected in 1946—all were originally members of the Radical Party. World War II shaped the course of Chilean politics from 1939 to 1945. The Chilean economy benefited from the uptick in global, and particularly Allied, demand for copper. Increased employment contributed to greater purchasing power, while export taxes on copper contributed to a marked increase in government revenues. Fears that the Japanese might take advantage of Chile’s long and undefended coastline, coupled with concerns about the intentions of Germans residing in the country, led the government to take a neutral position in the war until January 19, 1943. Chile’s refusal to crack down on German and Japanese espionage activities in the country brought U.S. condemnation. Historically, Chilean political right and centrist groups mistrusted communists and socialists, therefore avoiding political confrontations. That changed in 1943 when Moscow directed Communist parties abroad henceforth to work within existing political systems by connecting to popular causes. After World War II, the international struggle against global communism further intensified the pressure on Chile’s political left. Because he captured the 1946 presidential race with Communist support, President Videla appointed three of its party members to cabinet posts. As international anticommunist rhetoric intensified during the cold war, Videla turned on the Communists. He ordered their dismissal from all government positions. Finally, in 1948, the rightists and centrists came together to approve legislation that outlawed the Communist Party and banned its members from seeking public office.

From 1952 to 1964, Chile was presided over by two presidents from the political right: former president

Ibáñez and Jorge Alessandri (b. 1896–d. 1986), a son of the former president. Their acceptance of International Monetary Fund financial programs to stabilize the national currency and bring inflation under control also required cuts in government spending, which hit the lower socioeconomic sectors the hardest; the cost of public transportation increased, as did the cost of public utilities (electricity, heat, water, sewerage), for example. These hardships drove the underclass further to the political left; they came to support the Popular Action Front (Frente de Acción Popular, or FRAP) and its chief spokesman and self-professed Marxist SALVADOR ALLENDE GOSSENS. When the younger Alessandri took office in 1958, he fell victim to the proportional representation scheme devised by his father. During his administration, Congress was hopelessly deadlocked. The shortcomings of economic orthodoxy and political stagnation were worsened by the influx of rural people to urban centers that offered few employment opportunities and inadequate housing, schools, and medical care. Their political power could be measured by the fivefold increase in voter registration, to 2.5 million people from 1938 to 1964.

#### FROM SOCIAL DEMOCRACY TO COMMUNISM

The 1964 Chilean presidential election stood not only as a high point in the nation's history but also as a measuring stick of the free world's battle against communism. The FRAP again nominated Allende as its candidate, while the PDC put forward EDUARDO FREI MONTALVA. As an avowed Marxist, Allende promised an all-out attack on capitalism. In contrast, Frei spoke of reforming rather than destroying the capitalist system. For the United States, already stung by the success of FIDEL CASTRO RUZ in CUBA, a Marxist victory in Chile was unacceptable. It openly supported Frei's candidacy and through the U.S. Central Intelligence Agency (CIA) clandestinely paid 50 percent of his campaign costs. Frei won the September 4, 1964, elections with 56 percent of the vote; Allende received 39 percent. From the Chilean people, Frei received a mandate to bring about change. At the moment, most observers failed to recognize that the PDC did not have command of the legislature.

Frei began his presidency by fulfilling two of his campaign promises. The first was the nationalization, or "Chileanization," of the copper companies. In November 1965, the Chilean government purchased 25 percent of the Anaconda and 51 percent of Kennecott copper companies. Ultimately, the profits from these investments would be used to pay for housing and social programs, but in the meantime, they paid for the purchase of the companies themselves. Over the next five years, however, global demand for copper stagnated, making it difficult for the government to sell copper at a profit. Second, Frei had promised to distribute arable farmland to 100,000 Chilean families over the course of his presidency. Only about 20,000 families actually benefited from the program, however, as landowners were reluctant to sell

portions of their land and peasants were reluctant to purchase land, partly because they distrusted banks, which they were not familiar with. The Frei administration also received some \$500 million from the UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT to support the construction of housing, schools, medical clinics, and the like, along with the supporting infrastructure. The administration fell victim to the national congress, however, which had fractured into several political parties. The failure of Frei's programs, no matter the political dynamics, contributed to his lower approval ratings in the late 1960s, which, in turn brightened Allende's presidential prospects.

Allende captured the September 4, 1970, presidential elections with only 36.3 percent of the popular vote. Conservative Jorge Alessandri received 34.9 percent, and Christian Democrat Radomiro Tomić (b. 1914–d. 1992), 27.8 percent. At the time, many observers believed that the Chilean military would not permit a communist to assume the presidency, and indeed, some Chilean military officers had planned "preventative action." The military ultimately decided not to act, and Allende took office on November 3, 1970. He immediately froze prices and increased wages. While the nation went on a buying spree, merchants and producers held back stock, awaiting an end to the price controls. Allende went on to nationalize the U.S.-owned copper companies, W. R. Grace, Ford Motor Company, International Telephone & Telegraph, and others without compensation on the premise that they already had taken sufficient profits from the country. The government also took control of 60 percent of U.S.-owned banks. Chilean ownership, Allende and his advisers rationalized, would provide the government with the funds necessary to improve Chileans' quality of life. Allende apparently went too far in spring 1973, however, when he proposed abolishing the current congress and replacing it with a unicameral legislature whose composition would favor the urban working and underclass that formed the basis of his support. His proposal struck hard at the middle class, which cherished its own political participation. The proposal moved the military to act: On September 11, 1973, the military moved on the presidential offices in Santiago, and Allende lost his life shortly after making a radio address to the nation. Conventional wisdom maintains that Allende took his own life by gun, but others contend that he was shot by an advancing soldier.

Aside from the internal machinations that militated against the Allende regime were the actions of the United States. Richard M. Nixon's administration had severed trade relations with Chile immediately after Allende took office. At the time, the United States was Chile's biggest trading partner. The United States also used its power to prevent the Inter-American Development Bank and World Bank from advancing loans and credits to Chile. When Allende turned to Eastern Europe for assistance, Nixon used that request, as he did Castro's 1971 visit to





Located in central Santiago, La Moneda is the working office for Chilean presidents. (Thomas M. Leonard Collection)

Chile, to label Allende an international Marxist. In the meantime, the CIA provided opposition groups with funding for antigovernment radio broadcasts and printed material and to subsidize strikers, particularly truck drivers, from bringing foodstuffs to Santiago.

#### COMING FULL CIRCLE: DEMOCRACY TRIUMPHS OVER MILITARISM

The military junta that succeeded Allende set out to dismantle Chile's political system. Congress was dissolved, the constitution was suspended, and political parties were made illegal. A state of siege was declared, a 9 P.M. curfew was imposed, and the media came under the junta's control. The government also took direct control of labor unions. During its 17-year existence, the junta violated human rights in its suppression of opposition, real or imagined. Estimates of people either killed or kidnapped and "disappeared" during that time period range from 3,000 to 10,000.

The junta took on a sense of permanency when its leader, General AUGUSTO PINOCHET UGARTE, declared on January 22, 1974, that the military would remain in power for at least five years. National plebiscites in 1978 and 1980 appeared to reflect public confidence in Pinochet and permitted him to remain in power until 1990. As the generals consolidated their power, they turned to a group of economic advisers, the so-called CHICAGO BOYS, to implement far-reaching economic changes. Made up of former students of Milton Friedman and Arnold Harberger at the University of Chicago, this group adhered to the principles of a free market economy, free of government involvement. It fit within the neoliberal, or Washington Consensus, eco-

nomical model that gripped the world in the 1980s. Their policies reduced inflation from a 500 percent annual rate in 1973 to 10 percent in 1981 and contributed to an annual 7 percent economic growth rate. Latin America's 1982 financial crisis, caused by MEXICO's default on foreign debt, reversed Chile's progress and prompted Pinochet to install a new group of economic advisers, who took the reform measures to a new height. While new policies stimulated foreign investment, increased exports, and decreased unemployment, wages lagged and cuts in government social services left many Chileans without essentials. Despite these weaknesses, by 1988, the Chilean economy had recovered to the point where Pinochet was confident of winning another plebiscite that would again extend his term in office. Chileans, however, were not satisfied with his economic program. The needs of the poor, estimated at nearly 40 percent of the population, remained unmet. Small businesspeople had lost out to international conglomerates. Intellectuals, journalists, students, and working professionals lamented the loss of civil and human rights and wanted a return to democracy. On October 5, 1988, Chileans voted that Pinochet must go, and following a tense year of speculation regarding his future, he stepped aside after the December 14, 1989, presidential election, which was won by Patricio Aylwin (b. 1918– ), a Christian Democrat, and part of the 17-party coalition known as Concertación. This left-of-center party has captured every presidential election since 1989: Eduardo Frei Ruiz-Tagle (b. 1942– ), son of the former president, in 1994; Ricardo Lagos (b. 1938– ), in 2000; and Michelle Bachelet (b. 1951– ), in 2006, the latter being Chile's first woman president. Concertación

gained control of both houses of the national legislature in the December 11, 2005 elections.

Concertación continued the neoliberal economic policies throughout the 1990s that were credited with the high (7 percent) annual growth rate in the gross domestic product (GDP) through 1998, when factors beyond the government's control adversely affected the economy. The 1997 Asian financial crisis and a severe drought that limited agricultural production and exports and led to the rationing of electricity and a general economic slowdown caused the GDP to drop to about 3 percent through 2004, when a recovery began. In addition to a free trade agreement (FTA) with the United States, which went into effect in January 2004, Chile has FTAs with several other countries. Beginning in 2007, Chile expanded its trade with other Asian countries, which already accounts for 30.8 percent of Chile's exports. The EU takes in 24.4 percent, and the United States, 23.7 percent of Chilean exports.

Chile continues to enjoy a high standard of living and has a well-trained labor force but confronts a number of important economic and social issues. Chile's population is aging, which will present unique challenges in the future. For example, while the privatized national pension system accounts for approximately 21 percent of the domestic savings rate, critics point out that only 55 percent of workers participate in the program. Participants can withdraw, without penalty, unlimited funds for hous-

ing, higher education, and the like. Chile continues to enjoy an influx of foreign direct investment (FDI), which stood at \$3.4 billion in 2006, but 80 percent of this goes into only four sectors: electricity, gas, water, and mining. That year, most of the remainder went toward mergers and acquisitions, meaning little FDI contributed to job creation. In addition to addressing these issues, President Bachelet created a special study commission to determine new areas of economic development, while continuing to advocate the FREE TRADE AREA OF THE AMERICAS.

On February 27, 2010, an 8.8 magnitude earthquake, followed by tsunami waves, struck south-central Chile, claiming more than 400 lives and hundreds more injured and missing. The Chilean government declared the epicenter region at Bio-Bio and Maule that includes the major port of Concepción "catastrophe zones." Initial estimates placed damage at \$15 to \$30 billion, or up to 20 percent of the Chilean GDP.

See also ALMAGRO, DIEGO DE (Vol. I); ARAUCANIANS (Vol. II); CHILE (Vols. I, II, III); CONSERVATISM (Vol. III); LIBERALISM (Vol. III); MAGELLAN, FERDINAND (Vol. I); O'HIGGINS, BERNARDO (Vol. II).

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One of several pedestrian zones in Santiago de Chile, where shoppers may purchase consumer goods from around the world (Thomas M. Leonard Collection)

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## Chileanization See CHILE.

### China and Latin America, People's Republic of

Speaking before an audience of government and United Nations officials in SANTIAGO DE CHILE on April 6, 2001, China's president Jiang Zemin predicted that his country's friendship and economic links with Latin America would grow significantly in the 21st century. Jiang's highly publicized 13-day visit to Latin America was followed by equally high-profile visits by President Hu Jintao in November 2004 and Vice President Zeng Qinghong in March 2005. Although China's TRADE with Latin America stood at \$13.5 billion in 2001, just slightly above China's total trade with Africa, it represented a 10-fold increase since 1993.

China's interest in Latin America is motivated by the need for commodities to feed its booming ECONOMY. These include oil, iron, and other ores; soybeans and soybean oil; copper, iron, and steel; and integrated circuits and other electrical machinery. This need contributed to a 600 percent growth in China's imports, from \$3 billion in 1999 to \$21.7 billion in 2004, while Chinese exports grew from \$5.3 billion to \$8.4 billion over the same period, leaving China with a Latin American trade deficit. Chinese exports to Latin America include electrical appliances, woven and knitted apparel, computers, office and industrial machinery, and mineral fuels. China's major Latin American trading partners are ARGENTINA, BRAZIL, CHILE, MEXICO, and PERU. Despite these increases, Chinese imports from Latin America stood at 3.88 percent of its total global imports and 3.09 percent of its global exports in 2004.

Chinese global foreign direct investment (FDI) amounted to \$33.2 billion in 2003, just 0.48 percent of

global FDI stock, with \$1.04 billion in Latin American extractive, manufacturing assembly, telecommunications, and textile industries. During his November 2004 visit, President Hu stated that China would invest \$100 billion in Latin America over the next 10 years, \$20 billion alone in Argentina. Some of the anticipated investment projects include railways in Argentina, a nickel plant in CUBA, a copper mine in Chile, and a steel mill in Brazil. Given the net decline in overall FDI in Latin America from \$78 billion to \$36 billion from 2000 to 2004, Chinese investments appear to be a welcome relief. In addition, China now permits its citizens to travel to Latin American and Caribbean countries.

Acquisition of energy resources is China's current main objective. In November 2004, China concluded a \$10-billion agreement to purchase Brazilian oil. Also, Petrobras, Brazil's state-owned energy company, and China's National Offshore Oil Company reportedly are exploring the feasibility of joint operations in exploration, refining, and pipeline construction around the world. During his visit to Beijing, Venezuelan president HUGO RAFAEL CHÁVEZ FRÍAS signed a series of energy-related agreements on January 29, 2005, that among other things, commits the China National Petroleum Corporation to spend more than \$400 million in developing Venezuelan oil and gas fields. China has also completed oil and gas contracts with Argentina, BOLIVIA, COLOMBIA, ECUADOR, and PERU.

Not all Latin American countries are pleased with the Chinese presence in the region. Mexico is the leading critic. Since the implementation of the NORTH AMERICAN FREE TRADE AGREEMENT in 1994, China has viewed Mexico as the entry point to the United States for its goods. The Mexicans oppose this. They claim a loss in U.S. market share to China and believe that many Mexican assembly jobs have been relocated to China's cheap LABOR market. The fear of competition from Chinese apparel and textile exports significantly contributed to the DOMINICAN REPUBLIC–CENTRAL AMERICAN FREE TRADE AGREEMENT with the United States in 2005. Within the region, Chinese companies are insular and do not interact with local businesses and services and have faced challenges from local labor unions regarding working conditions and wages. Opinion in the United States on China's expansion ranges from one of a potentially serious threat to little more than benign but limited competition.

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**civil war of 1948, Costa Rica** The 1948 civil war was a 44-day conflict that began after the February 8, 1948 presidential election. This election pitted National Republican Party (Partido Republicano Nacional, or PRN) candidate Rafael Calderón Guardia (b. 1900–d. 1970) against the unified opposition candidate, Otilio Ulate Blanco (b. 1891–d. 1973). As in the past, *personalismo*, rather than issues, dominated the campaign. The day of the election itself was uneventful. Ulate enjoyed a victory by a 54,931 to 44,398 count; however, charges of fraud and corruption sent the election results to the PRN-controlled congress, which declared the election null and void. Violence immediately broke out on the streets of San José, but more important, businessman and politician JOSÉ FIGUERES FERRER gathered his forces, along with others who were disenchanted with the election results, in San Isidro del General on COSTA RICA's central plateau. On March 12, Ferrer struck against ill-prepared government troops, largely volunteers mustered by Communist leader MANUEL MORA VALVERDE, who had supported both president Calderón during his 1940–44 administration and President Teodoro Picado (b. 1900–d. 1960) from 1944 to 1948. Publicly, Figueres declared he was fighting to validate the February elections, but privately, he declared his actions were to rid Costa Rica of communist influence. After initial battles on March 13 and 14, Figueres appeared content to fight a war of attrition, as his troops remained at San Isidro until April 10. Within two days, they captured Altamiera, Puerto Limón, Cartago, and the government headquarters as San Isidro de Coronado. Picado and his cabinet resigned on April 12, leaving Mora and his forces to fight alone until the final capitulation on April 21. Picado and his cabinet were joined by Calderón and his followers in finding asylum in NICARAGUA, where they established a government in exile.

Figueres immediately established a ruling junta, which he controlled. He quickly froze the assets of all *calderonistas* and *picadistas* on the grounds that they had conducted corrupt administrations. The junta also dismissed all PLN government bureaucrats, university professors, and LABOR leaders. Figueres then declared that communists could not be dealt with like “normal” people and ordered the party offices and newspapers closed and the arrest, without charge, of the top 35 Communist Party leaders, including Mora. When the party itself was outlawed on July 17, Mora and his colleagues were released from jail and advised that any future “insurrectionist” activity would lead to a 10-year banishment from the country. U.S. ambassador Nathaniel P. Davis found Figueres's assault on communism ironic, given that his social philosophy paralleled that of Mora's.

Figueres also provided for the election of a constitutional convention, which began its work on September 8, 1948. The new constitution provided for the sanctification of social legislation, which subsequently prompted one U.S. diplomat to characterize Costa Rica as the “Switzerland of the Americas.”

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**Colombia** Colombia is South America's fourth largest country. Encompassing 440,000 square miles (1.13 million km<sup>2</sup>), it is about three times the size of the U.S. state of Montana. Colombia is bounded on the north by VENEZUELA, the northeast by the Caribbean Sea, the south by ECUADOR and PERU, and the east by BRAZIL. Of Colombia's 44.4 million people, 58 percent are mestizo; 20 percent, white; 18 percent, Afro-Colombian; and 12 percent, other. While grasslands characterize the coastal plains along the Caribbean Sea and Pacific Ocean, three mountain ranges dominate Colombia's interior and have adversely affected the country's political unity and economic development.

Some historians suggest that NATIVE AMERICANS inhabited the lands of present-day Colombia some 22,000 years ago. It is certain that Mesoamerican Indians arrived in the region about 1200 B.C.E. Their descendants resisted the Spanish thrust inland after Rodrigo de Bastidas established a foothold at Santa María in 1525 and Pedro de Heredia founded Cartagena in 1533. In 1538, BOGOTÁ was established, and in 1717, it became the capital of the Viceroyalty of New Granada, which included present-day Colombia, Ecuador, and Venezuela. Although Colombia declared independence from Spain on July 20, 1810, it was not until August 7, 1819, that the Republic of Gran Colombia, which included all the territory of the colonial viceroyalty, was established. Owing to the individual nationalisms of three states, Gran Colombia split apart in 1830 to form the three independent nations of Colombia, Ecuador, and Venezuela. From the beginning of nationhood in 1830, Colombia experienced the liberal-conservative conflict that characterized Latin American politics elsewhere.

### MODERN COLOMBIA

The end of the War of the Thousand Days (1899–1903) and the independence of PANAMA in 1903 mark the beginning of modern-day Colombia. The civil war ended in a Liberal defeat, cost an estimated 100,000 lives, and left the nation too weak to retain Panama, even if it so wished. The war also prompted Liberals and Conservatives to reconcile their differences, with the latter including members of the opposition in their governing regime. Conservative general RAFAEL REYES set the tone in 1904. He encouraged industrialization, the expansion of agricultural exports including coffee, and foreign investment and implemented fiscal policies that improved Colombia's global credit standing. Colombian nationalism, however, prevented its acceptance of the

1909 Root-Cortés agreement, under which it would have recognized Panama's independence. Colombia finally recognized Panama's independence in 1921. Reyes's policies began a period of economic prosperity that lasted until the onset of the Great Depression in 1929. They also led to the growth of cities, the movement of rural laborers to the cities, and a nascent LABOR movement that espoused European socialist ideas.

The depression exacerbated existing social problems, which in turn contributed to political change in 1930 with the election of the first Liberal Party president in the 20th century, Olaya Herrera (b. 1880–d. 1937), and began 15 consecutive years of Liberal administrations. The most significant president of the Liberal period was ALFONSO LÓPEZ PUMAREJO, who during his first term (1934–38) introduced many economic reforms that reflected the import substitution model and contributed to Colombia's industrial development and an increasing urban labor force and, concomitantly, to the formation of labor unions. The foreign markets for Colombian coffee were also expanded under López Pumarejo. This progress, however, came to an end with the outbreak of World War II, which closed the European markets and prevented the importation of the raw materials that were essential for the industrial base. López Pumarejo came under criticism when Colombia declared war on the Axis powers on November 20, 1943. His second term in office (1942–45) also coincided with the economic downturn that developed at the end of the war and contributed to his unpopularity. López Pumarejo resigned the presidency on August 7, 1945. He was replaced by the first presidential designee, Alberto Lleras Camargo (b. 1906–d. 1990), who served until the inauguration of Conservative Mariano Ospina Pérez (b. 1891–d. 1976) on August 7, 1946.

Amid the political and economic changes that began in the 1930s, JORGE ELIÉCER GAITÁN emerged as a labor leader and spokesperson for the general populace. Gaitán orchestrated large street demonstrations throughout the country that were brutally suppressed by the MILITARY. Colombia appeared to be in chaos and politically ripe for the Liberals to retake the presidency in the 1948 elections, with Gaitán as their candidate. That was not to be. Gaitán was assassinated on April 9, 1948. His death ignited two days of rioting, during which an estimated 2,000 people lost their lives and downtown Bogotá was destroyed. The Bogotazo, as these riots came to be known, also signaled the start of La Violencia, or 15 years of armed conflict across the country that claimed an estimated 200,000 lives. Both reflected the population's frustration with the government's failure to address extremely poor socioeconomic conditions in the country.

### DOMINANCE OF DRUG CARTELS

When the violence subsided in 1957, the Conservatives and Liberals reached a power-sharing agreement, with the presidency to alternate between them every four years.

This arrangement, known as the National Front, lasted until 1974. Although it may have solved the Liberal-Conservative political conflict, it contributed to government inaction and voter apathy. The plight of the poor worsened, and several guerrilla organizations formed, including the Revolutionary Armed Forces of Colombia (Fuerzas Armadas Revolucionarias de Colombia, or FARC), the National Liberation Army (Ejército de Liberación Nacional, or ELN), the People's Liberation Army (Ejército Popular de Liberación, or EPL), and the 19th of April Movement (Movimiento 19 de Abril, or M-19). These groups momentarily appeared to be on the wane when the National Front came to an end, which was about the same time that Colombian DRUG cartels surfaced.

From the 1970s until the end of the 20th century, drug cartels became the dominant factor in Colombia's economic, political, and social development. Pablo Escobar (b. 1949–d. 1993) founded the Medellín cartel. According to U.S. government estimates, in the 1970s and 1980s, the cartel earned an estimated \$60 million weekly in U.S. drug sales, and in 1989, *Forbes* magazine named Escobar the 10th richest man in the world. While the United States was the cartel's major market, its tentacles reached throughout South America, into Europe, and, reportedly, also into Asia. Intimidation and violence became the cartel's modus operandi. During the 1980s, 30 Colombian judges and 457 police constables were killed, plus on average another 20 deaths per year. In 1991, Escobar surrendered to Colombian authorities to avoid extradition to the United States, but his confinement in a luxury estate was short lived. He escaped on July 22, 1992, which led to a massive manhunt by Colombian authorities, with U.S. military assistance. It ended on December 2, 1993, with his death.

The Cali cartel, founded by brothers Gilberto Rodríguez Orejuela (b. 1942– ) and Miguel Rodríguez Orejuela (b. 1946– ), took over Escobar's operation. Operating through unrelated cells, the Cali cartel focused on the manufacture and distribution of cocaine and heroin, making an estimated \$7 billion annually in the 1990s. It used much of those funds to invest in legitimate operations in Colombia, including 30 radio stations and a chain of pharmaceutical stores valued at \$216 million. While the Medellín group had killed its opponents, the Cali cartel bribed an estimated 2,800 government officials, including judges. It did, however, use violence to rid Cali and surrounding towns of "desechables" (discardable people), namely, prostitutes, abandoned children, and the homeless. Both cartels engaged in kidnappings and in violence against Colombia's various guerrilla groups operating in drug-growing and -processing areas and for attempting to recruit peasants into their forces. The 1995 arrest of the Orejuela brothers and other Cali leaders slowed drug production and trafficking until newer, smaller groups emerged after 2000. The drug barons were extradited to the United States in 2004, where they pled guilty to conspiracy to import cocaine into the

United States. Each received a 30-year prison term and forfeited their assets, including the pharmaceutical chain and radio stations.

With U.S. economic and military assistance, in 2004, President ÁLVARO URIBE VÉLEZ (b. 1952– ) commenced a two-pronged plan to combat drug-related activities in Colombia. He provided the military with sufficient means to subdue guerrilla groups unwilling to negotiate with the government, many of which were now linked to drug-production and -trafficking operations. As a result, drug production and trafficking markedly decreased between 2004 and 2006.

While confronting the cartels and guerrilla groups, the Colombian government committed the nation to the neoliberal economic policies practiced by other Latin American countries. Beginning in 1991, President César Gaviria (b. 1947– ) switched from the import-substitution-industrialization (ISI) economic model to export-led growth. This resulted in reduced tariffs, financial deregulation, the privatization of state and parastatal (partially government-owned) businesses, and a more liberal foreign exchange rate. These policies, along with the decrease in violence, were credited with reducing unemployment by four percentage points to 11 percent between 2002 and 2006 and increasing foreign investment by 294 percent to \$6.3 billion during the same time period. While coffee continues to be the country's primary agricultural product, it also now exports processed foods, textiles, paper and paper products, metal and metal products, and fresh-cut flowers. Colombia also has rich deposits of coal and emeralds. Colombia anticipated greater access to the U.S. market when it signed a free trade agreement with the United States on February 27, 2006. Because of a growing public backlash to globalization, the debates surrounding the November 2008 U.S. presidential election, and the nearly yearlong debate about health care reform, the agreement remains stalled in the U.S. Congress.

See also BASTIDAS, RODRIGO DE (Vol. I); COLOMBIA (Vols. I, III); CONSERVATISM (Vol. III); GRAN COLOMBIA (Vol. III); LIBERALISM (Vol. III); NEW GRANADA, VICEROYALTY OF (Vol. II); THOUSAND DAY WAR (Vol. III).

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**communism in Latin America** An active communist movement in Latin America can be traced to the World War I era, when LABOR groups aggressively sought to achieve their objectives, including the legalization of unions and the right to bargain for improved wages, working conditions, and benefits. In the atmosphere of the time, however, Latin American governments did not tolerate labor activism, as demonstrated by government action in ARGENTINA, BRAZIL, and CHILE from 1916 to 1920, when labor groups were suppressed in an effort to bring them under government control because of their alleged communist influence.

The successful Bolshevik Revolution in Russia and the establishment of the Soviet Union in 1917 and the Comintern (an international Communist organization) in 1919 sent shockwaves throughout western Europe, the United States, and Latin America. Two important issues related to communism in Latin America guided policy toward that region. First, communism threatened to replace the established social order, including a privileged elite, with a more egalitarian society. Latin America's elite therefore resisted communism, real or imagined, at any cost. The second issue focused on the extent of Soviet, or subsequently Cuban or Chinese, influence in local movements. Before World War II, a few Latin American Communist leaders attended Soviet-sponsored conferences and the Soviet embassy in MEXICO CITY served as a distribution center for Soviet propaganda, but the Moscow government did not formulate any specific hemispheric plans. Nevertheless, Communists and alleged communists were linked to any attack on the established order.

The MEXICAN REVOLUTION (1911–20) produced a constitution that provided the basis for the government to protect labor's rights, confiscate and redistribute property to the rural poor, and control the exploitation of natural resources and foreign investment (see CONSTITUTION OF 1917). A strong case could be made that these legalities were a reaction to the Porfiriato (1876–1911), as the era of Porfirio Díaz's dictatorship is known. But, in the 1920s, as the Mexican government instituted democratic centralism and implemented the legal provisions for land confiscation, many contemporary analysts, including U.S. assistant secretary of state Richard Olds, described the government as communist. By the 1930s, Communist Parties had appeared in several Latin American countries, but in CENTRAL AMERICA, they drew most of the elite's attention and were driven underground or out of existence, except in COSTA RICA. The fate of alleged communist leaders AUGUSTO CÉSAR SANDINO in NICARAGUA and AGUSTÍN FARABUNDO MARTÍ in EL SALVADOR illustrates the point. In Costa Rica, MANUEL MORA VALVERDE founded the Communist Party in 1932. Caribbean coastal banana workers who labored for the United Fruit Company formed its largest support base. The party had sufficient strength to influence the outcome of Costa Rica's 1940 and 1944 presidential elections.



Office of the national student headquarters of the Brazilian Communist Party in 1964 (United States Information Agency)

During the 1930s and early 1940s, “the generation of rising expectations” made its way into Latin America’s political arena. Led by the middle sector and rural and urban labor leaders, they demanded participation in a more democratic government process and the protection of labor. Some political groups, such as the Communist Parties of Chile, Costa Rica, and Cuba, made no effort to hide their identity. Others, including Brazil’s Social Democratic Party and GUATEMALA’s Labor Party, included Communist spokesmen and espoused a communist philosophy.

As before World War II, these so-called leftist groups demanded social and political reforms. This time, however, their demands were judged against a cold war backdrop: The Soviet Union, many believed, was determined to bring the world under Communist control. In 1954, on the eve of the U.S.-SPONSORED INVASION OF GUATEMALA, Assistant Secretary of State Henry Holland advised his fellow policy makers of the need to distinguish between legitimate movements for change and communism. The Dwight D. Eisenhower administration ignored Holland’s advice and approved the Central Intelligence Agency-sponsored

invasion and restoration of the old order. Eisenhower’s policy makers, like those of other Western governments, as well as Latin American elites, had framed Guatemalan president JACOBO ARBENZ GUZMÁN’s land distribution programs and control of foreign investment against the backdrop of Soviet actions at home and in Eastern Europe and Mao Zedong’s programs in China. Arbenz was thus considered a communist by these groups.

FIDEL CASTRO RUZ’s CUBAN REVOLUTION (1956–61) brought Holland’s observation into sharper focus. Since CUBA’s independence in 1898, the country’s elite had controlled national government and permitted private U.S. business interests to dominate the economy. After World War II, Cuba’s younger generation clamored for a more democratic government and intensified this demand after FULGENCIO BATISTA Y ZALDÍVAR’s March 10, 1952, coup d’état and subsequent brutal dictatorship. Castro was among the young revolutionaries whose experiences growing up in rural Cuba and attending Belén High School in HAVANA contributed to his anti-elite attitude. His *History Will Absolve Me*, a personal defense plea he used at his 1953 trial, clearly described Cuba’s socioeco-

conomic disparities. On taking power in 1959, his brutal treatment of the elite and his political opponents, land confiscation, and rent and wage policies made the West suspicious of him. The doubt disappeared in 1960 when, in response to a U.S. sugar embargo, he nationalized U.S. companies on the island and signed a TRADE agreement with the Soviet Union. From thereon, Castro was branded a communist. His subsequent personal dictatorship, control over all aspects of Cuban life, along with a state-directed economy confirmed the allegation but did not end the debate, which lingers until today. Viewing JUAN BOSCH as another Castro, U.S. president Lyndon B. Johnson landed 20,000 marines in the DOMINICAN REPUBLIC on August 14, 1965, reportedly to prevent the spread of communism in the hemisphere.

The United States initiated the ALLIANCE FOR PROGRESS on August 17, 1961, to provide opportunities for Latin America's underclasses to improve their quality of life and participate in the political system. But, Latin America's elite would not open the political system, which significantly contributed to the Alliance's eventual failure. Castro's revolution also ushered in military governments across the hemisphere that intended to squelch alleged communist movements. In the 1980s, events in GRENADA and Central America led U.S. president Ronald R. Reagan to conclude that communism had again reared its ugly head, prompting him to direct U.S. interventions to suppress the movements. This time, however, U.S. intervention did not have broad-based support at home or abroad. Vociferous critics, particularly in Central America, believed the long-standing socioeconomic disparities and closed political system caused the crisis, not communism.

Latin America's acceptance of the neoliberal economic model in the 1980s and the collapse of the Soviet Union in 1991 contributed to the belief that communism had passed into history. However, the socioeconomic promises of neo-liberalism did not improve the quality of life for most Latin American people, which in turn led to the election of leftist political leaders or parties, among them HUGO RAFAEL CHÁVEZ FRÍAS in VENEZUELA, JUAN EVO MORALES AYMA in BOLIVIA, NÉSTOR KIRCHNER in Argentina, and LUIZ INÁCIO LULA DA SILVA in Brazil. While some political commentators see their emergence as a response to the shortcoming of neoliberalism, others assert that communism has resurfaced in the region.

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**Compton, John** (b. 1926–d. 2007) *prime minister of St. Lucia* Born on April 29, 1926, on the island of Canouan in SAINT VINCENT AND THE GRENADINES, John Compton was an attorney and economist by profession. Compton's family had moved to SAINT LUCIA, where he received his primary school education, and in 1954, he graduated from the London School of Economics. In 1964, Compton founded the conservative United Workers Party (UWP). Following elections in 1964, Compton defeated the St. Lucia Labour Party (SLP) candidate, George Charles (b. 1916–d. 2004), and became premier of St. Lucia. When the United Kingdom granted St. Lucia independence on February 22, 1979, Compton became the island's first prime minister. Following the nation's first postindependence elections later in the year, Allan Louisy (b. 1916– ), the leader of the SLP, took office on July 2, 1979. Louisy's government, however, was brief. Facing the rejection of his financial plan for the nation and the resignation of most of his cabinet, Louisy resigned on May 4, 1981, and was replaced by Attorney General Winston Cenac (b. 1925–d. 2004). Michael Pilgrim (b. 1947– ), the leader of the Labor Progressive Party, a small pro-Cuban socialist party, served as acting prime minister after Cenac's resignation on January 17, 1982. Pilgrim resigned on May 3, 1982, in favor of Compton.

Compton ruled St. Lucia until 1996. Concerned about the possibility of political and social unrest in the Caribbean, Compton sent members of St. Lucia's Special Services Unit into active duty during the 1983 U.S.-sponsored invasion of GRENADA. In 1996, Compton resigned as prime minister and leader of the UWP. That same year, he was knighted by Queen Elizabeth II. Compton was succeeded by VAUGHAN LEWIS, who was defeated by SLP candidate KENNY ANTHONY in 1997. In a bitter leadership struggle, Compton ousted Lewis as leader of the UWP in 2005, which resulted in Lewis joining the SLP. In the period leading up to the 2006 elections, Compton's opponents claimed that Compton's age made him an unsuitable candidate. Compton, however, argued that since he was not preparing to participate in the Olympics, his age was not relevant. Coming as a surprise to most political analysts, Compton won the December 11, 2006, elections. Nevertheless, on May 1, 2007, Compton suffered a series of strokes, which left him partially impaired. After spending time in a New York City hospital, Compton returned to St. Lucia on May 19, 2007. Although Compton was still prime minister, Stephenson King (b. 1958– ) became acting prime minister until Compton's death on September 7, 2007. Two days later, King became prime minister.

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**Conference of Latin American Bishops (Consejo Episcopal Latinoamericano; CELAM)** The Conference of Latin American Bishops (CELAM) was established in 1955 in RIO DE JANEIRO to promote communications on religious issues across Latin America via annual conferences, publications, and training institutes. Among the bishops was a small group who advocated church involvement in people's social affairs. This group was encouraged by the work of the Second Vatican Council (1962–65) and prompted the progressive bishops to set the agenda for the 1968 bishop's conference in Medellín, COLOMBIA. At Medellín, the bishops agreed that the CATHOLIC CHURCH should take a more active role in addressing Latin America's social realities, which resulted in the concept of liberation theology. In the broadest sense, this meant that the bishops would direct the church away from serving the needs of the elite and seeking to preserve the status quo. In application, it meant that parish priests organized the Christian communities to pressure government for improved sanitary conditions, better housing and EDUCATION, medical care, and other basic needs. Because the priests attacked the established order, the elite labeled them communists. The priests became victims of state brutality during the 1970s and 1980s.

The movement within CELAM that began at Medellín ended in 1972 with the election of Colombian cardinal Alfonso López Trujillo (b. 1935–d. 2008) as CELAM's general secretary. A conservative backlash had set in: From the Vatican, Pope Paul VI tried to slow the movement by announcing that the teachings of liberation theology were antithetical to the Catholic Church's global teachings. The change in CELAM's goals was complete in 1979 when the bishops convened in Puebla, MEXICO, for their annual conclave, which was attended by Pope John Paul II, himself a critic of liberation theology. Critics produced a 20-page refutation of liberation theology and parish priests' activism. At his stop in Managua, NICARAGUA, on March 16, 1983, Pope John Paul II condemned those clergy who supported the Sandinistas.

The reformist Latin American priests continued their cause throughout the 1980s but largely disappeared from the forefront of Latin American politics following the collapse of the Soviet Union in 1991 and the acceptance of economic globalization by the Latin American governments. When Joseph A. Radzinger, a longtime critic of church political activism in general and liberation theology in particular became Pope Benedict XVI on April 25, 2005, it signaled the end of a popular movement.

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**Constitution of 1917, Mexico** The 1917 constitution of MEXICO was promulgated by leaders of the MEXICAN REVOLUTION in an attempt to address the reforms being demanded by numerous revolutionary factions. The document was drafted at a convention in Querétaro led by First Chief VENUSTIANO CARRANZA. Despite Carranza's attempts to influence the delegates to accept a modified version of the Constitution of 1857, they instead approved a radical document that included some of the most progressive social reform provisions of its time.

Numerous provisions within the document took up social reform issues. Article 27 addressed the demands for agrarian reform made especially by the followers of revolutionary leader EMILIANO ZAPATA. This provision called for *ejido* lands seized during the Porfiriato to be returned to indigenous communities and outlined the social responsibilities of land ownership. Article 123 stipulated sweeping LABOR reform, including an eight-hour workday, a six-day workweek, wage regulations, and safety measures in the workplace. The constitution also guaranteed workers' rights to organize, allowing them to use collective bargaining and work stoppages to negotiate with employers. Article 3 of the constitution called for a national secular EDUCATION program that was free and compulsory through primary school. Article 28 aimed to safeguard a reasonable standard of living by prohibiting monopolies and price gouging for rent, food, health care, and other basic services.

The Constitution of 1917 aimed to prevent the rise of another dictator like Porfirio Díaz. The document called for a six-year presidency; presidents could not seek reelection. It also attempted to curb the influence of the CATHOLIC CHURCH. Members of the clergy were prohibited from all political participation, including forming or joining POLITICAL PARTIES and voting. Finally, the constitution aimed to protect Mexican national interests against foreign competition. It restricted non-Mexican ownership of property and businesses and provided provisions for expropriating property owned by foreigners. Although the Constitution of 1917 addressed nearly all the demands of the various factions, its provisions were inconsistently implemented, causing numerous conflicts throughout the 20th century.

See also CONSTITUTION OF 1857, MEXICO (Vol. III); DÍAZ, PORFIRIO (Vol. III); *EJIDO* (Vol. III); PORFIRIATO (Vol. III).

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**Contras** See CENTRAL AMERICAN WARS; NICARAGUA.

**Convention of Aguascalientes** (1914) The Convention of Aguascalientes was a special meeting called in MEXICO by VENUSTIANO CARRANZA in 1914 during the MEXICAN REVOLUTION. Carranza was serving as first chief after the overthrow of VICTORIANO HUERTA and invited delegates from the revolutionary factions to participate in electing a provisional president. The Convention of Aguascalientes was intended to resolve the question of the succession of power peacefully but instead accentuated the deeply rooted divisions among revolutionary leaders.

Delegates met in Aguascalientes, considered to be a neutral town, in October 1914. It quickly became evident that the delegates representing FRANCISCO VILLA and EMILIANO ZAPATA would clash with those representing Carranza and ÁLVARO OBERGÓN. Carranza was so displeased with the direction the convention seemed to be taking that he refused to attend. In his absence, convention delegates voted to remove him as first chief and elected Eulalio Gutiérrez as provisional president. In November, Carranza withdrew his delegates and installed his military in Veracruz to defend what would become known as the Constitutionalist government. Villa and Zapata departed for MEXICO CITY to instate Gutiérrez as president and to defend what became known as the Conventionist government.

By the end of the year, Mexico was embroiled in a full-scale civil war between the Constitutionalist Army and the forces of Villa and Zapata. The Conventionist alliance broke down, however, and throughout much of 1915, Mexico was plagued by a multisided war with shifting alliances and constantly splintering factions. By 1917, the Constitutionlists had mostly quashed the Villista and Zapatista armies. Carranza called for a new convention. It was held in Querétaro, and delegates drafted the CONSTITUTION OF 1917.

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**Correa, Rafael** (b. 1963– ) *president of Ecuador* Born in Guayaquil, ECUADOR, Rafael Correa earned a degree in economics at the Catholic University in the same city, a master's in economics from Louvain University in Belgium, and a doctorate, also in economics, from the University of Illinois. Correa served as Ecuador's minister of the economy and finance for four months in 2005 under President Alfredo Palacio (b. 1939– ). In the October 15, 2006, general election, Correa won 22 percent of the popular vote, enough to force a runoff with Álvaro Noboa (b. 1937– ) on November 26. Correa won the election with

56 percent of the popular vote. He took office on January 15, 2007, the seventh person to do so in 10 years.

As a doctoral student at the University of Illinois, Correa claimed that an unchecked free market would concentrate solely on the generation of wealth at the expense of other socioeconomic needs. This philosophy made him skeptical of Ecuador's proposed 2005 free trade agreement with the United States while he was finance minister and caused him to reject financial advice from the International Monetary Fund. President Noboa forced Correa's resignation on August 22, 2005, because he proposed to issue bonds at lower-than-current interest rates, with the Venezuelan government purchasing half of the issue. Some Ecuadorean analysts suggest that the link to Venezuelan president HUGO RAFAEL CHÁVEZ FRÍAS prompted the United States to force President Noboa to act.

During his campaign for the presidency in 2006, Correa criticized the neoliberal economic policies of his predecessors and called for the formation of a constituent assembly, renegotiation of contracts with foreign oil companies, and a restructuring of Ecuador's international debt. Political bickering delayed voting for a constitutional assembly, which finally began its deliberations on November 20, 2007. Correa has as yet not renewed talks with the United States regarding a free trade agreement, which he personally opposes. On May 15, 2006, the Ecuadorean government nationalized the U.S.-based Occidental Petroleum Company, but final settlement awaits the decision of international arbitrators. In October 2007, Correa decreed that foreign oil companies should pay 99 percent of "extraordinary income" to the Ecuadorean government. Although Ecuador fully serviced its international debt in 2007, Correa has promised that any international obligations will be met only after domestic spending obligations are satisfied; these have shifted to health, EDUCATION, and basic infrastructure.

In shifting government emphasis from protecting the interests of foreign and native elites to servicing the needs of the nation's poor, Correa has challenged Ecuador's political tradition. He was reelected president in 2009. He began his second term on August 10, 2009.

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**Costa Rica** Costa Rica occupies 19,730 square miles (5,100 km<sup>2</sup>) of land on the Central American isthmus. Three topographical regions characterize the country:

the Central Highlands, wherein lies the Central Meseta, which is home to the majority of Costa Ricans, and the tropical Atlantic and Pacific coastal plains. Costa Rica's political history and its population are very different from those of its neighbors. Today, 94 percent of the 4 million Costa Ricans are classified as white and 3 percent are classified as black, while smaller percentages of Amerindians, Chinese, and other racial groups make up the remainder.

Christopher Columbus visited and named the land Costa Rica (rich coast) during his fourth voyage to the New World in 1502. Because of its sparse population and lack of natural wealth, Spain failed to colonize it, leaving it to fall into obscurity throughout the colonial period. Although Costa Rica joined its Central American neighbors in declaring its independence from Spain in 1821, and subsequently joined the United Provinces of Central America, it remained on the fringe of regional political affairs. Costa Rica declared itself a republic in 1849. Costa Rica subsequently developed a representative government, but political power remained in the hands of the landed elite. During the same period, government

lands were sold off cheaply and in small plots, usually of 10–20 acres (4–8 ha) each. This led to the emergence of a large number of small landowners, who like their richer brethren engaged in the exportation of coffee. Late in the 19th century, the United Fruit Company developed an extensive banana industry on the Caribbean coast. The fissures in Costa Rica's socioeconomic and political systems did not become apparent until 1914.

In 1914, when voters failed to give any of the candidates a majority in the nation's first direct election of a president, Congress selected Alfredo González Flores (b. 1877–d. 1962) to fill the office. González Flores's reform agenda failed to materialize because the outbreak of World War I in August 1914 closed the European market to Costa Rica's exports and this in turn resulted in a drastic reduction in government income. The landed elite and United Fruit Company did not embrace González Flores's social philosophy, which called for improvement in the quality of life for the poor. Corruption scandals that permeated throughout his administration further eroded his support and led to his ouster on January 27, 1917, by his war minister, General Federico Tinoco



For their study of comparative social patterns among indigenous peoples, anthropologists prepare to enter a rural village near Tortuguero in northeast Costa Rica. (Thomas M. Leonard Collection)

(b. 1870–d. 1931). Tinoco's government was considered illegal, thus there were student demonstrations, persistent rumors of assassination attempts and coup d'états, and consistent U.S. pressure for free and open elections, which led to Tinoco's resignation on August 13, 1917. Tinoco immediately departed for Europe and remained in Paris until his death. With Tinoco gone, the United States pressed for elections, finally held on December 16, 1917, and resulting in a victory for Julio Acosta García (b. 1872–d. 1963). The end of World War I and the restoration of legitimate government did not prevent the widening of Costa Rica's socioeconomic fissures, however.

Beginning in 1924, for the next 12 years, the presidency alternated between two of Costa Rica's elder statesmen: Ricardo de Jiménez Oreamuno (b. 1859–d. 1915) representing the Republican Party, renamed the National Republican Party (Partido Republicano Nacional, or PRN) in 1932, and Cleto González Víquez (b. 1858–d. 1937) of the National Union Party (Partido Unión Nacional, or PUN). *Personalismo* (personal popularity), rather than political ideology, characterized both parties. Suffrage broadened and the secret ballot was introduced during the 1920s. When in power, each party concerned itself with the conduct of foreign affairs, the construction of infrastructure, improving EDUCATION, protecting civil liberties, maintaining law and order, and collecting the taxes and tariffs necessary for financing government operations.

Beneath the mirage of tranquility, however, the public's social consciousness had been awakened. Jorge Volio Jiménez (b. 1882–d. 1955) was the first to come forward. Considered by some to be unstable and erratic, Volio studied for the priesthood in Rome, where he had fallen under the influence of Pope Leo XIII's encyclical *Rerum Novarum*. Volio went on to preach "social Christianity" in Costa Rica, which called for broad social reforms, legalization of LABOR unions, an end to monopolies, limits on foreign companies operating in the country, and higher taxes on the wealthy. Although Volio drifted out of the political arena after his unsuccessful bid for the presidency in 1924, his social Christianity remained a viable alternative to the existing system for the intellectual element of Costa Rica's emerging middle class.

In 1929, a 19-year-old student and member of a prominent FAMILY, MANUEL MORA VALVERDE, founded Costa Rica's communist movement: the Workers and Peasants Bloc (Bloque Obreros y Campesinos, or BOC). Three years later, it fielded candidates in the presidential election. Initially, the party appealed to middle- and upper-class intellectuals and students, but by the late 1930s, it had made significant inroads into the laboring groups, particularly those on the United Fruit Company's banana plantations. The strengthening of the communist party was seen in the significant increase in votes its candidates received from the 1932 election (1,132) to the 1942 election (17,060), which

sent Mora to the national congress. A year later, Mora directed through the Legislative Assembly a labor code that he reportedly designed and in part wrote. The law required that 90 percent of the workers employed in any given firm must be Costa Rican and that they should receive 80 percent of the payroll. Other provisions stipulated that dismissed employees receive a month's salary for each year worked and that all laborers, including household servants, be covered by contract. Recognizing Mora's political clout, the 1944 PRN presidential candidate, Teodoro Picado (b. 1900–d. 1960), struck a deal with him. In return for Mora's electoral support, Picado pledged to continue his reform program. Although Picado won the 1944 election and his alliance with Mora became tenuous, Picado's proposed social legislation over the next four years fell on deaf ears in the conservative-dominated congress.

During the 1940s, issues related to World War II also confronted Costa Rica. The government supported the Allied cause and followed U.S. directions in implementing restrictions on the resident community. Costa Rica also suffered from the loss of European markets and the concomitant loss of taxes and tariffs and endured food shortages and inflation. In the midst of the war and Costa Rica's political turmoil, the Center for the Study of National Problems (CEPAN) surfaced as an important political critic. Founded by university students in the 1930s, its membership expanded in the 1940s to include schoolteachers, news reporters and writers, office workers, and the like. It published a weekly news sheet and sponsored a weekly talk show featuring one its leaders, JOSÉ FIGUERES FERRER. In addition to condemning government corruption and the restrictive political arena, CEPAN called for social reform. As the 1948 election approached, Figueres was convinced that the PRN would not let any opposition group gain control of the government.

The 1948 presidential contest pitted former president and PRN leader Rafael Ángel Calderón against Otilio Ulate Blanco (b. 1891–d. 1973), a liberal journalist and head of PUN. Ulate was declared the victor of the February 8 contest, but the PRN-controlled congress nullified the election. Both sides charged fraud. The whole affair prompted Figueres on March 12 to lead his rebel forces against the government's ill-prepared army (see CIVIL WAR OF 1948, COSTA RICA). Discussions among the protagonists began almost immediately and culminated in an agreement between Ulate and Figueres on May 2. The agreement provided for a Figueres-led junta to govern the country for 18 months, during which a constitutional convention would be convened. New elections were held on October 2, 1949, and again, Ulate captured the presidency. He went on to serve a full four-year term and was succeeded by Figueres in 1953. For the next two generations, Figueres's National Liberation Party (Partido de Liberación Nacional, or PLN) dominated Costa Rican politics.

Figueres also set Costa Rica's social agenda, which extended into the 21st century. Initially, aided by high prices for coffee on the global market, the government expanded public education, established a social security program, and built hospitals and other infrastructure throughout the country. In late 1957, coffee prices plunged, and with this, government debt increased. Neither the CENTRAL AMERICAN COMMON MARKET nor the U.S.-sponsored ALLIANCE FOR PROGRESS brought economic, and particularly industrial, development to Costa Rica in the 1960s. By 1974, Costa Rica's economy had stagnated, prompting President Daniel Obudar Quirós (b. 1922–d. 1991) to change the direction of development, to reemphasize agricultural modernization and expansion. The Costa Rican economy continued to worsen, however. By 1981, the country's foreign TRADE debt stood at \$3 billion, and inflation had climbed to an annual rate of 50 percent. Under these conditions, President Rodrigo Alberto Carazo Odio (b. 1926– ) turned to the International Monetary Fund (IMF). In return for its financial assistance, the IMF required the government to cut public spending, lift price controls on utilities and gasoline, and devalue the currency. These measures sparked a negative response in Costa Rica, causing the government to renege on the agreement.

The Costa Rican economy worsened throughout the 1980s because of war in NICARAGUA. Thousands of Nicaraguans fled to Costa Rica, further straining government social services and contributing to inflation. These conditions prompted President OSCAR ARIAS SÁNCHEZ to lead the way to a negotiated settlement of the Nicaraguan conflict, which was finally resolved in 1989.

Despite continuing economic plight since the end of the CENTRAL AMERICAN WARS of the 1980s, Costa Ricans have maintained a democratic political system. Presidents since 1990, including Arias, who was elected to his second term on February 7, 2006, have grappled with economic development. Tourism has replaced AGRICULTURE as the primary economic industry, and electronic and garment manufacturing have broadened the economic base. According to 2006 statistics, however, the public debt is 53.4 percent of the gross domestic product, and external debt stands at \$6.4 billion. Costa Rican labor laws, beneficial to and protective of labor, discourage foreign investment. Unlike their Central American counterparts, many of Costa Rica's political leaders do not view the DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT (DR-CAFTA) as a promise for a brighter economic future. Rather, they see it as a threat to Costa Rica's social service system, labor guarantees, and small farmers. For these reasons, the Costa Rican congress refused to ratify the DR-CAFTA and prompted President Arias to conduct a national referendum on October 7, 2008. The majority of Costa Rican voters (52 percent) ratified the regional trade agreement.

See also COSTA RICA (Vols. I, II, III).

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**Cotonou Agreement** The Cotonou Agreement is a 20-year agreement that was signed on June 23, 2000, in Cotonou, Benin, between the European Union (EU) and 77 African, Caribbean, and Pacific (ACP) states, all former European colonies. It came into force in 2002. The agreement replaced the LOMÉ CONVENTION that governed the relationship from 1975 to 2000. Caribbean states included in the Cotonou Agreement are ANTIGUA AND BARBUDA, BAHAMAS, BARBADOS, BELIZE, CUBA, DOMINICA, DOMINICAN REPUBLIC, GRENADA, GUYANA, HAITI, JAMAICA, SAINT CHRISTOPHER AND NEVIS, SAINT LUCIA, SAINT VINCENT AND THE GRENADINES, SURINAME, and TRINIDAD AND TOBAGO. Haiti received “lesser-developed” status.

The Cotonou Agreement focuses on reducing poverty through political dialogue, development aid, and closer economic and TRADE cooperation. Discussions of development issues are to move beyond governmental persons and agencies to include representatives of the private sector, nongovernment organizations (NGOs), and the general public. New issues outside development will be added to the agenda, including peace and security, the arms trade, and MIGRATION. The agreement also focuses on private-sector initiatives for development and provides a mechanism by which such initiatives can receive funding from the European Investment Bank.

Whereas the Lomé Convention provided for nonreciprocal trade preferences for the ACP partners, beginning in 2008, the ACP countries were required to open their markets, duty free, to European exports. The lesser developed countries (LDCs) will not be required to open their markets to duty-free trade and will instead be transferred into the EU's Generalized System of Preferences.

Another change from the Lomé Convention is the introduction of performance-based partnerships, under which the EU will evaluate a country's needs and past performance before granting any new financial assistance. In practice, this means that “good performers” might be rewarded at the expense of those not performing to expectations or stated goals. Allocations for this program are to be made for five-year periods; the initial (2002–07) allocation was set at approximately \$27 million.

In June 2005, the partnership agreed to several technical revisions regarding trade and also addressed political issues. The new revisions required the partners to mediate disputes among themselves, combat arms proliferation and terrorism, and prevent mercenary activities from organizing within their borders. The provision that called for ACP partners to use the International Criminal Court (ICC) prompted Sudan to withdraw from the Cotonou Agreement because it did not hold membership in the ICC. The second round of revisions are scheduled for 2010.

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**Creelman, James** (b. 1859–d. 1915) *American journalist in Mexico* James Creelman was an American journalist writing for *Pearson's* magazine, who conducted the famous “Creelman interview” with Mexican dictator Porfirio Díaz in 1908. In the interview, Díaz announced that he would not run for office again in the 1910 presidential election and that he welcomed candidates from an opposition party to participate in the political process. In response to Creelman’s interview, FRANCISCO MADERO published his book *The Presidential Succession in 1910* (*La sucesión presidencial en 1910*) and announced his candidacy. The Creelman interview is considered one of the precursors of the MEXICAN REVOLUTION.

Creelman’s interview, which was intended for a U.S. audience, came in the final years of the Porfiriato (1876–1911). Díaz’s comments throughout the interview were intended to demonstrate to foreigners that MEXICO had progressed during his rule of more than three decades. Díaz spoke of the violence and political chaos that had plagued the nation in the 19th century and argued that his administration had brought peace and stability. He then promised that he would step down at the end of his presidential term.

A number of local politicians reacted to the interview with enthusiasm and began to organize opposition movements in preparation for the 1910 election. Madero, from the northern state of Coahuila, quickly rose to prominence as the most likely winner. On the eve of the election, Díaz retracted the promise he had made during the interview with Creelman. The dictator arrested Madero and easily won the presidency in a highly questionable election. The political corruption demonstrated by Díaz following his interview with Creelman compelled many to support Madero’s call to revolution in November 1910.

See also DÍAZ, PORFIRIO (Vol. III); PORFIRIATO (Vol. III).

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**crime and punishment** Latin America’s return to democracy in the 1980s and 1990s brought with it the popular anticipation that judicial systems and criminal codes would be reformed and that professionalism within the police system would result in the thorough investigation of crimes and fair treatment of suspects. These things did not happen on a uniform basis. Crime has increased, from the kidnapping for ransom of foreign and native business executives and government officials to petty larceny. Violent crime increased throughout the 1990s. This has led to enormous growth in the private security business. In 2002, the number of homicides per 100,000 people reached 55 in SÃO PAULO and RIO DE JANEIRO, 95 in San Salvador, 101 in Guatemala City, and 248 in Medellín. MEXICO CITY averaged 543 daily reported crimes in 2000.

As elsewhere in the world, poverty, unemployment, the rapid growth of crowded urban areas, the availability of DRUGS, and the presence of organized crime are among the most common reasons for the increase in crime. Youth gangs are a recent phenomenon and operate freely in cities such as Rio de Janeiro, São Paulo, Tegucigalpa, and San Salvador. Some analysts suggest that radical Islamists have set up training camps along the border of ARGENTINA and BRAZIL and are recruiting disgruntled Latin Americans to carry out terrorist attacks throughout the hemisphere.

The problem of crime is compounded by the lack of public confidence in the judicial and law enforcement systems. According to *Latinobarómetro*, in 2001, a hemispheric average of 64 percent of the people had little or no trust in the police force and judicial system. Amnesty International points out that the criminal justice system has built-in biases against the poor, the indigenous, and WOMEN. Among the problems most commonly cited are police brutality, forced confessions, poor prison conditions, and long incarcerations before trial. Justices are inadequately trained and are often political appointments; they may be open to bribery and face intimidation, including death threats, which affects their decisions.

Since the 1980s, international agencies such as the UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT and the INTER-AMERICAN DEVELOPMENT BANK have conducted ongoing training programs that aim to reform the police and judiciary. Argentina and CHILE are given high marks as models for steadily improving their criminal justice systems.

Inadequate criminal justice systems and the causes of increased crime present Latin America with a double-edged sword. Each contributes to slow economic growth. Some economists suggest that five percentage points could be added to Latin America’s overall economic growth if crime were cut in half. Without economic growth, the problems of social injustice cannot be addressed, while increasing crime contributes to a lack of economic growth.

See also CRIME AND PUNISHMENT (Vols. I, II, III).

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**Cristero Rebellion** (1926–1929) The Cristero Rebellion was an armed insurrection led by devout Catholics against the anticlerical policies of the Mexican government. Rallying to the call of “¡Viva Cristo Rey!” (Long live Christ the King!), the Cristeros mounted a bloody revolt throughout MEXICO from 1926 to 1929.

In the years immediately following the MEXICAN REVOLUTION, national leaders only selectively implemented the various anticlerical measures contained in MEXICO CONSTITUTION OF 1917. President PLUTARCO ELÍAS CALLES, however, began enforcing restrictions against the CATHOLIC CHURCH shortly after taking office in 1924. As church leaders protested, Calles cracked down even harder against Catholic privileges. In response, Mexican bishops announced a general strike, suspending all religious services throughout the country. As tensions mounted, several local insurrections erupted as armed Catholics confronted the federal army throughout the last half of 1926.

Cristero leaders René Capistrán Garza (b. 1898–d. 1974), Anacleto González Flores (b. 1888–d. 1927), and Enrique Gorostieta (b. 1889–d. 1929) organized a formal resistance movement in January 1927, and the Cristero Rebellion began targeting representatives of the Mexican government. Some of the worst atrocities were committed against young rural teachers who had replaced parish priests as the main educators in remote villages. Cristero violence was met with even greater repression by government troops. The bloodshed had not yet subsided when ÁLVARO OBREGÓN was elected to a second term as president in 1928. Before his inaugural date, Cristero supporter José de León Toral (b. 1900–d. 1929) assassinated the revolutionary leader at a public luncheon. A later investigation revealed that León Toral may have been part of a larger conspiracy led by a Catholic nun named Madre Conchita. Toral was executed, and Madre Conchita spent many years in prison before she was exonerated in 1940.

The Cristero Rebellion officially came to an end in 1929 under an agreement orchestrated by U.S. ambassador Dwight Morrow, although sporadic hostilities continued for several years.

**Further reading:**

Matthew Butler. *Faith and Impiety in Revolutionary Mexico* (New York: Palgrave Macmillan, 2008).

**Crowder, Enoch** (b. 1839–d. 1932) *U.S. Army general and ambassador to Cuba* Crowder shared the common U.S. view of Cuban politics at the end of the 19th century: Cubans were incapable of democratic self-government and in need of U.S. guidance until they attained political maturity.

Crowder accompanied Governor General Charles Magoon to CUBA in October 1906 as head of the Advisory Law Commission charged to revise Cuba’s confusing legal system. The commission’s revisions included a civil service law patterned after that of the United States and the establishment of several executive departments including justice, treasury, and state. The commission’s electoral reform package, designed to ensure fair elections, received most attention. Crowder supervised the implementation of these reforms in the spring and summer during Cuba’s municipal, provincial, congressional, and presidential elections, the last being won by Liberal Party candidate José Miguel Gómez (b. 1858–d. 1921) in what all considered to be fair elections. However, following the withdrawal of the Magoon mission on January 1, 1909, Cuba’s political leaders reverted to fraudulent electoral practices.

U.S. president Woodrow Wilson dispatched Crowder in 1919 in a second effort to correct electoral abuses in Cuba. Crowder’s efforts resulted in a new electoral law in August 1919 with rules and procedures designed to mold Cuba into a two-party system similar to that in the United States. The reforms were to be introduced during Cuba’s 1920 election, but the realities of Cuban politics doomed them to failure. Outgoing Conservative Party president Mario G. Menocal (b. 1866–d. 1941) amended the electoral code to ensure that his friend and fellow Conservative Alfredo Zayas (b. 1861–1934) was on the ticket. Menocal then had Liberal Party candidates harassed during the campaign, prevented Crowder from supervising the election, and appointed electoral judges who favored Zayas. Under such conditions, the Liberals withdrew from the process.

In 1921, U.S. president Warren G. Harding appointed Crowder as his special envoy to the government in HAVANA, a position Crowder held until being appointed ambassador in 1923. His first assignment was to deal with Cuba’s financial crisis, which was caused by the precipitous drop in world sugar prices following World War I and related government debt. To secure a \$65 million loan from J. P. Morgan and Company, Crowder convinced Zayas to introduce government austerity measures. Next, Crowder persuaded Zayas to replace corrupt officials with more honest men. The Cuban situation brightened in 1923. Economic recovery was under way, and with Crowder’s “honest cabinet” government, graft and corruption markedly decreased. Nevertheless, the optimism was short lived. In 1924, Zayas ignored Crowder’s suggestions, replaced the “honest cabinet” with his own appointees, and did nothing to check lavish spending by the Cuban congress.

Crowder remained in Cuba until 1929 but did not intervene in Cuban political affairs because of changing U.S. policy toward the Caribbean, which resulted in President Franklin D. Roosevelt's pronouncement of the GOOD NEIGHBOR POLICY in 1933.

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**crown colony** See BRITISH OVERSEAS TERRITORIES.

**Cuba** With an area of 44,218 square miles (114,524 km<sup>2</sup>), Cuba is the largest and westernmost island of the Greater Antilles; it is only slightly smaller than the U.S. state of Pennsylvania. Of the 11.3 million people residing on the island, approximately 70 percent are between the ages of 15 and 64 years. Today, the name of Cuba is synonymous with its dictator, FIDEL CASTRO RUZ. Cubans live in a political dictatorship, and the majority are poor.

### PERIOD OF THE PLATT AMENDMENT, 1902–1933

In Paris, on December 10, 1898, U.S. and Spanish peace commissioners signed a treaty to end the Spanish-American War, which began in 1895. When the Treaty of Paris went into effect 15 months later, the United States faced the difficult challenge of preparing Cuba to become a self-governing democracy. Nearly 300 years of Spanish centralized authority had left Cuba's white elite, the creoles, without much governmental experience and the more numerous and less educated (in most cases illiterate) mulattoes and Afro-Cubans with even less. Because of their greater numbers, however, the mulattoes and Afro-Cubans prevailed in the U.S.-sponsored and -supervised 1900 municipal elections and the 1901 election of a constituent assembly. Fearing a political and economic disaster, the United States sought another way to ensure that the creoles, or "better classes," as they were referred to, controlled government. To achieve that goal, the chief U.S. administrator in Cuba, General Leonard Wood, implemented voting restrictions and property qualifications in order to minimize political participation on the part of nonwhite Cubans. In addition, to ensure political stability and secure Cuba from foreign interlopers, the United States required the Cuban government to accept the PLATT AMENDMENT as part of its constitution, as a prerequisite to becoming a republic on May 20, 1902. The Platt Amendment gave the United States the right to intervene in Cuba to maintain political order, as well as

the right to control its financial affairs and limit its independence in foreign affairs. The Platt Amendment also became a characteristic of U.S.-Caribbean policy for the next generation. The Cuban *independentistas* reluctantly gave way to U.S. demands, whereupon General Wood authorized the withdrawal of the U.S. MILITARY from the island on May 20, 1902. (The U.S. military had begun its occupation and administration of government functions in Cuba on January 1, 1899.)

Until the emergence of FULGENCIO BATISTA Y ZALDÍVAR in 1933, Cuba's political arena remained the domain of creoles. Party names and ideology meant little. *Personalismo*, or charisma, characterized politics and contributed to political turmoil, which in turn contributed to U.S. intervention in the country's political affairs from 1906 to 1920. Tomás Estrada Palma (b. 1835–d. 1908) became Cuba's first president on May 20, 1902. While Palma's efforts to unify the various political factions were applauded by many, his efforts to extend his presidency in 1906 led to disorder and prompted U.S. president Theodore Roosevelt to send in marines to maintain public order and Charles Magoon as provisional governor until 1909. Magoon accomplished much during his tenure, including the construction of roads, public schools, and water and sewerage systems; he also established a public health system and revived the worn-torn ECONOMY. He developed a detailed electoral code and a modern judicial system and defined the structure and responsibilities of municipal government. Like his superiors in Washington, D.C., Cuba's elite were satisfied with Magoon's work when he left Cuba on January 28, 1909, immediately after José Miguel Gómez (b. 1858–d. 1921) assumed the presidency.

Cuba's next three presidents shared characteristics with their predecessors. Each came from the Cuban elite and had served in the Cuban liberation army during the war for independence. They also fell under the shadow of U.S. interests in Cuba affairs. When violence threatened in the months leading up to the 1913 election, U.S. Marines landed, which cooled the tempers of the opposing political factions. When President Mario García Menocal (b. 1866–d. 1941) wanted to extend his presidency in 1917, opposition groups again threatened revolt. Once again, U.S. Marines were dispatched to Cuba, along with a warning from U.S. president Woodrow Wilson that his administration would not recognize a government that came to power by force. While these actions helped stem the violence, they did not stop the electoral fraud that returned Menocal to office in 1916 and brought Alfredo Zayas (b. 1861–d. 1934) to the presidency in 1921. With the Cuban government plagued by debt and in need of a financial bailout, Zayas accepted U.S.-imposed reforms, which included a momentary end to government corruption and the implementation of a balanced budget in order to receive a \$65 million loan from the J. P. Morgan Company. By 1923, however, corruption



and nepotism again came to the fore in Cuban politics. GERARDO MACHADO Y MORALES (b. 1874–d. 1937) succeeded Zayas in 1925 following elections in 1924. Early in his presidential tenure, Machado delivered on his campaign promises for economic development through government-sponsored agricultural diversification and industrial programs; infrastructure projects, particularly road building; and improved EDUCATION, especially at the University of Havana. Machado's supporters used intimidation and coercion to ensure he was reelected to the presidency in 1928, but at the same time, the Cuban sugar market collapsed, a situation that only worsened in the early 1930s. Most Cubans blamed Machado rather than the global depression for the country's lost market share. Machado's opponents used reports of the administration's financial and political corruption to fuel protests against him.

In the 30 years following independence in 1902, the Cuban economy underwent significant changes, the most evident being the dominance of U.S. firms across the economic spectrum. In 1902, U.S. investments on the island totaled \$100 million, twice what they had been in 1895, but still far less than the \$1.5 billion on the eve of the Great Depression that began in 1929. North Americans owned tobacco and sugar properties, sugar mills, railroads, factories, and public utilities, while sugar remained Cuba's primary export product and the United States its primary market. Cubans were dependent on the United States as the source of bank loans, consumer goods, and machinery.

U.S. firms contributed significantly to the growth of Cuba's middle sector, an amorphous group of people that included skilled workers, white-collar managers, professional people, educators, and the educated, as well as the many small businessmen and shopkeepers who serviced the urban centers. During the 1920s, many urban sector groups formed their own organizations; these included the Confederación Nacional Obrera de Cuba (CNOC), or the national labor union; the Directorio Estudiantil Universitario, which was made up of university students; and the Partido Nacional Sufragistas, which called for WOMEN'S suffrage. In Cuba's closed political system, however, these groups lacked the opportunity to achieve their goals. Many also considered that the United States was using the Platt Amendment as a vehicle to maintain power in the Cuban elitist regimes that protected their own economic interests at the expense of Cuban economic development and sovereignty.

As the Great Depression deepened in the 1930s, Cubans became increasingly frustrated at the government's failure to alleviate their economic hardship. By spring 1933, the situation had become so tense that U.S. economic interests on the island appeared to be under threat. U.S. president Franklin D. Roosevelt dispatched Sumner Welles to Cuba to find a solution to the crisis. Welles labored unsuccessfully from May until August 12, 1933, when the Cuban army ousted Machado and placed

Carlos Manuel de Céspedes (b. 1871–d. 1939) in the presidency. He could control neither the economic chaos nor the street violence, which culminated on September 5, 1933, with the so-called Sergeant's Revolt, led by Sergeant Fulgencio Batista. Céspedes was replaced by a five-man junta known as the pentarchy, of which RAMÓN GRAU SAN MARTÍN was the leading figure.

At the same time, many Cubans believed that Grau, a former university professor who had been exiled for opposing the Machado regime, would be able to unite the various political factions. He did not and instead turned to the ideals of José Martí, the father of Cuban independence. In what some analysts have called the "Revolution of '33," Grau envisioned an anti-imperialistic social revolution that appealed to Cuban nationalistic spirit. His unilateral suspension of the Platt Amendment satisfied many Cubans' anti-imperialistic nationalism. Grau appealed to LABOR with decrees that implemented an eight-hour workday, required that 50 percent of all employees in any given company must be Cuban, and prohibited any more Haitian and Jamaican workers from entering the country. These actions also struck at U.S. economic interests in Cuba, but President Roosevelt demurred to Welles's request not to intervene, as this would be contrary to the forthcoming announcement of the GOOD NEIGHBOR POLICY. Welles and his successor, Jefferson McCaffrey, went on to encourage Batista to seize power, and on January 14, 1934, Batista's military ousted Grau from the presidency.

### THE BATISTA PERIOD, 1934–1959

Batista remained at the center of Cuban politics for the next 25 years. From behind the scenes, he ruled Cuba from 1934 to 1940 through puppet presidents and in 1940 was elected to the presidency in his own right. Unable to seek immediate reelection in 1944, Batista turned over the presidential sash to his old nemesis, Grau. The latter was succeeded by Carlos Prió Socarrás (b. 1903–d. 1977). While the three presidential elections were relatively free of corruption by Cuban standards, other government actions signaled important changes in the country's socioeconomic structure. In 1934, Batista negotiated an end to the Platt Amendment, which fueled Cuban nationalism. Before the decade ended, Batista had directed the implementation of a state-sponsored health program, the establishment of consumers' cooperatives, government control of rents and utilities, and a modest agricultural reform program. Batista also oversaw the writing of the 1940 constitution, considered Latin America's most progressive at the time. It included provisos for universal suffrage, civil liberties, and workers' rights. The wealth generated by the demand for Cuban sugar during World War II supported a vast public works program, but the winds of economic change surfaced in 1947 as other prewar sources of cane and beet sugar, such as eastern Europe and Southeast Asia, returned to the global market. The various health issues associated

with the consumption of sugar led to a dramatic increase in the popularity of sugar substitutes, which hit Cuba's sugar industry hard. At the same time, Cuba remained economically dependent on the United States not only as a market for its sugar but as a source for consumer and industrial goods. U.S. companies maintained their control over the TRANSPORTATION, communication, sugar-refining, and tourism industries in Cuba, which fueled anti-American nationalism.

Anti-Americanism forced the Cuban congress to reject U.S. financial assistance. In 1946 and 1947, U.S. assistance and grant programs were designed to help diversify the Cuban economy and therefore decrease the country's dependence on sugar. In what many observers described as a strange marriage, Communist Party congressional delegates joined with Liberal and Conservative Party representatives to reject the offer. The Communists described the financial aid package as just another example of U.S. imperialism, while the landowning Conservatives and Liberals preferred to pressure the government to find additional outlets for the country's sugar in the increasingly competitive world market.

Grau and Prío Socarrás soon lost the idealism that had brought them to the presidency in 1944 and 1948, respectively, and once again embezzlement, graft, corruption, and malfeasance of public office permeated every branch of national, provincial, and municipal government. Cronyism and nepotism contributed to the employment of 11 percent of the working population in government posts. During the same time period, organized violence gripped Cuban cities. Gangs made up of armed gunmen, or *pistoleros*, found a haven on the University of Havana campus. The U.S. MAFIA made inroads into the Havana tourist INDUSTRY and by the 1950s had increased its gambling and prostitution operations across the island.

In the midst of this violence and corruption, a student leader in the 1933 Sergeant's Revolt, Eduardo Chibás (b. 1907–d. 1951), organized the Orthodox Party in 1947 and garnered public attention with a call to uphold the ideals of Martí and the "Generation of 1930," these being social justice, political freedom, economic reform, and public honesty. Chibás drew support from the middle class and university students, including Fidel Castro, who demanded an end to political corruption. Chibás used a weekly radio program to stir the public, but this came to an abrupt end on August 5, 1951, when he committed suicide during a broadcast. Cubans' emotional response to his death remains as the public high-water mark of their disgust with their politicians. Chibás's death also directly contributed to the coup d'état engineered by Batista on the morning of March 21, 1952, and to Castro's determination to destroy the existing political apparatus.

Batista returned to Cuba from Florida to assume a senate seat to which he had just been elected and to form his own political party. Batista ran for the presidency in 1952, but when opinion polls indicated that he would not win, he found support among a group of younger army

officers to stage a coup d'état on March 10, 1954. Batista subsequently rigged the November 1954 election and returned to office for another four years.

A native of Birán in Oriente Province, Castro entered Cuba's turbulent political arena shortly after receiving his law degree from the University of Havana in 1950. Although drawn to the ideology of Chibás's Orthodox Party, the party shunned him because of his affiliation with student gangs at the university, his participation in the 1947 attempted coup d'état against the Dominican dictator RAFAEL TRUJILLO, his association with the 1948 riots in BOGOTÁ, COLOMBIA, and his vehement public criticisms of the Cuban government since graduation. Nevertheless, Castro campaigned for a congressional seat in the 1952 elections as a self-professed *ortodoxo* until Batista's coup on March 10, which convinced Castro that the only way to reform the Cuban political system would be to rebuild it after its destruction.

Following the Batista coup, Castro set about organizing a revolutionary group that led an unsuccessful attack on the Moncada army barracks in Oriente Province on July 26, 1953. Most of Castro's followers either died in the battle or were executed later by Batista's army. Fidel and his brother RAÚL CASTRO RUZ were captured and imprisoned after show trials. Fidel defended himself with an appeal that described Cuba's socioeconomic and political injustices. For many analysts, Castro's statement, later published as *History Will Absolve Me*, foreshadowed Castro's policies once he himself came to power. In 1955, after serving only 11 months of their 15-year sentences on the ISLE OF PINES, the Castro brothers departed for MEXICO CITY, where they found comfort with several other disgruntled expatriates who helped finance the acquisition of arms that would be used on Castro's return to the island. In the meantime, in Cuba, several groups opposed to Batista had formed. For the most part, these were made up of university students and the urban middle class who wished to see a democratic Cuba. Batista's brutal attempts at suppressing these groups only served to embolden them.

Only 11 of Castro's 86 followers survived after landing on the beaches of Oriente Province the night of December 2, 1956. These 11, along with the Castro brothers and ERNESTO "CHE" GUEVARA, an Argentine doctor turned revolutionary, escaped to the Sierra Maestra mountains, from which they conducted a guerrilla war against the Batista regime until Batista fled the country on December 31, 1958 (see CUBAN REVOLUTION).

## CASTRO AND THE CUBAN REVOLUTION

Shortly after arriving in Havana on January 7, 1959, Castro set about manipulating events to ensure his rise to power. Many of the elite and military officers who did not immediately flee the island after Batista's downfall faced "kangaroo courts," which condemned them to death by firing squad or to long prison terms. Presidents Manuel Urrutia (b. 1908–d. 1981) and Osvaldo Dorticós

(b. 1919–d. 1983) served in name only before their resignations; Castro was the real power behind the scenes. In spring 1959, Castro nationalized large landed estates and turned them into farmer's cooperatives, pegged rents to salaries, lowered the salaries of Cubans working for U.S. companies, and owing to "threats to the regime" announced the need to postpone elections. These actions prompted many from the middle class to leave the country. In June 1960, Castro nationalized U.S. oil refineries on the island for refusing to refine Soviet oil, on President Dwight D. Eisenhower's directions. This came at a time when the U.S. Congress voted to cut imports of Cuban sugar, and when that law was enacted on July 3, 1960, Castro began nationalizing all U.S. business operations in Cuba. The confrontation reached its peak in January 1961 when Castro demanded drastic cuts in the U.S. embassy staff in Havana. Eisenhower responded by severing diplomatic relations altogether.

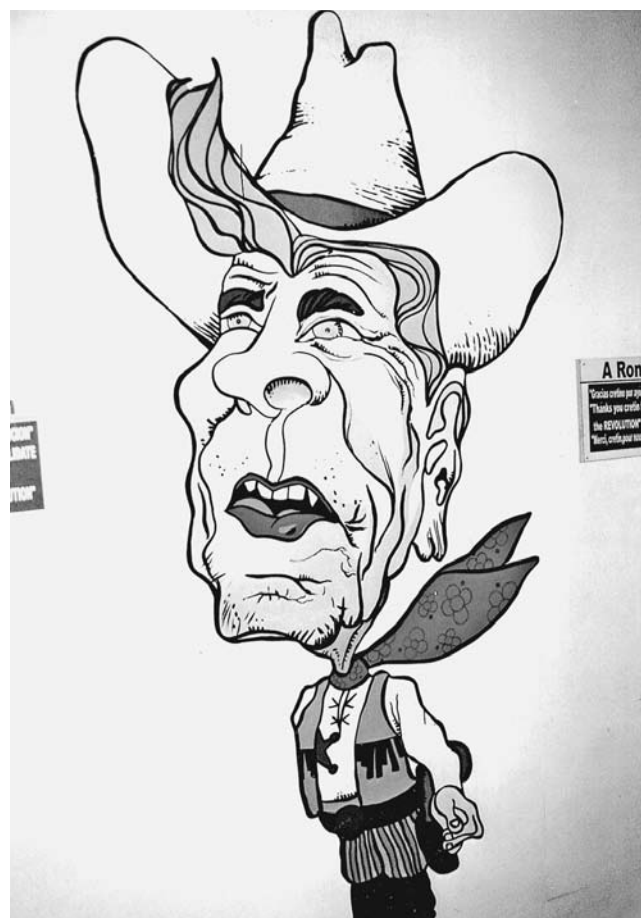
Castro became something of a pawn in the cold war between the United States and the Soviet Union. Following the failed BAY OF PIGS INVASION in April 1961, Soviet premier Nikita Khrushchev publicly declared that the Soviets would defend Cuba and a year later convinced his reluctant generals to approve placing missiles on the island. This had more to do with a global balance of power than it did with Cuba's defense against invasion, as Castro despairingly learned when the CUBAN MISSILE CRISIS ended in October 1962. Until Cuba's near economic collapse at the end of the decade, the Soviets remained reluctant to become involved in the island's affairs (see SOVIET UNION AND CUBA).

During the years 1962–70, the Cuban economy spiraled downward. As minister of industry, the idealistic Guevara failed to persuade Cuban workers to toil for something other than money. With the U.S. embargo, Cuba could not earn sufficient foreign income to purchase the machinery necessary to build an industrial base (see CUBA, U.S. TRADE EMBARGO OF). To meet this need, Castro determined that there would be a 10-million-ton sugar crop by 1970, which would be sold on the world market. The government plowed under thousands of acres of land that had been devoted to growing other foodstuffs, citrus, and timber, yet the goal was not met. With the economy in ruins, Castro had no choice but to accept the implementation of Soviet-style five-year plans if he hoped to move the nation out of the economic doldrums. By the mid-1970s, the Cuban economy had recovered sufficiently to satisfy the basic needs of most Cubans, though there was no excess and only limited consumer goods. Improvements in EDUCATION, health care, sanitation, and medicine, however, earned Cuba high regard in the international community.

Castro had consolidated his power in the political arena by 1964. No rival parties existed to challenge his own Communist Party of Cuba (PCC). Committees for the defense of the revolution (CDRs) appeared in every

neighborhood, workplace, and school to inform on those discontented with the revolution. All elements of society were organized into groups controlled by the state: Women came under the Federation of Cuban Women (Federación de Mujeres Cubanas, or FMC); athletes were placed under the National Institute for Sports, Physical Education, and Recreation (Instituto Nacional de Deportes, Educación Física y Recreación, or INDER); and the film and art industry came under the Cuban Institute of Cinematographic Art and Industry (Instituto Cubano de Arte e Industria Cinematográfica, or ICAIC). Additionally, the press was censored. Having consolidated his control over Cuban society and with his brother, Raúl, in charge of the military, Fidel could admit his shortcomings and offer to resign in 1970 over the failed economy. There was no one to step forward.

Disparities of wealth surfaced in the mid-1970s. The government had failed to satisfy people's housing needs, there was a lack of consumer goods, and only high-ranking Communist Party members could travel abroad. These problems became evident in the April to September 1980 MARIEL BOATLIFT, when approximately



The wall painting at the entrance to Cuba's national museum in Havana sarcastically comments to U.S. president Ronald Reagan: "Thank you, cretin, for helping to continue the [Cuban] revolution." (Thomas M. Leonard Collection)

250,000 Cubans left the island for the United States. The quality of life in Cuba did not improve in the 1980s. The Soviet Union, now splintering, could no longer afford to underwrite the Cuban economy at an estimated \$2 million annually. When the Soviet Union collapsed in 1991, Cuba entered a period of particular economic hardship. Shortages of food, fuel, and medical supplies became widespread, and although the Fifth Communist Party Congress in 1997 deprived Castro of some decision-making power, he retained his position. "Socialism or Death" was his battle cry to save the revolution.

By the late 1990s, a number of interconnected economic reforms had brought about a semblance of economic recovery. Joint ventures with European firms resulted in the construction of luxury hotels, which in turn brought tourists to the island and stimulated job creation in the service sector; many private homes were turned into restaurants and pensions as well. Other joint ventures included the mining of bauxite and foreign operation of port facilities. The government permitted cash-only farmer's markets to compete with state-run food stores. Those with skills, such as television, radio, and bicycle repair people, found themselves making more money than medical doctors on the state payroll. Still, there were shortages, and by 2000, taking advantage of new U.S. legislation, Cuba began to purchase U.S. foodstuffs. Electricity and fuel shortages continued to hamper both the economy and the quality of everyday life, however. Petroleum grants from VENEZUELA's president HUGO RAFAEL CHÁVEZ FRÍAS alleviated the situation somewhat. Still, the government silenced protesters and dissenters when Castro fell ill in summer 2006. Raúl Castro assumed the presidency in February 2008.

See also CUBA (Vols. I, II, III); MARTÍ, JOSÉ (Vol. III); WAR OF 1898 (Vol. III).

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**Cuba, U.S. trade embargo of** On July 6, 1960, President Dwight D. Eisenhower ordered the stoppage to U.S. imports of Cuban sugar for the remainder of the 1960s. The sugar embargo was in retaliation for FIDEL CASTRO RUZ's nationalization of U.S. oil refineries in CUBA. As Castro continued his nationalization, on October 30, 1960, Eisenhower stopped all TRADE

with Cuba, except for food and medicines. Adverse public reaction to the implementation of Castro's CUBAN REVOLUTION in the United States and President John F. Kennedy's determination that Castro be ousted made the embargo complete on September 4, 1961. Two years later, in July 1963, some \$33 million in Cuban assets were frozen in U.S. financial institutions. Kennedy and President Lyndon B. Johnson then successfully persuaded most European and Latin American nations to curtail their trade with Cuba. By 1968, Cuba stood in near economic isolation.

The embargo began to crumble in the early 1970s as Latin American nations including ARGENTINA, CHILE, COLOMBIA, PERU, and VENEZUELA reopened diplomatic and trade relations with Cuba. In 1972, the European Economic Community extended special trade privileges to the country. As a result, by 1975, Cuba's trade with the noncommunist world accounted for 41.2 percent of its total trade. Despite pressure from the U.S. business community, Presidents Richard M. Nixon and Gerald R. Ford kept the U.S. embargo in place. Ford also attempted to prevent subsidiaries of U.S.-based companies from sending their manufactured goods to Cuba, but President Jimmy Carter lifted those restrictions, along with Kennedy's travel restrictions on U.S. citizens traveling to Cuba. The changes were short lived. Presidents Ronald R. Reagan, George H. W. Bush, William J. Clinton, and George W. Bush reinstated the trade embargo, and during the 1990s, the Cuban Democracy Act and the Cuban Liberty and Democratic Solidarity Act further tightened the restrictions. Only the loophole on food and medicine trade remained in place by 2001, and U.S. agricultural interests capitalized on it. To the consternation of President George W. Bush, representatives of U.S. agrobusiness and governors of Midwestern agricultural states attended Cuba's agricultural affair in September 2001 and have done so each year through 2008. In all, some \$700 million in contracts provide for the sale of U.S. foodstuffs, agricultural products, and cattle to Cuba. U.S. policy direction took another turn with the presidential election of Barack Obama in November 2008. Once in office, by executive order, Obama removed the limits on dollar remittances to the island by Cuban Americans and permitted unlimited travel by Cuban Americans to visit their island relatives. These gestures await indicators from Cuba before exploratory talks take place on lifting other portions of the U.S. embargo.

Largely because the Soviet Union propped up the Cuban ECONOMY through 1991, the U.S. trade embargo failed to bring economic chaos to Cuba or force Castro's overthrow (see SOVIET UNION AND CUBA). While the Cuban economy has worsened since 1991, the government's policy of joint ventures with foreign-, but not U.S.-, owned businesses and its emphasis on tourism, along with remittances from Cuban Americans, have kept the Cuban economy afloat, although barely.

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**Cuban American National Foundation (CANF)**

Founded in 1981 by Jorge Mas Canosa (b. 1939–d. 1997) and a group of prominent Cuban exiles in Miami, Florida, the Cuban American National Foundation, or CANF, came to influence and advise U.S. foreign policy makers regarding CUBA in the latter part of the 20th century. After participating in the failed 1961 BAY OF PIGS INVASION, Mas Canosa returned to Miami, where he became a prominent businessman.

Recognizing that the United States would not overthrow FIDEL CASTRO RUZ, Mas Canosa founded CANF initially to enlighten the U.S. public about the harsh economic, social, and political conditions in Cuba. Subsequently, CANF turned its attention to the implementation of harsh measures against Cuba in an effort to topple Castro by economic strangulation. Mas Canosa found a sympathetic ear in Presidents Ronald R. Reagan and George H. W. Bush and is credited with the harsh stance each took toward Castro. The U.S. government's National Endowment for Democracy provided financial support for CANF's anti-Castro programs. In 1985, the U.S. government established and financed Radio Martí and in 1990 TV Martí to broadcast programs into Cuba (see RADIO AND TV MARTÍ). U.S.-based Cuban exiles dominated their supervisory boards, which were chaired by Mas Canosa. CANF members also lobbied Congress for the passage of the 1992 Cuban Democracy Act (Torricelli Bill) and the 1996 Cuban Liberty and Democratic Act (Helms-Burton Bill).

Reportedly, Mas Canosa envisioned himself as president of a post-Castro Cuba and toward that end assembled a team of economists, engineers, and other specialists to plan a market economy directed by CANF. This proposal caused a split in the Cuban-exile community and led to the establishment of more moderate groups that called for negotiation with the Castro regime. CANF also struck out against its critics, a fact best illustrated by its 1992 demonstrations against the *Miami Herald* for an alleged pro-Castro editorial policy. *America's Watch*, which usually criticized foreign dictators, accused Mas

Canosa and CANF of creating a repressive atmosphere within the Cuban-exile community.

Jorge Mas Santos (b. 1962) succeeded his father as chairman of CANF's board of directors in 1997, but he represented the growing generational differences within the Cuban-exile community. Many of the younger exiles, born in the United States, favored an accommodation with the Communist-led island government. The older exiles, such as CANF president Francisco Hernandez, continued to advocate a "hard" policy toward Castro and viewed Mas Santos as favoring the younger generation. In protest, 12 senior members of CANF's directorship resigned in 2001. A year later, CANF and its hardline supporters found solace in U.S. president George W. Bush's tightening of the economic embargo on Cuba. The generational split on U.S.-Cuban policy remains.

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**Cuban missile crisis (1962)** On October 14, 1962, photographs from a U.S. U-2 reconnaissance plane confirmed the construction of Soviet missile sites in CUBA. For the next two weeks, the world stood on the brink of nuclear war. Several reasons have been advanced to explain why the Soviets sought to construct the sites. For FIDEL CASTRO RUZ, the answer was simple: Soviet premier Nikita Khrushchev was making good on his promise to defend Cuba against a possible U.S. invasion. The Soviets' reasons were more complex (see SOVIET UNION AND CUBA). So, too, were the reasons behind U.S. president John F. Kennedy's response.

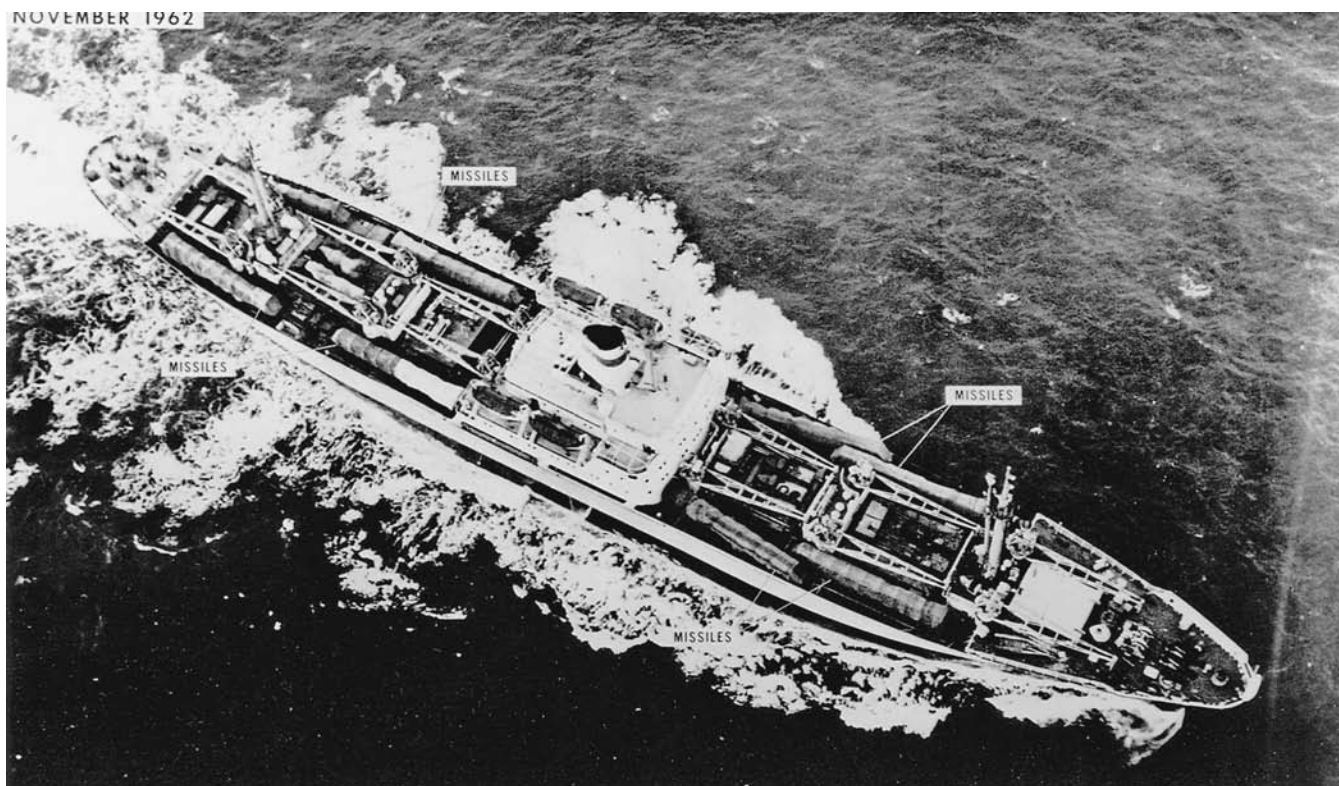
President Kennedy's acceptance of responsibility for the April 1961 failed BAY OF PIGS INVASION and his nervousness in the face of Khrushchev's arrogant taunts at the June 1961 Vienna summit conference left the Soviet premier with the impression that he was dealing with a weak U.S. president. Thus, placement of Soviet missiles in Cuba beginning in the spring of 1962 not only challenged the perception of Soviet missile inferiority but also provided the Soviets with a counterbalance to U.S. missiles situated in Western Europe. Immediately, the Soviets gained leverage in the ongoing discussions to make Berlin a free city. Khrushchev had recently pro-

posed that West Berlin become a free city under United Nations (UN) control rather than continuing as an example of Western economic success—a free society situated in the Soviet sector of East Germany. Thus, missiles in Cuba could be used as a bargaining chip to achieve this goal in Berlin. While the Kennedy administration understood the Soviets' reasoning, particularly the final point, Berlin, the missiles also directly threatened U.S. urban centers within a 1,000-mile (1,609-km) range. Beyond that, Kennedy reasoned that the missiles contradicted the Monroe Doctrine, which had guided U.S. policy in the Western Hemisphere since 1823. The doctrine declared the hemisphere off-limits to European encroachment. At the same time, Kennedy confronted a recalcitrant congress that was stalling his domestic initiatives and presented him with a then two-year-old resolution authorizing the use of force to rid Cuba of communism. Additionally, congressional elections were scheduled for November 1963. Forcing the Soviets to back down on the missiles in Cuba would improve Kennedy's image as a strong president. He argued that he needed more Democrats in Congress not only to support his domestic policies but to play a tougher diplomatic game with the Soviets.

Immediately after confirmation of Soviet missile sites in Cuba, Kennedy formed an executive committee (EXCOM) to deal with the crisis. During its meetings between October 16 and October 21, EXCOM divided

into two groups. The "hawks" included former secretary of state Dean Acheson, presidential adviser McGeorge Bundy, Vice President Lyndon Johnson, director of the Central Intelligence Agency John McCone, and the chairman of the Joint Chiefs of Staff, General Maxwell Taylor. The "moderates" included Attorney General Robert Kennedy, Secretary of Defense Robert McNamara, and Undersecretary of State George Ball. The hawks recommended an immediate air strike, while the moderates favored a blockade. Secretary of State Dean Rusk went further. He proposed a blockade against only offensive weapons because that would be more acceptable to the international community, whose support the president desired. EXCOM accepted the proposal and the entire National Security Council approved a plan of action that included a presidential address on the matter to the American people and, at the same time, announcing the implementation of a naval blockade against offensive weapons being introduced to Cuba. Presidential emissaries were dispatched to Great Britain and France before Kennedy's address to the nation. The U.S. case would be presented to the UN and the ORGANIZATION OF AMERICAN STATES (OAS).

As Kennedy implemented the plan, throughout the week, his brother Robert met with the Soviet ambassador to the United States, Anatoly Dobrynin, in the hope of keeping channel communications open. Dobrynin came away from these meetings convinced that the hawks



The Soviet ship *Metallurg Anosov* carrying missiles out of Cuba at the conclusion of the 1963 missile crisis (Courtesy of the John F. Kennedy Presidential Library)

would prevail and force the president to order bombing raids of the Soviet missile sites in Cuba.

On October 22, Rusk gained OAS support for the quarantine and, if necessary, the use of force to end the crisis. At the UN, Ambassador Adlai Stevenson indicted the Russians before the Security Council but sought no action because the Soviets had the power to veto council decisions.

Against this backdrop, the Soviets formulated their response. On October 23, Khrushchev sent out two contradictory messages. To Kennedy, the Soviet premier denounced the blockade and accused the president of taking the world to the brink of nuclear war. In a second message, to British pacifist Bertrand Russell, Khrushchev again blasted Kennedy but also recognized the consequences of war, which suggested that a top-level meeting had taken place to settle the crisis. On October 25, 20 of 25 Soviet cargo ships turned away as they approached the U.S. naval blockade. The other five were searched for missiles and, not carrying any, were permitted to continue on to Cuba.

The crisis came to a head on October 26, when Kennedy received a personal letter from Khrushchev in which the latter offered to remove the missiles from Cuba in return for a U.S. promise not to invade the island. Later that day, ABC newscaster John Scali met with Soviet KGB agent Aleksandr Fomin in a Washington, D.C., coffeeshop, during which Fomin outlined the Soviet plan for a settlement. It repeated Khrushchev's points to Kennedy and added that the removal of missiles would be supervised by UN observers. Before receiving Scali's report, Kennedy received a more formal note from Khrushchev, who now demanded that the United States remove its missiles from Turkey in return for the Soviet missile removal from Cuba. Kennedy agreed to do so but not publicly out of concern for adverse reaction from North Atlantic Treaty (NATO) members. The deal was struck. Castro, who had not been consulted during the Kennedy-Khrushchev negotiations, was so furious that he refused to admit the UN observers into Cuba. Therefore, U.S. reconnaissance planes witnessed the Soviet missile withdrawal instead.

Subsequent documentation in the 1990s revealed that the Soviets actually had 42,000 troops and nine short-range tactical nuclear weapons on the ground in Cuba and that local commanders planned to use the weapons if the United States had invaded the island. The world was closer to nuclear war than most realized in 1962.

See also MONROE DOCTRINE (Vol. III).

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**Cuban revolution** (1933) See GRAU SAN MARTÍN, RAMÓN; MACHADO Y MORALES, GERARDO.

**Cuban Revolution** (1956–1961) FIDEL CASTRO RUZ's arrival in HAVANA on January 7, 1952, marked the culmination of events that had begun with FULGENCIO BATISTA Y ZALDÍVAR's coup d'état on March 10 of that year and also marked the beginning of the consolidation of the revolution that changed CUBA from the 1960s into the early 21st century. Batista's coup convinced Castro that only through violence could Cuba's old order be changed and a new system based on the ideals of José Martí be instituted. Castro's defense of the raid on the Moncada Barracks on July 26, 1953, published as *History Will Absolve Me*, is testimony to this belief. Released from prison after serving only 11 months of a 15-year sentence for leading the Moncada attack, Fidel and his brother RAÚL CASTRO RUZ departed for MEXICO CITY, where they planned to return to Cuba to change the old order. They were not alone.

As the Castros plotted in MEXICO, several groups did the same in Cuba, including José Antonio Echeverría's (b. 1930–d. 1957) university student group, the Revolutionary Directorate, and Frank País's (b. 1934–d. 1957) underground 26th of July Movement, which initiated violence against the Batista regime. The latter reacted with ever-increasing repression. When the Castros returned to the island along with Argentine revolutionary ERNESTO "CHE" GUEVARA and 81 other men on December 2, 1956, the anticipated general uprising against Batista did not occur. Alerted to the plan, Batista's army closed down Havana and awaited Castro's landing in Oriente Province. The Castro brothers, Guevara, and 18 others escaped into the Sierra Maestra mountains in southeastern Oriente Province, where they quickly learned that socioeconomic hardship and the central government's repression of mainly Afro-Cuban agricultural workers could be used to build a popular resistance movement. Early victories over the government's Rural Guard at La Plata and El Uvero in 1957 and the guard's terroristic response increased popular support for the revolutionaries' cause. Throughout 1957 and into early 1958, the size of the insurgent force grew, and new fronts were opened, headed by Raúl Castro in the north; Juan Almeida (b. 1927) near Santiago de Cuba; Camilo Cienfuegos (b. 1932–d. 1959?) on the Holguín plains; and Guevara around Turquino Peak. By February 1958, these groups

had destroyed railroads, bridges, and large sections of highways.

While guerrilla warfare gripped the countryside, in Havana, protests, demonstrations, and violence became commonplace. Faculty and students closed down the University of Havana. The students almost succeeded in assassinating Batista during an attack on the presidential palace on March 13, 1957. In a coordinated attack on a Havana radio station, Echeverría lost his life. Otherwise, the urban insurgents exploded bombs, set fires, cut power lines, derailed trains, and kidnapped and killed their alleged or real enemies. Batista responded with equal ferocity toward insurgents, real or imagined. Echeverría's death and Batista's repression allowed Castro to seize the leadership role of the insurgency, which he did in the Caracas Pact, concluded in the Venezuelan city of that name on July 28, 1958. Accordingly, the various insurgent groups agreed to cooperate in overthrowing Batista and implementing a program of economic, social, and institutional justice for the Cuban people.

In mid-1958, Batista launched a military offensive against the rebels in the countryside, but by summer's end, his army had withered away, mostly without fighting the Castro-led forces in eastern Cuba. By late November 1958, Batista's army no longer existed. After refusing last-minute U.S. mediation efforts to reach an accommodation with Castro, Batista fled for the DOMINICAN REPUBLIC on December 31, 1958, leaving Colonel Ramón Barquín (b. 1914–d. 2008) to order a cease-fire and then surrender his troops to the Army of Liberation.

The government established by Castro in January 1959 included several moderates, including Manuel Urrutia (b. 1901–d. 1981) as president and José Miró Cardona (b. 1903–d. 1974) as prime minister. These appointments, however, concealed the fact that Castro was the real power. As the moderates resigned in protest, they were replaced by Castro's followers, including Augusto Martínez Sánchez (b. 1923– ) as labor minister, Guevara as director of the National Bank, and Castro himself as prime minister. Castro became the focal point of the revolution.

During the first nine months of his administration, Castro took every opportunity to denounce U.S. dominance of the Cuban ECONOMY and support for the elite rulers of the past. He set out to consolidate his control over the country. *Batistianos* and other alleged opponents of the revolution faced summary trials, followed by execution, exile, or long jail sentences. Committees for the defense of the revolution (CDRs) were placed in every workplace, housing project, and classroom to ferret out opponents of the revolution. Castro turned to the Communist Party for its leadership and discipline to find individuals for government, commercial, and industrial positions. His people took control of

the Confederation of Cuban Workers (Confederación de Trabajadores Cubano) and University Students' Federation (Federación Estudiantil Universitaria). Castro also directed the formation of other groups, including the Federation of Cuban Women (Federación de Mujeres Cubanas, or FMC) and the National Association of Small Farms (Asociación Nacional de Agricultores Pequeños, or ANAP). Supporters of the revolution learned that loyalty to Castro had its rewards, such as government positions, access to government loans for economic activities, and admission to higher education. As Castro later remarked: "Within the Revolution, everything is possible; outside, it is improbable."

Beginning in March 1959, Castro also focused on the needs of the urban poor. Over the next nine months, he decreed drastic rate cuts for rents, electricity, telephone, and water and sewerage services. The homes of Batista government and army officials and other elites were confiscated and distributed among the poor. An import luxury tax was placed on television sets, jewelry, and cars, which curtailed the spending of those among the wealthy who had not yet left the island and were not in prison. The salaries of Cuban nationals employed in U.S.-owned businesses were slashed to equal those of other Cubans. The Agricultural Reform Law, passed on May 17, 1959, restricted land holdings to 1,000 acres (405 ha), except for cattle grazing. The confiscated lands were divided into 67-acre (27-ha) plots for distribution to peasant farmers. Reading and medical programs sent thousands of Cuban youth into the countryside to supply these basic needs to the rural poor.

By the time of the BAY OF PIGS INVASION in April 1961, Castro had institutionalized his revolution. Political opposition had been eliminated, and his brand of *personalismo* dominated the political arena. Castro solidified his support from lower socioeconomic groups through his urban and agrarian reform decrees. The Bay of Pigs invasion served to tighten his control over the island, which he accomplished before the weaknesses of his system manifested in the mid-1960s.

See also MARTÍ, JOSÉ (Vol. III).

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# D

**D'Aubuisson, Roberto** See DUARTE, JOSÉ NAPOLEÓN; EL SALVADOR; FARABUNDO MARTÍ NATIONAL LIBERATION FRONT.

**de la Huerta, Adolfo** (b. 1881–d. 1955) *revolutionary leader and interim president of Mexico* Adolfo de la Huerta was a leader in the MEXICAN REVOLUTION and served as governor of the state of Sonora. He helped steer MEXICO away from the fighting phase of the revolution after 1920 but was expelled from the country after leading an unsuccessful revolt in 1924.

De la Huerta was born on May 26, 1881, in Hermosillo. He became a loyal ally to FRANCISCO MADERO and contributed to the local 1910 insurrection against Porfirio Díaz. After Madero was overthrown and executed in 1913, de la Huerta joined forces with VENUSTIANO CARRANZA against the dictatorship of VICTORIANO HUERTA (1913–14). De la Huerta rose to prominence in Sonoran politics and formed an alliance known as the Sonoran Triangle with ÁLVARO OBREGÓN and PLUTARCO ELÍAS CALLES. The three leaders overthrew Carranza's government in 1920, and de la Huerta served as interim president until Obregón was elected in November of that year.

Between 1920 and 1923, de la Huerta served as finance minister and worked to stabilize the nation's postrevolutionary ECONOMY. When Obregón announced in 1923 that he would support Calles for president in the upcoming election, de la Huerta rose in revolt. The ensuing rebellion threatened the delicate peace the Sonoran Triangle leaders had managed to achieve in the aftermath of the violent revolution. De la Huerta's revolt was defeated after just a few months. Calles became

president, and de la Huerta fled into exile in the United States. De la Huerta returned to Mexico in 1935 and died in MEXICO CITY on July 9, 1955.

See also DÍAZ, PORFIRIO (Vol. III).

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**Devil's Island Prison** One of the world's most infamous prisons, the Devil's Island Prison in French Guiana was the inspiration for the 1973 movie *Papillon*, starring Steve McQueen and Dustin Hoffman.

During the 19th century, Emperor Napoléon III of France decided that penal settlements in French Guiana, one of the FRENCH OVERSEAS POSSESSIONS, would reduce the cost of maintaining prisoners in France and contribute to the development of the colony. Devil's Island (Île du Diable) is the smallest (35 acres [14 ha]) and northernmost of the three Îles du Salut lying off the coast of French Guiana. Devil's Island Prison opened in 1852, and the French eventually constructed prisons on the other two islands, as well as on the mainland at Kourou. Over time, the entire penal system in French Guiana became collectively known as Devil's Island.

Between 1852 and 1938, the French sent more than 80,000 prisoners to Devil's Island. Prisoners sentenced to a term of less than eight years had to spend an equal period of time living in the colony after their release from prison. Those whose sentence was more than eight years had to remain in the colony permanently. Regardless, as 90 percent of the prisoners died of disease

and abuse, the prison population did little to augment the colony's struggling population. Although escape was arduous and the punishment for a failed attempt severe, prisoners such as Henri "Papillon" Charrière frequently tried to escape. In 1938, the government ceased sending prisoners to Devil's Island, and the penal settlement was eventually closed in 1952. French Guiana has never fully escaped its negative image as a former penal colony with an unhealthy climate and an impenetrable hinterland. In 1965, the French government transferred control of Devil's Island to the Centre National d'Études Spatiales (CNES), the French government's space agency, which had been established in 1961.

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**Díaz, Félix** (b. 1868–d. 1945) *Mexican political leader and counterrevolutionary* Félix Díaz was the nephew of dictator Porfirio Díaz, who ruled MEXICO from 1876 to 1911, and led an insurrection against the presidency of FRANCISCO MADERO (1911–13) after his uncle had been deposed at the beginning of the MEXICAN REVOLUTION. Díaz's rebellion eventually led to Madero's overthrow and execution, and Díaz contributed to the rise of dictator VICTORIANO HUERTA (1913–14).

Díaz was born in 1868 in Oaxaca. His father, also named Félix Díaz, was the younger brother of Porfirio. The elder Félix became governor of Oaxaca in 1870 and carried out a number of aggressive Liberal reforms. Shortly thereafter, he was tortured and killed following an unsuccessful revolt against Benito Juárez. The younger Félix pursued a career in the MILITARY and later entered politics. He eventually rose to the rank of general and briefly became governor of Oaxaca during the Porfiriato.

Félix Díaz supported his uncle when widespread rebellion broke out in 1910 and continued to challenge Madero after the revolutionary leader was elected president. In 1912, Díaz allied with another Porfirian general, Bernardo Reyes (b. 1850–d. 1913), and led a counter-revolutionary revolt against Madero. Madero assigned Victoriano Huerta to put down the revolt, but the shrewd general betrayed the president and joined forces with Díaz after a 10-day standoff in MEXICO CITY. Díaz hoped to become an integral part of Huerta's administration after the overthrow of Madero, but the newly installed dictator sent him on a diplomatic mission to Asia. Díaz returned in the later years of the revolution but found few supporters for his attempts to overthrow VENUSTIANO CARRANZA. Díaz died in obscurity in 1945.

See also DÍAZ, PORFIRIO (Vol. III); PORFIRIATO (Vol. III).

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**Dirty War** (1974–1983) The Dirty War in ARGENTINA was a nine-year conflict between Argentina's MILITARY governments and leftist opposition groups that reached its height between 1976 and 1978 during the administration of General Jorge Rafael Videla (b. 1925– ). During the conflict an estimated 9,000 persons lost their lives and another 10,000–30,000 simply "disappeared."

Following the 1966 coup d'état, a string of ruling military generals sought to break the political strength of Argentine LABOR unions. Government repression of the workers only emboldened the opposition, which became increasingly combative, as seen in the May 1969 confrontation in Córdoba between middle-sector labor groups and the military over Argentina's declining economic well-being. Four significant guerrilla groups emerged out of the violence: the Peronist Montoneros, the Peronista Armed Forces, the Revolutionary Armed Forces, and the People's Revolutionary Army. Each determined to destroy the country's existing political order. Over the next several years, these groups, acting independent of one another, carried out kidnappings for ransom, bank robberies, and assassinations, including the killing of former president Pedro Aramburu (b. 1903–d. 1970). The continuing violence and worsening economic conditions led to the return of JUAN DOMINGO PERÓN as president in 1973. He died in 1974 and was succeeded by his vice president and wife, ISABEL MARTÍNEZ DE PERÓN, who quickly lost control over labor unions and was deposed by the military on March 24, 1976. Against this backdrop of political turmoil, urban violence, and a down-spiraling ECONOMY, the military carried out its Dirty War.

The Argentine Anticommunist Alliance (Triple A), supplemented by antiguerrilla units in the national military, had initiated the war in 1973 and by 1975 was responsible for 458 assassinations. Four executive "decrees" in 1975 directed the military to "annihilate" subversives throughout the country. The country was divided into five zones, each of which was further divided into subdistricts, all under military control. The Argentine security services, which started counting its victims in 1975, reported that 22,000 people "disappeared" during the Dirty War. The Argentine National Commission on the Disappearance of Persons (Comisión Nacional sobre la Desaparición de Personas, or CONADEP) put the number at 9,000, while some human rights groups place it at 20,000 to 30,000. The operation included murder, rape, imprisonment, torture, and, for some, being dropped from an airplane over the Atlantic Ocean. Young children who survived their parents' "disappearance" were placed in the homes of

military officers and their civilian colleagues. Families were denied information about relatives who had disappeared. The disappeared included prominent labor leaders, journalists, trade unionists, intellectuals, and ordinary citizens who came under military suspicion.

Although CONADEP issued its report in 1984, it was not until 1995 that some military officers admitted their roles in the Dirty War. President Raul Alfonsín (b. 1927– ), who headed the first Argentine civilian administration after the 1982 MALVINAS/FALKLANDS WAR, successfully prosecuted several of the military officers, including Videla, who had directed the death squads or implemented the orders of those who did. Alfonsín's successor, CARLOS SAÚL MENEM, pardoned Videla and other officers on December 29, 1990. Many Argentines condemned this action as a violation of the nation's constitution, which does not permit the president to pardon persons already convicted of a crime. Others viewed the pardon as a pragmatic decision to heal national wounds and prevent possible future uprisings over the Dirty War resulting from the revisitation of past events during trial hearings. Videla did not escape prison, however. In 1998, he received a prison sentence for fraudulently arranging the adoption of children whose parents had disappeared by military families. And, in 2005, President NÉSTOR KIRCHNER approved the congressional repeal of Menem's pardon.

New laws also led to charges against Argentine cardinal Jorge Bergoglio (b. 1936– ) for conspiring with the 1976 junta in the disappearance of two Jesuit priests and in the 2006 charges against Ford Motor and Daimler-Chrysler company officials of cooperating with military officials in the disappearance of workers.

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**Dominica** The largest and northernmost of the Windward Islands, Dominica occupies 290 square miles (751 km<sup>2</sup>) of territory. The oblong-shaped island lies between Guadeloupe to the north and Martinique to the south. Geographically, Dominica is unlike its neighbors. The country has one of the most rugged landscapes in the Caribbean and is mostly covered by rain forest. The capital, Roseau, is located on the southwestern coast. The nation became independent from the United Kingdom in 1978.

Virtually all of Dominica's 72,000 inhabitants are descended from African slaves. Dominica, however, is



Dominica prime minister Eugenia Charles meets with U.S. president Ronald Reagan (to her left) and his cabinet on October 25, 1983, the eve of the U.S.-sponsored invasion of Grenada. (Courtesy of the Ronald Reagan Presidential Library)

the only eastern Caribbean nation that still has an Indian population. About 3,000 Caribs live on the eastern coast in eight villages. Since Dominica was initially colonized by the French and lies between two FRENCH OVERSEAS POSSESSIONS, about 80 percent of the island's people speak a French-based Creole. Nevertheless, English is the official language. Also as a result of the island's colonial past, about 80 percent of the people are Roman Catholic.

Following the 1783 Treaty of Paris, the British took possession of Dominica. The French unsuccessfully tried to regain the island in 1795 and 1805. In 1831, the British granted political rights to free blacks. Following the abolition of slavery in 1838, Dominica became the only British colony in the Caribbean to have a legislature controlled by blacks. White planters, however, who felt threatened by black rule, convinced the British government in 1865 to replace the elected assembly with one composed of half elected and half appointed legislators. Black political power was temporarily stymied. Demand for black political rights dramatically increased after World War I and were finally restored during the Great Depression. From 1958 to 1962, Dominica was part of the ill-fated WEST INDIES FEDERATION. In 1961, the Dominica Labour Party (DLP), led by Edward Oliver LeBlanc (b. 1923–d. 2004), came to power. LeBlanc served as chief minister from 1961 to 1967 and premier from 1967 to 1974, when he unexpectedly resigned. LeBlanc was replaced by Patrick John (b. 1938– ), who became the first prime minister following independence from the United Kingdom on November 3, 1978. By 1979, political discontent forced John to resign. MARY EUGENIA CHARLES led the Dominica Freedom Party (DFP) to victory in 1980. John, supported by white supremacist groups, unsuccessfully tried to overthrow the government in 1981. Edison James (b. 1943– ) led the Dominica United Workers Party (DUWP) to victory in 1995, but the DLP returned to power in 2000. After two DLP prime ministers died in office, Roosevelt Skerrit (b. 1972– ) became prime minister in 2004. Skerrit has joined Venezuelan president HUGO RAFAEL CHÁVEZ FRÍAS's Bolivarian Alternative for the Americas.

Unlike other former British colonies in the region, Dominica became a republic following independence. The president is the ceremonial head of state, while executive power lies with the cabinet, led by the prime minister. The unicameral House of Assembly consists of 21 directly elected members and nine appointed members who may be chosen either by the president or the other members of the assembly.

Economic development has been complicated by the severe impact of hurricanes. During the 1990s, problems in the banana industry, the main agricultural crop, weakened the ECONOMY. The lack of a large international airport and sandy beaches has limited the development of the tourism industry. The island's vast rain forests, however, hold out the potential for the development of ecotourism.

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**Dominican-Haitian relations** Foreign relations between the DOMINICAN REPUBLIC and HAITI have been plagued with conflict for almost two centuries. This tension has been exacerbated by geographic proximity, cultural differences, and authoritarian political regimes.

Tense relations have frequently erupted into violence since 1821, when the Dominican Republic first declared its independence. At the root of Dominican-Haitian conflict is the vast cultural divide between people who share a small Caribbean island. These cultural differences stem from the colonial period when France established a colony on the western third of the island of Hispaniola, and Spain established a colony on the eastern two-thirds of the island. The French created a lucrative sugar-producing colony based on slavery, whereas the Spanish, who found virtually no gold on the island, allowed their colony to languish as a peripheral component of the Spanish Empire in the New World. By the end of the 18th century, the French colony was primarily populated by black African slaves who spoke Kreyòl, a language derived from West African languages, and practiced Vodou, a religion influenced by West African spirituality. The people living in the Spanish colony, however, who represented less than one-fifth of the French colony's population, were primarily white and mulatto Spanish-speaking Roman Catholics who emphasized their European cultural traditions.

In 1795, following the Treaty of Basel, Spain surrendered its portion of the island to France. Nevertheless, Toussaint Louverture (b. 1743–d. 1803), a black leader of the Haitian Revolution, convinced that the island should be united under one government, invaded the eastern portion of the island in 1801. He was forced to withdraw in 1802 to return to Haiti to fight troops sent by Napoléon Bonaparte to subdue the revolution. Following Haiti's declaration of independence in 1804, Haitian leaders contended that the continued French presence in the eastern part of the island was a threat to Haitian independence and unsuccessfully invaded the eastern part of the island in 1805. Spanish settlers were able to expel the French in 1808 and restore Spanish colonial rule, only to declare independence on November 30, 1821. Within weeks, Haitian troops invaded and militarily occupied the Dominican Republic from 1822 to 1844. To change the racial composition in the Dominican Republic, the Haitians encouraged

the immigration of thousands of freed blacks from the United States to the eastern section of the island. Much Dominican hostility towards Haitians stems from this period. Following the second Dominican declaration of independence in 1844, Haiti made frequent attempts to reconquer the Dominican Republic. Haitian leader Faustin Soulouque made numerous attempts to reunify the island. Fear of Haitian military power convinced many political leaders in the Dominican Republic that the solution to the Haitian threat was annexation to a more powerful power, such as France, Great Britain, Spain, or the United States. This fear led to reannexation to Spain (1861–65) and an attempt to annex the Dominican Republic to the United States, which was rejected by the U.S. Senate in 1870.

During the 1870s, the Dominicans began to develop a liberal export-led economy based on sugar production. Haitians were recruited to work on the Dominican sugar plantations, many of which became American-owned during the U.S. military occupation of the Dominican Republic (1916–24). The presence of large numbers of Haitians in the Dominican Republic was viewed as a necessary evil, since most Dominicans refused to cut sugarcane. During the Great Depression, however, the need for Haitian cane cutters diminished, and the Dominican government, led by RAFAEL TRUJILLO, unleashed a wave of terror against Haitians in the western sector of the Dominican Republic. Fearful of the “Haitianization” of the Dominican Republic, Trujillo, using the excuse that the Haitians were engaging in illicit activities, orchestrated the death by machete of more than 15,000 Haitians.

Following the overthrow of the Trujillo dictatorship in 1961, relations with Haiti did not improve. Dominican president JUAN BOSCH, who only ruled for seven months in 1963, threatened to invade Haiti and overthrow brutal Haitian dictator FRANÇOIS DUVALIER. Haitian cane cutters continued to play an important role in the Dominican economy, although during the 1970s, Dominican president JOAQUÍN BALAGUER repeatedly warned that the Haitian presence in the Dominican Republic threatened Dominican national identity. Notwithstanding the decline of the Dominican sugar industry during the 1980s, Haitians continued to seek employment in the Dominican Republic. Following the overthrow of the Duvalier dictatorship in 1986, frequent political and economic chaos in Haiti convinced the Dominican government to close the border between the two nations. During the first decade of the 21st century, massive Haitian MIGRATION has resulted in the presence of more than 500,000 Haitians in the Dominican Republic. Accusations by human rights agencies that Haitians in the Dominican Republic are mistreated have increased tension between the two nations.

See also DOMINICAN REPUBLIC (Vol. III); HAITI (Vol. III); HAITIAN OCCUPATION OF SANTO DOMINGO (Vol. III); HISPANIOLA (Vols. I, II); SOULOUQUE, FAUSTIN (Vol. III).

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**Dominican Republic** Occupying the eastern two-thirds of the island of Hispaniola, the Dominican Republic shares the island with HAITI. Culturally different, the two nations have experienced tense relations for almost two centuries (see DOMINICAN-HAITIAN RELATIONS).

The Dominican Republic occupies 18,810 square miles (48,718 km<sup>2</sup>) of territory, making it the second largest nation in the Caribbean after CUBA. The nation’s capital and largest city, SANTO DOMINGO, lies on the southern shore. The Caribbean’s highest peak, Pico Duarte, and the largest lake, Lago Enriquillo, are located in the Dominican Republic. The Dominican Republic’s population of 9.4 million people, which includes more than 500,000 Haitians, is 75 percent mulatto, 15 percent white, and 10 percent black. Although more than 90 percent of the Dominican population has some degree of African ancestry, most Dominicans identify themselves as mixed-race or mulatto to distinguish themselves from the black population in neighboring Haiti. Dominicans use a variety of terms to indicate variations in skin tones, which are reinforced on their national identity cards. A substantial number of Dominicans have migrated to other lands in search of economic prosperity. Currently, more than 1 million Dominicans reside either legally or illegally in the United States, primarily in the greater New York City region.

### A TRADITION OF INSTABILITY

Whereas the entire island of Hispaniola was initially a Spanish colony, in 1795, Spain ceded the western third to France. In 1821, Spanish-speaking colonists on the eastern side of the island declared themselves independent but were conquered by neighboring Haiti the following year and did not regain independence until 1844. After a brief period of economic and political pandemonium, the Dominican government voluntarily petitioned to return to Spanish colonial status in 1861. Realizing that Spanish colonial status was not the panacea for their economic and political woes, Dominican elites proclaimed independence in 1865. Although the Dominican Republic, pursuing a liberal economy based on exports of raw materials to Europe and the United States, experienced a brief period of economic and political stability during the last two decades of the 19th century, political and economic chaos had returned to the nation by 1900. In 1905, the United States implemented a U.S. CUSTOMS

RECEIVERSHIP, which placed the collection of Dominican customs revenues in the hands of U.S. government officials, who dispersed money to the Dominican government while simultaneously paying the Dominican foreign debt. Ongoing economic and political chaos, which directly threatened U.S. investment in the sugar industry, the threat of European intervention, and the desire to protect access routes to the Panama Canal, convinced the United States to militarily occupy the Dominican Republic from 1916 to 1924.

The groundwork for U.S. military intervention was laid on May 13, 1916, when the United States sent 700 U.S. Marines to the country to restore order and stability. On August 16, 1916, the U.S. government suspended payments to the Dominican government after President Francisco Henríquez y Carvajal (b. 1859–d. 1935) refused to accept a U.S. government official as his financial adviser. The cessation of funds caused further economic chaos and resulted in U.S. president Woodrow Wilson sending more marines to the country in November. The U.S. military government attempted to implement fundamental changes in the nation's political, economic, and social life in the hope of creating a stable neighbor that would safeguard U.S. strategic and economic interests. The marines disarmed the Dominican population and created a theoretically apolitical National Guard. The U.S. military government also facilitated the expansion of U.S. investment in the sugar industry. In 1922, U.S. secretary of state Charles Evans Hughes and former Dominican minister of finance Francisco J. Peynado (b. 1867–d. 1933) announced the Hughes-Peynado Plan, which paved the way for presidential elections in the country and the withdrawal of U.S. Marines. In 1924, after Dominicans ratified the Dominican-American Agreement, which guaranteed the U.S. Customs receivership until the foreign debt was paid to American banks, U.S. Marines left the Dominican Republic.

### THE TRUJILLO DICTATORSHIP

In 1930, RAFAEL TRUJILLO, the leader of the U.S.-created National Guard, overthrew the government and established an authoritarian dictatorship that lasted for more than three decades. Ruthlessly suppressing all opposition to his regime, during the Great Depression, Trujillo was faced with governing a poverty-stricken nation with an empty treasury, a huge foreign debt, and a capital city destroyed by a hurricane. Within two decades, Trujillo paid off the nation's foreign debts, developed a national infrastructure, and laid the groundwork for economic development by promoting industrialization. Sugar exports accounted for the majority of government revenue. In the process, he accumulated a personal fortune of almost \$1 billion. The cost of fiscal solvency during the era of Trujillo was the loss of personal freedom for the Dominican people: Trujillo's seven intelligence agencies enabled the dictator to establish one of Latin America's most brutal authoritarian dictatorships. One of Trujillo's

most notorious acts was the massacre of 12,000 Haitians in the northern border region in 1937. To deflect criticism of his regime, Trujillo offered sanctuary to 100,000 Jewish refugees from Europe.

By the end of the 1950s, Trujillo had lost the support of the nation's elites, the CATHOLIC CHURCH, and the U.S. government. In 1956, Trujillo authorized the kidnapping of Jesús Galíndez in New York City. An outspoken critic of the Trujillo regime, Galíndez had just completed his doctoral defense at Columbia University. The doomed Galíndez was flown back to the Dominican Republic on a small plane piloted by American Gerald Lester Murphy. After Murphy became vocal about his participation in the abduction of Galíndez, Trujillo's henchmen concocted an elaborate scheme to kill him and cover up his death. They claimed that Dominican pilot Octavio de la Maza had killed Murphy, and then himself, after Murphy refused to end their homosexual love affair. U.S. authorities, as well as de la Maza's wife and Murphy's girlfriend, were unconvinced. Trujillo's failed attempt to assassinate Venezuelan president RÓMULO ERNESTO BETANCOURT BELLO in 1960 further convinced the United States that continued support of the Trujillo dictatorship could damage U.S. hegemony in the Caribbean. The murder of three elite sisters—Minerva, Patria, and Maria Teresa Mirabal—on November 25, 1960, convinced elite sectors of the Dominican population to increase anti-Trujillo activities. On the evening of May 30, 1961, Trujillo was assassinated by a group of conspirators made up of both former accomplices and victims of the dictatorship. The conspirators, armed with weapons provided by the United States, assassinated Trujillo as he was preparing to visit one of his numerous mistresses. Attempts by Trujillo's son RAMFIS TRUJILLO to continue the dictatorship were futile, and the entire Trujillo family had fled the island by the end of 1961.

### THE BALAGUER YEARS

In December 1962, the Dominican people began their first experiment in democratic government. In U.S.-supervised elections, JUAN BOSCH, who had lived in exile for most of the Trujillo dictatorship, was elected president with 60 percent of the vote. Initially hailed by John F. Kennedy's administration as a potential showcase for democracy, the Bosch administration soon lost the support of the Dominican military and the United States. Even U.S. ambassador John Bartlow Martin, who initially believed that the democratic experiment could work, became disillusioned with Bosch. U.S. officials were disturbed by Bosch's rhetoric, which they interpreted as being soft on communism. When Bosch attempted to limit the power of the Dominican military, General Elías Wessin y Wessin (b. 1923–d. 2009) orchestrated a military coup that removed Bosch from office on September 25, 1963. Bosch left the country, and the United States severed diplomatic relations and suspended all economic and military assistance.

In December 1963, President Lyndon B. Johnson recognized the governing junta led by Donald Reid Cabral (b. 1923–d. 2006) and appointed W. Tapley Bennett Jr. to serve as U.S. ambassador. Reid Cabral's government, which implemented austerity measures, received extensive support from the U.S. government. In April 1965, a group of pro-Bosch military officers known as Constitutionalists and led by Francisco Caamaño Deñó (b. 1932–d. 1973) staged a revolt to return the exiled Bosch to power. Loyalists within the army, who were supported by the nation's elites, instead rallied around General Antonio Imbert (b. 1920– ), one of Trujillo's assassins. Civilians stole weapons from the National Police and began to kill police officers. The counterrevolution, launched on April 24, 1965, which took Ambassador Bennett by surprise, resulted in a civil war.

On April 28, the United States sent 400 marines to restore order. Johnson, under the initial pretense of humanitarian concerns (the protection of U.S. citizens), eventually sent 23,000 U.S. troops, led by General Bruce Palmer, to restore order and stability. Although the ORGANIZATION OF AMERICAN STATES quickly sanctioned the intervention, code-named OPERATION POWER PACK, this was the first overt use of U.S. military forces in Latin America since marines were withdrawn from Haiti in 1934. Johnson rationalized his decision to intervene as an attempt to prevent the spread of communism in the Western Hemisphere. His decision, however, was also based on domestic political concerns as well as manipulation by the Dominican elite of U.S. government officials. On August 31, 1966, the United States implemented the Act of Dominican Reconciliation with prominent Constitutionalists and Loyalists. Héctor García Godoy (b. 1921–d. 1970), who had been Bosch's foreign minister and was acceptable to both sides in the conflict, was chosen as president of a provisional government until elections could be held. Both Wessin y Wessin and Caamaño Deñó were sent into exile.

U.S.-supervised elections in 1966 were won by JOAQUÍN BALAGUER, who closely aligned the Dominican Republic politically and economically with the United States. All subsequent Dominican governments have pursued a foreign policy closely tied to that of the United States. In return for his pro-U.S. foreign policy, Balaguer was rewarded with generous sugar quotas and increased economic aid. To alleviate economic and social pressures on Balaguer's government, the United States relaxed its immigration policy. The result was a massive influx of Dominicans to the United States. Remittances from the more than 1 million Dominicans living in the United States contributed substantially to the Dominican economy. During Balaguer's administration, the Dominican Republic experienced the most spectacular growth of any Latin American nation during the 1970s. The nation's economic boom was made possible by political stability and a revitalized sugar industry.

High inflation and unemployment undermined Balaguer's hold on power during his third term. In 1978, he lost the presidential elections to the Dominican Revolutionary Party (Partido Revolucionario Dominicano, or PRD). Although the following administration of Antonio Guzmán (b. 1911–d. 1982) implemented numerous health and EDUCATION projects, by 1980, the economy had fallen into a recession. Plagued by the rising cost of oil imports, a sharp decline in profits from sugar exports, and accusations that his daughter Sonia was involved in corrupt activities, Guzmán decided not to run for reelection in 1982. PRD candidate Salvador Jorge Blanco (b. 1926– ) won the 1982 elections. The day before leaving office, Guzmán committed suicide. Jorge Blanco's administration experienced a tremendous loss of popularity and legitimacy when it implemented International Monetary Fund austerity measures in May 1984. A series of violent riots broke out, which led to the death of dozens of Dominican citizens. Given the poor performance of the PRD governments, Balaguer returned to office in 1986. Balaguer won subsequent elections in 1990 and 1994. Acknowledging that there were voting irregularities in the 1994 election, Balaguer agreed to step down from the presidency in 1996 and hold new presidential elections.

#### PROBLEMS OF MODERNITY

The 1996 elections pitted PRD candidate José Francisco Peña Gómez (b. 1937–d. 1998) against Bosch protégée Leonel Fernández (b. 1953– ), who represented the Dominican Liberation Party (Partido de Liberación Dominicana, or PLD). Fernández, a young lawyer who had grown up in New York City, won and initiated a series of reforms designed to modernize the political economy and infrastructure. Sugar exports no longer represented a substantial component of Dominican revenue; instead, tourism, MINING (especially nickel), and remittances from Dominicans living abroad, primarily in the United States, accounted for the majority of Dominican revenue. Attempts were made to convert the sugar-growing lands to the production of other agricultural crops, such as pineapples, for export. Fernández was barred by the constitution from running for reelection in 2000. PRD candidate Hipólito Mejía (b. 1941– ) won the 2000 presidential elections. Mejía's administration was characterized by excessive corruption, rising inflation, and a greatly devaluated national currency.

Fernández was elected to a second term of office in the presidential election held on May 16, 2004. With 59 percent of the vote, he had a clear mandate to rule. Fernández's victory was due to both his charismatic appeal and the virtual collapse of the Dominican economy, which can be attributed to high oil prices, excessive borrowing initiated by Mejía, and the failure of three of the Dominican Republic's largest banks. His greatest challenge was to resolve the nation's chronic energy problems. As the Dominican constitution was amended during the Mejía administration to allow sitting presidents

to run for reelection, Fernández, in a highly controversial move, sought the PLD's presidential nomination in May 2007 and won a third term in the May 2008 presidential elections. On March 1, 2007, the DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT (DR-CAFTA) went into effect under Fernández's mandate. The goal of DR-CAFTA is the creation of a free trade zone similar to the NORTH AMERICAN FREE TRADE AGREEMENT. For many, it is seen as a step toward the FREE TRADE AREA OF THE AMERICAS, an agreement that would involve all nations in the Western Hemisphere except CUBA and VENEZUELA.

Merengue, a lively, fast-paced dance hall music, was declared the national music of the Dominican Republic during the Trujillo era. Dominican merengue singers Juan Luis Guerra, Fernando Villalona, and Milly Quesada are internationally recognized and popular throughout the Western Hemisphere. Unlike most Latin American nations, baseball, not soccer, is the most popular sport in the Dominican Republic (see SPORTS). Dominican Major League Baseball players in the United States include Sammy Sosa, Pedro Martinez, and David Ortiz. After the United States, the Dominican Republic has the second highest number of baseball players in Major League Baseball. Whereas the Dominican Republic has a well-developed communication network and entertainment industry, Dominicans are especially fond of *telenovelas* (soap operas) imported from MEXICO, COLOMBIA, Venezuela, and BRAZIL.

See also DOMINICAN REPUBLIC (Vol. III).

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**Dominican Republic–Central America Free Trade Agreement (DR-CAFTA)** Signed on December 17, 2003, in the main hall of the ORGANIZATION OF AMERICAN STATES (OAS) in Washington, D.C., the Central American Free Trade Agreement (CAFTA) brought together four isthmian republics—EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA—under a free trade agreement with the United States. Subsequent negotiations incorporated the DOMINICAN REPUBLIC in the pact on October 4, 2004. Initially fearing the loss

of sovereignty over many of its state-owned commercial operations, the government of COSTA RICA later joined after holding a public referendum on the treaty in 2007. All six countries had a sense of urgency, as the CARIBBEAN BASIN INITIATIVE was set to expire on December 31, 2008.

Modeled after the NORTH AMERICAN FREE TRADE AGREEMENT, the Dominican Republic–Central America Free Trade Agreement (DR-CAFTA) provided for the immediate elimination of Central American and Dominican Republic tariffs on about 80 percent of U.S. exports to the region and for the elimination of tariffs on all industrial goods over a 10-year period and most agricultural goods, services, and investment over an 18-year period. The treaty also provided for parallel intellectual property rights laws in print, audio-visual, and medical drugs and for greater commercial transparency in order to end corrupt practices. The treaty called for the privatization of government-owned telecommunication services including Internet and wireless services so that private companies could compete for contracts. It also called for governments to withdraw from other government-sponsored social services, ranging from subsidized TRANSPORTATION to social security. Effectively, the agreement exemplified the neoliberal economic policies espoused by George W. Bush's administration.

The origins of the DR-CAFTA treaty can be traced to the collapse of the September 2003 World Trade Organization meeting in Cancún, MEXICO, when a “Group of 21” developing nations walked out in protest over U.S. and European agricultural subsidies, and to the November 21, 2003, ministerial meeting in Miami, Florida, at which the Bush administration faced strong opposition, led by BRAZIL and VENEZUELA, to a FREE TRADE AREA OF THE AMERICAS. In March 2004, the Bush administration pursued a new strategy to reach free trade agreements with single nations or with clusters of nations. The DR-CAFTA pact falls into the latter category.

Legislative ratification of the agreement faced difficult obstacles in each country, including the United States. For example U.S. textile workers, particularly in North and South Carolina and Alabama, feared the loss of their jobs. Central American workers in the same industries feared likewise, because henceforth their industries would have to compete against those in low-wage Asian countries, particularly China. U.S. sugarcane and beet sugar growers foresaw the importation of unprotected raw sugar from the signatory countries. The undercurrent to these protests were allegations of U.S. imperialism from think tanks and academics but also by Central American farmers and small businessmen who envisioned the loss of their livelihood to U.S. commercial giants. While administrative cajoling resulted in narrow congressional approval of the DR-CAFTA treaty on July 27, 2005, the Central American governments confronted large-scale and sometimes violent demonstrations against the treaty by workers, small farmers, and businessmen.



In Costa Rica, the public debate over the DR-CAFTA resulted in a national referendum on October 7, 2007, where it won approval with only 51.6 percent of the popular vote. Only the Dominican Republic escaped large public demonstrations.

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**Douglas, Denzil** (b. 1953– ) *prime minister of St. Christopher and Nevis* Born on January 14, 1953, in the village of St. Paul's on the island of St. Christopher (St. Kitts), Denzil Douglas earned a B.S. in surgery before earning a doctorate in medicine from the University of the West Indies in TRINIDAD AND TOBAGO in 1984. After a two-year internship in Trinidad and Tobago, Douglas returned to St. Christopher and established a private medical practice. In 1987, Douglas was elected deputy chairman of the Labour Party. In 1989, he won a seat in the National Assembly and became the leader of the Labour Party. Douglas restructured and reinvigorated the party, which facilitated its victory in the 1995 elections in SAINT CHRISTOPHER AND NEVIS. He was subsequently reelected to office in 2000 and 2004.

During Douglas's tenure as prime minister, the secession movement on Nevis gained momentum. According to the nation's constitution, Nevis can secede from the Federation of St. Christopher and Nevis if two-thirds of the Nevis Island Assembly, composed of five representatives, and two-thirds of the voters agree. In 1996, the autonomous government of Nevis, led by Premier Vance Amory (b. 1949– ) of the Concerned Citizens' Movement (CCM), initiated steps to withdraw Nevis from the federation. A referendum in 1998, however, failed to achieve the required two-thirds majority for secession. While against the secession of Nevis, Douglas acknowledges the right of Nevisians to determine their future. In 2006, Joseph Parry's Nevis Reformation Party (NRP) won the local elections and became premier of Nevis, essentially ending the push for independence in Nevis.

Douglas's government has an excellent human rights record. As the sugar industry has all but disappeared, Douglas has pursued economic diversification programs and supports the expansion of the tourism industry. Offshore finance and service industries (numbering more than 17,000) have become an important source of revenue for the government (see OFFSHORE BANKING).

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**DR-CAFTA** See DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT.

**drugs** In Latin America, drugs have been used as stimulants and in religious ceremonies since at least 3000 B.C.E. During the colonial period, Spanish administrators allowed Amerindian workers in the Andes Mountains to chew coca leaves as a stimulant to work. Until the late 19th century, cocaine in the United States was dispensed by pharmacists and used in the manufacture of the popular soft drink Coca-Cola. At that time, medical and scientific research in Latin America and the United States demonstrated that drugs, particularly cocaine, could become habit forming and contribute to erratic behavior and ill health. Since the beginning of the 20th century, Latin America and the United States have engaged in a struggle over the growing and the trafficking of now-illegal drugs. The struggle at first focused on cocaine produced in BOLIVIA's Chaparé region and PERU's Huallaga Valley, but has now extended to ECUADOR, COLOMBIA and MEXICO.

By the early 20th century, drugs had become a transnational issue. Cocaine from Latin America and South Asia, along with opium from China, made their way to the United States and Europe. The first effort to control the traffic was the 1912 Hague Opium Convention, which addressed international trade in narcotics, but the producer states refused to cooperate with its implementation. The United States then acted on its own and also determined to battle drug use from within. By 1914, 49 states had regulations on the use of cocaine, and 26 states had laws prohibiting the use of opium, morphine, and cocaine. The federal government went further with the December 17, 1914, Harrison Narcotic Act, which required all persons growing, processing, and distributing any drugs, or their derivatives, to register with federal tax collectors and to pay a series of heavy taxes. While doctors were free to prescribe addictive drugs for medical purposes, the law was interpreted to mean that they could not do so to addicts, as drug addiction was not considered an illness at that time. These efforts sought to curtail domestic use of illegal drugs, which in turn would reduce demand for production in foreign countries, including Latin America. These laws did not have the effect the authorities had anticipated, however.

World War I curtailed the importation into the United States of Asian drugs, but it also encouraged increased production of cocaine and marijuana in Mexico

and accelerated production in Bolivia and Peru. The failure to limit consumption at home led to a new U.S. policy: eliminate drugs at the source. The Federal Bureau of Narcotics (FBN) pursued this policy when it was established in June 14, 1930. In the pursuit of eradicating cocaine production in Mexico, Peru, and HONDURAS, U.S. officials now had to confront corrupt government officials who protected the growing and transportation operations. The U.S. policy of going to the “source” of illicit drugs contributed to expanding operations throughout Latin America. World War II added a new twist to the problem, as U.S. MILITARY personnel, particularly those fighting in Southeast Asia, became addicted to drugs, in particular cocaine. The use of illegal drugs in the United States reached epidemic proportions in the counterculture movements of the 1960s and 1970s, a problem exacerbated by ground troops returning from the Vietnam War, during which drugs and particularly cocaine were available on the battlefield. By the 1960s, drug cultivation in Latin America had become a significant factor in local economies. Rural farmers earned more money from growing marijuana and coca than they did from traditional fruits and vegetables. In devising policies to deal with drug production, the changed economic status of rural farmers needed to be addressed.

In the 1970s, the United States focused on drug interdiction at its borders and providing financial support for rural farmers in the Andean regions to grow alternative crops that would earn them sufficient income to abandon the cultivation of coca and marijuana. Neither tactic appeared effective. Drug use in the United States continued to rise. In response, Ronald Reagan’s and George H. W. Bush’s administrations declared a “war on drugs” that included the eradication of drug crops at the source, expanded interdiction beyond the U.S. border, and doled out harsh treatment of drug users at home. The Reagan and Bush administrations spent \$65 billion on these programs. By 1992, the U.S. National Institute for Drug Abuse reported that the number of drug users had been cut in half, from 24 million in 1979 to 11.4 million, leading their supporters to claim a victory in the war on drugs. Critics, however, quickly pointed out that Latin American drugs now made their way to European countries, including Russia.

Bill Clinton’s administration initially altered emphasis from elimination at the source and drug interdiction to one of EDUCATION. Forty-one percent of the record-high \$13.5-billion antidrug budget went to education and training. Clinton’s drug czar, Lee Brown, also targeted the environment of inner-city youth in an effort to eliminate drug-related crime and drug use. Interdiction, except at the Mexican border, was deemphasized.

The “victory,” if there was one, left indelible marks on Latin America. The pursuit of drug growers, processors, and traffickers enhanced the power of the MILITARY, which expanded its influence in government policy, particularly in Bolivia, Colombia, and Peru. Alternative

crop programs failed, as small farmers continued to cultivate coca and marijuana. These societies also became increasingly violent, with thousands of innocent civilians losing their lives. As drug crops and processing centers were destroyed in Colombia and Peru, narco traffickers moved their operations to other countries, including Ecuador and Mexico (see DRUG TRADE IN MEXICO). As the U.S. sealed its border more tightly, narco traffickers delivered their product via small aircraft through BELIZE and GUATEMALA, or by speed craft, jumping from island to island up the Caribbean island chain to Florida.

By the end of the 1990s, drug use in the United States had again increased. At the end of his administration in 2000, Clinton pushed through Congress a \$1.3-billion assistance package to battle drugs in Colombia, Ecuador, Aruba, and Curaçao. The preponderance of the aid package was for military assistance, including airport construction and improvement in the latter three countries. Sixty-five percent of the funding went to Colombia, where guerrilla groups worked with drug-growing farmers and narco traffickers. By 2008, Colombia had become less violent but now faced a new threat: Venezuelan president HUGO RAFAEL CHÁVEZ FRÍAS has been linked to aiding Colombian guerrillas. Also in 2008, many analysts suggested that Mexico had become the focal point for drug production and trans-shipment to the United States and that the cartels, in feuding among themselves, have increased civil violence and corruption in the country. In May 2008, U.S. president George W. Bush asked Congress to appropriate \$500 million in military aid for the Mexican army to quell the problem.

On June 28, 2008, Congress approved \$400 million for Mexico and \$65 million for Central America. The funds were part of the United States Agency for International Development (USAID) budget. No funds were dispersed before the presidential election in November 2008, and when the Obama administration approved the payment of \$65 million to Mexico, human rights groups and Senator Patrick Leahy (D.-Vt.) resisted the disbursement; no funds had been paid by end of 2009.

See also COCA (Vols. I, II, III); DRUGS (Vols. II, III).

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**drug trade in Mexico** The trafficking of illegal DRUGS has been a major source of contention in U.S.-MEXICAN RELATIONS in the 20th and early 21st centuries. A drug trade between MEXICO and the United States has

always existed, but developments in the past hundred or so years have drawn increasing attention to the issue.

In the early 20th century, the U.S. government passed the Harrison Narcotics Act, which made the sale and distribution of certain drugs without a license a criminal offense. Additional restrictions went into effect in the 1920s and 1930s and attempts to regulate the flow of controlled substances resulted in an increase in the flow of illegal drugs from Mexico into the United States. By the 1960s, recreational drug use in the United States was fueling an enormous demand for illicit substances, and the U.S. government created several agencies devoted to enforcing drug laws. Those agencies eventually merged to become the Drug Enforcement Administration in 1973.

U.S. policies aimed at stemming the tide of illegal drugs have relied on eradication and interception. Operation Intercept in 1969 shut down the U.S.-Mexican border for several weeks as drug enforcement officials inspected all crossing traffic. Operation Condor in 1975 used chemical defoliants to wipe out marijuana and opium crops in Mexico. Both of these policies were controversial and failed to bring the desired results, as the flow of drugs continued to grow and powerful drug cartels emerged throughout Mexico. During periods of economic crisis, in particular, drug cultivation has offered a lucrative financial opportunity to many farmers and others who would otherwise suffer the effects of high inflation and currency devaluation.

Mexico's drug trade is characterized by growing violence and corruption. Many government officials and police officers accept bribes from cartel leaders, making law enforcement efforts largely ineffective. Drug lords have grown increasingly violent, kidnapping and torturing government agents, politicians, journalists, and even high-profile entertainers to demonstrate that no one is safe from their reach. A drug culture has flourished, particularly in the border regions. Narcotics traffickers are often the subject of local legends, as well as folk songs known as *narcocorridos*.

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**Duarte, José Napoleón** (b. 1925–d. 1990) *president of El Salvador* Born into an upper-middle-class family, José Napoleón Duarte joined the student groups in 1944 that pushed for the ouster of then-President MAXIMILIANO HERNÁNDEZ MARTÍNEZ. Following his 1948 graduation with an engineering degree from the University of Notre

Dame, Duarte returned to EL SALVADOR to work in his father-in-law's construction business and as a part-time university lecturer.

Duarte reignited his political activism in 1960 when he founded the Christian Democratic Party (Partido Democrática Cristiano, or PDC). During the 1960s, Christian Democratic Parties were seen as a viable alternative to the extremist political groups on both the right and the left across Latin America. As elsewhere, the Christian Democrats in El Salvador advocated socioeconomic betterment for the poor within the nation's constitutional system. At that time, El Salvador's landowning elite and MILITARY stood opposed to any such change. Drawing his support from the urban middle and lower classes, Duarte won successive two-year terms from 1964 to 1970 as mayor of San Salvador. He did not seek another term in 1970 in order to prepare for the 1972 presidential election.

In 1972, Duarte became the presidential candidate of the United Opposition Front (Unión Nacional Opositora, or UNO), a PDC-led coalition that ran against Arturo Armando Molina (b. 1922– ) of the National Conciliation Party (Partido de Conciliación Nacional, or PCN), and a military-based party on the extreme right. In disputed results, Duarte allegedly lost by 10,000 votes; when he charged electoral fraud, he was arrested, tortured, and then deported to VENEZUELA, where he remained until 1979.

Duarte returned to El Salvador following a coup d'état on October 15, 1979, that ousted the 5-month-old repressive regime of General Carlos Humberto Romero (b. 1924– ). Moderate military officers, allegedly supported by the U.S. Central Intelligence Agency (CIA), engineered the coup. The 1979 coup also ignited El Salvador's simmering guerrilla groups, and the following year saw the beginning of a 12-year civil war.

Duarte joined the junta in March 1980 and became its provisional president in December, justifying his decision on the junta's plans to nationalize the Salvadoran banking system and implement agrarian reform. When ousted from office in December 1982 by right-wing politicians who controlled the newly elected constitutional assembly, Duarte prepared for the 1984 presidential contest. His chief opponent was Roberto D'Aubuisson (b. 1944–d. 1992), candidate of the right-wing Nationalist Republican Alliance (Alianza Republicana Nacionalista, or ARENA), which represented the conservative landowning elite and was supported by the military. D'Aubuisson had ordered the 1980 execution of Archbishop Oscar Romero (b. 1919–d. 1980). The differences between Duarte and D'Aubuisson represented the dichotomy that characterized Salvadoran society and was playing out with increased violence between the guerrilla groups and the military and its death squads.

Following a violent and bitter campaign, Duarte won the May 8, 1984, runoff and internationally supervised election with 57 percent of the popular vote. Duarte was

El Salvador's first elected civilian president in 51 years. Through the CIA, the United States pumped uncounted millions into Duarte's campaign. U.S. president Ronald Reagan's administration saw Duarte and the PDC as the only alternative to a guerrilla victory, led by the Marxist group, the FARABUNDO MARTÍ NATIONAL LIBERATION FRONT (Frente Farabundo Martí de Liberación Nacional, or FMLN).

Duarte's five-year presidency achieved little. Despite continued economic assistance from the United States, his efforts at economic reform and land distribution were resisted by ARENA and the traditional elite families it represented. He also had to deal with a war-torn national economy that only worsened during his presidency. While he sought to negotiate with the guerrillas, Duarte was challenged by a U.S.-supplied military that was determined to crush the FMLN. He was further weakened in 1985 when guerrilla bandits kidnapped his daughter, freeing her only after Duarte released some 100 political prisoners and provided for their safe travel out of El Salvador.

The constitution forbade Duarte from seeking immediate reelection, thus his political career ended in 1988. That same year, he was diagnosed with cancer, and two years later, on February 23, 1990, he succumbed to the disease.

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**Duarte Frutos, Óscar Nicanor** (b. 1956– ) *president of Paraguay* Born in Coronel Oviedo, PARAGUAY, Óscar Nicanor Duarte Frutos became affiliated with the Colorado Party (PC) at age 14, while in high school. He earned a bachelor's degree in 1974 and a law degree in 1984 from the Catholic University and, in 1989, a doctorate from the National University in Asunción. He served as minister of education and culture in the administration of JUAN CARLOS WASMOSY (b. 1938– ). As a result of a political controversy, Duarte resigned from the Colorado Party in February 1997 to join the Colorado Reconciliation Movement (MRC). In January 2001, he rejoined the ruling Colorado Party and stood for the presidency as its candidate in the April 27, 2003, election, which he won with 37.1 percent of the popular vote. When he took office on August 15, 2003, he became the 11th consecutive PC president. An opponent of free TRADE, Duarte advocated a greater government role in the ECONOMY and in addressing social problems.

Three days after his inauguration, the INTER-AMERICAN DEVELOPMENT BANK advanced his administration a \$23.4 billion loan to improve and expand early childhood EDUCATION, particularly in rural communities.

Duarte's "leftist" social programs and affinity with Venezuela's HUGO CHÁVEZ and Bolivia's EVO MORALES brought him strong political opposition that stalled his legislative program. Under duress, Duarte resigned the presidency on June 23, 2008, but Congress failed to convene the required quorum to validate it. After two months of political manipulation, Congress accepted Duarte's resignation on September 4, 2008. Duarte was appointed senator for life, and Jorge Céspedes succeeded him as president.

See also COLORADO PARTY, PARAGUAY (Vol. III).

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**Duvalier, François (Papa Doc)** (b. 1907–d. 1971) *dictator of Haiti* Born on April 14, 1907, in Port-au-Prince, HAITI, François Duvalier was the son of Duval Duvalier, a black justice of the peace. His mother was mentally deficient, so he was raised by his aunt. Growing up during the U.S. military occupation of Haiti (1915–34), Duvalier was outraged by the racism exhibited by American soldiers. He became a supporter of the philosophy of *noirisme* (Negritude), which held that Haitian blacks should be proud of their African ancestry and fight racial injustice. Although he was a member of a black middle-class family who practiced Roman Catholicism, Duvalier studied Vodou and actively practiced the RELIGION, eventually becoming a *houngan*, or Vodou priest. Through hard work, Duvalier earned a degree in medicine from the University of Haiti in 1934. For the next decade, he worked as a hospital physician. In 1943, during World War II, Duvalier enrolled in a U.S.-funded program to control the spread of tropical diseases in Haiti. He spent a year studying at the University of Michigan and subsequently returned to Haiti, where he achieved fame in eradicating yaws, a tropical infection of the skin, bones, and joints caused by a spirochete bacterium. Part of a worldwide eradication campaign, the number of people in the world afflicted with yaws declined from more than 50 million to virtually none by the 1950s.

In 1957, espousing the doctrine of *noirisme*, Duvalier challenged the mulatto elite's control of political and economic power in Haiti and won the country's first universal suffrage elections. Initially heralded by Haiti's black population as a democratic reformer, Duvalier instituted a brutal, corrupt authoritarian regime. His goon squad of

25,000 henchmen, the Volunteers for National Security, better known as the TONTON MACOUTES, implemented a wave of terror and crushed political opposition. Duvalier also used Vodou to terrorize, physically and psychologically, the Haitian population. He deliberately modeled his image on that of Baron Samedi, a powerful spirit of the Vodou religion who guarded the crossroads between life and death. Duvalier frequently wore a black tuxedo and dark glasses, a popular depiction of Baron Samedi representing a corpse dressed and prepared for burial in Haitian fashion. As both a medical doctor and a Vodou priest, he earned the nickname Papa Doc, a title that evoked both fear and respect.

Duvalier created the Tonton Macoutes in early 1959, after having survived a coup attempt by the Haitian military the previous year. By 1961, the Tonton Macoutes, who both created and bolstered support for the Duvalier regime, had more power than the Haitian military. After suffering a massive heart attack on May 24, 1959, which was complicated by diabetes, Duvalier lay unconscious for nine hours. During this time, it is suspected that oxygen deprivation caused neurological damage and affected his sanity. Afterward, Duvalier's actions were conditioned by paranoia and were much more brutal. In 1961, he rewrote the Haitian constitution and held elections in which he was the only candidate. In 1964, he convinced the Haitian National Assembly to declare him president for life.

Under the guise of nationalism, Duvalier expelled all foreign Roman Catholic bishops from Haiti and replaced them with black supporters. In response to Duvalier's brutality, thousands of middle- and upper-class Haitians, especially mulattoes, fled the country during the 1960s, causing a brain drain and lowering literacy levels. Duvalier's patronage of rural blacks earned him popularity, and his patronage of urban blacks resulted in the expansion of the black middle class. Notwithstanding his increased brutality, Duvalier's anticommunist rhetoric earned him military and economic assistance from the United States. Most of the economic aid, however, was diverted into the coffers of Duvalier's political supporters. Malnutrition and illiteracy became endemic in Haiti's growing urban slums. Duvalier brought an already poor nation into much worse poverty, making Haiti the poorest nation in the Western Hemisphere.

Duvalier died on April 21, 1971, in Port-au-Prince and was buried in a magnificent mausoleum. He was succeeded by his son, JEAN-CLAUDE DUVALIER. Whereas the father was called Papa Doc out of fear and respect, the son was mockingly called Baby Doc out of derision. François Duvalier's burial place was destroyed by Haitians after the overthrow of the Duvalier dictatorship in 1986.

See also VODOU (Vol. III).

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**Duvalier, Jean-Claude (Baby Doc)** (b. 1951– ) *dictator of Haiti* Born on July 3, 1951, in Port-au-Prince, HAITI, Jean-Claude Duvalier was the only son of Haitian dictator FRANÇOIS DUVALIER. Never exhibiting a strong aptitude for academics, Duvalier studied at prestigious schools in Port-au-Prince. After graduating from secondary school, he briefly studied law at the University of Haiti. Duvalier, however, demonstrated no interest in continuing his education. He was equally uninterested in Haitian politics and grudgingly assumed the presidency when his father died in 1971. Content with attending ceremonial events and living a playboy lifestyle, Duvalier left the administration of the government in the hands of his mother, Simone (b. 1913–d. 1997), and his older sister, Marie-Denise (b. 1942– ).

Whereas his father was called Papa Doc out of fear and respect, Duvalier was mockingly called Baby Doc out of derision. He possessed neither the skills of Western academia nor the ability to manipulate Vodou for his own self-serving interests, as his father had. Most Haitians, who could not believe that the new regime could be more brutal and corrupt than the previous one, were surprised. In 1980, much to the chagrin of Haiti's black population, Duvalier married Michèle Bennett (b. 1950– ), a divorced mulatto with an unsavory reputation. Following their wedding, which cost the Haitian government \$3 million, Duvalier's wife promptly took an interest in Haitian political and economic affairs. As Duvalier's mother's political power diminished, Bennett's increased. Frustrated by her husband's political ineptitude, Bennett, supported by her corrupt businessman father and his associates, squandered what little wealth Haiti possessed. Bennett engaged in monthly shopping trips to Paris and hosted lavish parties in the National Palace while the majority of Haiti's population experienced the worst poverty in the Western Hemisphere. Perhaps most onerous to Haiti's black population was the expectation that Duvalier's mulatto son would become president after Duvalier's death.

As the brutality and corruption increased, thousands of poor Haitians began to flee the nation. Attempts to reach the United States in small boats, however, were actively repelled by the U.S. Coast Guard. Duvalier and his wife seemed indifferent to the plight of Haiti's people. In 1983, following a state visit to Haiti by Pope John Paul II, the pope announced that the political and economic system in Haiti must change. In January 1986, the U.S. government actively petitioned Duvalier to abandon the Haitian presidency. Unwilling to offer Duvalier asylum, the U.S. government offered to facilitate his flight into exile. On

February 7, 1986, political turmoil and the loss of U.S. support forced Duvalier and his family to flee to France. Although initially living a luxurious lifestyle, Duvalier quickly exhausted his resources. He divorced his wife in 1990, citing immoral acts. Since his exile, Duvalier has voiced his intent to return to rule Haiti if the people there so desire. As of 2007, Duvalier lived in a small apartment in Paris with his girlfriend, Veronique Roy, the granddaughter of former Haitian president PAUL MAGLOIRE.

See also VODOU (Vol. III).

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# E

**earthquake of 1985, Mexico** On September 19, 1985, a major earthquake hit MEXICO shortly after 7:00 A.M. With the epicenter in the state of Michoacán, the temblor measured 8.1 on the Richter scale and was felt throughout much of the country. The earthquake caused considerable damage, especially in MEXICO CITY, just over 200 miles away. What occurred in the aftermath of the earthquake is often cited as one of the most shocking examples of government corruption and ineptitude in Mexico in the late 20th century.

The force of the earthquake demolished hundreds of buildings and damaged thousands more in Mexico City. Estimates reported that up to 10,000 people were killed, and as many or more were left homeless. During the cleanup and recovery phase, it became clear that many structures had not been built according to the required safety standards in Mexico City, which was both earthquake prone and built on a swampy lake bed. Many construction companies with connections to high-ranking politicians had cut corners, their owners and corrupt politicians profiting from this. The destruction was made worse by the fact that Mexico was in the midst of a major economic crisis. A massive peso devaluation in 1982 had set off a devastating recession with high rates of unemployment and rising inflation. Social services agencies did not have sufficient money to aid the many in need, and the government was unable or unwilling to provide further resources. As a result, grassroots organizations began to form to provide basic support to the needy. Political opposition groups such as the National Action Party (Partido Acción Nacional, or PAN), used the opportunity to build a local support base and in the coming decades was able to challenge the dominant Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI) for power.

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**Echeverría, Luis** (b. 1922– ) *president of Mexico* Luis Echeverría was the president of MEXICO from 1970 to 1976. During his presidency, the Mexican ECONOMY suffered a series of crises, and people began to question the leadership of the Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI), which had dominated the presidency since 1929.

Echeverría was born on January 17, 1922, in MEXICO CITY. He studied law and began a career in public service within the PRI. In 1968, Echeverría was serving as minister of the interior when government troops opened fire on a large gathering of demonstrators who were part of the 1968 STUDENT MOVEMENT IN MEXICO. The Tlatelolco massacre—as the episode came to be known—occurred just two weeks prior to the opening ceremony of the Summer Olympic Games in Mexico City, and the government downplayed the incident to national and foreign reporters. Echeverría was elected president two years later, and during his presidency, several other confrontations took place between government troops and student or worker demonstrators. Decades after he left office, prosecutors brought genocide charges against him on three different occasions for his alleged role in the Tlatelolco massacre and other government repression. Echeverría was cleared of all charges on July 8, 2006.

Despite his suspected involvement in silencing opposition to the government, Echeverría was known for moving Mexico to the left through social programs

and increased government spending. He resurrected the rhetoric of the MEXICAN REVOLUTION that had been abandoned in earlier decades and devoted large sums of money to social reform. Nevertheless, corruption and misspending also defined his presidency, and Echeverría's term ended amid high inflation, currency devaluation, and high unemployment. After he left office, Echeverría continued to work in public service.

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**economy** The economies of contemporary Latin America are as diverse as the region's geography, climate, natural resources, and population and are intertwined with the global marketplace. Three largest countries—ARGENTINA, BRAZIL, and MEXICO—account for approximately 58 percent of Latin America's gross domestic product (GDP). A middle group—CHILE, COLOMBIA, ECUADOR, PERU, URUGUAY, and VENEZUELA—account for approximately 23 percent. Fourteen others—BAHAMAS, BARBADOS, BOLIVIA, COSTA RICA, DOMINICAN REPUBLIC, EL SALVADOR, GUATEMALA, HAITI, HONDURAS, JAMAICA, NICARAGUA, PANAMA, SURINAME, and TRINIDAD AND TOBAGO—have GDPs of less than 1 percent each of the region's total. In addition, there are wide variances in the literacy rate and per-capita income, which reflect the level of economic development, a point further confirmed by the fact that Latin America has the widest disparity in income distribution in the world. In 2007, 35 percent of the population lived in poverty. This figure does not include CUBA, for which accurate economic data is difficult to ascertain.

Spain and Portugal directed the colonial economies to serve their own purposes, and at independence, most Latin American nations were bankrupt financially, devoid of a dynamic entrepreneurial class, and without the infrastructure necessary to participate in the global economy. From 1820 to 1850, as the new nations struggled to establish governments, the creole *hacendados* retreated within their estates (haciendas) where they could maintain themselves, while local merchants watched the political conflict from the sidelines. The sense of political stability imposed by caudillos after the mid-19th century permitted the exportation of coffee, sugar, and ores from some countries. Yet, significant changes had occurred by the 1880s. Domestically, elite landowners emerged to participate in and dominate politics. They also accepted the “liberal” philosophy that permeated industrial western Europe and the United States at the time. In application, liberalism granted entrepreneurs a free hand in developing the economies. According to the liberal thought, the benefits of economic expansion would pass to the working class, and the whole of

society would advance. Latin American elites accepted liberal economic principles but not the anticipated social consequences. As western Europe industrialized, its rural workers poured into urban centers to seek employment. This demographic change meant that foodstuffs needed to be imported, along with raw materials required for industrial growth. Advances in shipping and technology, particularly refrigeration, made Latin America an attractive place to European businessmen. From approximately 1880 to the onset of the Great Depression in 1930, Latin American economies developed in accordance with European demands. Within Latin America, the elite benefited from the exchange at the expense of workers, as evidenced by the vast disparities in income, lifestyles, and access to medical services. The economic and social disparities spilled over into politics in the years after World War II and despite approximately 25 years of MILITARY rule remain evident in the 21st century.

### EXPORT-BASED ECONOMIES, 1880–1930

Each of the Latin American countries sent one or two primary products into the world market. For example, Argentina sent wheat and beef; Brazil, coffee and rubber; Chile, nitrates and copper; Mexico henequen and sugar for industrial purposes; Peru, guano and subsequently metal ores; Cuba and the Dominican Republic, sugar and tobacco; and CENTRAL AMERICA, coffee and bananas. An expansive infrastructure was needed to support the transport of produce from agricultural fields and ores from the depths of the mines to overseas markets (see AGRICULTURE; MINING). Because the Latin Americans lacked the capital to do so, Europeans, primarily the British, and then North Americans filled the vacuum. Banks, exchange houses, legal firms, railroads, warehouses and docks, ships, and electrical and processing plants provided lucrative opportunities for foreign investors and, to a lesser degree, local elites. The foreigners were attracted by generous offers: no tariffs on imported machinery, raw materials, and even luxury consumer goods to satisfy the foreigners' tastes, which were considered essential for the success of an operation. Political and LABOR tranquility, guaranteed by Latin American militaries and police, ensured a favorable investment climate. Host countries benefited from taxes imposed on the exported items that were passed on to the consumer. Elite and foreign landowners profited greatly from the system, but the rural and urban working classes did not. The system also produced a middle sector (middle class) made up of lawyers, doctors, white-collar office workers, small shopkeepers, and skilled labor who sought and gained entrance into the political system through POLITICAL PARTIES such as the Democrats in Chile and the Radicals in Argentina or government control over middle-sector labor groups, as in Mexico following the MEXICAN REVOLUTION.

The success of export-based economies remained dependent on the foreign demand for primary products, which in turn determined Latin America's ability





A copper strip mine in Chile, illustrating Latin American countries' dependence on a single primary product as the basis for an export-oriented economy between 1880 and 1930 (*Office of Inter-American Affairs, Photography and Research*)

to consume foreign manufactured final products and its ability to pay its debts to European and North American financiers. The system collapsed with the onset of the Great Depression in 1930. The value of Latin American exports declined by 48 percent between 1930 and 1934 as compared to the 1925–29 period. Overall, exports declined by nearly two-thirds of predepression levels.

#### IMPORT SUBSTITUTION AND MILITARY DICTATORS, 1930s–1980s

Programs designed to correct the losses from the Great Depression did not bring about economic recovery and served only limited interests. For example, on May 1, 1933, Argentina brokered the Roca-Runciman barter agreement with Great Britain that provided for the exchange of Argentine beef and wheat for British machinery and spare parts for its nascent industrial base. Germany's Aski mark system and the U.S. Trade Reciprocity program during the 1930s were designed to generate those countries' own industries, not Latin America's. While Germany continued to purchase Latin American goods, these were paid for in Aski marks, essentially credits in the German national bank to be used for

the purchase of German manufactures. Latin America did not benefit from the U.S. Trade Reciprocity program that called for a mutual reduction in tariffs. Latin America's primary products already entered the United States under most-favored-nation status, and with their depressed economies, Latin Americans had little funds for the purchase of U.S. goods. While the larger Latin American nations shied away from trade reciprocity agreements, dictators throughout the hemisphere signed the agreements as means to legitimize their extraconstitutional governments.

Astute political leadership in Brazil and Mexico capitalized on U.S. wartime economic largesse to initiate the development of their own industrial base. Argentina, Chile, and Cuba benefited from World War II as the Allied demand for beef, grains, copper, and sugar skyrocketed, owing to the loss of other sources under Axis control. Shortly after the war ended in 1945, however, the prosperity disappeared with wartime markets, and Latin American pleas for an economic recovery program similar to that in Europe fell on deaf ears in Washington, D.C. U.S. policy makers advised the Latin Americans that, as the European economies recovered, their need

for Latin America's primary products would rekindle their economies.

Equally significant during the 1930s was the Latin American adoption of the import-substitution model of economic development. Henceforth, Latin America would produce at home, particularly, consumer goods that had previously been imported. The state assumed an active role in stimulating industrial growth by placing high tariffs on imported goods, thus protecting native producers from foreign competition and driving up the cost of imported products. Governments also favored local manufactures in their procurement practices, and most important, national governments increased their direct investment in and ownership of industries.

By 1960, two factors, one economic and the other political, converged, which led to a generation of military governments across Latin America. The limited size of domestic markets, beset by significant wage disparities, contributed to a slowdown in industrial production. Efforts at economic cooperation and integration, such as the 1960 establishment of the CENTRAL AMERICAN COMMON MARKET, were stymied by national jealousies among the partners. This came at a time when global prices and demand for Latin America's primary agricultural products stagnated. Politically, FIDEL CASTRO RUZ successfully engineered the 1959 CUBAN REVOLUTION, which immediately set off alarm bells throughout Latin America. The region's history of a closed political system, huge disparities in wealth distribution, and lack of economic opportunity and social betterment converged at the same time to threaten the very fabric of Latin America's existence. The U.S. response, the ALLIANCE FOR PROGRESS, was an attempt to advance and modernize industrialization, carry out land reform, and train business managers, technocrats, and medical personnel. To benefit from the program, Latin America's elite had to share political power with the workers, make the political process transparent and democratic, and make some of their idle lands available for redistribution to rural peasants. The elite would not budge and turned to the military to suppress "leftists and communists" (that is, almost anyone who called for socioeconomic and political reform). From the mid-1960s until the early 1980s, all of Latin America endured military or bureaucratic authoritarian regimes. Civil and human rights were violated, and thousands "disappeared." Governments also suppressed labor unions and political parties and at the same time increased their role in directing and controlling the national economies.

To revive their stagnant economies, these bureaucratic authoritarian regimes turned to international private banks and other creditors, including the World Bank and the INTER-AMERICAN DEVELOPMENT BANK. As a result of this borrowing, Latin America's cumulative international debt rose from \$27 billion to \$231 billion between 1970 and 1980, with an annual debt service obligation of nearly \$18 billion. These countries faced the improb-

ability of repayment, and in fact, Mexico defaulted on its foreign debt in 1982. While the United States bailed Mexico out of its financial difficulties, other countries were forced to renegotiate their loans with international creditors and turn to the International Monetary Fund (IMF) to revamp their currencies. These two actions—renegotiating debts and turning to the IMF—resulted in government austerity measures that led to severe cuts in government assistance for EDUCATION, health care, infrastructure development, and the like.

At the same time as the LATIN AMERICAN DEBT CRISIS of the 1980s, the industrialized world, led by the United States and Great Britain, accepted the principles of the neoliberal economic model, or the "Washington Consensus," as it was often referred to. Latin American governments fell into line and, in accordance with those principles, sold off most state-owned and parastatal (semiprivate) industries and used the windfall profits to pay down international debts. The governments also eliminated tariffs and other restrictions, which increased the likelihood of foreign investment. Structural reforms in banking, investment laws, and commercial activities were put in place by the mid-1990s. By the end of the 20th century, Latin America's macroeconomic picture had improved, but not the quality of life for the most people, particularly the lower classes. This factor contributed to the movement to the left in political elections and raises the question of whether Latin America is on the precipice of another change in economic policy.

See also CAUDILLO (Vol. III); ECONOMY (Vols. I, II, III); HACIENDA (Vols. II, III); INDUSTRIALIZATION (Vol. III); LATIFUNDIO (Vol. III); LIBERALISM (Vol. III).

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**Ecuador** Ecuador is situated on the Pacific Ocean in the northwest corner of South America. COLOMBIA lies directly to its north and PERU to its east and south. Ecuador includes the Galápagos Islands, which are located nearly 600 miles (966 km) west of the mainland in the Pacific Ocean. Approximately 13.7 million

people reside within Ecuador's 98,985 square miles (256,370 km<sup>2</sup>), which is about the size of the U.S. state of Colorado. The country's most populous regions are the coastal lowlands and the central highlands. Quito, the national capital, has 2 million residents, while the major port city of Guayaquil has 2.28 million inhabitants. The tropical, or Amazon, region to the east of the Andes remains sparsely populated. Mestizos account for 65 percent of Ecuador's total population, followed by NATIVE AMERICANS, 25 percent; Spanish and other whites, 7 percent; and blacks, 3 percent. Ecuador's substantial petroleum resources account for 40 percent of its gross national product and 33 percent of the government's budget revenues. Other important exports are bananas, seafood, flowers, sugar, and tropical fruits.

Long before the Spanish conquistador Juan Pizarro arrived in 1531, highly advanced Amerindian cultures flourished throughout Ecuador as part of the vast Inca Empire that extended from the Ecuadorean Andes to present-day BOLIVIA. In 1534, three years after Pizarro's arrival, the Spanish had conquered the indigenous peoples. Initially, Ecuador became part of the Viceroyalty of Peru, but with Spain's reorganization of its South American empire in 1563, the Ecuadorean city of Quito became the seat of an *audiencia* in the Viceroyalty of New Granada. Thereafter, until independence in 1822, the Spaniards exploited Native American labor via the *encomienda*, hacienda, and *mita* systems to cultivate agricultural produce and extract gold and other resources that supported the Spanish mercantile system. Owing to a shortage of Spanish WOMEN during the same time period, intermarriage between the Spanish and Amerindians produced a large mestizo population.

Ecuadorean independence came in two stages. In May 1821, Antonio José de Sucre, a lieutenant in Simón Bolívar's liberating army that was sweeping through South America, arrived in Guayaquil. A year later on May 24, 1824, in a battle on the slopes of the Pichincha Volcano, Sucre defeated the Spanish, and Ecuador became part of the Confederation of Gran Colombia with Venezuela and Colombia, with BOGOTÁ as its capital. Ecuadorean separatist tendencies continued from then until May 13, 1830, when a new constitution went into effect, declaring Ecuador's independence from the confederation.

Political turmoil characterized Ecuador's postcolonial experience until the 1860s when Gabriel García Moreno secured conservative rule over the country. At the same time, demand for coca pushed Ecuador into the global trading arena. Conservative power came to an end with the 1895 Liberal Revolution led by General JOSÉ ELOY ALFARO DELGADO. Alfaro and his successors took the country further into the global marketplace through the exportation of bananas and coca. During the 30 years of Liberal governance, a combination of coastal agricultural and private banking interests—known as "*la argolla*"—determined both the Liberal Party's and the nation's fate. Party infighting, however, continued.

Agriculturalists demanded that the central government seek foreign export markets for Ecuador's major produce and that the government use its resources for the construction of roads and railroads that served the agro-export INDUSTRY. During this same time period, the central government was unable to control the actions of private banks, which included the printing of their own money to meet *la argolla's* private needs. The combination of the overbuilding of infrastructure and the printing of unsecured paper money contributed to Ecuador's bankruptcy by 1925.

The increased exportation of commodities also contributed to a more active LABOR movement, although Ecuador's Liberal government was not tolerant of its demands, brutally suppressing labor strikes in Guayaquil in 1922 and in the central Sierra region in 1923. The government did, however, outlaw debt peonage and imprisonment for failure to pay debts. The Liberals also significantly altered church-state relations, stripping the CATHOLIC CHURCH of privileges it had held since the colonial period. The concordant with the Vatican was terminated, and foreign clergy were expelled. The church and its clergy no longer could censor reading material, EDUCATION was secularized, and the state took control of marriage and divorce. The 1929 constitution, Ecuador's 13th since 1830, reflected the nation's changing political and social dynamics. It enhanced the power of the legislature at the expense of the executive and in so doing recognized the new groups emerging in the political arena, whose philosophies tended to the left of those held by the old guard, the coastal elites. The 1929 constitution also paved the way for legislation in the 1930s that protected workers from unscrupulous employers and improved working conditions.

The Liberal era disintegrated after 1925, and for the next generation, Ecuador again experienced a high degree of political turmoil, which was exacerbated by the loss of markets during the Great Depression. Ecuador's ECONOMY did not begin to recover until the early 1940s, thanks to U.S. economic assistance. This period also was marked by Ecuador's involvement in international affairs. First, it accepted the advice from the U.S.-sponsored 1926–27 advisory commission headed by Edwin F. Kemmerer. This resulted in the establishment of a central bank, which ended the freedoms of private banking institutions. Kemmerer also reorganized the state budgeting and customs agencies that *la argolla* had previously controlled. That alone provided the government with a financial windfall, which for the next 15 years it put toward infrastructure projects, education, and the establishment of a retirement system for government workers.

As World War II approached, Ecuador accommodated U.S. concerns over the defense of the Panama Canal. President Carlos Alberto Arroyo del Río (b. 1893–d. 1969) permitted the United States to construct a naval base in the Galápagos Islands and an air sta-

tion at Salinas on the Ecuadorean coast. But, in 1941, Ecuador was unprepared to repel the Peruvian invasion that began on July 5 and terminated 16 days later. In the Protocol of Peace signed at the Foreign Ministers Conference January 15–28, 1942, in RIO DE JANEIRO, Ecuador renounced its claim to nearly 30,000 square miles (77,700 km<sup>2</sup>) of border territory. Arroyo del Río came under increasing attack as a result of this loss. He weathered the storm until May 28, 1944, when he was forced to resign, to be replaced by the populist José MARÍA VELASCO IBARRA. (The Ecuadorean-Peruvian border problem festered until 1995, when war again erupted in the upper Cenepa Valley. A cease-fire was brokered by Argentina, Brazil, Chile, and the United States. A comprehensive settlement was signed in October 1998, ending a dispute that dated to 1830, and confirming Peru's ownership of the majority of the disputed territory [see ECUADOR-PERU BOUNDARY DISPUTE].)

Ecuadorean politics after World War II continued to be tumultuous. The 1967 discovery of oil fields in the Oriente region resulted in a surge of export earnings from \$43 million in 1971 to \$350 million in 1974 and an annual 9 percent increase in the gross domestic product. The government, however, used the income to leverage additional foreign loans, which soared from \$324 million in 1974 to \$4.5 billion in 1979. As a result, inflation became the overriding economic and political issue for the next generation, whether the military governments

of the 1970s or the subsequent civilian leadership that alternated between moderate leftists and neoliberal administrations from 1979 to 1996. Whoever governed faced a continuing economic crisis that included high inflation, budget deficits, a falling currency, uncompetitive industries, and mounting debt service.

Neoliberalism and globalization did not bring prosperity to Ecuador's working classes. After 1996, the pressure to improve the quality of life for the wider populace led to rapid changes in the presidency, with each new leader's programs attempting to improve life for the under-represented and volatile lower classes. Populist Abdalá Bucaram (b. 1952– ) of the Ecuadorean Rodolsista Party (Partido Rodolsista Ecuatoriano, or PRE) won the May 9, 1996, presidential election with a promise to end elitist rule and redistribute the national wealth but was ousted on February 19, 1997. His successor, Quito mayor Jamil Mahaud (b. 1949– ), proposed to replace the Ecuadorean sucre with the U.S. dollar, a plan neither popular nor widely understood. In the confusion, the military ousted Mahaud on June 22, 2000. Vice President Gustavo Noboa (b. 1937– ) took over the presidency and is credited with bringing temporary political stability to the country. He completed Mahaud's dollarization scheme and secured congressional approval for the construction of a second oil pipeline into Ecuador's interior. Hopes for continued political stability ended on January 22, 2003, however, when Noboa turned the presidency over to former



An *urbano*, or slum area, in Guayaquil, Ecuador (Thomas M. Leonard Collection)

army colonel Lucío Gutiérrez (b. 1957– ). The latter's conservative fiscal policies, complete makeover of the Supreme Court, and declaration of a state of siege only intensified the opposition against him and finally led to his ouster on April 20, 2005. Political chaos followed until RAFAEL CORREA (b. 1963– ) of the Proud and Sovereign Fatherland Alliance (Alianza PAIS) won the presidency on November 26, 2006. When he took office on January 15, 2007, opposition parties controlled the National Congress. Hopelessly deadlocked, Correa dismissed the congress on March 1, which was replaced with a constituent assembly on October 1, 2007. The assembly was to produce Ecuador's 20th constitution since independence but was dismissed by President Correa on November 30, 2007. Since then, Correa has governed without a legislature. Correa was elected to another term in 2009.

Despite the political turmoil, Ecuador's elite remains the dominant political force. While highly fractured around their own interests, the elite demonstrates a willingness to compromise on major issues. Beginning in the early 1990s, Ecuador's indigenous people entered the political arena and played an important voting bloc in the 1996 presidential election and secured six representatives in the 2007 constituent assembly. Ecuador's place in the global economy continues to rest, however, on its ability to successfully deal with its historic problems, including class and regional differences, government corruption, and to develop a diversified economy.

See also BOLÍVAR, SIMÓN (Vol. II); ECUADOR (Vols. I, III); GARCÍA MORENO, GABRIEL (Vol. III); GRAN COLOMBIA (Vol. III); MITA (Vols. I, II); NEW GRANADA, VICEROYALTY OF (Vol. II); PIZARRO, JUAN (Vol. I); SUCRE, ANTONIO JOSÉ DE (Vol. III).

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**Ecuador-Peru boundary dispute** On October 26, 1998, in the Brazilian capital of Brasília, Ecuadorean president Jamil Mahuad (b. 1949– ) and Peruvian president ALBERTO FUJIMORI signed a treaty that ended a dispute over 48 miles (77 km) of the Ecuador-Peru border between the Marañón and Putumayo Rivers in the Condor Mountains. The dispute over this largely uninhabited territory dated to colonial times. According to the agreement, PERU ceded four-tenths of a square

mile (1 km<sup>2</sup>) of territory, known as Tiwinza, to ECUADOR as private property without relinquishing sovereignty. The agreement, brokered by ARGENTINA, BRAZIL, CHILE, and the United States, opened the door to \$3 billion in investment in oil, electric power, roads, and other projects in this impoverished border area.

Spain's failure to clearly demark the boundaries of its colonial possession served as the starting point of the conflict that remained one of the hemisphere's most resistant to resolution. The two nations appeared to have settled the dispute with the December 17, 1823, Mosquera-Galdiano Treaty, which reaffirmed the 1809 Spanish colonial boundary. This was reaffirmed in 1829 and 1830 agreements that also granted Ecuador access to the Amazon River. For nearly a century, the governments of Ecuador and Peru persisted in pressing their claims, which included warfare in 1859–60 and the stationing of Peruvian naval ships at Iquitos in 1864. By the terms of the June 21, 1924, Ponce-Castro protocol, the feuding parties agreed to settle the dispute by arbitration. The resultant July 6, 1936, Ulloa-Viteri Accord established a border based on the possession of territory that each nation had at the time. Ecuador rejected the accord, claiming that it demonstrated how much territory Peru had seized over the preceding century. Following a series of border incidents, Peruvian forces occupied several border locations by 1940 and prompted Peruvian president Manuel Prado (b. 1899–d. 1967) to establish a six-battalion MILITARY unit on its northern frontier, plus artillery and air support units. Exactly who fired the first shot on July 5, 1941, remains unclear, but the undermanned and ill-equipped Ecuadorean army retreated. As Peruvian airplanes bombed villages on Ecuador's northern coast and its army advanced on the important port of Guayaquil, the Ecuadorean government sought peace. At the time, the guarantors of the 1924 accord—Argentina, Brazil, Chile, and the United States—were preoccupied with World War II and therefore used the 1942 Rio Conference to broker a deal that left Ecuador no choice but to sign the agreement reached at Rio. Ecuador lost some 80,000 square miles (207,200 km<sup>2</sup>) of the disputed territory, as well as its access to the Amazon River.

From 1943 to 1946, U.S. military reconnaissance airplanes flew over the area to determine a common boundary acceptable to both Ecuador and Peru. Because the reconnaissance flights discovered that the Cenepa River is much longer than previously thought, all but 78 miles (125.5 km) of a common border were clearly marked. The disputed border caused two more military confrontations, in 1981 and 1995, before the four guarantors worked out the 1998 Brasília Accords.

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**education** A 2007 INTER-AMERICAN DEVELOPMENT BANK report asserted that only one-third of Latin American young people manage to obtain a secondary school education, compared to about 80 percent of Southeast Asian children. The gap is one of many issues that confront Latin American governments and educational leaders in an increasingly globalized and technology-laden world.

Education in Latin America from colonial times until the late 19th century remained mainly in the hands of the CATHOLIC CHURCH, whose narrow curriculum did not introduce new scientific theories or humanistic knowledge. Given the social structure during the same time period, these schools served mostly the children of the elite and some members of the fledgling middle class. The laboring masses, both urban and rural, were outside this venue. As liberals entered the political arena beginning in the 1850s, efforts at mass education were introduced, such as that of BENITO JUÁREZ in MEXICO and DOMINGO F. SARMIENTO in CHILE. By the end of the 19th century, liberals were encamped in most presidential palaces across Latin America, and among their social reforms was the introduction of public education and laws that made grammar school (grades 1–8) mandatory for all children, but the laws were not evenly enforced throughout the hemisphere, particularly in rural areas. Education also suffered from insufficient funding, as ruling elites resisted efforts to increase levies on themselves.

The vacuum in quality was filled by “foreign” schools, such as British and German institutions. The British schools in ARGENTINA, for example, were a natural outgrowth to Great Britain’s dominant presence in the nation’s agro-export ECONOMY. The German schools, as in GUATEMALA, served as a means to maintain German culture and to preach German superiority over the local population, but in each instance, these quickly emerged as excellent academic institutions. Children of local elites and the children of managers of other foreign companies were enrolled in these schools. Not until World War II did the United States become involved in Latin American education. Through the OFFICE OF THE COORDINATOR OF INTER-AMERICAN AFFAIRS, U.S. efforts focused on English-language and nursing and book-keeping schools, but its longest-lasting contribution came with the establishment of agricultural institutes. The war’s end momentarily halted the U.S. effort.

Higher education followed a similar pattern. Universities were few, and all were linked to a religious order or directed by the archbishop of each country. The liberals introduced public university education in the late 19th century, but as with kindergarten through 12th grade, it suffered from insufficient funding and a largely part-time faculty. For these reasons, the elite sent their children abroad for university training.

As the cold war intensified in Latin America during the 1950s and 1960s, a new emphasis on education broadened the effort to reach more children at the lower

level and to improve the quality of university training. In addition, specialty schools appeared in urban centers for computer and technology training, office administration, and management skills and to improve and expand the skilled labor force. Despite educating more people, broadening the base of education, improving the quality of teaching and research at all levels, and the use of specialized education, Latin America, like other parts of the developing world today, confronts continued funding problems, inadequately trained teachers and researchers, and up-to-date technology to prepare young people for the globalized economy.

See also EDUCATION (Vols. I, II, III); JUÁREZ, BENITO (Vol. III); LIBERALISM (Vol. III); SARMIENTO, DOMINGO F. (Vol. III).

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**El Salvador** With nearly 7 million inhabitants living within its 8,008 square miles ([20,740 km<sup>2</sup>] about the size of the U.S. state of Massachusetts), El Salvador is CENTRAL AMERICA’s most densely populated country. When the world demand for indigo collapsed in the mid-19th century, coffee became the nation’s major export crop. With this, government policies encouraged private ownership at the expense of the rural poor and the production of traditional foodstuffs. As the 20th century began, an estimated 2 percent of the population controlled nearly 80 percent of the productive lands. This set in motion political and socioeconomic patterns that continue to characterize the country.

From 1900 to 1930, the elite class, popularly known as the “14 families,” dominated national politics. The government served the interests of these landed elite, using the military to keep the impoverished, larger populace in subjugation. When LABOR unions surfaced in the 1920s, brutal government-sponsored repression prevented their development. The Great Depression that began in 1929 drastically reduced the global demand for coffee, worsened the plight of Salvadoran peasants, and contributed to the founding of the Liberal Party by Alberto Masferrer (b. 1878–d. 1932) and the 1930 presidential election of its candidate, Arturo Araujo (b. 1878–d. 1967). His election triggered a year of chaotic government and labor demonstrations that prompted the vice president, army general MAXIMILIANO HERNÁNDEZ MARTÍNEZ, to engineer a coup d’état on December 2, 1931, and establish a dictatorship that lasted until 1944. A month later, in January 1932, Hernández Martínez

directed the MILITARY suppression of a peasant uprising led by communist-leaning AGUSTÍN FARABUNDO MARTÍ. Although exact numbers are impossible to obtain, an estimated 10,000 to 30,000 peasants lost their lives. As a result of La Matanza (massacre), the elite came to associate any suggestions for social change on behalf of the peasants as communist-inspired. The peasants abandoned any public expression of their Amerindian heritage out of fear for their safety. The global depression and World War II continued to lessen the global demand for coffee which, in turn, increased the elite's discontent with Hernández Martínez. But it was the rising discontent of university students and professionals of the middle sector that finally led to the overthrow of Hernández Martínez on May 8, 1944. Nevertheless, political reform did not occur. With the exception of Eusebio Rodolfo Cerdón Cea (b. 1899–d. 1966) in 1962, the military occupied the presidential palace until 1984.

While coffee remained El Salvador's primary export after World War II, cotton, sugar, rice, and cattle entered the mix and led to the elite's expansion of their landholdings, particularly along the Pacific coast. Cognizant of limited opportunities for further agricultural expansion, the elites used their profits to invest in manufacturing and service industries beginning in the 1950s. Salvadoran INDUSTRY further benefited from the establishment of the CENTRAL AMERICAN COMMON MARKET (CACM) in 1960 and the implementation of the ALLIANCE FOR PROGRESS two years later. Both stimulated the development of the manufacturing sector, albeit one that was capital intensive rather than labor intensive. El Salvador also benefited from U.S. foreign economic policy during the 1950s; the United States provided funding for roads and storage and port facilities to support the agro-export industry. On the downside, by 1960, El Salvador's population had increased by 1 million persons since 1900. With farmlands locked into agro-export products, urban centers such as San Salvador, Usulután, Sonsonate, Santa Ana, and La Unión swelled with people who demanded jobs, housing, and supporting infrastructure.

Historically, El Salvador relieved population pressure by permitting the outmigration of peasants to HONDURAS. Since the 1920s, these people had occupied unused farmland in that country without major incident. By the 1950s, however, Honduras confronted similar internal population pressures as El Salvador, and large landowners there demanded the expulsion of the squatters. A 1968 Honduran agrarian reform law authorized just that. The returning refugees further strained the quality of life for El Salvador's poor. In addition, the Central American Common Market mitigated against the weak Honduran ECONOMY, as the government could not protect its infant industries from Salvadoran imports. Tensions between the two countries reached a climax when riots broke out at a June 1968 World Cup soccer game in Tegucigalpa. During the monthlong SOCCER WAR that followed, the Honduran air force inflicted

heavy damage on El Salvador's Pacific coast ports. At the same time, the Salvadoran MILITARY reemphasized loyalty to the institution at the expense of dealing with the nation's serious socioeconomic ills.

While the discredited Liberal Party disappeared along with its leader, Hernández Martínez, in 1944 and the military continued to dominate national politics, there was greater tolerance of labor unions and middle-class POLITICAL PARTIES that sought to address the nation's socioeconomic problems. The most significant of these groups was the Christian Democratic Party (Partido Democrático Cristiano, or PDC), led by JOSÉ NAPOLEÓN DUARTE. With support from the Catholic clergy and middle-sector groups, Duarte was elected mayor of San Salvador in 1968.

The military's resurgent patriotism, however, soon conflicted with the desire for popular government, as evidenced by the PDC's broad-based appeal. When the PDC joined forces with other popular based groups to form the National Union of Opposition that enabled Duarte to win the 1972 presidential election, the military overturned the results to install their own man, Arturo Molina (b. 1922– ), in the presidential palace. Duarte was exiled to VENEZUELA, while his running mate, Guillermo Ungo (b. 1931–d. 1991), joined the FARABUNDO MARTÍ NATIONAL LIBERATION FRONT (Frente Farabundo Martí de Liberación Nacional, or FMLN), a fledgling group that subsequently engaged the government in more than a decade of guerrilla war.

The Salvadoran conflict became part of the CENTRAL AMERICAN WARS of the 1980s that brought U.S. pressure and military advisers and assistance into the conflicts in an effort to prevent an alleged communist takeover of Central America. Ronald Reagan's administration attempted to turn the Salvadoran conflict into a crusade for democracy by engineering Duarte's presidential election in 1984. In all, the United States spent an estimated \$221 billion on a war that significantly damaged the Salvadoran economy and took an estimated 75,000 Salvadoran lives. A 1989 Central American peace initiative led to a peace accord between the government and the guerrillas in 1992.

The peace accords provided for a drastic reduction in the Salvadoran military. By 2000, it numbered approximately 32,000 men and no longer played a role in national politics. A national police force replaced the military's internal security forces, and the judiciary became independent of political influence. Since then, the far-right Nationalist Republican Alliance (Alianza Republicana Nacionalista, or ARENA) dominated the presidency until the 2009 elections, when Mauricio Funes (b. 1959– ) of the FMLN won with 51.3 percent of the popular vote.

Socioeconomic issues remain the country's main challenge. The devastation of the agricultural sector resulted in high unemployment and significantly contributed to the MIGRATION of farmworkers to the United States, where an estimated 2 million Salvadorans now reside. Remittances

from Salvadorans residing in the United States, estimated at \$2.8 billion in 2006, go to about 22.3 percent of El Salvador's families. The remittances also accounted for 16.2 of the gross domestic product. El Salvador under ARENA's leadership followed the world into globalization by selling state-owned industries and opening the country to foreign investment, particularly in *maquila* plants, tax-free industrial complexes that take advantage of cheap labor to produce textiles, electronic goods, and pharmaceuticals for sale on the world market (see MAQUILADORA). The *maquilas* generated an estimated 70,000 jobs. The retail and financial service sector have also grown markedly and now employ approximately 48 percent of the labor force. In an effort to ease credit restrictions, in 2001, the U.S. dollar circulated equally with the Salvadoran colon, and in 2004, the latter went out of circulation. But the conversion to a dollarized economy also restricted fiscal policy and contributed to El Salvador's willingness to sign the DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT with the United States in 2006. El Salvador is also seeking similar agreements with MEXICO and the European Union in the hope of bringing into the country foreign investment that will increase employment opportunities.

See also EL SALVADOR (Vols. I, II, III).

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#### El Salvador–Honduras War See SOCCER WAR.

**Esquivel, Manuel** (b. 1940– ) *prime minister of Belize* Born on May 2, 1940, in Belize City, BELIZE, Manuel Esquivel earned a B.S. in physics at Loyola University in New Orleans in 1962. He then returned to Belize and taught math and physics at St. John's Junior College. In 1967, he earned a post graduate certificate in physics education from Bristol University in England.

During the early 1970s, Esquivel began to take an interest in politics and joined the newly formed Liberal Party. On September 27, 1973, the Liberal Party merged with the National Independence Party and the People's Development Movement to form the United Democratic

Party (UDP) to oppose GEORGE PRICE's People's United Party (PUP). In January 1983, an internal power struggle led to Esquivel being named leader of the UDP. Esquivel's UDP won the general elections in December 1984, and Esquivel became prime minister. He attempted to expand the ECONOMY by increasing exports and encouraging foreign investment, especially from the United States and Taiwan. The PUP, however, won the 1989 elections, thus Esquivel became leader of the opposition.

A few weeks before Belize's June 30, 1993, elections, the MILITARY in GUATEMALA overthrew Guatemalan president Jorge Serrano Elías (b. 1945– ), who had established diplomatic relations with Belize in 1991, and renewed claims to Belizean territory. Playing on Belizean fears of Guatemala and accusing Price of allowing too many Latino immigrants into the country, the UDP narrowly won the 1993 elections, and Esquivel returned as prime minister. Allegations of corruption, however, led to the UDP's defeat in the 1998 elections. Esquivel lost his seat in the House of Representatives and resigned as UDP leader. He was replaced by Dean Barrow (b. 1951– ), the current leader of the UDP and prime minister of Belize since 2008.

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**Estado Novo (New State)** The Estado Novo was established during BRAZIL's fascist-style dictatorship under GETÚLIO DORNELLES VARGAS. After coming to power in 1930, Vargas oversaw the writing of Brazil's 1934 constitution, which did not permit his reelection in 1938. To overcome that obstacle, he and his advisers fabricated the so-called Cohen Plan, a "communist plot" to overthrow the Brazilian government. To thwart the alleged coup, in a radio address to the nation on the evening of November 10, 1937, Vargas announced a new constitution. The document combined the fascist principles of António de Oliveira Salazar's government in Portugal and Benito Mussolini's in Italy. The hope for democracy was gone. The MILITARY shut down the Congress, and the 1938 elections were canceled. Vargas announced that he would serve a six-year term, but that he would not be a candidate in the 1943 election. That election was not held; owing to wartime conditions, Vargas again extended his term. The new 1937 constitution granted him complete control over the newly formed congress and judiciary. Political opposition was silenced, and the media, heavily censored. Individual civil and human rights were regularly violated.



The Estado Novo also enabled Vargas and his advisers to carry out state-sponsored economic development. The state played the dominant role in organizing and strengthening cartels in the marketing of cacao, coffee, sugar, and tea and in creating new state enterprises, including the National Motor Factory, National Iron Smelting Company, National Oil Advisor, and the São Francisco Hydroelectric Company. Although World War II limited the exportation of primary agricultural products and Brazil lacked the financial capital to implement the latter, the seeds were planted for the country's post-war industrialization.

Despite its fascist ideology, Brazil identified itself with the United States and initially adopted a neutral stance upon the outbreak of the European war on September 1, 1939. For a price, Vargas allowed the United States to set up military bases on Brazil's northeast coast to guard the PANAMA CANAL and VENEZUELA'S oil fields against a potential German air assault. Subsequently, Brazil supplied the United States with rubber and quinine, which were essential for the war effort, and manufactured uniforms and vehicles for the Allies. Brazil declared war on Germany and Italy on August 22, 1942, after the sinking of Brazilian ships by German submarines. Later that year, Vargas dispatched troops to fight with the Allies in Italy.

The war's idealistic objectives of democracy and freedom fed opposition to Vargas and the Estado Novo at home. Despite setting a date for another presidential election, granting a general amnesty for political opponents, allowing the formation of other political parties, and committing to a new constitutional convention, Vargas could not stem the tide of opposition against him. He was deposed by the military on October 29, 1945.

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**Estrada Cabrera, Manuel** (b. 1857–d. 1924) *president of Guatemala* Manuel Estrada Cabrera had an undistinguished career as a lawyer in his native city of Quetzaltenango, GUATEMALA, and as a Supreme Court justice prior to his election to the national legislature in 1885. President José Reina Barrios (b. 1835–d. 1889) appointed Estrada Cabrera interior and justice minister in 1892, and his loyalty, more than his competency, led to his being named vice president in 1898, the same year Reina was assassinated. Estrada Cabrera's 22-year presidency began with a constitutional amendment that lifted

the one-term restriction on presidents and was followed by rigged elections.

A disciple of liberalism as espoused by former Guatemalan president JUSTO RUFINO BARRIOS, Estrada Cabrera favored large landed estates and an agro-export ECONOMY. He encouraged the development of a new coffee elite in the western highlands at the sacrifice of NATIVE AMERICANS, whose lands were confiscated and made available to the new elite, who in turn hired the same indigenous peoples to work the coffee plantations. He supported the expansion of United Fruit Company landholdings and the construction of its subsidiary, the International Railways of Central America (IRCA), and its port and warehouses at Puerto Barrios on Guatemala's Caribbean coast. The construction of public health facilities and schools in rural cities benefited mainly the middle and upper classes rather than indigenous workers. The impact of liberalism in Guatemala was the same as elsewhere in Latin America. Modernization benefited the upper and middle sectors, although the two groups remained outside the political system. They became increasingly opposed to Estrada Cabrera's tyrannical and closed regime. Those military officers not in the president's inner circle also sought change in order to create promotional opportunities within the MILITARY. A nascent LABOR movement had arisen by the mid-1910s to demand better wages and working conditions for workers.

The dissatisfaction with Estrada Cabrera dramatically increased following his government's apathetic response to earthquakes that struck Guatemala City in late 1917 and early 1918. Church leaders joined the middle sector in forming the Unionist Party, which demanded that Estrada Cabrera resign, which he finally did on April 15, 1920.

See also BARRIOS, JUSTO RUFINO (Vol. III); LIBERALISM (Vol. III).

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**European Union and Latin America** From the time of Latin American independence in the 1820s to the outbreak of World War II in 1939, Europe and particularly Great Britain and Germany were the major foreign players in the economies of Latin American nations. The war itself and the prostrate continental economies opened Latin America to a U.S. economic presence. Then, in the late 1950s, several European countries revived their contacts with ARGENTINA, BRAZIL, and MEXICO, but only a trickle of investment followed.

Despite the establishment in 1958 of the European Economic Community (EEC, subsequently identified as the EC), Europe made no concerted effort to implement an economic assistance program or to explore avenues of economic cooperation with Latin America. Not until 1971, and only at the urging of the Special Commission for Latin American Coordination (Comisión Especial de Coordinación Latinoamericana, or CELA), did the EEC take special notice of the region. The EEC declared 1971 “Latin America’s Year” and established a “mechanism for dialogue” for annual discussions with Latin American ambassadors in Brussels. Nevertheless, real progress remained elusive. Several factors contributed to Europe’s inability to develop a relationship with Latin America, including nationalistic problems within Western Europe, the impact of détente on Western European trade with the Soviet Union, the impact of the “oil shocks” during the 1970s, and problems within Latin America itself. Governments were run by military dictators whose nationalistic economic programs did not bode well for cooperative external economic relationships, except in the case of CHILE. Latin America’s early attempts at regional economic integration, such as the Latin American Free Trade Association in 1960, the CENTRAL AMERICAN COMMON MARKET in 1961, and the CARIBBEAN FREE TRADE ASSOCIATION in 1965, at best served as forerunners to future endeavors. Additionally, most Latin Americans were disturbed by the EC’s support for Great Britain in the April 1982 MALVINAS/FALKLANDS WAR.

The situation changed in the mid-1980s with the admission of Spain and Portugal to the EC. Spain and, to a lesser degree, Portugal wished to develop a special relationship with their former colonies in the Western Hemisphere. Although the Iberian colonies had achieved independence nearly 175 years earlier, Spain determined to lead the European Community to Latin America in the late 20th century. Other issues contributed to Europe’s revived interest in the region. The CENTRAL AMERICAN WARS of the 1980s led to Europe’s participation in the Contadora Peace Process to end the conflict, a commitment that was reinforced with the creation of the Common Foreign and Security Policy in the 1992 Maastricht Treaty.

During the 1980s, democratic governments replaced MILITARY regimes in Latin America, and these new governments embraced the neoliberal economic model. The Latin Americans were anxious for new global contacts. By 2000, several bilateral trade agreements were signed, even with CUBA, despite U.S. consternation at this. The European Union (EU) also completed a trade agreement with Mexico and pursued policies to end drug trafficking in COLOMBIA. As these bilateral efforts continued, the EU determined that the best possibility for significant economic cooperation rested with the SOUTHERN CONE COMMON MARKET (MERCOSUR).

MERCOSUR’s 300-million-plus consumer market, with an annual economic output of \$1.3 trillion, attracted

the EU. The Europeans and MERCOSUR partners were also drawn together by the anticipated U.S. plan for FREE TRADE AREA OF THE AMERICAS (FTAA). If successful, the FTAA would limit Europe’s economic access to MERCOSUR and other Latin American nations. For the Latin Americans, the proposed FTAA was another example of attempted U.S. hegemony in the hemisphere. The Brazilians led the charge to unite all of Latin America into a single trading bloc before dealing with the United States on any FTAA agreement. The process began with the signing of an inter-institutional agreement on May 29, 1993, that provided for EU technical assistance, personal training, and institutional support for MERCOSUR’s integration process. Owing to a wide range of issues, minimal progress was made at subsequent meetings in Madrid (1995), RIO DE JANEIRO (1999), BUENOS AIRES (2000), Brussels (2000), and Brasília (2000). The process also slowed because of the European Union’s expansion to incorporate former Soviet satellite states in Eastern Europe. By 2008, the EU totaled 25 member states whose interests needed to be preserved. Similarly, Latin America experienced traumatic crisis at the turn of the 21st century that affected MERCOSUR’s growth and stability. MERCOSUR’s integration process was hampered by arguments over the harmonization of LABOR and investment laws, while the Argentine and Brazilian financial crises from 1999 to 2001 led to currency devaluation that adversely affected those countries’ TRADE. Events in the United States also contributed to a decline in the haste for the EU and MERCOSUR to complete a free trade pact. Largely for political reasons, the U.S. Congress refused to concede fast-track negotiating authority to President William J. Clinton so that he could complete a free trade agreement with Chile. Clinton’s successor, George W. Bush, dismissed the FTAA vision. Instead, Bush pursued free trade agreements with individual states, such as Colombia, or small groups of nations such as the Andean and Central American groups.

In 2005, the EU recommitted itself to a MERCOSUR linkage. While the lure of a large market remains, several challenges need to be overcome before an agreement can come into being. MERCOSUR politics have become increasingly nationalistic, and demands for an improved quality of life for the majority have intensified. Because the benefits of the neoliberal economic model have not reached all social sectors, further expansion of free trade is subject to popular opposition. MERCOSUR has yet to harmonize its trading, investment, and intellectual property rights laws, much less implement its anticipated common external tariff. The EU wants Argentina and Brazil to end protective tariffs on their textile industries, just as the South Americans want the EU to terminate their protective agricultural policies.

Since the 2000 Argentine and Brazilian economic crisis, the interests of the MERCOSUR countries have increasingly diverged. Brazil, for example, continues to

cast about for its own trading partners. Venezuelan president HUGO RAFAEL CHÁVEZ FRÍAS typifies the strident nationalism that now characterizes Latin American politics and, coupled with his confrontational style in challenging the U.S. presence in Latin America, may harm Brazil's effort to bring about Latin American economic unity. Moreover, China has entered the Latin American marketplace (see CHINA AND LATIN AMERICA, PEOPLE'S REPUBLIC OF). In 2009, U.S. president Barack Obama promised renewed interest in Latin America, but the playing field has changed significantly since 2000.

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**EZLN (Ejército Zapatista de Liberación Nacional; Zapatista Army of National Liberation)** The EZLN is a revolutionary movement based in Chiapas, southern MEXICO, whose name translates to the Zapatista Army of National Liberation. The EZLN attracted world attention when they rose in revolt on January 1, 1994, to protest the implementation of the NORTH AMERICAN FREE TRADE AGREEMENT. Members of the EZLN oppose neoliberalism and globalization, two phenomena epitomized by the free trade agreement with the United States and Canada.

The EZLN is made up mostly of the rural indigenous of Chiapas who witnessed the erosion of the agricultural

protections guaranteed by the CONSTITUTION OF 1917 under the presidency of CARLOS SALINAS DE GORTARI. The group named itself for national hero EMILIANO ZAPATA, who fought in the MEXICAN REVOLUTION to bring about agrarian reform. EZLN followers evoke the memory of Zapata by calling themselves Zapatistas and by drawing parallels to his cause in their platform.

The EZLN is led by a group of *comandantes*, or commanders. The most visible leader is Subcomandante Marcos, who has become an iconic figurehead and spokesperson for the movement. Following their initial uprising in Chiapas in 1994, the Zapatistas quickly gained control over some areas of Chiapas. The surprising successes of the EZLN forced the Mexican government to engage in a long series of frustrated negotiations with the rebels. While Zapatistas initially rose in armed revolt, they later adopted a strategy of peaceful revolution. They have published numerous manifestos, or declarations, and have disseminated their message using modern technologies such as radio and the Internet. Many observers have credited the EZLN for contributing to the electoral overthrow of the Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI), Mexico's dominant political party, in 2000.

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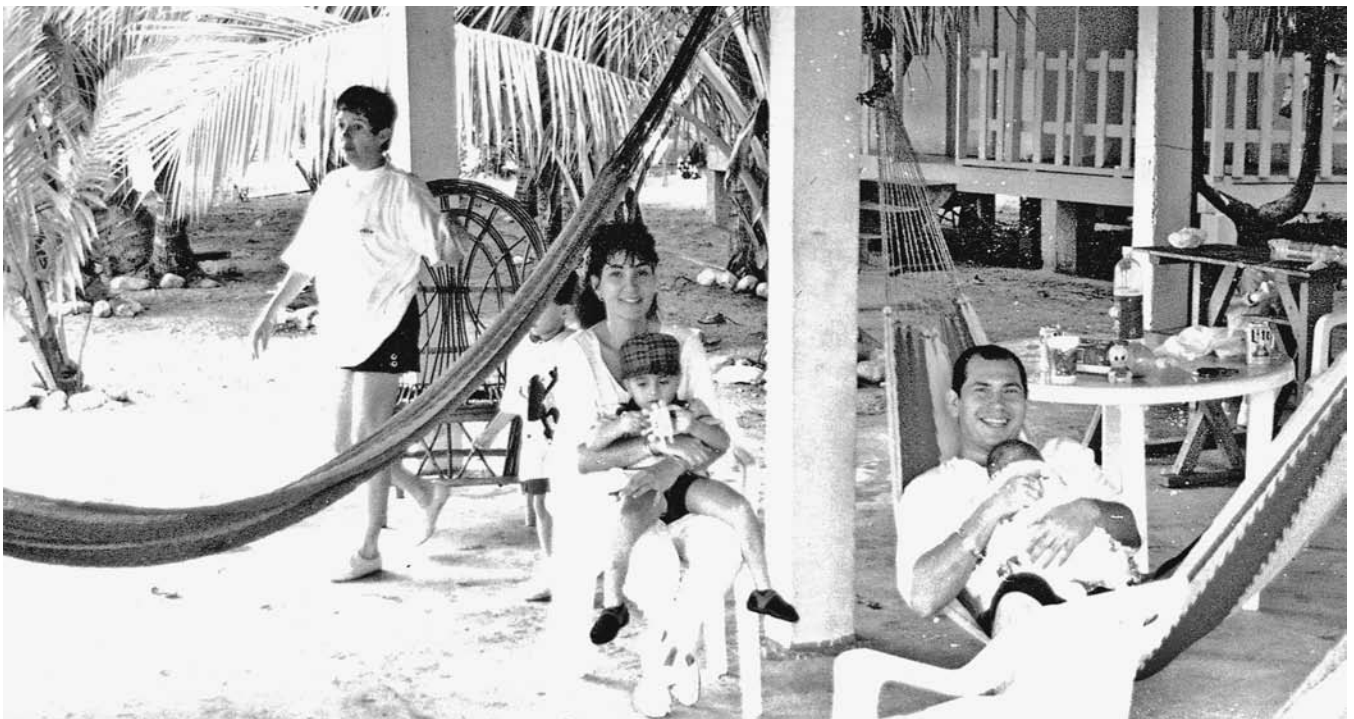
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# F

**Falklands War** See MALVINAS/FALKLANDS WAR.

**family** Conventional wisdom points to the primacy of family throughout Latin America. While this assumption is correct, family patterns began to alter with the industrialization and urbanization of the region in the late 19th century. The commercialization of AGRICULTURE

lessened producers' need for workers and had the double consequence of dissolving consensual unions and forcing men to migrate to urban areas in search of employment, leaving WOMEN behind to tend for themselves and any children (see MIGRATION). As Latin America's export-based economies grew in the early 20th century, rural and urban elite and middle-class families who did not benefit from the boom often took in boarders to assist



A Honduran middle-class family vacationing on a Caribbean beach (Thomas M. Leonard Collection)

with household duties or to supplement family income, rather than as a status symbol.

As Latin America's economic development and urbanization continued after World War II to the present day, family patterns continued to change. The middle sector expanded with the professionalization of women, which contributed to a delay in the average age of marriage. Coupled with the legalization of divorce, the number of households headed by women increased. These factors, as well as scarcity of space in urban centers, contributed to a decline in the birthrate. Urban workers, traditionally ignored by the political system, became one of Latin America's most potent political forces during the last half of the 20th century and demanded wage guarantees, improved housing, health care, EDUCATION, and other government social services. Family size among the rural and urban poor remained high, largely through economic necessity.

A focus on children's rights were one consequence of Latin America's modernization. The PAN-AMERICAN UNION sponsored regular conferences on children's issues beginning in 1913. Several countries, including ARGENTINA, COSTA RICA, MEXICO, and VENEZUELA held similar conclaves that often led to legislation to provide for abandoned children, granting the right to intervene in family matters for moral reasons, recognizing the problem of child delinquency, and the like. However, over time, owing to insufficient government income as well as government indebtedness, these programs were not always implemented, which is considered a significant factor in the rise of teenage gangs across the region.

See also FAMILY (Vols. I, II, III).

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**Farabundo Martí National Liberation Front (Frente Farabundo Martí de Liberación Nacional; FMLN)** The Farabundo Martí National Liberation Front (FMLN) was formed in 1980 as the umbrella for five leftist groups in EL SALVADOR that aimed to overthrow the MILITARY government and replace it with a communist one. Membership included the Central American Workers' Revolutionary Party (Partido Revolucionario de los Trabajadores Centroamericanos), People's Revolutionary Army (Ejército Revolucionario del Pueblo), Farabundo Martí Liberation Forces (Fuerzas Populares de Liberación), Armed Forces of National Resistance (Fuerzas Armadas de Resistencia Nacional), and the Communist Party of El Salvador's Armed Forces of Liberation (Fuerzas Armadas de Liberación). The FMLN pooled the resources of these groups and coordinated the strategy and tactics of the countrywide insurgency.

The FMLN was divided into two main branches: one for propaganda and public diplomacy and the second

for military operations. Initially, the FMLN adopted a three-pronged strategy: 1) secure its rural support base, 2) delegitimize the regime with attacks on government infrastructure and military forces and installations, and 3) conduct an urban propaganda campaign in hopes of inciting a popular uprising against the government. Financial support came from communist groups outside El Salvador, particularly in NICARAGUA and CUBA, which enabled the FMLN to conduct two offensives in 1982. These were unsuccessful in part because of limited resources and easily interrupted supply lines, exacerbated by communications difficulties and internal disputes over command authority and strategy. With some 12,000 men under its command, in September 1983, the FMLN launched what some called its "final offensive," but this failed largely because of U.S. military advice and equipment given to the national army. As U.S. assistance to the Salvadoran government continued, the FMLN further removed itself from direct confrontation with Salvadoran troops. It reorganized into smaller groups for attacks on key infrastructure sites, such as electric stations, bridges and roads, and crops, particularly coffee and cotton. The FMLN also moved into the cities to destroy factories, assassinate government officials and members of elite families, or kidnap the same for ransom. Often, these and other people were tortured and killed. The Salvadoran army reacted in kind, often attacking rural villages that served as havens for FMLN guerrilla bands. The December 11, 1981, tragedy at El Mozote best illustrates the point. There, the Salvadoran army's U.S.-trained Atlacatl battalion massacred an estimated 1,000 villagers for their alleged support of the FMLN guerrillas.

The FMLN's most significant and, in fact, last major offensive of the war came in 1989 when it caught the government's military off guard, taking control of large sectors of the country and carrying the fight into San Salvador. Although the battle did not bring down the national government, most analysts agree that it was the turning point in the war. The U.S. government was already under tremendous public pressure to bring the war to an end, and the newly elected president, George H. W. Bush, supported a negotiated settlement that was finally concluded on January 16, 1992. In the meantime, the U.S. Congress cut off continued military funding for the Salvadoran government. As a result of the peace treaty, the FMLN disarmed itself under United Nations supervision and turned itself into a political party, which today is the second most important party in El Salvador's unicameral legislature.

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**Ferré, Luis A.** (b. 1904–d. 2003) *engineer, industrialist, and governor of Puerto Rico* Luis A. Ferré was a strong advocate for PUERTO RICO becoming a state of the United States. After earning his master's degree in 1925 from the Massachusetts Institute of Technology, he returned to Puerto Rico to pursue business interests. His cement company significantly benefited from the construction boom generated by OPERATION BOOTSTRAP.

Ferré entered politics when elected mayor of Ponce in 1940 but lost his bid for resident commissioner in 1948 on a statehood platform. He was elected a delegate to the 1952 Constitutional Convention, which led Puerto Rico to becoming a commonwealth a year later. On three successive occasions, Ferré unsuccessfully ran for the island's governorship as the candidate of the Republican Party of Puerto Rico (Partido Republicano de Puerto Rico). After his 1964 defeat, Ferré founded the New Progressive Party and won the 1968 election with a call for changing Puerto Rico's relationship with the United States. After his failed bid for reelection in 1974, Ferré continued to be active in politics and a champion for Puerto Rican statehood until his death in 2003, despite rejection of this by the Puerto Rican people in 1993 and 1998 referendums.

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**Figueres Ferrer, José** (b. 1906–d. 1990) *president of Costa Rica* The son of Spanish immigrants to COSTA RICA, José Figueres Ferrer went on to govern the nation on three separate occasions. With little formal EDUCATION, he came to the United States ostensibly to pursue electrical engineering at the Massachusetts Institute of Technology but never matriculated. According to Figueres's own account, he used the Boston Public Library to become widely read in social philosophy, studying the works of Miguel Cervantes, Immanuel Kant, José Martí, and Friedrich Nietzsche. Figueres returned to Costa Rica in 1928 and established Lucha Sin Fin *finca* (Endless Fight ranch) to grow hemp and make it into rope and bags. The workers earned some of the profits. He was expelled from the country for two years in 1942 for asserting that President Rafael Calderón

Guardia (b. 1900–d. 1970) sympathized with the Nazis by permitting a German submarine to attack Puerto Limón on July 2, 1942, which resulted in the sinking of the *San Pablo*, a U.S. cargo steamer. While exiled in MEXICO, Figueres joined with other Caribbean exiles to form the CARIBBEAN LEGION, which subsequently sought the ouster of FULGENCIO BATISTA Y ZALDÍVAR in CUBA, RAFAEL TRUJILLO in the DOMINICAN REPUBLIC, ANASTASIO SOMOZA GARCÍA in NICARAGUA, and RÓMULO ERNESTO BETANCOURT BELLO in VENEZUELA.

On returning to Costa Rica in 1944, Figueres immersed himself in national politics. He joined the National Liberation Movement (Movimiento Nacional de Liberación), an organization of intellectuals critical of the landed elite's control of the political arena at the expense of lower socioeconomic groups. He equally disliked MANUAL MORA VALVERDE and his Popular Vanguard Party (Partido de la Vanguardia Popular, or PVP) because of its alleged communist philosophy. Figueres linked Mora to Calderón, largely because of the 1943 Labor Code, and to President-elect Teodoro Picado (b. 1900–d. 1960) for his campaign alliance with the communist Manual Mora. When Calderón attempted to steal the 1948 presidential election from the opposition's standard-bearer Otilio Ulate Blanco (b. 1881–d. 1975), Figueres determined to break the Calderón-Mora alliance permanently.

A 44-day civil war ensued, and at its conclusion, Figueres headed a junta that ruled Costa Rica for 18 months (see CIVIL WAR OF 1948, COSTA RICA). During that time period, the junta abolished the army, outlawed communism, nationalized the banking system, imposed a 10 percent tax on the wealthy, and provided for the election of a constituent assembly that drafted a new constitution in 1949. The new document embraced Figueres's social philosophy and stipulated that a president could not seek reelection until 12 years after his initial term. With his program in place, Figueres turned over the government to Ulate on November 8, 1945.

During his second term as head of state, but first as elected president, 1953–59, Figueres promoted private INDUSTRY and worked for completion of the PAN-AMERICAN HIGHWAY through Costa Rica. He labored for the expansion of the middle class as a means to improve the lot of the poor without threatening the privileged position of the elite. But, his continued matériel and moral support for the Caribbean Legion, and his criticism of U.S. support for Latin American dictators, prompted Dwight D. Eisenhower's administration to distance itself from Figueres.

Figueres's third term (1970–74) was marred by revelations of his links to the Central Intelligence Agency (CIA) and its Soviet counterpart, the KGB, and to corrupt U.S. financier Robert Vesco. Figueres created the Inter-American Democratic Social Movement (INADESMO), a CIA front organization to support left-of-center political groups in the Dominican Republic, Venezuela,

GUATEMALA, Nicaragua, HONDURAS, and PANAMA. He accepted \$300,000 from the KGB to help finance his 1970 presidential campaign and shortly after taking the presidency, extended diplomatic and trade relations to the Soviet Union. In 1974, he took another \$10,000 to start his own newspaper with a promise to print stories favorable to the Soviet Union. In 1974, Figueres granted political asylum to Vesco, who allegedly had looted millions of dollars from U.S. mutual funds. These embarrassments, plus the World Bank-imposed financial bailout program to keep the Costa Rican economy afloat, contributed to the National Liberation Party's loss of the 1978 presidential race to Social Christian Unity Party candidate, Rodrigo Carazo (b. 1926– ).

Until his death on June 8, 1990, Figueres remained a spokesman for democratization throughout Latin America in general and in Costa Rica in particular. He was well liked and received in many Latin American countries for his left-of-center political ideals. He supported the SANDINISTA NATIONAL LIBERATION FRONT in Nicaragua in its effort to oust dictator ANASTASIO SOMOZA DEBAYLE. He became one of the region's most ardent critics of U.S. policy regarding the CENTRAL AMERICAN WARS of the 1980s.

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**Flores Magón brothers** *anarchists and activists in Mexico* Ricardo Flores Magón (b. 1873–d. 1922), Enrique Flores Magón (b. 1877–d. 1954), and Jesús Flores Magón (b. 1871–d. 1930) were anarchists who became advocates of radical reform in MEXICO during the late Porfiriato and built their reputation as opponents of the dictator Porfirio Díaz (in power from 1876 until 1911). As journalists and social activists, the brothers inspired resistance movements throughout the country that eventually coalesced in the MEXICAN REVOLUTION.

The Flores Magón brothers were born to a poor indigenous father and a mestiza mother in the state of Oaxaca. Ricardo was influenced by the indigenous struggle during the liberal reform era of the late 19th century in his home state. The brothers founded the newspaper *Regeneración* in 1900 to give voice to those being exploited

under the policies of Díaz. Ricardo and Jesús were later arrested and imprisoned for speaking out against Díaz's administration, and the newspaper was shut down. They were eventually released, and in 1904, the brothers fled to Texas. They later relocated to Saint Louis, Missouri, and continued publishing *Regeneración* from there. They also established the Mexican Liberal Party (Partido Liberal Mexicano, or PLM), as a formal resistance organization to challenge the Díaz dictatorship.

In the late years of the Porfiriato, the Flores Magón brothers published strong denunciations against Díaz. They advocated land and labor reform, and their writings appealed to large numbers of exploited workers throughout Mexico. LABOR unrest and work stoppages at the Cananea Copper Company and the Río Blanco Textile Factory may have been inspired by writings in *Regeneración*. After the outbreak of the Mexican Revolution in 1910, Ricardo Flores Magón stayed in the United States, where he attempted to organize other anarchists to return to Mexico and fight for that cause. He was arrested on several occasions and died in a U.S. prison in 1922.

Enrique returned to Mexico a year after his brother Ricardo's death, and he fell out of favor with other *magonistas*. After assisting with the founding of Confederación Campesina Mexicana in San Luis Potosí, Enrique withdrew to private life until his death in 1954. Jesús, a lawyer and political moderate, served as undersecretary of justice in the Madero administration until Madero's overthrow and murder in 1913, when he left the country for the United States. In 1917, after the revolution ended, Jesús returned to Mexico and continued to practice law until his death on December 7, 1930 in Mexico City.

See also DÍAZ, PORFIRIO (Vol. III); PORFIRIATO (Vol. III); REFORMA, LA (Vol. III).

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**Foraker Act** (1900) Officially known as the Organic Law Act of 1900, the Foraker Act was signed into law by U.S. president William McKinley on April 2, 1900. The law became known by its sponsor's name, Joseph B. Foraker, a Republican from Ohio. Under its terms, Puerto Ricans regained their government, as was established by the Charter of Autonomy granted by Spain in 1897, just prior to U.S. entry into the Cuban war for independence in 1898.

Under the terms of the Foraker Act, Puerto Ricans were administered by a governor, a secretary, and five cabinet members, all of whom were named by the president of the United States. A 35-member Legislative Assembly represented the people. The act also provided for the election of a resident commissioner to serve as a nonvoting representative of PUERTO RICO in the U.S. Congress. On May 1, 1900, Charles H. Allen was inaugurated as the first civilian governor of Puerto Rico.

In effect, Puerto Rico remained in its colonial status, with the United States replacing Spain as the metropole power. The island's status would change under the terms of the JONES ACT in 1917.

See also PUERTO RICO (Vol. III); WAR OF 1898 (Vol. III).

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**FMLN** See FARABUNDO MARTÍ NATIONAL LIBERATION FRONT.

**Fox, Vicente** (b. 1942– ) *president of Mexico* Vicente Fox became president of MEXICO in 2000 and was the first non-PRI politician to win the highest office since the Institutional Revolutionary Party's (Partido Revolucionario Institucional) inception in 1929. Fox represented the National Action Party (Partido Acción Nacional, or PAN) and is remembered for his part in a major democratic transition in Mexican history.

Fox was born on July 2, 1942, in MEXICO CITY and was raised in the state of Guanajuato. He studied business administration at the Universidad Iberoamericana and at Harvard University. Fox pursued a career with the Coca-Cola Company and eventually ran the company's Mexican operations. He ventured into politics in the 1980s and became involved with the PAN during a time when opposition POLITICAL PARTIES were gaining momentum in the nation. Fox won the governorship of Guanajuato in 1995 as a PAN candidate. In 2000, he ran for president, promoting a campaign of change and honesty. Fox won the election on his birthday, with more than 42 percent of the vote.

Fox attempted to curb corruption during his administration. He brought in advisers to clean up bureaucratic inefficiencies and commissioned special security forces to pursue the ringleaders of the DRUG TRADE IN MEXICO. Fox often found himself at the center of controversy during his presidency. He was a vocal advocate of immigration reform in the United States and appeared to cultivate a close relationship with U.S. president George W. Bush (see IMMIGRATION FROM MEXICO TO THE UNITED STATES). Fox continued to be a public figure after his presidential



Mexican presidential candidate Vicente Fox casts his vote in the 2000 election. (AP Photo/Victor R. Caivano)

term expired in 2006, appearing at public events and publishing an English-language autobiography in 2007.

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**Franco, Rafael** (b. 1897–d. 1973) *president of Paraguay* Rafael Franco emerged as a military hero of the CHACO WAR and used this to his advantage on February 17, 1936, in the coup d'état that drove PARAGUAY's president Eusebio Ayala (b. 1874–d. 1942) from office. As president, Franco initiated a reform program that included the disbursement of 495,000 acres (200,320 ha) to peasant families, while for urban laborers he mandated an eight-hour workday and granted them the right to strike. Military officers loyal to the



Liberal Party ousted Franco 18 months after he took office. He fled to ARGENTINA, where he continued to influence the Febrerista Revolutionary Party (Partido Revolucionario Febrerista, or PRF). In 1946, President HIGINIO MORÍNIGO invited Franco to return home as part of a planned coalition cabinet. Subsequently, President ALFREDO STROESSNER invited him back to lead the Febreristas as a token opposition political party in several elections. Franco accepted this as the only way to keep the PRF in the Paraguayan public's eye. With his death in 1973, the Febreristas lost all viable leadership.

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**Free Trade Area of the Americas (FTAA)** The concept of a Western Hemisphere TRADE ZONE can be traced to the administration of U.S. president George H. W. Bush (1989–92). Bush was attempting to placate Latin Americans' fear that their countries would be economically hurt by the 1991 NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA), which was designed to integrate the U.S., Canadian, and Mexican markets. Bush's successor, President William J. Clinton, pursued the project with the first Summit of the Americas conference in Miami, Florida, December 9–11, 1994. The Miami Declaration pledged the nations to rid the hemisphere of poverty, provide for sustainable economic growth, commit to democratic government, and set a date of 2005 for the completion of an FTAA agreement. To reach that deadline, negotiations began in 1998 among the various technical committees representing economic sectors, such as AGRICULTURE, textiles, and telecommunications, and various issues including LABOR and intellectual property rights. National interests prevailed, however, and there was insufficient progress by 2005. An FTAA agreement remains elusive.

Not everyone was happy with the proposed FTAA. Most Latin Americans saw it as another U.S. attempt to dominate hemispheric affairs and to profit most from it. BRAZIL led the charge and instead aimed to unite the Latin Americans into one trading bloc before confronting the United States over the FTAA. By 2008, BOLIVIA, CHILE, COLOMBIA, ECUADOR, PERU, and VENEZUELA had become associate members of the SOUTHERN CONE COMMON MARKET (MERCOSUR). Latin American governments also sought economic agreements outside the hemisphere. Discussions with the European Union began in 1995 but have stalled over protective measures, such as agriculture and textiles, within each group (see EUROPEAN UNION AND LATIN AMERICA). After 2000, China completed trade agreements with several Latin American countries, including ARGENTINA, Brazil, Chile,

Ecuador, and MEXICO (see CHINA AND LATIN AMERICA, PEOPLE'S REPUBLIC OF). The MERCOSUR economies were adversely affected by Brazil's devaluation of the real and the Argentine financial crisis between 2000 and 2002 (see ARGENTINA, ECONOMIC COLLAPSE IN).

The United States became increasingly hesitant to rush to a new free trade agreement amid allegations that NAFTA had already cost thousands of jobs in Mexico and had adversely affected certain economic sectors, such as south Florida agriculture. Intellectual property rights, telecommunications, and information technology sectors also contributed to U.S. concerns. At the Eighth Ministerial Meeting in Miami on November 21 and 22, 2003, these differences became divisive. As a result, President George W. Bush determined to seek trade agreements with smaller groups or individual Latin American nations, such as the DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT, the ANDEAN COMMUNITY OF NATIONS, and Colombia. Because of these myriad issues, in 2008, FTAA discussions were at a standstill as the U.S. presidential elections approached in November. Throughout the campaign, the Democratic candidate Barack Obama pledged a renewal of U.S. interest in Latin America and called for a new and fair commitment to inter-American trade, a promise he repeated at the Fifth Summit of the Americas Conference in TRINIDAD AND TOBAGO from April 16 to 19, 2009.

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**Frei Montalva, Eduardo** (b. 1911–d. 1982) *president of Chile* Born into a middle-class family in SANTIAGO DE CHILE, Eduardo Frei Montalva was educated in local schools and in 1933 earned his law degree from the Universidad Católica. Shortly after his graduation, Frei married María Ruíz-Tagle, and together, they had five children. Originally a member of the Conservative Party, Frei became disenchanted with its indifference toward the needs of the working class. In 1938, Frei and several of his colleagues founded the Falange Nacional to rally behind Popular Front (Frente Popular, or FP) candidate Pedro Aguirre Cerda's (b. 1879–d. 1941) successful bid for the presidency. In 1945, President Juan Antonio Ríos (b. 1888–d. 1946) appointed Frei minister of public works, and in 1949, Frei became the Falange's first elected senator. A political pragmatist, Frei recognized that the Falangist name was associated with the political right and that the Socialist and Communist Parties were identified with the extreme left. In order to offer a middle position, in 1957, he helped found the Christian

Democratic Party (Partido Demócrata Cristiano, or PDC), which brought together wealthy Catholic industrialists, professionals, small businessmen, and other members of the middle sector, as well as industrial workers, miners, peasants, and agricultural laborers. The PDC became a centrist party, offering itself as an alternative to the extreme left and extreme right. Frei appealed to a wide audience through his belief that capitalists and workers were not natural enemies and that social reform and justice could be accomplished within a capitalistic-democratic framework.

Frei lost his bid for the presidency in 1958, but six years later, he defeated FP candidate SALVADOR ALLENDE GOSSENS by a large margin, with 56 percent of the popular vote. Frei took office on November 3, 1964. The campaign was cast within the framework of the cold war, as a struggle between capitalism and communism. Frei and his supporters placed Allende in the latter category and pointed to the political tyranny and economic decline of CUBA caused by communist FIDEL CASTRO RUZ. The U.S. Central Intelligence Agency (CIA) provided \$3 million to the Frei campaign. In congressional elections a year later, the Christian Democrats gained a majority of the legislative seats but not enough to prevent its programs from being blocked by coalitions on the right and the left.

The centerpiece of Frei's program was the "Chileanization" of the copper industry, which was dominated by U.S. firms. Frei reasoned that outright nationalization with compensation would be too expensive, and to encourage further U.S. investment in the country would only expand U.S. influence in CHILE'S ECONOMY. The centrist choice, according to Frei, was for the Chilean government to buy into the companies, with compensation to be paid to the original owners from the income earned from increased production. Once the payments were completed, the Chilean government would use the income to invest in the country's infrastructure, including homes, schools, medical clinics, and so forth for the poor. With the PDC majority in Congress in November 1965, the Chilean government purchased 51 percent of the Kennecott and 25 percent of the Anaconda copper-MINING companies. Frei's plan fizzled over the next five years, however. Copper production increased by only 10 percent, and although copper prices increased, this was due to inflation rather than higher productivity. The expected income was based on the latter, a point not lost on leftist politicians.

Frei's second initiative, agrarian reform, also failed to meet its objective. He expected to place 100,000 peasant families on their own farms by 1970, but only an estimated 28,000 peasants became farm owners. While large landowners were reluctant to part with any of their land, the peasants, having long mistrusted government institutions, were hesitant to borrow funds from government banks to purchase available plots. The Frei administration also received a mass infusion of foreign capital from the United States, the INTER-AMERICAN DEVELOPMENT

BANK, and the World Bank for infrastructure projects, but congressional opposition, largely from conservative POLITICAL PARTIES and the FP that had no interest in Frei succeeding, refused to appropriate the required Chilean portion of the reform programs.

By 1970, the high expectations of Frei's "Revolution in Liberty" had not been realized, which contributed further to the frustration of the people and to Allende's election that same year. Nevertheless, Frei's legacy lived on beyond his death in 1982. His eldest son, Eduardo Frei Ruíz-Tagle (b. 1942– ), served as president of Chile from 1994 to 2000, and the PDC continues to be Chile's largest party into the 21st century.

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**French overseas possessions** French territory in the Caribbean region currently consists of three overseas departments—French Guiana, Guadeloupe, and Martinique—and two overseas collectives—Saint Martin and Saint Barthélemy. The Guadeloupe department currently includes the adjacent islands of Les Saintes, Marie-Galante, and La Désirade.

Prior to the 20th century, France lost many of its colonies in the Caribbean. Whereas HAITI declared its independence from France in 1804, islands such as DOMINICA, GRENADA, SAINT LUCIA, and SAINT VINCENT AND THE GRENADINES were captured by the British. Until 2007, there were three French overseas possessions (commonly known in French as *départements d'outre-mer*). These regions are officially part of France and use the euro as their official currency. On February 22, 2007, however, Saint Martin and Saint Barthélemy, feeling no cultural affinity toward Guadeloupe, seceded from Guadeloupe and became overseas collectives. Saint Martin, which occupies 20 square miles (52 km<sup>2</sup>) of territory, consists of several islets and the northern part of the island of Saint Martin. The southern part of the island is currently a part of the Netherlands Antilles (see CARIBBEAN, DUTCH). The island, inhabited by 35,000 people, has an elected Territorial Council, which has been led by Frantz Gumbs (b. unknown) since 2009. Saint Barthélemy, commonly known as St. Barts, occupies 8 square miles (21 km<sup>2</sup>) of territory and is inhabited by 7,000 people. The island also has a Territorial Council, which has been led by Bruno Magras (b. 1951) since 2007.

After more than five centuries of European colonialism in the Americas, French Guiana, which lies between SURINAME to the west and BRAZIL to the east and south,

remains the only nonindependent state on the South American mainland. Over 90 percent of French Guiana's 33,399 square miles (86,503 km<sup>2</sup>) of territory is covered by tropical forest. Most of French Guiana's 202,000 inhabitants live along the coast. During the 19th century, Emperor Napoléon III decided that penal settlements in the colony would reduce the cost of prisons in France and contribute to the development of the colony. Between 1852 and 1938, more than 56,000 prisoners, including Alfred Dreyfus of the notorious Dreyfus Affair, were sent to the DEVIL'S ISLAND PRISON. Although the prison closed in 1952, French Guiana has never fully escaped its negative image as a former penal colony with an unhealthy climate and an impenetrable hinterland.

In 1946, after more than three centuries as a French colony, French Guiana was transformed into an overseas department. Unlike the peoples of other European colonies in the Caribbean who loudly clamored for independence during the post-1945 era, the people of French Guiana wanted to remain part of the French nation, primarily for economic reasons. In theory, French Guiana was to be equal and identical to any other French department. Beginning in 1958, French Guiana underwent a significant economic transformation. The traditional AGRICULTURE-BASED ECONOMY was replaced by a consumer-oriented economy based on massive cash infusions from France. By 2000, over three-fourths of the population was involved in the service sector. The most dynamic sector of French Guiana's economy is the fishing industry. By 2000, shrimp represented 60 percent of French Guiana's total exports. Since 1982, the French government has encouraged French MIGRATION to the territory. Many of these recent immigrants, who make up 25 percent of the population, are working for the European Space Agency, which launches its communication satellites from the GUIANA SPACE CENTER at Kourou. Antoine Karam (b. 1950– ) has been president of the Regional Council since 1992.

Guadeloupe, which occupies 629 square miles (1,629 km<sup>2</sup>) of territory, is an archipelago of five principal islands—Basse-Terre, Grande-Terre, La Désirade, Les Saintes, and Marie Galante—in the Leeward Islands. It is located between Montserrat to the north and Dominica to the south. A narrow channel divides Guadeloupe proper into two islands, Basse-Terre and Grande-Terre. The resulting landmass is butterfly-shaped. The capital, Basseterre, is located on the western island of Basse-Terre. Most of Guadeloupe's 410,000 people are French-speaking Catholics of African descent. In 1946, Guadeloupe became a French overseas department. Although the overwhelming majority of Guadeloupe's people prefer continued association with France, albeit for economic reasons, a small, violent secessionist movement has resorted to terrorism to make itself heard. Victorin Lurel (b. 1951– ) has been president of the Regional Council since 2004. Agriculture is the single most important economic activity in Guadeloupe. During the post-World

War II period, bananas replaced sugarcane as the most important crop. Over 50 percent of the revenue from agricultural exports comes from bananas. Revenue from tourism is enhanced by the number of U.S. cruise ships visiting Guadeloupe. France provides huge subsidies that allow the people of Guadeloupe to have a higher standard of living than would be possible if they were independent.

Martinique, which occupies 436 square miles (1,129 km<sup>2</sup>) of territory, is the northernmost of the Windward Islands. Martinique is located between Dominica to the north and St. Lucia to the south. Fort-de-France, the capital, is located on the western side of the island. Most of Martinique's 400,000 people are French-speaking Catholics of African descent. Repeated attempts by the inhabitants of Martinique during the 20th century to gain greater autonomy often resulted in violence. A significant number of people on the island began to embrace the philosophy of Negritude, which urged black people to reject cultural assimilation and emphasize their African heritage. Author Aimé Césaire (b. 1913–d. 2008), the mayor of Fort-de-France from 1945 to 1983, consistently sought greater autonomy for the island. Basing his ideas on a blend on Negritude, anticolonialism, and communism, Césaire believed that the political assimilation of the French colonies into the French Republic would guarantee the human rights of the people of Martinique.

In 1946, Martinique became a French overseas department. Although Martinique was offered independence in 1958, the inhabitants, motivated by economic factors, voted to continue their relationship with France. Alfred Marie-Jeanne (b. 1936– ) has been president of the Regional Council since 1998. Agriculture, once the mainstay of the island's economy, generated only 5 percent of the island's revenue in 2007. Although limited attempts at light industry have been implemented, tourism has become the most important source of foreign exchange. France continues to provide huge subsidies that allow the people of Martinique to have a higher standard of living than would be possible if they were independent.

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**FSLN** See SANDINISTA NATIONAL LIBERATION FRONT.

**FTAA** See FREE TRADE AREA OF THE AMERICAS.

**Fujimori, Alberto Kenya** (b. 1938– ) *president of Peru* According to the official account, Alberto Kenya Fujimori was born to working-class parents who had migrated to PERU from Japan. Subsequent allegations, never proven, charged that Fujimori was born in Japan and came to Peru with his parents when they immigrated in 1934, which would have made him ineligible for the presidency. What is certain is that he attended local public schools and earned a degree in agricultural engineering in 1957 from the Universidad Nacional Agraria La Molina. Fujimori subsequently pursued graduate studies in France and the United States. In 1974, he married Susana Higuchi, also of Japanese descent. They divorced in 1994. For 15 years prior to his presidential candidacy in 1990, Fujimori held several academic positions in Peru and from 1987 to 1989 hosted a popular television show that gave him wide public exposure.

In 1989, Fujimori joined with a group of middle-sector professionals, small businessmen, and Protestant evangelicals to form a new political party, Change 1990 (Cambio 90), to challenge Peru's traditional elite-MILITARY leadership and political corruption. Fujimori beat Peru's renowned writer Mario Vargas Llosa (b. 1936– ) in the June 11, 1990, election. Contrary to his campaign promises, Fujimori implemented a neoliberal economic program. His austerity measures included the firing of 400,000 government employees. Changes in existing laws opened the oil, gas, and MINING sectors to foreign investment, while new government agencies were established to set pollution standards on a case-by-case basis in those industries. Critics assert that this leniency significantly increased environmental degradation in the Amazon region, the Andean highlands, and national parks. In contrast, Fujimori's supporters point out that the measures reduced the annual inflation rate from 7,650 percent in 1990 to 40 percent in 1993, increased foreign direct investment by more than \$2 billion, and generated a 7 percent annual economic growth rate by 1994. Fujimori granted the military, the police, and the government intelligence service a free hand in repressing the SHINING PATH and TUPAC AMARU REVOLUTIONARY MOVEMENT.

Opposition POLITICAL PARTIES controlled the Chamber of Deputies and Senate and opposed Fujimori's programs and his desire for more centralized authority to direct a government assault on guerrilla organizations, Fujimori engineered a self-coup (*auto golpe*) on April 2, 1992. The constitution was suspended, the congress dismissed, and the judiciary purged. No significant popular protest surfaced against the action or Fujimori's call for a new constituent assembly on January 31, 1993. The new constituent assembly permitted him to seek a second presidential term, which he won in new elections held on April 9, 1999. Among his immediate actions were to pardon all military personnel of human rights violations in the campaign against guerrilla organizations and to strip universities of their autonomy. Fujimori now became known as a dictator, and concerns over the loss of civil and human rights intensified.



Peruvian president Alberto Fujimori takes office in 1990. (AP Photo/Alejandro Balaguer)

The pro-Fujimori Congress approved a new constitution, which the Peruvian people ratified on December 31, 1999. The document contained a provision that made Fujimori eligible to seek a third presidential term in the April 9, 2000, elections, which the electoral board claimed he narrowly won by wide enough margin to prevent a runoff election on May 28. Fujimori had won amid charges of voter intimidation and government fraud. Complicating matters countless numbers of Alejandro Toledo's (b. 1946– ) Possible Peru Party had submitted blank ballots to protest the alleged voter intimidation and government voter fraud. In any case, the debated election results became a moot point when, on September 14, 2000, television station Canal N broadcast a video showing the director of Peru's National Intelligence Service (SIN) accepting a bribe. Over the next two months, both allegations and verifications of corruption in Fujimori's administration intensified, and his support base collapsed. Fujimori left Peru for a meeting of the Asian Pacific Economic Cooperation forum in Brunei but wound up in Tokyo, Japan, from where he faxed his resignation to Congress. Fujimori remained in Japan until November 6, 2005, when he arrived in SANTIAGO DE CHILE via a private jet from Tokyo and Tijuana, MEXICO. His intention was to return to Peru to participate in the 2006 presidential elections despite a Peruvian law that prevents him from participating in national politics until 2011.

Fujimori remained in Santiago while the Chilean Supreme Court considered the Peruvian request to extradite him on a warrant for human rights violations during his presidency. On September 21, 2006, the Peruvian request was granted, and the next day Fujimori returned to LIMA to face charges of corruption and human rights violations. Fujimori received a six-year sentence on

December 10, 2007, stemming from corruption charges. On April 7, 2009, Fujimori received a 25-year sentence for human rights violations.

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# G

**Gairy, Eric** (b. 1920–d. 1997) *prime minister of Grenada* Born on February 18, 1920, near Grenville, GRENADA, Eric Gairy was a schoolteacher and TRADE union leader. From 1941 to 1942, Gairy worked at the U.S. naval base at Chaguaramas in Trinidad. He subsequently worked for the Lago Oil Company in Aruba from 1943 to 1948. In 1950, he formed the Grenada United Labour Party (GULP). Gairy served as chief minister of the House of Representatives from 1954 to 1960. Herbert Blaize (b. 1918–d. 1989), leader of Grenada National Party (GNP), established in 1953 to oppose GULP, was appointed chief minister in 1960 but lost power to Gairy in 1961. Blaize, however, was reappointed chief minister when Gairy was dismissed for corruption in 1962. In 1967, shortly after the British granted Grenada more internal self-government, Blaize lost power to Gairy, who became premier. To solidify his hold on power, in 1970, Gairy formed the Mongoose Gang, a private army under his command that terrorized political opposition, especially those who supported the Black Power movement.

On February 7, 1974, after the United Kingdom granted Grenada independence, Gairy became prime minister. In the 1976 elections, Blaize temporarily allied his center-right GNP with MAURICE BISHOP's left-wing New Jewel Movement (NJM). Regardless, Gairy won the elections. Critics of Gairy's government accused him of becoming increasingly authoritarian. In 1977, Gairy obtained MILITARY assistance from CHILE's AUGUSTO PINOCHET UGARTE, who provided counterinsurgency training to the Grenadian military and police. At the same time, Gairy facilitated the establishment of St. Georges Medical School. In 1977, while addressing the United Nations, Gairy called for the establishment of

an agency to study unidentified flying objects (UFOs) and the Bermuda Triangle. On March 13, 1979, while Gairy was out of the country attending a UFO seminar at the United Nations, Bishop's NJM launched a coup that overthrew Gairy's government. Gairy stayed in exile, first in New York City, then in San Diego, California, until after the U.S.-led military intervention of Grenada known as OPERATION URGENT FURY ousted the NJM from power. Gairy's attempts to regain power in the 1984, 1990, and 1995 elections met with failure. He died on August 23, 1997, after suffering a stroke in Grand Anse, Grenada.

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Norma Sinclair. *Grenada: Isle of Spice* (Northampton, Mass.: Interlink Publishing, 2003).

**Gaitán, Jorge Eliécer** (b. 1898–d. 1948) *Colombian labor activist and politician* The son of a BOGOTÁ, COLOMBIA, bookseller and schoolteacher, Jorge Eliécer Gaitán did not begin his formal education until age 11. He went on to earn a law degree from the National University in 1924 and two years later, a doctorate in jurisprudence at the Royal University in Rome, Italy. Exposed to Liberal Party ideas since early childhood, Gaitán became a party activist in 1919, at age 21. He became a national figure for his leadership role in the 1928 banana worker's strike against the United Fruit

Company (UFCO) in Magdalena. The army crushed the strike, killing an uncounted number of unarmed workers. This prompted Gaitán to travel throughout the country, using his oratory skills to speak out against the MILITARY action, the elite government it represented, and U.S. capitalism as represented by UFCO. Gaitán's reputation as a defender of laborers' rights contributed to his election as mayor of Bogotá in 1936 and to his appointments as minister of education in 1940 and labor minister in 1943 and 1944 (see LABOR). Having built an extensive following among Colombia's lower socioeconomic group, the Liberal Party judged him too far to the political left to support him in his bid for the presidency in 1946, which was unsuccessful. A year later, however, Gaitán became the undisputed leader of the Liberal Party and was considered by most analysts to be its candidate for the presidency in the 1950 election. However, on April 9, 1949, Juan Roa Sierra (b. 1927–d. 1948) assassinated Gaitán as he left his law office in Bogotá. Roa was immediately murdered by an angry mob, leaving behind a host of unsubstantiated theories about his motive for the crime. Gaitán's death touched off nationwide rioting known as the Bogotazo and unleashed a 15-year period of unrest known as La Violencia. Gaitán's legacy as a spokesman for Colombia's underclass remains.

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**Galtieri, Leopoldo** (b. 1926–d. 2003) *de facto president of and commander of the armed forces in Argentina* Born into a working-class family in BUENOS AIRES, ARGENTINA, Leopoldo Galtieri entered the Argentine MILITARY academy at age 17 to study engineering. Subsequently, he studied at the U.S. Army School of the Americas in the Panama Canal Zone. In 1975, he became commander of the Argentine engineer corps; in 1976, a major general; and in 1980, commander in chief of the army.

Galtieri supported the military coup that ousted President ISABEL PERÓN on March 24, 1976, and became a member of the ruling junta. As the junta's repressive DIRTY WAR and failed economic policies generated opposition to it, he became *de facto* president of Argentina on December 22, 1981, replacing General Roberto Viola (b. 1924–d. 1994). Galtieri also remained as the army's commander in chief. The political change did not stymie the opposition, whose demonstrations turned increasingly violent. From the start of his "presidency," Galtieri planned to invade the Malvinas, or Falkland Islands, thinking that in current world conditions Great Britain would not come to the defense of the archipelago some 8,000 miles from London. While Argentina's invasion on April 2, 1982, stirred

Argentine nationalism to reclaim islands the British had occupied since 1833, the British did come to the South Atlantic and with their superior force overwhelmed the underprepared Argentine military. The Argentines surrendered on June 14, 1982. Galtieri resigned from the presidency three days later.

President Raúl Alfonsín (b. 1927– ) came to office on December 10, 1983, with a reputation as a battler for human rights during the military regimes. Determined to rectify the past, he directed the arrest of Galtieri and other junta leaders on charges of human rights violations during the Dirty War and for mismanagement of the MALVINAS/FALKLANDS WAR. Evidence at Galtieri's trial revealed that while he was not among the worst violators of human rights, he did lead Battalion 601, the unit in charge of the Dirty War. Nevertheless, it was his mismanagement of the Malvinas/Falklands War that sent him to prison in 1988. Galtieri served five years before receiving a pardon from President CARLOS SAÚL MENEM.

While never regretting his role in either the Dirty War or admitting to any wrongdoing in the Malvinas/Falklands conflict, Galtieri spent his remaining years living quietly in a Buenos Aires suburb. He died of heart failure at the age of 76 on January 12, 2003.

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**García Pérez, Alan** (b. 1943– ) *president of Peru* Born into a middle-class family in LIMA, PERU, Alan García Pérez received his primary and secondary education in local schools and pursued undergraduate studies at the Catholic University in Lima before earning a law degree at the National University of San Marcos in 1971. He also earned a doctoral degree in political science at the Universidad Complutense in Madrid, Spain, and a degree in sociology from the University of Paris. At the urging of AMERICAN POPULAR REVOLUTIONARY ALLIANCE (APRA) leader VICTOR RAÚL HAYA DE LA TORRE, García returned to Peru in 1978 and was elected to the constituent assembly that year and to the Chamber of Deputies in 1980.

García captured the presidency in the April 14, 1985, elections, the first APRA candidate to do so in the party's 60-year history, and at age 36, he was the youngest president in the region, which earned him the title "Latin America's Kennedy." During his term, the ECONOMY was wracked by continuing inflation that totaled 2.2 million percent, the percentage of people living in poverty climbed 13 percentage points to 55 percent of the total

population, the annual per-capita income dropped to \$720, the gross domestic product (GDP) slipped by 20 percentage points, and the national reserves were put at -\$900 million. The international financial community abandoned Peru when García declared that the country would annually put only 10 percent of its GDP toward payment of its foreign debt. The García regime was also plagued by rumors of graft, corruption, and nepotism, and some appointees were said to have links to Colombian drug dealers.

In addition to a continuing economic crisis during his first term, García confronted a rising tide of violence from the SHINING PATH guerrilla organization. While the brutal and repressive MILITARY response did not put down the guerrillas, it did result in violations of human rights and massacres, such as those at Accomarca in August 1985, Santa Bárbara in June 1986, and Cayara in May 1988. Additionally, an estimated 1,600 people “disappeared” during García’s administration. García left office on July 28, 1990, under a cloud of suspicion. On April 9, 1992, President ALBERTO KENYA FUJIMORI directed the military to arrest García on charges of corruption, but García escaped to COLOMBIA and then to France, where he earned a minimal income, yet lived an ostentatious lifestyle, his daughter attending a prestigious private school.

Following Fujimori’s resignation on November 22, 2000, García returned to Peru on January 27, 2001, and again confronted charges of corruption during his first presidential term. While García denied the allegations, Peru’s Supreme Court ruled that the statute of limitations had run out. During these machinations, Congress approved legislation that barred anyone who had been investigated for corruption during their public careers from seeking the presidency.

Once cleared of corruption charges, García began campaigning for the presidency and lost the race in a close runoff election on June 4, 2006, to Possible Peru Party candidate Alejandro Toledo (b. 1961– ). Nevertheless, García came away from the election as APRA’s undisputed leader. As APRA’s candidate, García again campaigned for and won the presidency in the June 4, 2006, runoff election with 53 percent of the popular vote. He came to office promising to balance economic stability with spending on social programs, a difficult challenge in a country where 44.5 percent of the people live below the poverty line and where an estimated 49.5 percent of the workforce is underemployed.

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**Gomes, Albert** (b. 1911–d. 1978) *chief minister of Trinidad and Tobago* Born on March 25, 1911, in Belmont, a suburb of Port of Spain, Trinidad, to middle-class Portuguese immigrant parents, Albert Gomes studied journalism at the City College of New York between 1928 and 1930. Following his return to Trinidad, he established *The Beacon*, a provocative literary magazine financed by his father. After his father suspended support of *The Beacon* in 1933, Gomes went to work in a pharmacy owned by his father. During the 1930s, he became involved in the growing LABOR movement in Trinidad and Tobago.

Gomes served on the Port of Spain city council from 1938 to 1947 and was elected to the Legislative Council in a special by-election in 1945. In the 1950 elections, the British Empire Citizens’ and Workers’ Home Rule Party, led by Tubal Uriah “Buzz” Butler (b. 1897–d. 1977), won seven of the 18 available seats, but the British governor, fearing that Butler’s political agenda was too radical, asked Gomes to form a coalition government. Gomes served as chief minister of Trinidad and Tobago from 1950 to 1956. The People’s National Movement (PNM), led by ERIC WILLIAMS, won the 1956 elections. Joining the Democratic Labour Party (DLP) in 1957, Gomes was elected to the WEST INDIES FEDERATION parliament. After Trinidad and Tobago achieved independence in 1962, Gomes, a 300-pound white man, realized that he had no political future in Trinidad and Tobago. He moved to England where he wrote his autobiography, *Through a Maze of Colour* (1974). Gomes died of stomach cancer on January 13, 1978.

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**Gómez, Juan Vicente** (b. 1857–d. 1935) *dictator and president of Venezuela* Juan Vicente Gómez served as Venezuelan dictator and as president on three occasions between 1908 and 1935. One of 14 children born into a ranching and business family in Táchira State, at age 14, Gómez was thrust into a position of responsibility with the death of his father. Gómez assumed the directorship of his father’s business pursuits and inherited his position on the state’s municipal council. In the late 1880s, Gómez developed a friendship with Cipriano Castro (b. 1858–d. 1924) and as an officer in Castro’s army entered CARACAS with him in 1899 to seize the presidency. As a loyal supporter, Gómez suppressed Castro’s political



opponents and in the process earned a reputation as an efficient yet brutal administrator. Castro departed for Europe on November 23, 1908, for medical treatment, and in his absence, Gómez seized power, on December 19. Gómez went on to govern VENEZUELA as an iron-fisted dictator for the next 27 years, manipulating the constitution six times to remain in office. For his brutal suppression of political opponents and his violation of civil and human rights, Gómez earned the title “Tyrant of the Andes.” His economic policies encouraged ownership of large estates to produce the primary export crops, coffee and cacao. After the discovery of oil in Lake Maracaibo in 1918, Gómez made generous concessions to foreign oil companies, including Royal Dutch Shell, Sinclair of Indiana, and Standard Oil of California. In the process, Gómez and his family and close friends personally profited.

Gómez has been the subject of significant historical debate. Earlier scholars were extremely critical of his political dictatorship and economic policies that benefited the landed elite at the expense of Venezuela’s middle and lower sectors. While acknowledging Gómez’s mistakes, more recent scholars portray him as a major stepping stone to Venezuela’s modernization. These scholars place Gómez alongside RÓMULO ERNESTO BETANCOURT BELLO as Venezuela’s most important 20th-century political leader.

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Thomas Rourke. *Tyrant of the Andes: The Life of Juan Vicente Gómez* (New York: W. Morrow & Co., 1936).

**Gómez, Laureano** (b. 1889–d. 1965) *president of Colombia* Born into a middle-class family in BOGOTÁ, COLOMBIA, Laureano Gómez graduated from the National University in 1909 with an engineering degree. With an interest in politics, from 1911 to 1916, he worked as editor of the conservative newspaper *La Unidad*, at the same time serving as an elected member of the national Chamber of Deputies. During the 1920s, he served as minister to CHILE and ARGENTINA and minister of public works. Following the Liberal electoral victory in 1930, Gómez proselytized the conservative cause through newspaper editorials and criticized Presidents Olaya Herrera (b. 1880–d. 1937), ALFONSO LÓPEZ PUMAREJO, and Eduardo Santos (b. 1888–d. 1974). Gómez fled to Spain after he nearly lost his life in the Bogozato on April 9, 1948. He returned to capture, unopposed, the November 27, 1949, presidential election as the Conservative Party candidate. Governing without a congress, he directed infrastructure improvements including

roads, oil pipelines, and soccer stadiums and dispatched troops to fight on behalf of the United Nations in the Korean War (1951–53). Nevertheless, his regime was better known for its repression. When public order collapsed around him, on June 13, 1953, General GUSTAVO ROJAS PINILLA ousted Gómez, who again departed for Spain. Although exiled, Gómez remained the recognized leader of the Conservative Party. In that position, in 1956 at Siges, Spain, Gómez signed an agreement with the Liberal Party by which each shared political power for 15 years starting in 1958. Following the agreement, Gómez returned to Colombia, residing in Bogotá until his death in 1965.

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**González, Elián** (b. 1994– ) *refugee from Cuba* Elián González was a five-year-old Cuban native rescued by a U.S. fisherman three miles (5 km) from the Florida coastline on Thanksgiving Day, November 25, 1999, an event that triggered a seven-month political and legal battle between the United States and the Cuban governments. The rescue of González became an emotional battle for Cuban-exile communities, particularly those in Miami, Florida, and Union City, New Jersey, that was played out in the international media.

With several others, young González had secretly left CUBA in a small boat on November 22, 1999. Two days later, it sank in the Florida Straits, with only three survivors. González’s mother and stepfather were among the dead. After receiving medical treatment from the Immigration and Naturalization Service (INS), González was put into the temporary custody of his grandfather’s stepbrother, Lázaro González, himself a Cuban exile living in Miami’s Little Havana. In December, Elián’s blood father, Juan Miguel González, requested that his son be returned to Cuba. A debate followed over issues such as children’s rights, the state of civil rights in Cuba, educational systems, the rule of law, and the possibility that Elián’s father could immigrate to the United States. Emotions flared as the Cuban-American community staged demonstrations in Miami, Union City, and elsewhere, while FIDEL CASTRO RUZ orchestrated mass turnouts in Cuba calling for the return of González. The situation intensified in January 2000 when González’s two grandmothers arrived in the United States with the intention of taking him home. It reached new heights when Juan Miguel González arrived in the United States in April. Lázaro González refused to grant the Cubans visitation rights and publicly vowed never to turn the boy over to U.S. authorities. His protestations led Attorney General Janet Reno

to order the abduction of Elián from Lázaro González's home on April 22, 2000, to unite him with his father in Washington, D.C. Finally, both the Atlanta Appeals Court and the U.S. Supreme Court refused to consider asylum petitions for Elián González. On June 22, he, his grandmothers, and his father returned to HAVANA to a tumultuous welcome. While it was a triumph for the U.S. legal system, Castro used the incident to further stir anti-Americanism in Cuba.

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**good neighbor policy** In his March 4, 1933, inaugural address, U.S. president Franklin D. Roosevelt announced that the United States henceforth intended to be a "good neighbor" in its relations with other nations around the globe. Secretary of State Cordell Hull made a similar announcement before the Seventh Inter-American Conference of American States, meeting in Montevideo, URUGUAY, December 3–26, 1933. At that conference and again at the Inter-American Conference for the Maintenance of Peace in BUENOS AIRES December 1–23, 1936, the U.S. delegations pledged their government to nonintervention in the internal affairs of Latin American nations. U.S. involvement in the internal affairs of its southern neighbors can be traced to the 1898 war for Cuban independence and its role in PANAMA'S 1903 independence and subsequent interventions to maintain political order in both nations; the CENTRAL AMERICAN CONFERENCES OF 1907 and 1923; and the U.S. interventions in the circum-Caribbean region since 1900, which brought charges of imperialism from critics in both North and South America.

Several factors contributed to a change in policy in the decade after World War I. Europe no longer posed a threat to the Caribbean region. Furthermore, the larger Latin American nations—ARGENTINA, BRAZIL, CHILE, and MEXICO—had called for an end to U.S. interventionist policies. As secretary of commerce, Herbert Hoover called for the withdrawal of marines from the Caribbean countries to improve the U.S. image in the hemisphere, claiming that this would result in improved economic relations. State Department Latin American specialists, frustrated with the failed U.S. effort to democratize the region, had also called for the marines' withdrawal. J. Reuben Clark's *Memorandum on the Monroe Doctrine* rejected the Roosevelt Corollary that justified U.S. preemptive intervention under the terms of the Monroe Doctrine. The mounting death toll among U.S. Marines as the result of the chase for NICARAGUA'S alleged revolutionary AUGUSTO CÉSAR SANDINO further contributed to public protest against intervention.

In applying the good neighbor policy, Roosevelt directed the withdrawal of marines from the DOMINICAN REPUBLIC, HAITI, and Nicaragua, and the United States did nothing to interfere with the emergence of dictators TIBURCIO CARÍAS ANDINO, MAXIMILIANO HERNÁNDEZ MARTÍNEZ, ANASTASIO SOMOZA GARCÍA, RAFAEL TRUJILLO, and JORGE UBICO Y CASTAÑEDA in HONDURAS, EL SALVADOR, Nicaragua, the Dominican Republic, and GUATEMALA, respectively. The policy also led to a new Panama Canal treaty that was ratified by the U.S. Senate in 1936 (see PANAMA CANAL TREATIES). Roosevelt sidestepped the policy in relation to CUBA, however. There, presidential envoy Sumner Welles encouraged FULGENCIO BATISTA Y ZALDÍVAR to overthrow President RÁMON GRAU SAN MARTÍN on January 15, 1933. Welles's TRADE reciprocity agreements were used by dictators to legalize their positions, but nothing more. The United States did not directly intervene in the internal affairs of a Latin American country until its sponsored 1954 invasion of Guatemala (see GUATEMALA, U.S. SPONSORED INVASION OF).

See also MONROE DOCTRINE (Vol. III); PANAMANIAN INDEPENDENCE (Vol. III); WAR OF 1898 (Vol. III).

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**Goulart, João Belchoir** See BRAZIL; BRAZIL, 1964 COUP D'ÉTAT IN.

**Grau San Martín, Ramón** (b. 1887–d. 1969) *president of Cuba* Beginning in 1927, Ramón Grau San Martín became a vocal critic of corrupt president GERARDO MACHADO Y MORALES, which resulted in his jailing in 1931 and then exile in the United States. Following the "Sergeant's Revolt" on September 4, 1933, Grau served in the short-lived, five-man junta known as the pentarchy, and upon its collapse, he became provisional president, a post he held until January 14, 1934. As a Cuban nationalist, Grau unilaterally terminated the PLATT AMENDMENT, legalized LABOR unions, established an eight-hour workday, and declared that 50 percent of the workers in all firms operating on the island had to be Cuban. Grau also announced a land reform program to appease the peasant class. These programs were popular among laborers and students but not among the Cuban elite, U.S.-owned companies operating on the island, and the U.S. government, whose economic interests in CUBA were threatened. Grau's pronouncements prompted U.S. president Franklin D. Roosevelt's special envoy to Cuba, Sumner

Welles, to request that the U.S. intervene on the island. Owing to the GOOD NEIGHBOR POLICY, Roosevelt refused, but he did not extend U.S. recognition to the Grau government and did not prevent Welles from speaking with the political opposition, including FULGENCIO BATISTA Y ZALDÍVAR, whom Welles encouraged to oust the provisional president. Batista did just that on January 14, 1934, and commenced a 25-year run as the most dominant political figure in Cuba until FIDEL CASTRO RUZ.

For his part, Grau escaped to MEXICO, from where he criticized the United States for intervening in Cuban affairs and Cuba's corrupt political system. He returned to Cuba to be elected to the 1940 constitutional commission, which he eventually chaired. Cuba's 1940 constitution was considered Latin America's most progressive at the time. Grau lost the 1940 presidential election to Batista but won the 1944 contest in what most considered to be the fairest election in Cuban history.

During his four-year presidency, Grau San Martín confronted a Cuba stuck in the past as the world around it rapidly changed. Because Cuba remained the free world's primary source of sugar from 1941 to 1947, the landed elite consistently pressured the government to find new sugar markets, even after production in other regions of the world increased from 1947. Cuba's Communist-led labor movement had also benefited from World War II and wanted those gains protected in the postwar world, but at the same time, it became stridently anti-American. Despite their divergent interests, these two groups—sugar growers and labor—became strange bedfellows in the Cuban congress in rejecting U.S.-funded programs designed to diversify AGRICULTURE and develop INDUSTRY on the island. Each group viewed the U.S. proposals as potential opportunities for its further penetration into the Cuban ECONOMY.

As a nationalist, Grau refused to negotiate with the United States and extend its World War II air base rights on the island, but this did not stop him from purchasing U.S. MILITARY equipment and supplies, which he used to thwart various coup attempts against him. Grau again sought unsuccessfully the presidency in 1954 and 1958. Following Castro's 1959 revolution, Grau San Martín retired to his HAVANA home, where he died on July 26, 1969.

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**Grenada** The southernmost nation in the Windward Islands, Grenada became independent of the United

Kingdom on February 7, 1974. Grenada is the largest and southernmost of the Grenadines, a vast archipelago of more than 600 mostly uninhabited islets divided between Grenada and SAINT VINCENT AND THE GRENADINES.

Known as the Spice Isle because of its production of nutmeg and mace, Grenada occupies 132 square miles (342 km<sup>2</sup>), making it one of the smallest independent nations in the Caribbean. Most of the country's 105,000 people live on Grenada. Over 80 percent of those people are of African ancestry. Significantly, there are at least 200,000 Grenada-born people living abroad. St. George's, the capital and largest city, is located on the western side of Grenada. Grenada also possesses the Grenadine Islands south of the Martinique Channel, the most significant being Carriacou, Petit Martinique, Ronde Island, Diamond Island, Large Island, Saline Island, and Frigate Island. The Grenadine Islands north of the Martinique Channel are part of St. Vincent and the Grenadines. TRINIDAD AND TOBAGO is Grenada's southern neighbor.

In the 1763 Treaty of Paris, France ceded Grenada to the United Kingdom. The British made Grenada a CROWN COLONY in 1877. Grenada was part of the ill-fated WEST INDIES FEDERATION from 1958 to 1962. In 1967, Grenada became an associated state, when Britain granted the local population self-government. The United Kingdom, however, continued to control foreign relations and national defense. On February 7, 1974, the British granted Grenada independence, and the premier, ERIC GAIRY, the head of the Grenada United Labour Party (GULP), became the nation's first prime minister. Queen Elizabeth II, the official head of state, appointed a governor, who served as an adviser to the prime minister, who is usually the leader of the majority party in the House of Representatives.

On March 13, 1979, while Gairy was out of the country, the New Jewel Movement (NJM) led by MAURICE BISHOP, staged a virtually bloodless revolution and established the People's Revolutionary Government (PRG). One school of thought holds that the charismatic Bishop was merely a figurehead for a group of pro-Soviet sympathizers within the NJM intent on encircling the Caribbean in a Communist net, in addition to NICARAGUA and CUBA. Another school of thought holds that Bishop truly wanted democratic reform, but that hostility from the United States and neighboring Caribbean states pushed him into an alliance with Castro. Whereas the NJM called for a form of popular socialism based on grassroots local councils, it suspended the constitution, ruled by decree, arrested hundreds of political opponents, closed newspapers, and militarized the nation. The PRG turned Grenada into a Soviet-Cuban client state. The stockpiling of vast quantities of Soviet-supplied weapons was a matter of great concern to Grenada's neighbors.

On October 18, 1983, the PRG imploded. Minister of Finance Bernard Coard (b. 1944– ), who wanted to pursue a more pro-Soviet, anti-U.S. policy, overthrew Bishop with the support of the army. Bishop and many

of his closest associates were arrested, then executed the next day. Following several days of pandemonium, on October 25, 1983, U.S. president Ronald Reagan launched OPERATION URGENT FURY, a U.S. military intervention with the support of several English-speaking Caribbean leaders, most notably DOMINICA prime minister MARY EUGENIA CHARLES. The joint U.S.-Caribbean force promptly restored order and removed Coard and his supporters from power. British governor-general Paul Scoon (b. 1935– ), who had been placed under house arrest by Coard and liberated by U.S. forces, appointed Nicholas Brathwaite (b. 1925– ), a member of the National Democratic Congress (NDC), to reestablish the Grenadian government. In December 1983, when U.S. forces withdrew, Brathwaite became interim prime minister. Herbert Blaize (b. 1918–d. 1989), the leader of the New National Party (NNP), won the 1984 elections and served until his death in 1989. In elections held shortly after Blaize's death, Brathwaite's NDC returned to power in 1990. Keith Mitchell (b. 1946– ), the new leader of the NNP, won the 1994, 1999, and 2003 elections and has served as prime minister since 1995.

Tourism is the nation's leading foreign exchange generator. Grenada is known for its cultivation of spices such as cinnamon, cloves, ginger, mace, and nutmeg. Grenada produces 20 percent of the world's supply of nutmeg, making it the second-largest producer after Indonesia, which produces 75 percent of that supply.

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**Grove Vallejo, Marmaduke** (b. 1878–d. 1954) *Chilean military officer and senator* Born into a middle-class family in Copiapó, CHILE, Marmaduke Grove Vallejo entered the National Naval College in 1892, only to be dismissed two years later. In 1896, he enrolled in the National Military School and graduated in 1898 as a second lieutenant. He later studied in Germany and at Chile's Army Staff School. Grove rose quickly through the ranks and became subdirector of the National Military School in 1920 and in 1925, the director of the newly established Air Force Academy.

From an early age, Grove identified with the causes of Chile's workers, believing they were exploited by the country's agricultural and industrial elite. Grove's political philosophy surfaced publicly on September 3, 1924, when he represented 56 military officers before President Arturo Alessandri (b. 1868–d. 1950) to demand not only

wage increases for the officers but changes in the employment code and income tax system that would benefit the working class. Alessandri caved into Grove's first demand but not those he made on behalf of LABOR. Nevertheless, because he no longer controlled the military officers, Alessandri resigned and departed for Europe. Lieutenant Colonel CARLOS IBÁÑEZ DEL CAMPO headed the military junta that succeeded Alessandri. Recognizing Grove as a potential threat, Ibáñez forced him into exile in Europe.

Grove returned to Chile in 1932 determined to seize power, which he did on June 4, 1932. He proceeded to establish the Socialist Republic of Chile, but in the prevailing political turmoil, his administration lasted only 10 days. During that time the government granted the Central Bank the authority to extend credit to small MINING and agricultural businesses, and government-owned pawn shops were required to return pawned articles to their owners. Following the overthrow of his government on June 13, 1932, Grove went into exile on Easter Island. He returned to Chile only two weeks before the October 30, 1932, presidential election in which he stood as a candidate and finished second behind Alessandri with 17.7 percent of the popular vote. On April 13, 1933, Grove cofounded Chile's Socialist Party and was elected to the Senate on May 9, 1934, a position he held until his 1949 electoral defeat, after which he retired from public life. As a senator, Grove proposed Chile's first agrarian reform law in 1939 and remained a champion of workers' rights. On May 15, 1954, at the age of 75, Grove died in SANTIAGO DE CHILE.

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**Guantánamo Naval Base** Located on CUBA's southeast coast, in Oriente Province, standing watch over the Windward Passage that connects the Caribbean Sea and the Atlantic Ocean, Guantánamo Naval Base is a 45-square-mile (116.5-km<sup>2</sup>) facility and is the oldest U.S. overseas naval base. Article 7 of the 1902 PLATT AMENDMENT granted the United States the right to acquire a naval base in Cuba, and on July 2, 1903, an agreement was reached with the Cuban government to lease 28,700 acres (11,614.5 ha) of land and water in the Guantánamo Bay area for an annual payment of \$2,000.

From the start, the U.S. presence at Guantánamo stirred Cuban nationalism, which prevented any future agreements to expand the base. Even cooperative presidents such as GERARDO MACHADO Y MORALES and FULGENCIO BATISTA Y ZALDÍVAR understood that the Cuban congress would never approve such agreements. Although provisional president RAMÓN GRAU SAN MARTÍN unilaterally proclaimed the termination of the Platt Amendment in 1933, it was formally abrogated a year later with the PERMANENT TREATY of 1934. The new treaty, however,

provided for continued U.S. use of the Guantánamo naval facility for an annual payment of \$14,000. Since coming to power in 1959, FIDEL CASTRO RUZ has repeatedly claimed that he intends to reunite the base with the nation but never took any action in this direction.

Despite its importance to U.S. security, Guantánamo Naval Base initially could not meet its daily water needs. The hot, dry, and arid region receives about 25 inches (635 mm) of rainfall per year. U.S. troops destroyed the base's only well in 1898, fearing that the Spanish had poisoned it. Subsequent efforts to drill artesian wells met with failure. Purchasing water in Cuba or shipping it into the base proved costly and unsatisfactory. Finally, in 1940, the navy reached an agreement with the Bacardi Rum Company to supply the base with 3 million gallons of water from the company's pumping stations on the Yataras River, 12 miles (19 km) away. The issue reached a climax on February 6, 1964, when Castro closed the Yataras River pumps in retaliation for the U.S. Coast Guard seizure of a Cuban fishing vessel inside U.S. territorial waters. Although that incident was resolved peacefully within a month, U.S. president Lyndon B. Johnson ordered the construction of desalination plants on the base. When completed in December 1968, the plants produced 3 million gallons of water and 800,000 kilowatts of electricity daily. Another casualty of the 1968 water crisis was the estimated 600 Cuban workers who lost their jobs on the base, costing the Cuban ECONOMY \$1.2 million annually, along with the \$14,000 annual lease fee the U.S. paid to the Cuban government for use of the site. Since 1964, Castro has instigated incidents along the fence line separating the base from Cuba in order to keep the ownership issue in the public spotlight.

Traditionally, the Guantánamo Naval Base served as a guardian of the Caribbean and its sea and air routes to the Panama Canal and beyond, but during the Jimmy Carter, Ronald Reagan, and George H. W. Bush administrations, the United States conducted MILITARY maneuvers on or near the base, which Castro charged were preparations for a U.S. invasion of Cuba. When the cold war ended in 1991, the base was used to house 45,000 Haitian refugees and another 60,000 Cuban *BALSEROS* trying to escape political tyranny and economic deprivation. Under current policy, all Cubans escaping the homeland and caught on the high seas are returned to Guantánamo and then to Cuba. Since the United States commenced its "war on terrorism" in 2001, an estimated 400 alleged terrorists have been held in special facilities at the base.

The end of the cold war also touched off a debate in the United States regarding Guantánamo's military usefulness. This argument focuses on security needs, a concept that has come to include control of drug trafficking and the movement of terrorists.

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**Guatemala** Guatemala encompasses 42,092 square miles (109,018 km<sup>2</sup>) making it similar in size to its southeastern neighbor HONDURAS and to the U.S. state of Tennessee. Approximately 12.7 million people inhabit this mountainous and volcanic country, which also has fertile coastal plains. People of Amerindian-Spanish descent, locally identified as *ladinos*, and those of European descent make up 54.9 percent of the population. The remainder of the populace are Maya or other NATIVE AMERICANS and are usually identified by one of the 24 indigenous dialects spoken throughout Guatemala. Research of the Mayan culture that dominated the region in the preconquest period continues to attract scholars to Guatemala today.

Spanish conquistador Pedro de Alvarado conquered Guatemala in 1524, after which it became the major state in the Audiencia of Guatemala during the colonial period. Following independence from Spain in 1821 and the Mexican Empire in 1823, Guatemala City served as the capital of the short-lived United Provinces of Central America, until its collapse in 1838. Throughout the remainder of the 19th century, the landed elite developed the nation's coffee-based export ECONOMY.

MANUEL ESTRADA CABRERA assumed the presidency in 1898 and through constitutional manipulation, governed until April 15, 1920, when he was forced from office. During Estrada Cabrera's administration, the U.S.-owned United Fruit Company (UFCO) developed the lucrative banana industry and its subsidiary, International Railways of Central America (IRCA), which laid track that connected GUATEMALA CITY, the coffee highlands, and EL SALVADOR to UFCO's wharves and ships at Puerto Barrios. Although the banana industry created new jobs for indigenous laborers, in the absence of protective LABOR laws and other government measures, for the most part, they remained poverty stricken. Also during Estrada Cabrera's tenure, coffee growers replaced Guatemala City's merchants in political prominence, while UFCO's economic influence made it the most important factor in Guatemala's political arena. Following Estrada Cabrera's ouster in 1920, Guatemala experienced a decade of political turmoil despite its thriving export-based economy. The economy spiraled downward following the onset of the Great Depression in 1929; the concomitant political turmoil ended when General JORGE UBICO Y CASTAÑEDA won unopposed elections and assumed the presidency on February 14, 1931.

Ubico's government depended on support from the MILITARY, the coffee-growing elite, and UFCO. Political opposition was silenced, the legislature rubber-stamped Ubico's proposals, and the press was censored. Vagrancy laws forced the peasantry to work on coffee *fincas*. With the

outbreak of World War II in 1939, Ubico became decidedly pro-Allies. He implemented the U.S.-inspired anti-Nazi program that led to the confiscation, and eventual nationalization, of German-owned properties; the deportation of Nazis, real and suspected; and severe restrictions on those Germans who remained in Guatemala.

Middle-sector opposition to Ubico emerged in 1942. Students and intellectuals and, subsequently, small shopkeepers, lawyers, and medical doctors protested against Ubico's oppressive political regime, wartime-prompted inflation, and apparent uncritical support of U.S. wartime policies, particularly the confiscation of German-owned properties. The protests and demonstrations reached a peak in the late spring of 1944, as Ubico again sought to extend his presidency by constitutional manipulation. A period of political turmoil followed Ubico's forced resignation on July 1, 1944. Finally, elections on December 17–19, 1944, brought to the presidency JUAN JOSÉ ARÉVALO, a university professor who had spent the preceding 12 years exiled in ARGENTINA.

Arévalo's administration, from 1945 to 1950, set in motion allegations that communists controlled the government. Arévalo's call for social security, minimum wages, and maintenance of peasant homes, combined with the fact that many Guatemalan Communists held key government and labor union positions, ignited an elite-based backlash that asserted international communism had infiltrated the country. The anticommunist campaign intensified after the election of JACOBO ARBENZ GUZMÁN to the presidency on March 15, 1951. Arbenz's campaign promises to control foreign investment in Guatemala, expand legal protections for labor unions and workers, and endow indigenous peasants with land, threatened the traditional socioeconomic order. Arévalo's and Arbenz's rhetoric and programs also reflected the changing nature of Guatemalan society. The middle sector that inspired Ubico's ouster in 1944 demanded a more broadly based democracy, while labor leaders, many of them Communists, pressed for workers' and peasants' rights. Not only was Guatemala's elite under attack, so, too, was UFCO. To many, including the Dwight D. Eisenhower administration in the United States, the challenge to Guatemala's traditional order was seen as a microcosm of larger Communist successes in the Soviet Union, Eastern Europe, and China.

Arbenz came to the attention of the international community with the passing of Decree 900 on June 27, 1952, which provided for the nationalization of unused lands for distribution to peasant families. Initially, public lands were redistributed, but when 15 percent of UFCO's 650,000 acres were earmarked for confiscation, U.S. officials concluded that Arbenz had brought communism to Central America. UFCO initially protested the payment of approximately \$525,000 and expanded it into a larger "communist" plan. The Eisenhower administration drew the same conclusion and directed the Central Intelligence Agency (CIA) to engineer Arbenz's overthrow, which it

did on June 18, 1954 (see GUATEMALA, U.S.-SPONSORED INVASION OF). Carlos Castillo Armas (b. 1914–d. 1957), who commanded the Guatemalan army troops that ousted Arbenz, succeeded him as president. Although he set in motion nearly 40 years of military rule in Guatemala, he did not terminate the intra-army struggles for dominance of that institution and hence the country.

Castillo Armas revoked Arbenz's reform measures and suppressed the labor movement. By the early 1960s, middle-class hopes for a more democratic government and an independent judicial system had vanished. The traditional oligarchy—elite landowners, the military, and the CATHOLIC CHURCH—remained entrenched. The military governments became increasingly brutal. Any individual who challenged the existing order—rural and urban labor, intellectuals, university students, and other middle-sector members and politicians—faced death, prison, or exile. In the countryside, the Guatemalan military confronted guerrilla groups, initially, the Revolutionary Armed Forces (Fuerzas Armadas Revolucionarias, or FAR), which during the 1970s melded into the Guerrilla Army of the Poor (Ejército Guerrillero de los Pobres, or EGP). The brutality in the countryside by both government and guerrilla forces drew international criticism. Uncounted numbers of rural Native Americans found refuge in Chiapas State, MEXICO.

In the decade following Castillo Armas's seizure of power, Guatemala's economy benefited from post-invasion U.S. economic assistance in the form of the ALLIANCE FOR PROGRESS and the CENTRAL AMERICAN COMMON MARKET (CACM). AGRICULTURE was diversified, and the industrial base expanded, which contributed to greater employment and increased exports. Guatemala also escaped the depths of the oil shocks in the early 1970s by relying on the minimal petroleum reserves in the Petén. Nevertheless, when the price of crude oil quadrupled in 1979, triggering a global recession, demand for Guatemala's primary exports decreased. The country's economy spiraled downward, and its TRADE deficit climbed to \$409 million in 1981. Furthermore, the violence in Guatemala led to a drastic drop in tourism. During this time period, the middle sector emerged to publicly press for a democratic government. A constitutional convention held in 1985 resulted in an amended document and a presidential election on December 8, 1985. Christian Democrat VINICIO CEREZO (b. 1942– ) became the first civilian to hold the presidency since JULIO CÉSAR MÉNDEZ MONTENEGRO (b. 1915–d. 1996), from 1968 to 1972. Cerezo and Christian Democrat Jorge Serrano Elías (b. 1945– ), who succeeded him in 1992, pursued neoliberal policies, including austerity measures, selling the national airline, Aviateca, and devaluing the national currency, the quetzal. The last contributed to further inflation and, with the military lurking in the background, further suppression of labor leaders, intellectuals, and the military. When Serrano illegally attempted to disband Congress on May 25, 1993, he was forced from office, leaving Congress as the dominant political

player until January 7, 1996, when National Advancement Party (Partido de Avanzada Nacional, or PAN) candidate Álvaro Arzú (b. 1946– ) captured a runoff presidential election. Arzú's major accomplishment was concluding a peace agreement that brought Guatemala's 36-year-old civil war to an end. He is also credited with improving the country's human rights record. Still, Arzú and his three successors—Alfonso Portillo (b. 1951– ) and Óscar Berger Perdomo (b. 1946– ), both of the Guatemalan Republican Front (Frente Republicano Guatemalteco, or FRG), and current president Álvaro Colom (b. 1951– ) of the National Unity of Hope (Unidad Nacional de la Esperanza, or UNE)—confronted serious economic and social problems. While the private sector now accounts for 85 percent of the national economy, continuing confrontation between that sector and the national government, government corruption, and unreliable mechanisms for enforcing contracts deter foreign investment. An estimated 56 percent of Guatemalans live below the poverty line, and with a median age of 18.9 years for its 12.7 million inhabitants, there is an urgent need for job creation. The Guatemalan government hopes that its ratification on March 10, 2005, of the DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT will help address these issues.

See also ALVARADO, PEDRO DE (Vol. I); GUATEMALA (Vols. I, II, III); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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### Guatemala, U.S.-sponsored invasion of (1954)

On June 18, 1954, Guatemalan colonel Carlos Castillo Armas (b. 1914–d. 1957) led a rag-tag army of about 300 men across the Honduran border toward GUATEMALA CITY, while, in the capital, U.S. ambassador John Puerifoy directed an air assault on MILITARY and radio outposts and a propaganda campaign to advise the Guatemalan people that a massive army had entered the country to oust President JACOBO ARBENZ GUZMÁN. Arbenz resigned on June 27 and fled the country. While some argued

that Arbenz's programs were designed to address the country's ills, the elite, middle sector, and Archbishop Mariano Rosell y Arellano (b. 1894–d. 1964), as well as leading policy makers in Dwight D. Eisenhower's administration, believed that Arbenz was attempting to extend the reach of international communism (see COMMUNISM IN LATIN AMERICA).

The ouster of longtime dictator JORGE UBICO Y CASTAÑEDA on July 1, 1944, brought to the forefront GUATEMALA's historic sociopolitical and economic ills. The government had long been dominated by elite landowners, whose decision making was greatly influenced by the U.S.-based United Fruit Company (UFCO). The initial challenge to this structure came during the 1945–50 presidency of JUAN JOSÉ ARÉVALO, whose changes to social security, rent control, the LABOR code, and income taxes were aimed at improving life for the nation's poor, estimated at 80 percent of the population. These programs were largely opposed by the elite and middle classes, who initiated the overthrow of Ubico in 1944. These groups also desired greater participation in the political system; to them, Arévalo and his programs were communistic.

In the 1950 presidential campaign, Arbenz promised greater socioeconomic benefits for the poor, greater government control of foreign investments in Guatemala, and a land distribution program. Again, the elite and middle sectors warned of a communist regime, and Archbishop Rosell threatened to excommunicate those who voted for Arbenz on the grounds that communism and Catholicism were incompatible. Nevertheless, Arbenz won the election, his victory coming at a time of significant change in world politics. By 1950, the United States and the Soviet Union were locked in a cold war that spawned the European Economic Recovery Program (Marshall Plan, as it was popularly known) and North Atlantic Treaty Alliance (NATO) in Europe. The first was designed in part to keep the populace from turning to communism, while the latter was a military barrier aimed at preventing Soviet expansion on the continent (see SOVIET UNION AND LATIN AMERICA). Meanwhile, in the United States, Senator Joseph McCarthy had begun his investigation into alleged communists in government service. Dwight D. Eisenhower was elected to the U.S. presidency in November 1952. His administration dismissed the suggestions of State Department analysts, who considered Arbenz a socialist attempting to address Guatemala's long-standing social problems. Rather, the administration agreed with those who considered Arbenz a communist.

For many, Arbenz was confirmed as a communist when he implemented a land distribution program in June 1952. It provided for the confiscation of idle land on estates of more than 223 acres and its distribution to peasant families. Compensation to the owners would be in 25-year bonds at 3 percent at the rate of their most recent tax declarations, which often grossly undervalued a property's value. Arbenz claimed his plan was to increase local food production, which would lower food prices and

increase people's purchasing power. Guatemala's elite and middle sector, however, considered it communism. So did UFCO, particularly after Arbenz confiscated 400,000 acres of its unused land and offered compensation of \$1.18 million, the amount UFCO declared on its May 1952 tax assessment. UFCO undertook a public relations campaign in the United States promoting the idea that communism had come to Central America. Others also supported the UFCO claim about communism, even though many U.S. Latin American academics at the time viewed Arbenz more as a nationalist, reacting to Guatemala's historic conditions, rather than supporting an expansion of global communism.

In March 1954, U.S. secretary of state John Foster Dulles took the matter to the Tenth Inter-American Conference meeting in CARACAS, VENEZUELA. Rather than address the socioeconomic issues in Guatemala, which were also common in other Latin American countries at the time, Dulles charged that while communists did not threaten the Americas directly, they sought to gain control through subversion. While Dulles never mentioned any country by name, it was understood that he was referring to Guatemala. Dulles obtained a resolution that sanctioned preemptive military strikes against subversive forces.

The ORGANIZATION OF AMERICAN STATES (OAS) resolution enabled Eisenhower to go forward with the Central Intelligence Agency's "Operation PBSUCCESS." Once the operation began, the United States delayed the arrival of the OAS's Inter-American Peace Committee in Guatemala until after the Castillo Armas victory and

successfully argued before the United Nations (UN) Security Council that Article 51 of the UN Charter permitted regional organizations to settle regional disputes. In this case, the OAS had sanctioned the U.S. action. The United States had manipulated events to serve its own interests, and its actions led to widespread condemnation in Latin America.

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**Guatemala City** Guatemala City became the capital of GUATEMALA on January 3, 1776, following the destruction of the original colonial capital of Antigua, some 25



Entering "El Centro" in Guatemala City, Guatemala (Thomas M. Leonard Collection)



miles (40 km) to the west, in an earthquake. The city grew slowly into the 20th century and after World War II expanded rapidly, both physically and in terms of population. The original city covered just 3.5 square miles (9 km<sup>2</sup>), while today the metropolitan area encompasses approximately 40 square miles (103.5 km<sup>2</sup>), while the population has grown from 10,841 in 1778 to more than 4.5 million inhabitants today. Surrounded by four active volcanoes, Guatemala City is affected by both minor and major eruptions, the last major one being in 1976, which caused heavy damage to the city. Heavy rains often cause mudslides, particularly in the poorer districts, or *barrios*.

Because the city is divided into 25 zones, each with its own street numbering system, identification of buildings, markets, and houses is relatively easy, while moving from zone to zone is hampered by congested streets. Buses are the only means of public TRANSPORTATION. President JORGE UBICO Y CASTAÑEDA oversaw the completion of the presidential palace during World War II. Located in the city center, the palace is close to the Metropolitan Cathedral, the national archives and library, the national congress building, and the central market. An anthropological museum, a Maya dress museum, and the national zoo are among the many cultural attractions in the city. Several SPORTS parks and sports clubs are also located in the city. U.S. troops stationed in Guatemala City during World War II introduced baseball and basketball, and each has grown in popularity. Nevertheless, soccer, or *fútbol*, remains the most popular sport.

Guatemala City is the country’s commercial, financial, and industrial center. The last has prompted the relocation of indigenous peoples to the city. Many of the city’s small businesses are operated by descendants of German immigrants who came to Guatemala starting in the late 19th century and Koreans, who arrived after World War II.

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**Guevara, Ernesto “Che”** (b. 1928–d. 1967) *Argentine revolutionary and commander in Cuban Revolution* A native of ARGENTINA, where he earned his medical degree, Ernesto Guevara became one of FIDEL CASTRO RUZ’s most trusted advisers during the early years of the CUBAN REVOLUTION. El Che, as he was known, was influenced by the writings of Chilean Communist Pablo Neruda and his own extensive travels throughout Latin America before he left Argentina for good in 1953.

His first stop was GUATEMALA, where he became a supporter of reformist president JACOBO ARBENZ GUZMÁN until his overthrow by the U.S. Central Intelligence Agency (CIA) in 1954 (see GUATEMALA, U.S.-SPONSORED INVASION OF). The experience only strengthened Guevara’s



An Argentine revolutionary idealist, Che Guevara became a confidante of Cuban leader Fidel Castro. (Thomas M. Leonard Collection)

ideas about eliminating elitist governments across Latin America, while keeping the United States at a distance. Guevara left Guatemala for MEXICO, where he teamed up with the Castro brothers for their return to CUBA in December 1956. He subsequently led a guerrilla unit in the battle against FULGENCIO BATISTA Y ZALDÍVAR and was one of the first revolutionary leaders to arrive in HAVANA in January 1959. In June 1959, he married Aleida March, a fellow revolutionary. They had four children, the youngest of whom, Celia, would have no memory of him. Guevara also had a daughter, Hildita, from his first marriage.

As director of the Industrial Department of the National Institute of Agrarian Reform, president of the National Bank of Cuba, and, finally, minister of industry, Guevara played a significant role in developing Cuba’s economic policies in the early days of the revolution. His plan for a centralized ECONOMY requiring government ownership of the means of production contributed to the nationalization of landed estates and foreign-owned industries. His plan for Cuba’s industrial development failed due to a lack of investment capital and funds to purchase needed machinery, as well as a lack of skilled workers, many of whom had fled Castro’s revolution.

Guevara's hope to establish a currency-free economy and create a "new socialist man" who would work for the moral fiber of the revolution rather than money or material goods faded in 1965. At this point, Guevara lost his influence within Castro's inner circle. Some analysts attribute this to a personal split between Guevara and Castro. Others point to the former's failed economic policies, and yet others claim that Guevara wanted to spread revolutionary ideas beyond Cuba. Guevara completed diplomatic missions to the Soviet Union and Africa, where he worked with revolutionaries in the Congo and Angola in 1965 and 1966. But, his brand of revolution was not compatible with the divisions that plagued Africa's tribal groups. Disheartened by politics and ill from jungle disease and climate, he returned to Cuba for a brief period in 1966 before again leaving. He first considered going to PERU and VENEZUELA, but their socioeconomic structures would not accommodate his revolutionary ideas. Instead, he traveled to BOLIVIA, where the large peasant class had been long exploited by a small landed elite, as in Cuba. He hoped to inspire the impoverished and politically ostracized NATIVE AMERICANS to revolution. His efforts failed for several reasons. The Bolivian Communist Party did not support him, believing that reform could best be achieved by winning at the ballot box, not by the bullet. In addition, Castro, apparently, offered little assistance, particularly when the Bolivian MILITARY trailed Guevara in the Andes with the assistance of the CIA. On October 8, 1967, Bolivian troops captured Guevara and a day later executed him. Guevara's body remained in an unmarked grave until 1997, when his remains were exhumed and returned to Cuba to a hero's interment in Santa Clara.

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**Guiana Space Center** A French space and rocket launching facility near Kourou, French Guiana, the Guiana Space Center has been operational since 1968. In 1964, the French government selected Kourou, in one of its FRENCH OVERSEAS POSSESSIONS, as the site for its new space program. The French government allocated some 330 square miles (855 km<sup>2</sup>) of territory, including the land previously used as a penal colony known as DEVIL'S ISLAND PRISON, to the Centre National d'Études Spatiales (CNES), the French government's space agency, established in 1961. Due to its proximity to the equator and the fact that the most favorable direction of launches is over water, Kourou was an ideal site for the new space center.

When the European Space Agency (ESA) was established in 1975, the French government offered to share

its facilities. The ESA currently pays two-thirds of the Guiana Space Center's annual budget. ESA also provided the funding to upgrade facilities in preparation for the Ariane launchers currently under development. Since it became operational in 1968, the Guiana Space Center has also undertaken launches for private companies in Europe, the United States, Japan, Canada, India, and BRAZIL. The thousands of European workers at the facility have strengthened the economic viability of French Guiana and transformed the infrastructure of its coast. Devil's Island, now a popular tourist site, is under the launching trajectory and must be evacuated during launches.

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**Guyana** Formerly known as British Guiana, Guyana gained independence from the United Kingdom on May 26, 1966. Culturally, Guyana, the only English-speaking nation in South America, is more closely associated with the Caribbean than South America (see CARIBBEAN, BRITISH).

Occupying 83,000 square miles (214,969 km<sup>2</sup>) of territory, Guyana is bordered to the east by SURINAME and the west by VENEZUELA. Guyana's northern border is the Atlantic Ocean, and it shares its southern border with BRAZIL. Almost 70 percent of Guyana's territory is disputed by Venezuela, a dispute that dates back to the 19th century. Guyanese ethnicity is a reflection of the nation's colonial past. English and Dutch sugarcane planters used slaves from Africa and indentured servants from India. These imported plantation workers and their descendants make up the majority of Guyana's population. Ethnic and racial divisions between the Afro-Guyanese and the Indo-Guyanese have dominated Guyanese society since independence.

In 1928, the British government made British Guiana a CROWN COLONY. In the aftermath of riots during the Great Depression, the British sent Lord Moyne to investigate. In 1938, the Moyne Commission, which pointed out the growing polarization between the Afro-Guyanese and the Indo-Guyanese, recommended increased democratization and the formation of TRADE unions in the colony to alleviate social strife. Regardless, ethnic and racial divisions, based on mutual suspicion, have dominated Guyanese society since the end of World War II. Politics have been dominated by two politicians: CHEDDI JAGAN and FORBES BURNHAM. Jagan, born to Indian immigrants, formed the People's Progressive Party (PPP) in 1950. To broaden support for the PPP, Burnham, an Afro-Guyanese, was invited to join the party. Burnham became the party chairman, while Jagan led the PPP's parliamentary group.

In 1953, the British government supervised local elections, which were won by the PPP. The socialist



Nelson A. Rockefeller (at podium) with Forbes Burnham (far left) at the Timuhuri Airport in Georgetown, Guyana, on July 4, 1969 (Courtesy of the Rockefeller Archive Center)

agenda of the PPP, especially the Labour Relations Act, frightened conservative elements in the business community. Following a series of riots, the British suspended the constitution, and an interim government led by conservative business interests was installed, which survived until 1957. During this period, the personal rivalry between Jagan and Burnham led to a split within the PPP. The 1957 elections were won by Jagan's faction. Jagan's veto of British Guiana's participation in the WEST INDIES FEDERATION in 1958 caused him to lose Afro-Guyanese support, which enabled Burnham to form the People's National Congress (PNC).

In 1961, Jagan, who was influenced by Marxist ideology, won the newly created position of prime minister. His administration sought a nonaligned path and refused to support the U.S. embargo against CUBA. U.S. president John F. Kennedy vehemently opposed an electoral system, however democratic, that would allow Jagan to rule an independent Guyana. Much to the chagrin of Jagan, the British decided to delay independence until after the 1964 elections, which would be based on proportional representation. Although Jagan obtained 46 percent of the vote,

he lost his position when Burnham's PNC and the United Force (UF) combined their votes to form a coalition government. Burnham led Guyana from independence, first as prime minister then as president, until his death in 1985. Burnham, whose politics became more authoritarian and leftist after Guyana's independence, declared Guyana a republic in 1970. In 1978, the JONESTOWN MASSACRE placed Guyana in the global spotlight.

After Burnham's death, PNC vice president Desmond Hoyte (b. 1929–d. 2002) ruled until 1992, when the PPP, led by Jagan, won national elections. Presenting himself as a progressive, Jagan opened Guyana to U.S. foreign investment. Jagan ruled until he died of a heart attack in March 1997. Prime Minister Samuel Hinds (b. 1943– ) replaced him, and Jagan's widow, Janet, became prime minister. Janet Jagan won the December 1997 presidential elections but resigned for health reasons in August 1999. She was succeeded by Finance Minister BHARRAT JAGDEO, who had been named prime minister the day before Jagan resigned. Jagdeo subsequently won elections in 2001 and 2006. Whereas its relations with Spanish-speaking Latin America are minimal, Guyana

has encouraged greater unity among the English-speaking Caribbean nations. Guyana is a member of CARIBBEAN COMMUNITY AND COMMON MARKET (CARICOM), and CARICOM's headquarters are located in the capital of Guyana, Georgetown.

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# H

**Haiti** The first independent nation in Latin America and the second in the Western Hemisphere (after the United States), Haiti occupies the western third of Hispaniola in the Caribbean, sharing the island with the DOMINICAN REPUBLIC.

Haiti, which consists of 10,714 square miles (27,749 km<sup>2</sup>) of territory, is one of the poorest nations in the world. Haiti, which means “mountainous” in Taino (the language of the Amerindians who occupied the island before the arrival of Europeans), became independent from France on January 1, 1804, following the only successful slave revolt in the Western Hemisphere. It is imbued with a heavy footprint of African culture because of the French colonial system based on sugarcane cultivation by African slaves. The majority of Haiti’s 9 million people are descended from African slaves. More than 2 million Haitians currently live abroad, primarily in the Dominican Republic and the United States. Whereas French is the official language, most Haitians speak Haitian Kreyòl, which is based on French and West African languages. Although most Haitians are nominally Catholic, the vast majority practice Vodou (Vodun), a syncretization of Catholicism and West African spiritual belief systems. Inhabited by 3 million people, the capital and largest city of Haiti is Port-au-Prince.

Following independence in 1804, Haiti experienced more than a century of brutal, corrupt authoritarian regimes. Nearly the entire white population was killed or exiled during the violent Haitian Revolution (1791–1804). At this time, the nation’s economic infrastructure was also destroyed so that on independence, Haiti had a severely dislocated economic and educational system. Although often ruled by black leaders during the 19th century, the small educated mulatto elite dominated the

political and economic system. Freedom from slavery did not significantly improve the quality of life for most black Haitians. During the 19th century, Haiti frequently attempted to dominate the Dominican Republic, militarily occupying that nation from 1822 to 1844. Haitian militarism has resulted in tense DOMINICAN-HAITIAN RELATIONS, which persist in the contemporary period.

By the beginning of the 20th century, local mulattoes and foreigners, primarily Germans, dominated the nation’s ECONOMY. In addition, the Haitian government had extensive debts to foreign banks, most of which were French and German. In 1904, following the proclamation of the Roosevelt Corollary to the Monroe Doctrine and the initiation of construction on the Panama Canal, the United States took a greater interest in the fiscal stability of Haiti. Fearful that economic mismanagement could lead to European intervention, in 1910, the National City Bank of New York, encouraged by the U.S. government, purchased a controlling interest in the National Railroad Company of Haiti. By 1915, following the outbreak of World War I, President Woodrow Wilson was alarmed by the growing German military and economic presence in Haiti. In 1915, black president VILBRUN GUILLAUME SAM attempted to curtail the power of the mulatto elite and strengthen commercial and diplomatic ties with the United States. Faced with riots, Sam ordered the execution of 167 political prisoners on July 27, 1915. A mulatto-led revolt erupted, and Sam fled to the French embassy, where he was captured by rebels, who publicly dismembered his body.

News of events in Haiti convinced Wilson, fearful that pro-German mulatto rebels would come to power, to order the U.S. Marines to occupy Haiti on July 28, 1915. The U.S. military occupation, which lasted until 1934,

sought to restore stability, develop the nation's infrastructure, and eradicate tropical diseases. The National City Bank, which acquired a controlling interest in the National Bank of Haiti, consolidated Haitian foreign debt under American control and took responsibility for the collection of Haitian customs revenues. A similar U.S. CUSTOMS RECEIVERSHIP was established in the Dominican Republic the following year. In 1917, the United States imposed a constitution written by Assistant Secretary of the Navy Franklin Roosevelt and enforced a law demanding compulsory LABOR. The virtually complete financial reorganization of Haiti from Europe to the United States paved the way for expanded American investment in Haiti. The Haitian-American Sugar Company acquired German sugar estates and the United Fruit Company acquired German banana plantations. Notwithstanding U.S. efforts, the majority of the nation's black population resented U.S. military occupation, which was often colored by racism and ethnocentric attitudes.

During the American military occupation, the philosophy of *noirisme* (Negritude), or the glorification of Haiti's African heritage, imbued the black population with bitter self-pride in the face of racism. When the U.S. occupation ended in 1934, the Americans turned over political control to Sténio Vincent (b. 1874–d. 1959), an elite mulatto who had been nominal president since 1931. His government, however, was insensitive to the plight of Haiti's oppressed. For example, in 1937, when the Dominican dictatorship of RAFAEL TRUJILLO unleashed a wave of violence on Haitian workers in the Dominican Republic that resulted in the death of more than 12,000 Haitians, the Haitian government, which had encouraged workers to go to the Dominican Republic, merely issued a critical diplomatic note. After Trujillo's government offered an indemnity to the families of those butchered in his country, the Haitian government kept the payment.

In 1941, after Vincent resigned, ÉLIE LESCOT came to power with the assistance of the mulatto elite, Trujillo, and the United States and established a brutal dictatorship. Lescot supported U.S. war efforts during World War II. For example, in 1941, Lescot agreed to support the SOCIÉTÉ HAÏTIENNE-AMÉRICAINNE POUR LE DÉVELOPPEMENT AGRICOLE (SHADA), an American company that would supply raw materials for the U.S. war effort. Haitian land was expropriated. More than 40,000 rural Haitians were evicted from their farms, and more than 80,000 who were formerly engaged in subsistence AGRICULTURE were now employed in the production of rubber and sisal for the Americans. The plan, which was an economic failure, resulted in food shortages and destroyed Lescot's popularity among rural peasants. In 1946, PAUL MAGLOIRE led a military coup that brought Dumarsais Estimé (b. 1900–d. 1953) to power. For the first time since the end of the U.S. military occupation, a black leader ruled Haiti. Estimé nationalized SHADA after the U.S. government lost interest in the project, emphasized the production of coffee, and sup-

ported legislation to protect workers. His reform efforts and attempt to extend his term beyond 1950, however, sparked a military coup by Magloire, who ruled Haiti until 1956. Magloire established a close relationship with the United States, adopted an anticommunist foreign policy, encouraged tourism, and attempted to develop the nation's infrastructure. Following the devastation caused by Hurricane Hazel in 1954, however, accusations that he stole relief funds decreased his popularity, and he fled into exile in 1956.

In 1957, FRANÇOIS DUVALIER, a black medical doctor espousing the doctrine of *noirisme*, came to power in Haiti's first universal suffrage elections. Initially heralded as a democratic reformer, Duvalier instituted his own brutal and corrupt authoritarian regime. His goon squad of 25,000 henchmen, the Volunteers for National Security, better known as the TONTON MACOUTES, implemented a wave of terror and crushed political opposition. Duvalier, a Vodou priest, also used Vodou to physically and psychologically terrorize the Haitian population. As both a doctor and a priest, he earned the nickname Papa Doc. In 1964, Duvalier proclaimed himself president for life. In response to Duvalier's brutality, thousands of middle- and upper-class Haitians fled during the 1960s. Regardless, Duvalier's anticommunist rhetoric earned him military and economic assistance from the United States.

Following Duvalier's death in 1971, he was succeeded by his son, JEAN-CLAUDE DUVALIER. Whereas the father was called Papa Doc out of fear and respect, the son was mockingly called Baby Doc out of derision. Most Haitians, who could not believe that the new regime could be worse than the previous, were surprised. As the brutality and corruption increased, the economy declined. Thousands of lower-class Haitians began to flee the nation. Attempts to reach the United States in small boats, however, were actively repelled by the U.S. Coast Guard. Duvalier and his mulatto wife, Michelle Bennett, seemed indifferent to the plight of Haiti's people. Indeed, Bennett's frequent shopping trips to France drained the national treasury. On February 7, 1986, political turmoil and the loss of U.S. support forced Duvalier and his family to flee into exile.

After Duvalier's overthrow, Lieutenant General Henri Namphy (b. 1932– ) served as president of the National Ruling Council, an interim governing council composed of six civilian and military members. Although Namphy promised political and economic reform, his critics referred to his rule as Duvalierism without Duvalier. On January 17, 1988, scholar Leslie Manigat (b. 1930– ), with just over 50 percent of the vote, won the elections orchestrated by Namphy. Political and economic chaos, however, inhibited Manigat's ability to rule, and Namphy overthrew him on June 30, 1988, after Manigat tried to remove Namphy as army commander. A group of young officers led by Prosper Avril (b. 1937– ) in turn overthrew Namphy on September 17, 1988. Avril served

as president until March 10, 1990, when riots forced him to resign. Ertha Pascal-Trouillot (b. 1943– ), the chief justice of the Haitian Supreme Court, became president and supervised the 1990 presidential election, which international observers considered the first democratic election in Haiti's history. JEAN-BERTRAND ARISTIDE, a Catholic priest imbued with the philosophy of liberation theology, won 67.5 percent of the vote and assumed office on February 7, 1991.

Aristide's first term as president, however, was ended by a military coup staged by Raoul Cédras (b. 1949– ) on September 30, 1991. Following massacres of Aristide supporters, tens of thousands of Haitians attempted to flee to the United States, but the U.S. government refused to grant them refugee status. Nevertheless, the U.S. government placed an economic embargo on Haiti, which only increased the suffering of the Haitian population. On September 18, 1994, a U.S. delegation led by former president Jimmy Carter, as part of OPERATION UPHOLD DEMOCRACY, convinced Cédras to resign or face the possibility of a U.S. military intervention. Cédras resigned, went to live in exile in PANAMA with a generous stipend from the United States, and Aristide returned to rule Haiti on October 15, 1994. Aristide disbanded the army and established a civilian police force. René Préval (b. 1943– ), Aristide's prime minister in 1991, won the 1995 elections with 88 percent of the vote, and the first peaceful and democratic transition of power in Haitian history followed. Préval implemented International Monetary Fund economic reforms and began the privatization of state-run industries.

In late 1996, Aristide, who disagreed with Préval's economic policies, formed the Fanmi Lavalas, a popular leftist political party that criticized neoliberal economic reforms. In the 2000 elections, which were considered fraudulent by the U.S. government, Aristide won 91.8 percent of the vote. Then, on February 5, 2004, the National Revolutionary Front for the Liberation of Haiti took control of Gonaïves, Haiti's fourth-largest city. By the end of February, rebel forces were on the outskirts of Port-au-Prince. Aristide has subsequently claimed that U.S. ambassador to Haiti James B. Foley (b. 1957– ) forced him to resign and exiled him from Haiti. Regardless, the chief justice of the Supreme Court, Boniface Alexandre (b. 1936– ), became acting president on February 28, 2004, and petitioned the United Nations (UN) for an international peacekeeping force. The UN troops, led by the Brazilians, eventually numbered more than 7,000. The international community pledged more than \$1 billion in economic aid.

On February 7, 2006, Préval won the presidential elections with 51 percent of the votes. He immediately signed an oil deal with VENEZUELA and visited leaders in the United States, France, and CUBA. His first international visit, however, was to the Dominican Republic. Haitian and Dominican leaders have pledged to end two centuries of hostility between their countries. Since 2006, Préval has implemented significant economic and social reforms.

On January 12, 2010, an earthquake measuring 7.0 on the Richter scale struck 15 miles west of Haiti's capital, Port-au-Prince, killing approximately 225,000 and injuring another 300,000 people. An estimated 250,000 homes and 30,000 commercial properties were destroyed. Poorly constructed infrastructure, including sea and land transportation and communication systems, hampered international relief and recovery efforts.

See also HAITI (Vol. III); HISPANIOLA (Vols. I, II); VODOU (Vol. III).

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**Hassanali, Noor** (b. 1918–d. 2006) *president of Trinidad and Tobago* Born on August 13, 1918, in San Fernando, Trinidad, Noor Hassanali was a member of an Indo-Trinidadian family. A graduate of Naparima College, a secondary school established by Canadian Presbyterians in San Fernando, he taught at the college from 1938 to 1943, when he went to study law at the University of Toronto. While in Canada, he was a member of the Canadian Officers Training Corps until the end of World War II. After passing the bar exam at Gray's Inn in London in 1948, he returned to TRINIDAD AND TOBAGO and established a private law practice. Hassanali was appointed a magistrate in 1953, a senior magistrate in 1960, a judge on the High Court in 1966, and a judge on the Court of Appeals in 1978. After a legal career spanning almost four decades, Hassanali retired on April 14, 1985.

Following the landslide victory of the National Alliance for Reconstruction (NAR) in 1986, Prime Minister A. N. R. ROBINSON selected Hassanali to be the second president of Trinidad and Tobago in 1987. The first Indo-Trinidadian to be president of Trinidad and Tobago, Hassanali was also the first Muslim head of state in the Americas. Notwithstanding the 1991 victory of the People's National Movement (PNM), led by PATRICK MANNING, the PNM government reappointed Hassanali president when his term expired in 1992. Hassanali served as president until 1997, when BASDEO PANDAY, who had won the 1995 elections, selected Robinson to be the third president of Trinidad and Tobago. Admired by both Indo-Trinidadians and Afro-Trinidadians for his jurisprudence and honesty, Hassanali died at home on August 26, 2006.

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**Havana** Havana was named CUBA's colonial capital in 1553 by royal decree and quickly became an important port for ships returning to Europe from the New World because of the northwest-flowing Gulf currents. By the mid-18th century, some 70,000 people resided in Havana, making it the third-largest city in the New World after MEXICO CITY and LIMA. By the time of Cuba's independence in 1902, the city also had become a cultural center with a lyceum, or public hall, for artistic and literary use. In 1953, the same year that FIDEL CASTRO RUZ attacked the Moncada Barracks in Santiago de Cuba, Havana marked its 400th anniversary as Cuba's capital. Today, 4.5 million people reside in metropolitan Havana, about one-fifth of the nation's population.

For 30 years after Cuba's independence from Spain in 1898, Havana fell under U.S. influence, as North American businesses—banking, electricity, communications, retail operations, and TRANSPORTATION—set up operations in the capital, alongside illegal activities—gambling, prostitution, alcohol, and DRUGS—conducted by the U.S. Mafia. These interests remained in Havana until the CUBAN REVOLUTION began in 1959. Although Havana remains the country's commercial, shipping, and industrial center, Castro directed the dispersal of many business activities to other cities across the island.

Following the collapse of the Soviet Union in 1991 and the termination of its subsidy to the Cuban government, Cuba fell on hard economic times. This was most evident in Havana in broken infrastructure and the deterioration of buildings and homes, including the grand residences of the earlier Cuban elite along the Malecón. Cuban government officials, foreign diplomats, and businessmen reside in the better-maintained sections of the city, such as Vedado and Miramar. The government's emphasis on tourism to earn income led to the refurbishing of Old Havana and its colonial edifices. United Nations and international private funds have been used to restore historic buildings along the Malecón and older hotels, such as the Capri in the central city. Construction of new office buildings and hotels suggests a brighter future for the city.

The city is also home to the University of Havana, once considered Latin America's most prestigious institution of higher education, and several interesting pro-revolutionary museums. The government-run SPORTS facilities are world class, as Cuba continually seeks international recognition in sports venues.

See also HAVANA (Vols. II, III).



The Habana Libre Hotel, known as the Havana Hilton prior to the 1959 Cuban Revolution (Thomas M. Leonard Collection)

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**Haya de la Torre, Víctor Raúl** (b. 1895–d. 1979)

*Peruvian politician* Born into a prominent family in the city of Trujillo on PERU's northern coast, Víctor Raúl Haya de la Torre studied at local schools before pursuing law studies at the national universities in Trujillo and LIMA. As he matured, Haya de la Torre witnessed the adverse impact that foreign-owned commercial AGRICULTURE, largely cotton, had on small farmers in the Trujillo area. He also came to sympathize with the plight of urban workers in 1919 during their strike in Lima for higher wages. In 1929, Haya de la Torre founded the González Prada Popular University, a night school for urban workers. Also during his student days, Haya de la Torre joined the rising socialist movement and collaborated with the Socialist intellectual JOSÉ CARLOS MARIÁTEGUI. For speaking against the ideas of President AUGUSTO B. LEGUÍA, Haya de la Torre was imprisoned in 1923 and 15 months later deported to MEXICO CITY, where on May 7, 1924, he founded the AMERICAN POPULAR



REVOLUTIONARY ALLIANCE (APRA). Intended to be a Latin America-wide party that appealed particularly to NATIVE AMERICANS, APRA instead became a Peruvian political party that significantly influenced that country's transition from oligarchic-MILITARY governments to a more popular-based democratic system.

Haya de la Torre lost his initial bid for the presidency in 1931 to Colonel Luis Sánchez Cerro (b. 1889–d. 1933). A year later, he played a leadership role in workers' resistance to the military's suppression in Trujillo of a LABOR demonstration for higher wages that took the lives of four soldiers and an estimated 1,000 civilians. For 12 years thereafter, Haya de la Torre's political activities were largely clandestine until the 1945 presidential election when APRA supported the National Democratic Front (Frente Democrático Nacional, or FDN) candidate José Luis Bustamante (b. 1894–d. 1989). Haya de la Torre then resumed his public politicking, speaking out on behalf of labor until 1948, when *apristas* staged a violent uprising in the port city of Callao. Haya de la Torre sought refuge in the COLOMBIA embassy in March 1948 and remained there until 1954. He then traveled throughout Europe for two years. Haya de la Torre returned home again to become politically active and prepare himself for the 1962 presidential contest. Fearing that Haya de la Torre might triumph, the military staged another coup d'état. Aware of the growing indigenous pressure for change, successive presidents Fernando Belaúnde Terry (b. 1912–d. 2002) and Juan Velasco Alvarado (b. 1910–d. 1977) instituted socioeconomic reforms based on Haya de la Torre's ideas.

Haya de la Torre's last political acts included serving on the 1979 constituent assembly. It produced a progressive document that returned Peru to a democratic nation. Haya de la Torre died before he could stand as the *aprista* presidential candidate in 1980. He left a legacy of standing for worker's rights and a government that represented their interests.

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**Hernández Martínez, Maximiliano** (b. 1882–d. 1966) *dictator of El Salvador* Born in San Salvador, Maximiliano Hernández Martínez was educated at GUATEMALA's Military Academy. After returning to EL SALVADOR in 1899, he joined the national army and rose quickly in rank, becoming a brigadier general in 1919. A highly regarded strategist, Hernández Martínez spent most of the 1920s as a professor at Salvador's Military Academy and in the office of chief of staff.

In 1930, Hernández Martínez withdrew his presidential candidacy to serve as the vice presidential running mate of the eventual winner, Arturo Araujo (b. 1868–d. 1967). Although a wealthy planter, Araujo sympathized with LABOR's demands. Araujo's presidency was short lived, however. On December 2, 1931, a MILITARY coup ousted him, and in the process, Hernández Martínez was arrested. On recognizing that he was next in line to the presidency according to the constitution, the coup leaders released Hernández Martínez, and he became provisional president on December 5. Coup leaders intended that Hernández Martínez be a figurehead only, but he eventually outmaneuvered them to gain control in his own right.

Hernández Martínez strengthened his position as a result of an uprising that began on January 22, 1932. Instigated by AGUSTÍN FARABUNDO MARTÍ, peasants in western El Salvador struck out against the landowning elites on their estates and in local towns and villages. Hernández Martínez, who doubled as war minister, sent in the army to put down the revolt. Because records of the La Matanza (massacre) subsequently disappeared from government offices, the official death count remains unknown, but an estimated 10,000 to 30,000 peasants were killed. Following the revolt, the remaining NATIVE AMERICANS, fearing reprisals, deliberately abandoned their cultural heritage. La Matanza also strengthened Hernández Martínez's standing among the Salvadoran elite.

Although Hernández Martínez himself was not part of the 1931 coup, the United States withheld recognition of his government because it allegedly violated the 1923 Central American Treaty, which called for nonrecognition of illegal governments. That ceased to be an issue in 1933, when JORGE UBICO Y CASTAÑEDA won Guatemala's presidential election unopposed. Despite Hernández Martínez engineering his own reelection in 1934, in violation of the Salvadoran constitution, the other Central American governments extended recognition both to the Ubico regime and Hernández Martínez's. The United States followed suit in 1935.

In 1938, Hernández Martínez again manipulated the constitution to extend his presidency and ruled by sheer force and intimidation. The national legislature rubber-stamped his proposals, the press was censored, and any threat against government officials was punishable by death. But, plagued by the loss of global coffee markets because of the Great Depression and World War II, the regime had little currency to spend on the country's development. Nevertheless, Hernández Martínez undertook a public works program that included paving highways and constructing government buildings, schools, and hospitals. In addition, much of the Salvadoran portion of the PAN-AMERICAN HIGHWAY, the building of which was financed largely by the United States, was completed by 1944. Because of its location on CENTRAL AMERICA's west coast, El Salvador was on the periphery of U.S. military planning during World War II, and

Hernández Martínez reluctantly placed restrictions on local Germans, in accordance with U.S. wishes, for the training of his army.

In time, Hernández Martínez became his own worst enemy. Always distrusted by the landowning elite, he became a near recluse within the presidential palace, where he practiced theosophy and prescribed colored waters to cure himself of a variety of illnesses. In early 1944, when he appeared set on extending his presidency by extralegal means, Salvador's middle class found sympathizers among the army's younger officers to oust him on May 8, 1944. Hernández Martínez was sent into exile in HONDURAS, where he died on May 15, 1966.

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**Honduras** Totalling 43,277 square miles (112,087 km<sup>2</sup>), Honduras is approximately the size of the U.S. state of Tennessee. It also is one of the poorest nations in the Western Hemisphere, with an extraordinarily unequal distribution of wealth. The Honduran economy remains largely underdeveloped, with bananas and coffee its major export commodities. In recent years, the development of light industry, particularly in textiles and clothing, has helped alleviate unemployment, which is officially estimated at 27.9 percent of the 2.5-million-person labor force. The government anticipates that the 2007 DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT will bring further economic progress to Honduras.

In 1504, Christopher Columbus landed near the present-day town of Trujillo to claim the territory for Spain. Honduras became part of the Kingdom of Guatemala during the Spanish colonial period and belonged to the short-lived United Provinces of Central America following its independence from Spain in 1821. Honduras had a largely noneventful history until late in the 19th century, when it experienced a brief silver-mining boom and the banana industry was developed along its north coast, from Tela to La Ceiba.

For the first 30 years of the 20th century, three factors significantly influenced the Honduran experience. In 1903, conservative general Manuel Bonilla (b. 1849–d. 1919) engineered a coup d'état that ousted President Tenencio Sierra (b. 1833–d. 1907). Bonilla's coup marked the beginning of political turmoil, with the presidency changing more through military interference than the



Worker tapping a rubber tree, a secondary industry in Honduras and elsewhere in Latin America through the mid-20th century (*U.S. Army Signal Corps*)

ballot box. Throughout the period, the U.S. fruit companies—Standard, Cuyamel, and United Fruit—gained concessions from compliant presidents, including land grants with special privileges along extensive right of ways, lower taxation on imported goods and exported bananas, and avoidance of labor laws for the ever-increasing number of black Caribs hired to work the banana plantations. Taken together, the plantation expansion and economic concessions earned Honduras the title of a “banana republic.”

The third factor was the increasing U.S. presence in Honduras during the 20th century. The same year that Bonilla overthrew Sierra, 1903, the United States helped PANAMA gain independence from COLOMBIA for the purpose of building a transisthmian canal. Thereafter, the United States was determined to prevent regional political turmoil and financial mismanagement, as political turmoil could spill into Panama and international indebtedness could bring navies into the Caribbean for the purpose of debt collection. In both instances, the United States believed that its canal interests might be threatened and thereby justified its military interventions in Honduras in 1907, 1910, and on several instances during the 1920s, when local uprisings marred the political landscape. To prevent the possibility of European gunboat diplomacy, in 1911, the U.S. government dispatched Thomas C. Dawson to Tegucigalpa,

where he designed a plan under which U.S. banks paid off Honduran loans to European lenders, and Honduran customs receipts were used to pay back the U.S. banks (see U.S. CUSTOMS RECEIVERSHIP). In an effort to force constitutional government on the entire region, the United States sponsored the CENTRAL AMERICAN CONFERENCES OF 1907 AND 1923.

Honduras took another political turn in 1932 with the election of TIBURCIO CARIÁS ANDINO to the presidency. He governed the country until 1948, extending his term by constitutional adjustments and suppression of the opposition. The Great Depression and World War II caused the banana industry to lose its export markets, thus the government lost tax revenues. Nevertheless, Cariás managed to keep the national budget in the black, built roads into rural areas, and initiated an air service system to the country's most remote areas. He retired from politics in 1948.

Military rule returned to Honduras for the next 30 years, but the military's control of the political arena was overshadowed by the 1954 U.S. invasion of GUATEMALA and the 1969 SOCCER WAR between Honduras and EL SALVADOR (see GUATEMALA, U.S.-SPONSORED INVASION OF). In the first instance, the U.S. Central Intelligence Agency used Honduras as its staging area for the invasion of Guatemala to overthrow the allegedly communist government of JACOBO ARBENZ GUZMÁN. The invasion simultaneously served as the impetus for the Honduran government to suppress the peasantry's calls for land distribution programs. The Soccer War began in the summer of 1969 after a Honduran agrarian reform law led to the expulsion of Salvadoran squatters, many of whom had arrived in the country during the 1920s. Both conflicts illustrated an underlying socioeconomic problem that characterized all of CENTRAL AMERICA during the 20th century: unequal land distribution.

Civilian government returned to Honduras in 1982 with the election of Roberto Suazo Córdova (b. 1927– ), but the military continued to lurk in the background in large part because Honduras had become the staging area for the U.S.-led counterinsurgency wars in NICARAGUA and EL SALVADOR in the 1980s (see CENTRAL AMERICAN WARS). During the conflicts, Honduras became home to thousands of exiles from the battleground states, which strained the national budget as well as the country's social institutions and infrastructure. The massive U.S. presence also contributed to persistent inflation, which lasted until the end of the 20th century.

Additionally, Honduras is plagued by earthquakes and hurricanes. In 1998, for example, Hurricane Mitch wrought massive destruction on cities and towns throughout the country, including the capital, Tegucigalpa. Among the other problems facing current president José Manuel Zelaya Rosales (b. 1952– ) are overcrowding in urban centers, deforestation, land degradation, and soil erosion brought about by uncontrolled development and improper land use practices, as well as the polluting with

heavy metals of the country's major source of freshwater, Lake Yojoa, and surrounding rivers and streams.

In addition to the monumental problems that Zelaya inherited, he promised to improve the quality of life of the nation's poor, a promise identified by the Honduran wealthy with Venezuela's HUGO CHÁVEZ, Bolivia's EVO MORALES, and Nicaragua's DANIEL ORTEGA. This viewpoint was confirmed in March 2009 when Zelaya sought a national referendum on a proposed constitutional change that would permit him to seek a second consecutive presidential term. A crisis developed on June 24 when the military refused to deliver ballot boxes to the polling places. Four days later, on June 28, the military ousted Zelaya and sent him packing to Costa Rica, with the threat of arrest if he returned to Honduras. Following the constitutional process, the Honduran congress installed Roberto Michelletti (b. 1943– ) as interim president. Many members of the international community, including the United States, refused to recognize Michelletti as the legal head of state and withheld financial assistance to Honduras. The Organization of American States (OAS) and Costa Rican President OSCAR ARIAS SÁNCHEZ failed in their attempts to mediate the crisis. Zelaya demanded that he return to complete his presidential term that ends on January 27, 2010. Michelletti and the military are determined to prevent that from happening. In late October 2009, the Honduran political future remained unclear.

See also HONDURAS (Vols. I, II, III); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**Huerta, Victoriano** (b. 1854–d. 1916) *revolutionary leader and dictator of Mexico* Victoriano Huerta was a MILITARY general who initially supported FRANCISCO MADERO (1911–13) after the fall of Porfirio Díaz in the MEXICAN REVOLUTION. He later betrayed Madero and became dictator of MEXICO. During Huerta's brief rule, a coalition of revolutionary leaders formed to overthrow him in defense of democracy.

Huerta was born on March 23, 1854, in Jalisco. He rose within the ranks of the military during the Porfiriato (1876–1911) and fought alongside Díaz after Madero's revolution broke out in 1910. Although he had been loyal

to Díaz, Huerta was one of the many military leaders who kept their position after Madero was elected president in 1911. Madero called on him to put down several local revolts that erupted in the first months of his presidency. Huerta appeared to be a loyal and trusted ally to Madero. But, when a rebellion led by FÉLIX DÍAZ overran MEXICO CITY for 10 days in 1913, Huerta made a deal that brought him to power after ousting Madero.

The manner in which Huerta rose to power defied the democratic ideals of many local revolutionaries, and rebellions against his dictatorship sprang up throughout the country. VENUSTIANO CARRANZA formed the Constitutionalist alliance with ÁLVARO OBREGÓN and FRANCISCO VILLA, and in July 1914, Huerta was forced to resign. Huerta fled to the United States, where he and PASCUAL OROZCO attempted to plan another uprising. They were arrested by U.S. authorities. Huerta died while in custody on January 13, 1916.

See also DÍAZ, PORFIRIO (Vol. III); PORFIRIATO (Vol. III).

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**human rights** Violations in Latin America of human rights can be traced to colonial times and the Spanish abuse of NATIVE AMERICANS and African slaves. Although the religious orders, notably the Dominicans and Jesuits, attempted to protect these groups from abuse and the national constitutions that followed Latin America's independence in the 1820s outlawed slavery, the persecution of minorities continued. By the 20th century, these groups, along with immigrant minorities, were socially and politically marginalized and had little recourse to government or private protection. This was most evident during the Central American dictatorships of the 1930s, when labor and middle-sector protests were muted, and in the strong-armed governments of LAUREANO GÓMEZ in COLOMBIA and JUAN VICENTE GÓMEZ in VENEZUELA. Likewise, political opposition was not tolerated in MEXICO's single-party state.

The awakening of the labor movement in the 1930s and the impact of the Allies' idealistic goals during World War II gave rise to the "generation of rising expectations" immediately after that conflict ended in 1945 (see WORLD WAR II AND LATIN AMERICA). JUAN DOMINGO PERÓN's appeal to and support from urban labor, the plethora of POLITICAL PARTIES claiming to represent Brazilian labor, and the significance of "leftist" political parties in CHILE evidenced labor's growing importance. The middle sector's successful political challenge to Central American dictators from 1944 to 1946 illustrates

the second point. As the Latin American economies slowed in the 1950s and workers' demands could not be met, and after 1959, as FIDEL CASTRO RUZ engineered his revolution in CUBA, Latin America's elite feared the loss of their privileged position. Reportedly for national security reasons, MILITARY dictatorships replaced civilian governments across Latin America, except in Mexico, where the Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI) continued to rule, and in Cuba, where Castro tightened his control over society. The human rights violations of the military governments brought them international attention.

The most notable atrocities were committed during the 17-year regime of Chilean general AUGUSTO PINOCHET UGARTE and successive military governments in ARGENTINA and BRAZIL during the 1960s and 1970s (see DIRTY WAR). In each instance, people were arrested and detained, abused and tortured, and oftentimes put to death if they had not already died from the brutality. The horrors that occurred during the 25-year reign of PARAGUAY's dictator ALFREDO STROESSNER were uncovered with the 1999 discovery of his "Archive of Terror," a detailed accounting of the treatment prisoners endured.

Concomitant with the human rights violations during the late 1960s and 1970s were the loss of civil rights. If not fraudulent, elections were, at best, monitored to ensure the desired outcomes. The media fell under government censorship; public protests and demonstrations were outlawed. Universities came under government control, and professors lost their jobs, or worse, for speaking out against government policies. People had no legal recourse. Courts fell under the military's control or were shut down.

Despite these constraints, protests surfaced in some of the countries. In Argentina, the Madres de la Plaza de Mayo (Mothers of the Plaza de Mayo) received worldwide attention. Wearing blue head scarves, these mothers, daughters, and others peacefully paraded weekly in front of the presidential palace to demand information about the fate of their "disappeared ones" (*los desaparecidos*). Other protest groups included Brazil's Comissão de Justiça e Paz; Chile's Vicaría de la Solidaridad; Paraguay's Comité de Iglesias para Ayudas de Emergencia; and NICARAGUA's Comisión Permanente de Derechos Humanos. The civil and human rights violations drew the attention of international organizations, such as the Inter-American Commission on Human Rights, and U.S. nongovernment organizations, including Washington Office on Latin America.

As the violence subsided in the 1980s and 1990s, governments attempted to document and place responsibility for the inflicted terror. In Argentina, Brazil, and Chile, responsibility was placed on the military, but the new civilian governments often pardoned military officers to save their nations from emotional public trials. The case of Chilean president Pinochet stood as a potential model for other participants who would travel abroad in the future. In London in 1998 for medical treatment,



Mothers began a weekly march in the Plaza de Mayo in central Buenos Aires, Argentina, to demand that the government provide information about the “disappeared ones” from Argentina’s Dirty War. (Thomas M. Leonard Collection)

a Spanish court indicted Pinochet for the execution of Spanish citizens in Chile during his dictatorship and sought his extradition to Spain to stand trial for the alleged crimes. Following lengthy negotiations with the British government, Pinochet was returned to Chile, where he was eventually charged with human rights violations but died before going to trial. Cuba remains a peculiar model. Although annually condemned by the U.S. State Department and other international organizations for human rights violations, the Cuban government ignores the condemnations and asserts that it does not violate its citizen’s rights.

In 1973, the U.S. Congress authorized the State Department to issue annual reports on conditions throughout Latin America and authorized the president to cut U.S. military and socioeconomic assistance to governments that violated human rights. Starting in 1977, President Jimmy Carter implemented the policy, slicing military assistance to Argentina, Brazil, and Chile. The cuts had the unintentional consequence of encouraging those countries to develop their own small arms industries. Carter also banned arms sales to the governments of Nicaragua, EL SALVADOR, and GUATEMALA. In the first instance, Carter’s

decision accelerated the Sandinistas overthrow of dictator ANASTASIO SOMOZA DEBAYLE. El Salvador and Guatemala satisfied their needs in the global arms market. President Ronald Reagan abandoned Carter’s practice, arguing that Latin America’s struggle against communist insurgent groups took precedence over human rights.

Since the end of the cold war in 1991, human and civil rights violations continue in Latin America but on a much reduced scale. They also have received less attention in the international community, with the focus shifting to other issues such as the collapse of the Soviet Union, chaos in the Middle East, and the rise of Islamic fundamentalism.

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**IADB** See INTER-AMERICAN DEVELOPMENT BANK.

**Ibáñez del Campo, Carlos** (b. 1877–d. 1960) *president of Chile* A native of Linares, CHILE, Carlos Ibáñez del Campo began his military career in 1896. Following a checkered start that took him to military school, the War Academy, and assignments at Tacna, Iquique, and the Central American country of EL SALVADOR, Ibáñez returned to SANTIAGO DE CHILE at the invitation of President Arturo Alessandri (b. 1868–d. 1950) to direct the military's Cavalry School. By 1925, Ibáñez had become politically well connected. He and MARMADUKE GROVE VALLEJO directed the political maneuvering in 1924 and 1925 that led to his being promoted to general and becoming war minister. Two years later, Alessandri resigned under duress, opening the door for Ibáñez to win the presidency in the May 22, 1927, election with a full 98 percent of the vote.

Using executive powers set out in the 1925 constitution, Ibáñez ruled with an iron fist until 1931. He brooked no opposition and forced Congress to comply with his wishes. With massive financial assistance from U.S. banks, Ibáñez undertook an extensive public works program that resulted in the construction of public health, education, and transportation facilities and the implementation of social security and welfare programs. Nevertheless, when the Great Depression struck in 1929, Chile was the hardest-hit nation in the world, according to the League of Nations. The calamity also forced Ibáñez's retirement from office.

In the 1930s and 1940s, Ibáñez was linked to fascist and Nazi groups in Chile, and this was used against him when he stood as a candidate for the presidency in 1938

and 1942. During the same time period, Chilean politics began its drift to the left, a movement that prompted right-wing elements to plot coups in 1939, 1944, and 1946, each of which involved Ibáñez.

In 1952, running as the presidential candidate of the Agrarian Reform Party, Ibáñez mustered enough strength to win the election with 47 percent of the popular vote. Confronted with rampant inflation, he turned to the International Monetary Fund for relief. While the bank approved loans to stabilize the Chilean currency, the cost proved enormous. As part of the required austerity measures, the Chilean government had to lift its controls on the cost of electricity, but the managers of the state-owned companies refused to pass the costs on to the consumers, which led to demonstrations and LABOR strikes. The economic disruptions contributed to widespread political opposition that effectively made Ibáñez a lame duck president one year into his term. Ibáñez abandoned politics at the conclusion of his term in 1958. He died in 1960 at his home in Santiago.

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**immigration from Mexico to the United States**

Immigration from MEXICO to the United States defined U.S.-MEXICAN RELATIONS throughout the 20th century and has had an enormous cultural and economic impact on both countries. The advent of a Mexican-American ethnicity in the United States dates back to the end of the U.S.-Mexican War in 1848, when Mexico was

forced to cede large expanses of territory to its northern neighbor. The movement of people continued during the 20th century.

Immigration from Mexico to the United States can be divided into three main waves. The first coincided with the outbreak of the MEXICAN REVOLUTION. Large numbers of people migrated north to escape the violence that plagued Mexico between 1910 and 1920. Mexican immigration continued in the 1920s as many people relocated temporarily, moving back and forth across the border with relative ease. Many of those in this early wave were agrarian workers who found temporary work in rural areas of the U.S. Southwest. Mexican immigration during the 1920s came to an abrupt end with the onset of the Great Depression in 1929. In an effort to protect American workers, the U.S. government deported large numbers of Mexican migrants. Those who remained in the United States often relocated to the cities in search of better employment opportunities. By the end of the 1930s, many U.S. cities had become home to Mexican immigrant communities.

A second wave of immigration was precipitated by LABOR shortages in the United States during World War II. In 1942, the U.S. and Mexican governments entered into an agreement that allowed Mexican workers to seek temporary employment in the United States as part of the BRACERO PROGRAM. The guest worker program was enormously popular on both sides of the border and continued after the war. Millions of braceros worked legally in the United States as part of the program, while even more undocumented workers ventured across the border. Although most braceros worked as farmhands, some were employed in urban industries. By 1964, concerns over the influx of undocumented workers and the exploitation of braceros brought an end to the guest worker program. Faced with the prospect of reabsorbing millions of workers into its labor sector, the Mexican government created the Border Industrialization Program, which allowed for the construction of U.S.-owned MAQUILADORAS in the border region. In 1965, U.S. president Lyndon Johnson signed immigration reform legislation that made it easier for immigrants to sponsor family members to move to the United States and become U.S. citizens.

A last wave of Mexican immigration began in the late decades of the 20th century; it continues today. The decline of the Mexican ECONOMY that began in the late 1970s compelled many displaced laborers to seek employment in the United States in an effort to offset their financial problems. The numbers of undocumented Mexican immigrants grew precipitously in the 1980s, and in 1986, U.S. president Ronald Reagan signed the Immigration Reform and Control Act. The law granted amnesty to some illegal immigrants but also attempted to reinforce laws aimed at curbing illegal immigration. Despite the 1986 legislation, documented and undocumented immigration from Mexico increased in the 1990s. As the 2000 U.S. presidential election approached, U.S.

lawmakers considered revising immigration laws, but the issue got pushed forward to the presidency of Barack Obama which began on January 20, 2009.

In April 2009, the Obama administration planned to introduce legislation that would establish an orderly system of immigration and provide a path to legal citizenship for the estimated 12 million illegal immigrants already in the United States, but the national debate over health care reform delayed any such proposal. Although precise statistics are unavailable, immigration authorities reported that the number of Mexicans and others illegally crossing the U.S. southern border dropped significantly, owing to the deepening U.S. recession.

See also GADSDEN PURCHASE (Vol. III); U.S.-MEXICAN WAR (Vol. III).

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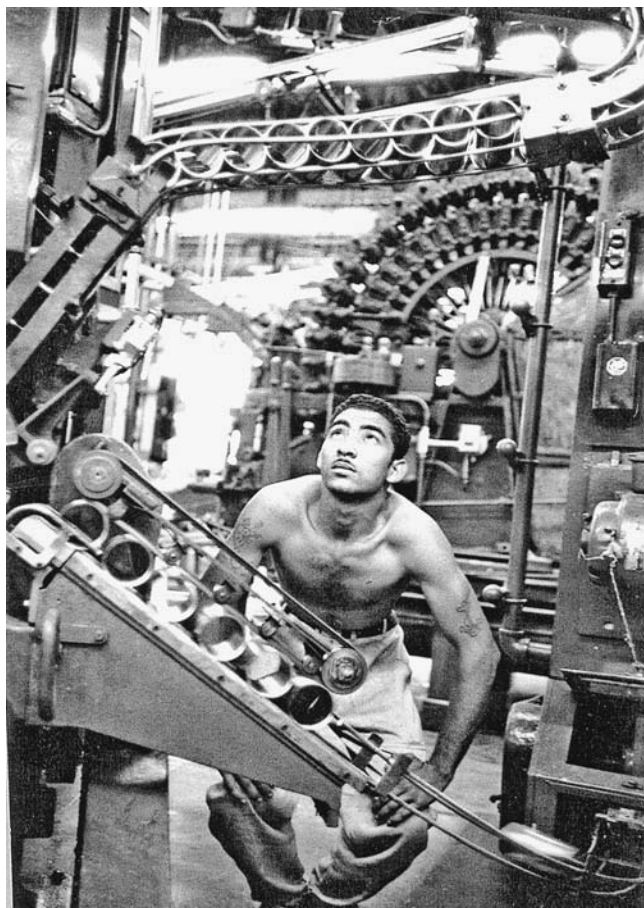
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**industry** Owing to the mercantilist economic policies of the Spanish, Portuguese, British, French, and Dutch, the industrialization of Latin America and the Caribbean was a 20th-century phenomenon. Historically, the colonies existed to serve the economic purposes of the mother country through the exportation of primary products and precious metals. The local industries that developed satisfied only local needs, supported those who assisted in the production and shipment of the products back to Europe, or served the needs of neighboring colonies. Examples include cordage for shipping, hardwoods for shipbuilding and, in the case of CHILE, wines and foodstuffs for its northern neighbors. Craftspeople at the local level included carpenters, seamstresses, and blacksmiths who met only local needs. Otherwise, the colonies were to purchase finished goods from the mother country. Many colonists circumvented the system to expand production but only for local consumption, not for the international market. The Latin Americans were unprepared for economic independence, but because the British assisted with financing the cause, they capitalized on it. Throughout the 19th century, the British enjoyed a privileged position in supplying Latin America with finished goods, followed by the Germans and the French. North America did not close the gap until the eve of the 20th century.

With the development of export-based economies by Liberal politicians in the late 19th century, Latin American entrepreneurs became involved in ancillary industries related to export crops. For example, Brazilians dominated the coffee-shipping supply industry; Argentines produced spare parts and hand tools



The steelmaking industry in San Vicente, Brazil (*United States Information Agency*)

for the British-controlled beef-processing, electric, and warehousing industries. MONTERREY, MEXICO, developed as an industrial center, and its businessmen subsequently would have significant influence in national politics. Still, Latin Americans remained dependent on outside demand for their raw materials and consumer goods.

World War I and the weak postwar European economies contributed to a continuing loss of world market share for Latin American producers (see WORLD WAR I AND LATIN AMERICA). The Great Depression of the 1930s unraveled each nation's ECONOMY. In response to these changed conditions, governments turned to the import-substitution model of development, meaning that countries would now produce at home what they had once imported. To do that, however, Latin America had to import the required heavy machinery from abroad but over time went on to produce consumer goods ranging from textiles to furniture and electronic goods to satisfy local demand. Significantly, a few countries—BRAZIL, Chile, and Mexico—capitalized on U.S. largesse during World War II to build steel, cement, and electric plants; undertake infrastructure projects; and otherwise lay the basis for industrial development (see WORLD WAR II AND LATIN AMERICA). Under these circumstances, the

number of industrial plants greatly expanded from the end of World War I in 1919 to the onset of the cold war in 1947; from 40,000 to 83,000 in ARGENTINA, and from 13,000 to 78,000 in Brazil. The smallness of their economies prompted the Central American republics to form the CENTRAL AMERICAN COMMON MARKET in 1960, but it collapsed nine years later due to continuing national rivalries and the 1969 SOCCER WAR. During that period, ALLIANCE FOR PROGRESS investments developed the region's industries, but these were capital intensive and did not generate sufficient jobs to satisfy the available LABOR pool. Cuba, however, provides a unique model. Since the 1920s, small businessmen and entrepreneurs clamored for government assistance to help diversify the ECONOMY and to industrialize. At the end of World War II, the United States offered grants and loans to do the same, but the Cuban congress rejected this offer. Instead, the Cuban land barons, who dominated the legislature, insisted on continuing the profitability of the sugar market and after World War II found strange bedfellows in the Communist labor leadership that described the U.S. offer as another act of imperialism. Subsequently, FIDEL CASTRO RUZ could not break Cuba's dependence on sugar. The world market did.

Industrialization also produced a dramatic growth in the middle class, which demanded a greater voice in the political system, and in the unionization of labor, which increasingly sought government-sponsored social programs. These demands collided with the stagnation of the import-substitution economic model by the late 1960s and early 1970s and coincided with the implementation of the CUBAN REVOLUTION and Castro's subsequent turning to the Soviet Union for economic assistance in 1970 (see SOVIET UNION AND CUBA). These events resulted in the emergence of MILITARY governments until the 1980s. The military regimes not only brutally suppressed any opposition but increased the government's role in the economy. Economic expansion came from international investments that resulted in a collective Latin American debt of \$231 billion in 1981.

Latin America's economic stagnation and ever-growing international debt reached a climax in the early 1980s and contributed to the region's so-called return to democracy. The political change came at a time when the world accepted the principles of the neoliberal economic model. Latin American countries were no exception and, like other nations around the globe, tore down their protective barriers and opened their doors to foreign investment. By the end of the 20th century, most Latin American nations had implemented the structural changes in banking, monetary policy, investment, and the like advocated under the neoliberal economic model. Acceptance of the model enabled Latin American countries to become more engaged in international TRADE and diversify their economies. Not all attained the success of Chile, which is often pointed to as the model of neoliberalism. Critics point out that it was imposed by a military



dictatorship. Furthermore, the benefits of neoliberalism have not passed down to the working classes, and this may account for their voting “leftist” candidates into the presidential palaces in recent elections.

Recent U.S. trade policies, such as the CARIBBEAN BASIN INITIATIVE, NORTH AMERICAN FREE TRADE AGREEMENT, and DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT, are viewed in the circum-Caribbean region as opportunities to expand employment and in the United States as a way of curtailing illegal immigration into the country.

See also INDUSTRIALIZATION (Vol. III).

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## Inter-American Development Bank (IADB)

With initial capitalization of \$1 billion, the Inter-American Development Bank (IADB) was established on December 30, 1959, by 19 Latin American countries and the United States to support Latin American and Caribbean economic and social development and regional integration by lending mainly to governments and government agencies, including state corporations. The bank is headquartered in Washington, D.C. In 1989, the bank’s membership approved an amendment to the charter providing for loans to the private sector.

The idea for an institution to support economic development can be traced to the First Inter-American Congress, held in Washington, D.C., in 1889–90, which approved a resolution calling for such an institution. Nothing materialized until 1933 when the Seventh Inter-American Conference, meeting in MONTEVIDEO, URUGUAY, called for the establishment of an inter-American bank to function mainly as a regional central bank. Given the global depression at the time, the U.S. Congress had no interest in considering such a proposal. Furthermore, in the years immediately following WORLD WAR II, the reconstruction of Europe took priority. Latin America’s economic decline in the late 1940s and early 1950s, coupled with the growing awareness of its potential sociopolitical consequences, raised government awareness of the need for economic development assistance. A report by Chilean Raúl Prebisch (b. 1901–d.

1986) called for the creation of an agricultural and industrial development bank. Brazilian JUSCELINO KUBITSCHEK DE OLIVEIRA and Colombian ALBERTO LLERAS CAMARGO (b. 1906–d. 1990) promoted the concept at a 1954 meeting of the hemisphere’s finance ministers, who endorsed it as Operación Panamericana. With a U.S. endorsement in 1958, the IADB began operating a year later.

From its original 20 members, the IADB expanded to include 46 member states, 20 of which are nonborrowing members: United States, Canada, Israel, Japan, and 16 western European nations. In early 2008, China initiated discussions to become an IADB member. Each nation’s voting power is based on its subscription to the bank’s capital stock. Latin America and the Caribbean represent 50 percent of the voting stock; the United States, 30 percent; Japan, 5 percent; Canada, 4 percent; and the other nonborrowing countries, 11 percent. Owing to its 1999–2002 financial crisis, ARGENTINA defaulted on its assessment, the only country to do so.

Initially, the IADB funded small business projects, including farming, that could generate employment, as well as projects to provide the supporting infrastructure, such as roads and water, sanitation, and electric systems. The debt crisis of the 1980s prompted the IADB to change its philosophy so that its lending practices came to reflect the so-called Washington Consensus, or the neoliberal economic model. The democratization that accompanied Latin America’s economic changes in the 1980s also prompted the IADB to support programs in developing civil society; these are related to legal and judicial reform, the protection of human rights, and transparency in government activities. By 2000, the IADB had approved more than 2,000 projects in Latin America and the Caribbean, disbursed as follows: 29 percent for health and sanitation, urban development, EDUCATION, environment, and micro-enterprise; 28.1 percent for energy, TRANSPORTATION, and communications; 22.2 percent to AGRICULTURE, fisheries, INDUSTRY, MINING, and tourism; 15.6 percent to modernization of the state; and 5.1 percent to export financing.

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## Inter-American Treaty of Reciprocal Assistance

See RIO PACT.

**Isle of Pines (Isla de Pinos)** The Isle of Pines is a 1,182-square-mile (3,061-km<sup>2</sup>) island off CUBA’s south-

west coast in the Caribbean Sea that retained its name until 1976, when the Cuban government changed it to the Isle of Youth (Isla de Juventud). At the time of Cuba's independence in 1898, the governments in HAVANA and Washington, D.C., both claimed ownership. As the two governments wrestled with the legal question, the United States lost interest when the Navy Department determined that the island would not serve its needs. The United States relinquished its claim in the 1904 Hay-Quesada Treaty, but owing to pressure from people living on the island and an estimated \$15 million in U.S. business, the U.S. Senate refused to ratify the treaty at that time. For the next generation, the U.S. government showed little, if any interest, in the island. During the same period, U.S. island residents, fearing negative consequences if they fell under Cuban rule, plotted several revolts with the goal of annexation to the United States. Finally, the U.S. secretary of state took an interest in the problem, which led him to steer the 1904 treaty through the Senate until its ratification on March 13, 1925. By 1935, all North Americans had left the island. In 1926,

Cuban president GERARDO MACHADO directed the construction of the Presidio Modelo (Model Prison) on the Isle of Pines to house 3,000 men. Owing to the Great Depression, the complex was completed 10 years later. Prisoners began to arrive in 1929, when the complex was only half completed. Approximately 13,000 persons were incarcerated in the Presidio before its closure in 1978. The Presidio housed Fidel Castro (b. 1926) from 1956 to 1958 for his having led the rebel attack on the army's Moncada Barracks on July 26, 1956. Castro subsequently used the prison to incarcerate opponents to his revolution, including gays and lesbians. After changing names in 1975, the Island of Youth became home to Cuban government-sponsored academic and vocational schools for training students from Third World countries and to a Cuban air force base.

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**Jagan, Cheddi** (b. 1918–d. 1997) *president of Guyana* Born on March 22, 1918, in Plantation Pont Mourant, GUYANA, Cheddi Jagan was the son of Indo-Guyanese plantation workers. In 1943, after earning a degree in dentistry from Northwestern University and marrying Janet Rosenberg (b. 1920–d. 2009), a Jewish woman from Chicago, Jagan returned to Guyana and immersed himself in politics. In 1946, Jagan was elected to the colony's legislative body. In 1950, Jagan formed the People's Progressive Party (PPP). To broaden support for the PPP, Jagan invited FORBES BURNHAM, who came from an upper-middle-class Afro-Guyanese family, to join the party. Burnham became the party chairman, while Jagan led the PPP's parliamentary group.

By establishing the PPP, Jagan hoped to increase the pace of decolonization in Guyana. Guyana's ethnic conflict, a result of British Guiana's colonial past, when European planters imported vast numbers of African slaves and indentured servants from India to work on the sugar plantations, however, threatened to slow the process. The PPP, therefore, was initially a coalition of lower-class Afro-Guyanese and rural Indo-Guyanese. During the 1953 elections, campaigning on a center-left platform, the PPP won 18 of 24 seats in the Legislative Assembly, a new institution created by the Waddington Constitution, which granted a limited degree of local autonomy to the Guyanese people. The PPP's introduction of the Labour Relations Act, however, sparked a confrontation with the British, who saw the legislation as a threat to order and stability. On October 9, 1953, the day after the act was passed, the British government suspended the colony's constitution.

By the time the British scheduled new elections in 1957, an open split had developed between Jagan

and Burnham. Jagan's faction of the PPP won the 1957 elections. Jagan and his supporters in the new government pushed for more rice land, improved union representation in the sugar industry, and more government posts for Indo-Guyanese. Jagan's veto of British Guyana's participation in the 1958 WEST INDIES FEDERATION resulted in the total loss of Afro-Guyanese support. In the 1961 elections, under the new Internal Self-Government Constitution, the PPP won 20 of the 35 seats in the Legislative Assembly, and Jagan was named prime minister. Jagan's government, however, which was friendly with FIDEL CASTRO RUZ's government, refused to observe the U.S. economic embargo on CUBA and signed TRADE agreements with Hungary and East Germany. In 1962, Jagan admitted that he was a Communist. Concerned about his Marxist ideology, the United States and the United Kingdom conspired to remove Jagan from office before granting Guyana independence. In 1964, the introduction of proportional representation facilitated Jagan's removal from power. A constant presence in the Guyanese political arena, Jagan won the 1992 presidential elections. By this time, however, he had abandoned his socialist philosophy and began to move Guyana toward a free-market capitalist system. He was dedicated to neoliberal economic policies and privatization of the state-run industries. Within four years of taking power, Jagan had reduced the nation's inflation rate from more than 100 percent to less than 5 percent a year. He lured foreign investors to Guyana's agricultural, MINING, and timber sectors. Before his term was finished, however, Jagan, after suffering a massive heart attack, died in the Walter Reed Army Medical Center in Washington, D.C., on March 6, 1997. Initially succeeded as president by Sam Hinds

(b. 1943– ), Jagan's wife, Janet, was elected president in December 1997.

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**Jagdeo, Bharrat** (b. 1954– ) *president of Guyana*  
Born on January 23, 1964, in Unity Village, GUYANA, to Indo-Guyanese parents, Bharrat Jagdeo entered politics at the age of 13 when he joined the Progressive Youth Organization, the youth arm of the People's Progressive Party (PPP). He earned an M.A. in economics from the Patrice Lumumba Peoples' Friendship University in Moscow in 1990. After returning to Guyana, he worked as an economist in the State Planning Secretariat. Following CHEDDI JAGAN's election in 1992, Jagdeo served as an adviser to the minister of finance. In 1995, Jagdeo was appointed minister of finance and was responsible for overseeing the nation's economic restructuring program.

During the government of Jagan's widow, Janet (1997–99), Jagdeo continued to serve as minister of finance. The day before President Janet Jagan resigned in August 1999, she named Jagdeo prime minister. According to the constitution, Jagdeo became president after her resignation. Elections held on March 19, 2001, were won by Jagdeo and the PPP. Like all previous elections in Guyana, the opposition claimed that the elections were fraudulent. Race riots erupted when the Afro-Guyanese claimed that the PPP, the vehicle for Indo-Guyanese political aspirations, had rigged the election. Jagdeo was subsequently reelected in 2006. Surprisingly, the pre- and post-election period was relatively free of violence, a unique historical experience in Guyana. As Jagdeo has attempted to heal the rift with the Afro-Guyanese community, some PPP supporters have criticized his efforts to include People's National Congress advisers in his government.

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**Jamaica** The third most populous English-speaking nation in the Western Hemisphere, after the United

States and Canada, Jamaica achieved independence from the United Kingdom on August 6, 1962. Jamaica was the first British colony in the Caribbean to gain independence, followed by TRINIDAD AND TOBAGO three weeks later.

Jamaica, which occupies 4,244 square miles (10,992 km<sup>2</sup>) of territory, is an island in the Greater Antilles that measures 146 miles (235 km) in length and 50 miles (80.5 km) in width at its widest point. Jamaica is the third largest island in the Caribbean, after CUBA and Hispaniola. The island is located 90 miles (145 km) south of Cuba and 120 miles (193 km) west of HAITI. The nation's name is derived from the Taino name for the island, *Xaymaca*, which means "land of springs." Most major towns and cities, including Kingston, the capital and largest city, are located along the coast.

With a population of 2.7 million people, Jamaica is the largest English-speaking nation in the Caribbean. Since independence, more than 1 million Jamaicans have emigrated abroad, primarily to the United States, Canada, and the United Kingdom. Over 90 percent of Jamaica's people are of West African descent. Whereas English is the official language, most Jamaicans speak Jamaican Creole, locally referred to as Patois. The question of whether Jamaican Creole is a separate language or a dialect of English is contested by scholars and linguists. Over 65 percent of the Jamaican people are Christians, primarily Anglican, Pentecostal, Baptist, Seventh-Day Adventist, and Church of God (see RELIGION). Roughly 10 percent of the population practices RASTAFARIANISM, a belief system founded in Jamaica during the 1930s that reveres former Ethiopian emperor Haile Selassie I. The spread of Rastafarianism is closely associated with REGGAE, a music style born in the ghettos of Kingston. Reggae artists such as BOB MARLEY facilitated the spread of the genre worldwide. Demographers estimate that there are more than 1 million Rastafarians spread throughout the world.

Initially a Spanish colony, the British captured Jamaica in 1655. The expansion of the sugar industry using African slaves made Jamaica one of the United Kingdom's most valuable colonies (see CARIBBEAN, BRITISH). The Great Depression was especially harsh in Jamaica. In 1938, sugar workers and dockworkers, many of whom were influenced by the new doctrine of Rastafarianism, initiated a revolt against British political and economic domination. Although it suppressed the revolt, the colonial government enacted a series of reforms that allowed for the formation of an organized LABOR movement and the development of a representative political system. Norman Manley (b. 1893–d. 1969) established the People's National Party (PNP) in 1938 and ALEXANDER BUSTAMANTE established the Jamaica Labour Party (JLP) in 1943. After the British granted Jamaica full adult suffrage, Bustamante's party won the 1944 elections. When the British increased Jamaican autonomy in 1953, Bustamante became chief minister, a position he held until the PNP won the 1955 elections,

and Manley became chief minister. Jamaica joined the WEST INDIES FEDERATION in 1958, a move opposed by Bustamante, who preferred independence. Manley, who supported the federation, bowed to local pressure to hold a referendum regarding the federation in 1961, which resulted in Jamaica withdrawing from the federation and the return of the JLP to power.

When Jamaica achieved independence on August 6, 1962, Bustamante became the nation's first prime minister. Queen Elizabeth II became the official head of state, but de facto power rested with the prime minister, usually the leader of the majority political party in the parliament. Bustamante, who favored close relations with the United States, retired in 1967, but the JLP continued to rule until defeated in the 1972 elections by the PNP, led by MICHAEL MANLEY, the son of the party's founder. Manley decided that Jamaica had to reorient its foreign policy away from the United States and granted diplomatic recognition to FIDEL CASTRO RUZ's regime in CUBA. Relations between Jamaica and the United States deteriorated when Manley supported Cuban interventionism in Africa. In 1980, the JLP, led by EDWARD SEAGA, defeated Manley's party. Seaga restored friendly relations with the United States and worked closely with Ronald Reagan's administration. Reagan made Jamaica the centerpiece of the CARIBBEAN BASIN INITIATIVE. Seaga supported OPERATION URGENT FURY, the U.S.-led military intervention of GRENADA in 1983. Manley returned to power following the 1989 elections. Citing health reasons, he retired in 1992 and was succeeded by Deputy Prime Minister PERCIVAL PATTERSON, who served as prime minister until 2006.

In February 2006, when Patterson announced his impending retirement, Portia Simpson-Miller (b. 1945– ), the vice president of the PNP since 1978, became the party's leader and was sworn in as prime minister on March 30, 2006. She was the third female leader in the English-speaking Caribbean, after DOMINICA's MARY EUGENIA CHARLES and GUYANA's Janet Jagan. In the September 2007 elections, however, the PNP won only 27 seats. The JLP, led by Bruce Golding (b. 1947– ), won 33 seats. Golding was sworn in as Jamaica's eighth prime minister on September 11, 2007. Jamaica's ECONOMY, a mixed free-market economy with state enterprises, is dominated by MINING (specifically bauxite) and tourism.

See also JAMAICA (Vol. II).

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### Japan, economic interests in Latin America

Peoples of Asian descent, including Japanese, have long been migrating to Latin America; the modern influx dates to the 19th and 20th centuries. The more recent migrants came as contract workers, while others arrived as economic or war refugees. In the early 21st century, an estimated 4.5 million Latin Americans are of Asian descent. The majority of the Asians are Chinese, Japanese, and Koreans, followed by Filipinos, Indians, and Vietnamese. Most who are of Japanese descent reside in BRAZIL (1.3 million), PERU (82,000), ARGENTINA (35,000), MEXICO (20,000), BOLIVIA (12,000), and PARAGUAY (10,000), with much smaller communities scattered across Latin America. Although immigrants continued to arrive in Latin America, the Japanese diaspora ended after World War II (see WORLD WAR II AND LATIN AMERICA). Following the war, Japanese communities in Latin America became more unified, creating their own social and cultural organizations and running businesses to serve their needs. Since the 1980s, upward of 250,000 Japanese descendants have left Latin America for their homeland in search of better economic opportunities.

In modern times, Japanese migrants came to Latin America in two waves. The first, at the beginning of the 20th century, resulted from Japan's growing population and poverty in the countryside. The second wave came in the 1920s to work as agricultural field hands. Over time, the Japanese descendants of these people have worked in menial jobs, operated small businesses, and entered various professions. Some have achieved international notoriety, such as ALBERTO KENYA FUJIMORI, a former Peruvian president; María Hiromi Hayakawa (b. 1982– ), a Mexican singer; Bárbara Mori (b. 1978– ), an Uruguayan actress; and Pedro Shimose (b. 1940– ), a Bolivian poet. During World War II, most Japanese endured various discriminations, including arrest, deportation, and the loss of civil rights as suspected enemy aliens.

Japan's economic interests in Latin America are a more recent phenomenon that followed its recovery after World War II. In 1974, Prime Minister Kakuei Tanaka demonstrated this newfound economic interest when he visited Mexico and Brazil to secure oil and other raw materials. In addition to obtaining the materials needed to sustain its own ECONOMY, Japan looked to Latin America as a market to sell its manufactures and as a place in which it could establish a cheap LABOR base for the exportation of its goods to other markets, particularly the United States. Mexico's MAQUILADORA program fit neatly into the Japanese plan. Japanese electronic and textile assembly plants quickly moved to Mexico's border with the United States in order to capitalize on the program. As a result

of these pursuits, Japan is Latin America's second-largest trading partner, after the United States.

Japanese direct investment and development assistance followed TRADE to Latin America but never in significant amounts for several reasons. Since the end of World War II, Japan has largely accepted U.S. hegemony over Latin America and has deferred to Washington policy decisions. Japan also has little understanding of Latin American cultural and political dynamics and clings to the conventional wisdom that the political situation in the region is unstable. The Japanese government lacks a centralized agency for foreign economic development assistance. The LATIN AMERICAN DEBT CRISIS OF THE 1980s adversely affected trade and investments and prompted the Japanese to focus on Asia. As the benefits of neoliberal policies made Latin America a more attractive trading partner, Japan again focused on the region in the late 1980s and early 1990s, but this was short-lived, as Latin America's overall economic recovery had stalled by the end of the 20th century. Based upon the historical record, as the 21st century begins, Latin America understands little of the needs and demands of the Japanese market. Industries could be developed to cater to that market, and the region could move beyond the exportation of primary products. Latin America is yet to capitalize fully on the Japanese market and assistance largesse.

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**Jones Act (Jones-Shafroth Act)** (1917) Officially known as the Jones-Shafroth Act, signed into law by U.S. president Woodrow Wilson on March 2, 1917, the Jones Act simply amended the 1900 FORAKER ACT. Pressure for a change in PUERTO RICO's status in relation to the United States emanated from the question of whether the islanders were entitled to U.S. citizenship. Their resident commissioner, Luis Muñoz Rivera (b. 1858–d. 1916), found many congressional supporters for the Puerto Rican request of U.S. citizenship during his five-year term, from 1911 to 1916.

Under the Jones Act, Puerto Rico became an organized but unincorporated territory of the United States, and Puerto Ricans became statutory citizens of the United States, which meant the cancellation of Puerto Rican citizenship and the U.S. congressional granting of citizenship. Puerto Rican citizenship was reestablished in 1927 for residency purposes only.

Puerto Rico's government structure now paralleled the U.S. model, with executive, legislative, and judicial branches. The governor, the attorney general, and the commissioner of education remained appointees of the U.S. president, with U.S. Senate approval. The other departmental heads—agriculture, finance, interior, and labor and health—were appointed by the governor and approved by the Puerto Rican Senate. A bicameral legislature was created: a 19-member Senate and a 39-member House of Representatives, with all members elected to four-year terms by manhood suffrage, restricted by property ownership. The resident commissioner remained subject to an election every four years. The commissioner continued to represent Puerto Rico as a nonvoting member in the U.S. Congress and before the various government departments and agencies. The separate court system paralleled that of the United States. The U.S. Congress retained the power to reject any Puerto Rican legislative act, and the U.S. president retained control over immigration, defense, fiscal and economic matters, and other government services.

The Jones Act was amended in 1948 to permit Puerto Ricans to elect their own governor and in 1952 to permit them to elect their own constitutional convention, which led to greater autonomy for the island government.

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**Jonestown massacre** (1978) The authoritarian regime of GUYANA's FORBES BURNHAM was placed in the global spotlight following the November 1978 Jonestown massacre. American Jim Jones, leader of the People's Temple of Christ, had established an agricultural community with more than 1,000 of his followers in western Guyana with Burnham's approval. Following an investigation by U.S. congressman Leo Ryan into claims of abuse committed against its members, Jones and more than 900 of his followers committed suicide. Investigations into the cult's activities led to allegations that the Burnham government had links to the fanatical cult.

Jim Jones established the People's Temple in Indianapolis, Indiana, in 1955. During the late 1960s, the cult moved to California, eventually settling in San Francisco. Jones preached a doctrine of social justice and racial equality. By the mid-1970s, however, allegations arose that members were abused. The U.S. government also accused the People's Temple of tax evasion. In 1974, Jones implemented plans to relocate the church to Guyana, where he had leased more than 3,800 acres

of jungle from the Burnham government. In 1977, after building his utopian community in the jungle, Jones went back to California and encouraged his followers to move to Jonestown, Guyana. Although many of the members initially thought that they were going to a paradise, they ended up working in agricultural fields six days a week in a tropical climate. Dissent was not tolerated. Armed guards patrolled the compound and enforced obedience to Jones.

Jones controlled the financial life of the community. All private wealth, including monthly welfare checks, was confiscated by Jones, who eventually developed a belief called “translation,” in which he and his followers would die together and thereafter move to another planet for a life of bliss. Jones periodically conducted mass suicide drills. Everyone was made to line up and drink a small glass of fruit-flavored poison. After the drill, Jones informed everyone that it was just a test and that there was no poison in the drink. On November 14, 1978, California representative Ryan flew to Guyana with a team of 18 people (including members of the press) on a fact-finding mission to investigate allegations of HUMAN RIGHTS abuses. After arriving in Georgetown, Guyana’s capital, lawyers for the cult informed Ryan that Jones refused to allow Ryan to visit Jonestown. Regardless, on November 17, Ryan and his entourage flew to Port Kaituma, about six miles (10 km) from Jonestown. That evening, Jones held a reception for the Ryan delegation. On the morning of November 18, several members of

the People’s Temple indicated to Ryan and his party that they wished to leave Jonestown. That afternoon, at the Port Kaituma airstrip, Jonestown loyalists attacked Ryan and the defectors. Ryan, three members of his entourage, and one of the defectors were killed. The survivors gathered together and spent the night in a restaurant until they were rescued by Guyanese government troops the next morning.

On the evening of November 18, Jones announced a suicide drill. This time, however, cyanide and Valium were mixed into a grape drink. Jones convinced his inner circle that the Guyanese MILITARY would execute everyone, and that night the poison was distributed. Death came within minutes. Although some people were able to avoid the poison, the final death count reached 909. Those who resisted committing suicide were shot, strangled, or injected with cyanide. The mass suicide has become known as the Jonestown massacre. As local Guyanese people refused to live in Jonestown after the event, the jungle quickly reclaimed the area.

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# K

**Kirchner, Néstor** (b. 1950– ) *president of Argentina*  
Néstor Kirchner captured the presidency of ARGENTINA by default in 2003 when incumbent CARLOS SAÚL MENEM withdrew from the scheduled May 18 runoff election. Born into a middle-class family in Río Gallegos in the Patagonian province of Santa Cruz, Kirchner was educated in the local public schools and the Colegio Nacional República de Guatemala. In 1976, he gained his law degree from La Plata National University and immediately targeted the MILITARY for its HUMAN RIGHTS violations, after which he became active in Santa Cruz state politics as a member of the left-of-center Jusicialista Party (Partido Justicialista, or PJ). As a lawyer and administrator of a charitable trust fund, Kirchner earned sufficient public credibility to run for and win the mayoralty of Río Gallegos in 1984. His performance as mayor (1987–91) earned him the PJ nomination for the state governorship in 1991, a contest he won with 61 percent of the popular vote. By this time, his wife, Cristina Fernández de Kirchner (b. 1953– ), was a member of the provincial congress. In 1995, Néstor Kirchner engineered an adjustment to the state's constitution that enabled him that same year to capture a second race for the governorship with 65 percent of the popular vote.

As governor, Kirchner inherited a state economic crisis that mirrored that of the nation: low productivity, high unemployment, and a \$12-billion budget deficit. His programs brought a marked improvement in the state ECONOMY by arranging for substantial investments in job creation and government consumption. He also brought the state budget into balance with cost cutting and by closing tax loopholes. During his second term, Kirchner became a critic of the corruption that char-

acterized the presidency of Menem, as well as Menem's neoliberal economic policies, which adversely affected the working class. Although his critics asserted that oil-rich and sparsely populated Santa Cruz State (population of 200,000) was no preparatory stage for national politics, Kirchner sought the presidential nomination of PJ in 1999. He was not successful; instead, the party chose the governor of Buenos Aires Province, Eduardo Duhalde (b. 1941– ), who was defeated by the Alianza coalition party candidate, Fernando de la Rúa (b. 1937– ) in the October 24, 1999, national elections. Duhalde inherited an economy in recession and that by the end of 2000 was on the verge of collapse. Over the next two years, Argentina's economy and social conditions worsened (see ARGENTINA, ECONOMIC COLLAPSE IN). Despite the charges of corruption against him and his previous administration and public disenchantment with his pardoning of military officers responsible for the DIRTY WAR, Menem thought his standing as a Peronista would be sufficient to win him the April 27, 2003, presidential election. He did, but with only 24 percent of the vote. Kirchner finished second, two percentage points behind. This forced the May 18 runoff election, but Menem withdrew three days before it, when opinion polls indicated that he would lose by a large majority.

As president, Kirchner first made political changes. He reshaped the Supreme Court by appointing justices more sympathetic to his views. He also abolished Menem's laws that protected Dirty War military officers from prosecution. A more daunting problem was the \$178-billion government debt, \$84 billion of which was owed to international organizations. With his economy minister, Roberto Lavagna (b. 1942– ), on March 3, 2005, Kirchner restructured 76 percent of this debt at



approximately one-third of its value and on December 15, 2005, announced the cancellation of Argentina's debt to the International Monetary Fund with a lump-sum payment of \$9.8 billion.

Kirchner's bold moves challenged the conventional wisdom of international bankers, but his programs restored confidence in the Argentine economy. Foreign investment soon followed, and the flight of capital decreased. The gross domestic product grew by more than 8 percent in the last three years of Kirchner's presidential term, and during the same time period, unemployment declined to 8.9 percent from its 2002 high of 51.4 percent.

The economic success provided Kirchner with sufficient popularity to seek a second term in the 2007 presidential election, but for reasons he did not make public, he chose not to run. His wife, Cristina, stood in his place. Her campaign avoided discussing issues and gave only promises to continue her husband's programs. She captured the October 28, 2007, election and was sworn in as president of Argentina on December 13, 2007, for a four-year term.

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**Kubitschek de Oliveira, Juscelino** (b. 1902–d. 1976) *president of Brazil* Juscelino Kubitschek de Oliveira was born into poverty in the colonial MINING town of Diamantina in Minas Gerais, BRAZIL. He received his education in local schools before going to medical college in Belo Horizonte in 1922. After earning a medical degree in 1927, Kubitschek used funds from his subsequent practice to undertake a year of specialized medical studies in Europe in 1930. Upon returning from



Brazilian president Juscelino Kubitschek (*left*) and U.S. vice president Richard M. Nixon at the Volta Redonda Steel Plant, Rio de Janeiro state, Brazil, on February 3, 1956 (*United States Information Agency*)

Europe, he opened his own practice in Belo Horizonte and in 1932 married Sarah Gomes do Lemos.

Kubitschek began his political career in 1933 as chief of staff to the governor of the state of Minas Gerais, Benedito Valadares (b. 1892–d. 1973), who identified with the needs of the working classes. Kubitschek then served as an elected deputy to the National Congress, from 1934 to 1937, but withdrew from politics because of his opposition to the ESTADO NOVO implemented by President GETÚLIO DORNELLES VARGAS. He returned to politics in 1940 when his old friend Valadares appointed him mayor of Belo Horizonte in 1940, a position he held until 1945. As mayor, Kubitschek earned good marks for improving the city's infrastructure and encouraging industrial development. As a member of the pro-Vargas Social Democratic Party (Partido Social Democrático, or PSD), Kubitschek was elected to the National Congress in 1946 and to the governorship of Minas Gerais in 1950. In the latter post, he orchestrated a state-sponsored infrastructure program, expanded electric distribution, built schools and clinics with federal funds, foreign capital, and private-public joint ventures, a pattern he would later use as president of Brazil.

Following Vargas's death in 1954, Kubitschek set his sights on the presidency, using the fallen president's political base. Kubitschek won the October 25, 1955, election with only one-third of the popular vote, owing to the extent of the country's anti-Vargas sentiment. As president, Kubitschek delivered on his promise of "50 years of progress in five years." Targets for the components of the planned industrial base—electric, infrastructure, cement, and steel—were met. Industrial expansion

followed, and the annual economic growth rate averaged slightly more than 7 percent in the final years of his administration. Also, as promised, the futuristic city of Brasília was completed, and in April 1960, the capital was moved there from RIO DE JANEIRO.

Inflation was a consequence of the rapid economic growth. In 1959, Kubitschek refused an International Monetary Fund corrective program that would have required austerity measures, thus subjecting Brazilians to continuing inflation. Between 1955 and 1960, the cost of living increased by 500 percent, and in 1960, the national debt totaled \$3.8 trillion. This opened the door to other charges against Kubitschek: corruption, graft, and nepotism. The constitution barred Kubitschek from seeking reelection in 1960. Because of runaway inflation, opposition candidate Jânio da Silva Quadros (b. 1917–d. 1992) won the October 25, 1960, election.

Kubitschek was elected senator from the state of Goiás in 1960. In 1964, he lost his political rights for 10 years when the military took control of the government (see BRAZIL, 1964 COUP D'ÉTAT IN). He then traveled to Europe and the United States before returning to Brazil and becoming an investment banker in 1967. Kubitschek died in an automobile accident on August 22, 1976.

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**labor** Organized Latin American labor movements appeared in the mid-19th century, but not until the emergence of export-based economies toward the end of that century did these have an impact on commercial operations. Railroad workers and dockworkers, along with miners, were among the first to organize, and any work stoppage on their part adversely affected the local economy and, therefore, was generally harshly repressed by local and state authorities. The influx of European workers beginning at the turn of the 20th century brought many Spanish, Italian, and eastern European laborers with socialist ideas. The ruling elites were in no mood to appease them and also suppressed their strikes, as occurred in 1907, when Mexican workers struck against U.S.-owned railroads, and in 1919, when the Argentine government rounded up and deported foreign labor leaders. Governments used legal means to bring labor under their control, as occurred in CHILE with the 1917 Yáñez Decree, which provided for government mediation of labor disputes that had reached a stalemate. During the first generation of the 20th century, governments and the agrarian and commercial elites had the advantage of an excess labor pool and, therefore, could respond harshly to labor unrest. In addition, the governing authorities, who were themselves elite or who represented the elite, promised labor tranquility to foreign investors in the export-based economies. Thus, until the onset of the Great Depression in 1929, urban labor worked under horrific conditions for poor pay, lived in inadequate housing, and lacked health care. Much of this found expression in the LITERATURE of the period.

The MEXICAN REVOLUTION at first seemed an isolated incident but eventually proved to be a turning point in labor history across Latin America. The CONSTITUTION

OF 1917 that resulted from it provided for the “human dignity” of Mexican people, granted the government the right to control the distribution of land, and permitted labor unions to organize. Two government-run organizations controlled labor: the Confederation of Mexican Workers (Confederación de Trabajadores Mexicanos, or CTM) and the Confederation of Peasants (Confederación de Campesinos, or CTC). Government’s catering to labor came to fruition under President LÁZARO CÁRDENAS from 1934 to 1940. In 1938, the foreign-owned oil companies Sinclair, Standard Oil, and Royal Dutch Shell refused to meet worker’s demands for higher wages. In response, Cárdenas nationalized them on March 15, 1938, for denying the workers their “human dignity.” Also during his administration, Cárdenas directed the distribution of some 44 million acres (17.8 million ha) of land to Mexican peasants. While these examples illustrate the state’s appeal to the Mexican labor force, they are also examples of MEXICO’s control of the labor movement through the principles of democratic centralism. The government controlled all labor unions from the top down, from the Ministry of Labor to the local labor union in each economic activity. The system worked well until the 1960s, when the Mexican government could no longer satisfy laborers’ demands or create sufficient jobs to meet the needs of the growing labor pool.

Labor was awakened elsewhere in Latin America during the 1930s, when some countries turned to the import-substitution model of economic development to manufacture goods that they had formerly imported. Industrialization led to a rise in organized labor, particularly in the Southern Cone countries. This came at a time when there was a proliferation of POLITICAL PARTIES, particularly on the left, including the Communist Party.

These new groups made significant inroads into urban labor at the end of World War II, making it a significant player in national politics.

ARGENTINA'S JUAN DOMINGO PERÓN is the most vivid example of a populist leader who successfully appealed to the needs of urban labor for political purposes. Perón's claim that he saved the labor movement from Communist control impressed neither Argentina's traditional elite nor its MILITARY, however, who engineered his ouster in 1955. Still, the *peronistas* remain a significant force in Argentine politics. In BRAZIL, President GETÚLIO DORNELLES VARGAS imposed a new constitution in 1934 that legalized labor unions. Vargas tightened his control over labor in 1938. The labor sector grew in size during World War II, as Brazil benefited from U.S. economic assistance for industrial development. In that country's newfound political freedom after World War II, new political parties, such as the Brazilian Worker's Party (Partido dos Trabalhadores Brasileiros, or PTB) and the Social Democratic Party (Partido Social Democrática, or PSD), came forward to represent labor's interests. These parties had become significant forces by 1964 when, during the presidency of João Goulart (b. 1919–d. 1976), a former Vargas labor minister, was suspected of communist leanings. This was also a time of high inflation and political instability, however. Brazil's traditional

elite and military officers, with the approval of the U.S. government, engineered Goulart's ouster on March 31, 1964. In Chile, the Popular Front (Frente Popular, or FP) was established in 1938. It included the Communist, Radical, and Socialist Parties and drew its support largely from urban labor. Its influence was felt in the 1946 presidential election of Gabriel González Videla (b. 1898–d. 1980). In the cold war environment of the time, however, Congress outlawed the Communist Party, forcing Videla to dismiss Popular Front administrators from office. From then until 1970, Chilean politics grid-locked, as no one party or combination thereof could command a working congressional majority, effectively preventing the legislature from developing programs to improve life for the laboring classes. Certainly, during this period, Chilean politics drifted to the left, and in 1970, Marxist SALVADOR ALLENDE GOSSENS was elected to the presidency. He immediately came under pressure from the Chilean elite and the United States, who had no desire to see another CUBA in the hemisphere. On September 11, 1973, General AUGUSTO PINOCHET UGARTE engineered Allende's ouster and set in motion a 17-year brutal military dictatorship that silenced the labor movement. Argentina, Brazil, and other Latin American countries also came under the control of military dictators during this time.



A union delegation of small farmers demands agricultural reform during a demonstration in Brasília, Brazil. (Thomas M. Leonard Collection)

In contrast, beginning in the 1930s, Communist labor unions flourished elsewhere in the hemisphere. In COSTA RICA, MANUEL MORA VALVERDE organized workers at the United Fruit Company and successfully bargained for improved working conditions and wages. His party also became a significant player in the 1940 and 1944 presidential elections, and he is credited with writing Costa Rica's progressive 1943 labor law. Both the party and the union continue to function into the 21st century, though their platform has been taken over by other groups. In Cuba, Blas Roca (b. 1898–d. 1994) organized urban labor and successfully dealt with the U.S. companies that dominated the country's ECONOMY. Neither he nor his workers supported FIDEL CASTRO RUZ's rise to power. By 1962, Castro's government controlled all labor groups in the country.

The bureaucratic-authoritarian regimes that controlled most Latin American nations from the mid-1960s to the early 1980s suppressed labor unions so that on the return to democracy in the 1980s organized labor was too weak and divided to play an important political role. That began to change in the late 1990s as the promises of the neoliberal economic model failed to materialize. Workers looked to leftist populists such as HUGO RAFAEL CHÁVEZ FRÍAS in VENEZUELA, JUAN ÉVO MORALES AYMA in BOLIVIA, and the left-of-center coalition Consternación in Chile.

See also LABOR (Vols. I, III).

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### Latin American debt crisis of the 1980s

Between 1975 and 1982, Latin America quadrupled its external debt from \$75 billion to \$314 billion, a total equal to 50 percent of the region's gross domestic product. During the same time period, debt service rose from \$12 billion to \$66 billion. Commodity prices declined globally, and interest rates rapidly climbed, making bankers increasingly reluctant to extend further credit to the region. Complications quickly followed. Latin American nations found it difficult to service their debts. Finally, in August 1982, MEXICO defaulted on its loans. Other nations followed, led by ARGENTINA.

The 1982 debt crisis resulted from the convergence of several factors. In 1971, the Bretton Woods Agreement collapsed. It had established, in July 1947,

a system of fixed exchange rates locked into a gold standard. Nations unable to remain on the gold standard, including the United States, moved toward a managed floating exchange rate of their national currency, but this proved unworkable. As a result, international capital markets reemerged, and commercial banks increased their lending activity. The situation became more complicated when the Organization of Petroleum Exporting States quadrupled the price of crude oil in 1973 and again in 1979, which increased member states' income beyond their capability to spend it at home. The excess was deposited in international commercial banks. Throughout the 1970s, loans from private commercial banks to Latin America replaced those from international agencies such as the World Bank, the International Monetary Fund, and the Organization for Economic Cooperation and Development. Between 1975 and 1982, Latin American debt to commercial banks increased to \$314 billion. During the same time span, Latin American exports grew by only 12 percent per year, while debt service for each nation ranged from 18 to 24 percent and only widened the gap between income earned from exports and the cost of servicing international debt. Latin Americans turned to borrowing in order to satisfy current service accounts, a factor complicated by inflationary pressures and fluctuations in the cost of loans in each country. These factors came together in August 1982, when Mexico defaulted on its international loan obligations. The other Latin American governments soon found themselves cut off from international credit markets.

The credit crunch forced Latin American governments to curtail expenses, which led to increased unemployment, drastic cuts in social safety net programs where they existed, and capital flight. As the debt crisis unfolded, the Latin American governments also accepted the principles of the neoliberal economic model that came into international vogue in the early 1980s. Neoliberalism called for the sale of state-owned and parastatal (semiprivate) industries to earn monies essential to reduce debt, the opening of national markets by removing protective tariffs, and a renewed emphasis on the exportation of primary products. These policies had brought a reduction in debt and a recovery in TRADE balances by the early 1990s but at excessive human costs. Some analysts suggest that the leftward drift of Latin American politics in the early 21st century can be linked to the failure of neoliberalism to improve the quality of life for the region's larger populace.

Latin America has endured continual financial crises. Spain and Portugal extracted all possible wealth from the region, leaving it with empty treasuries upon independence in the early 19th century. For generations after independence, Europeans extended credit to the new nations for the acquisition of European manufactured goods, construction of internal infrastructure, and, into the 20th century, the development of export-based

economies. Plagued with trade imbalances and shortages of currency, the Latin Americans could not always service their debts. Stemming from its construction of the Panama Canal from 1900 to 1914 and the need for its security, the United States became involved in circum-Caribbean politics (see PANAMA CANAL, CONSTRUCTION OF; U.S. CARIBBEAN INTERVENTIONS, 1900–1934). It used U.S. private banks and the U.S. Marines occupation of customhouses to satisfy the European financiers and keep their gunboats from collecting loans from various Caribbean nations. In practice, private U.S. banks paid the European debt and the marines' collection of custom duties ensured payment to the banks. Similar situations arose during the Great Depression in the 1930s, and unable to meet their debt obligations, Latin American governments defaulted on their foreign loans.

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**Lechín Oquendo, Juan** (b. 1914–d. 2001) *labor leader and vice president of Bolivia* Born to an immigrant Lebanese father and a mestizo mother in Corocoro in La Paz Department, Juan Lechín Oquendo became BOLIVIA's most famous and influential LABOR leader and served as the country's vice president between 1960 and 1964. Following his education in local schools, Lechín worked in Bolivia's tin mines, where he experienced first-hand the difficult work conditions of the mines and poor pay of the workers (see MINING).

In 1944, Lechín helped found the Federation of Bolivian Mine Workers (Federación Sindical de Trabajadores Mineros de Bolivia, or FSTMB) and served as its general secretary until 1987. He also joined the NATIONALIST REVOLUTIONARY MOVEMENT (Movimiento Nacionalista Revolucionaria, or MNR), but remained linked to the Trotskyite political party, the Revolutionary Worker's Party (Partido Obrero Revolucionario, or POR). Following the MNR's ascendancy to power on April 15, 1952, President VÍCTOR PAZ ESTENSSORO appointed Lechín minister of mines and petroleum. Lechín advocated arming the miners to serve as a counterbalance to the power of the MILITARY. The proposal contributed to his increasing popularity among Bolivia's lower socio-economic groups and contributed to the government's establishment of the Bolivian Labor Federation (Central Obrero Boliviano, or COB) under Lechín's direction until 1987. The COB served as an umbrella for the various miners' unions and given its strength and influence became a partner in government policy and in COMIBAL, the Mining Corporation of Bolivia, the state agency that directed the nationalized tin mines.

Lechín's popularity prompted his selection as Paz Estenssoro's running mate in 1960, with the assumption that Lechín would be the MNR's presidential candidate in the 1964 contest; however, the two men soon split. In addition to his popularity, Lechín's advocacy of Trotskyite ideas set him apart from the MNR leadership. He was expelled from the party at its 1964 convention, causing him to establish the Revolutionary Party of the National Left (Partido Revolucionario de la Izquierda Nacional, or PRIN) and then support the November 4, 1964, military coup that removed the MNR from power and forced its leadership and other leftists, including Lechín, into exile.

When Lechín returned to Bolivia in 1978, his popularity was still relatively intact, which prompted him to seek the presidency in the June 29, 1980, election as PRIN's candidate. He fared poorly. His performance did not matter to the military leaders, who again forced him into exile until 1982. Opposed to the neoliberal policies that militated against labor by Presidents Hernán Siles Zuazo (b. 1914–d. 1996) and Paz Estenssoro, who returned to the presidency for a fourth term on August 6, 1985, Lechín called for crippling miners' demonstrations and strikes. These came at a time when the global market and price for tin had plummeted. The diminished demand for tin caused high unemployment among tin miners, led to labor violence, and contributed to intra-union power struggles that resulted in Lechín's resignation from the FSTMB and his electoral loss for the continued leadership of COB in 1987. Thereafter, he became a marginal player in union affairs until his permanent retirement in SANTIAGO DE CHILE, where he died at age 83 on August 27, 2001.

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**Leguía, Augusto B.** (b. 1863–d. 1932) *president of Peru* Born into a prominent oligarchic family in Lambayeque, PERU, Augusto B. Leguía received his education at a British school in Valparaíso, CHILE. His marriage linked him to the agro-export elite, which in turn provided him the opportunity to use his accounting skills with local and foreign banks and insurance companies. Leguía was a highly successful businessman and served as president of the National Bank of Peru. He entered Peru's political arena when he was appointed finance minister in the early 1900s for Presidents Manuel Cándamo (b. 1841–d. 1904) and José Pardo (b. 1864–d. 1947). In that position, he pursued policies designed to enhance Peru's economic development.

As the Civilista Party candidate, Leguía won the uncontested November 6, 1908, presidential election. As

president, Leguía focused on creating an orderly society. When his opponents bungled a coup d'état in 1909, the president ordered the conspirators to long prison sentences. During his first presidency, Leguía settled long-standing boundary disputes with BRAZIL and BOLIVIA. He also established state control over the guano industry, which by the 20th century served mainly the domestic market. Upon completion of his term in 1912, he departed for the United States and Great Britain, where he pursued banking and other financial interests.

When he returned to Peru in 1918, Leguía broke with the Civilistas over the course of Peru's future economic development. He became the presidential candidate of the newly formed Democratic Reformist Party (Partido Reformista Democrático, or PRD). Fearful that the Civilistas would prevent him from taking office, Leguía turned to the MILITARY to ensure his presidency. After taking office, Leguía immediately called for a constituent assembly, which presented a new constitution in 1920. It enhanced presidential powers and granted the government wide-ranging powers over the ECONOMY. Leguía silenced his opposition through intimidation, incarceration, exile, and censorship of the press. In 1923, Leguía sent in the army to crush an indigenous uprising in the sierra. He was reelected in rigged elections in 1924 and 1929.

During his second presidency, Leguía settled remaining boundary disputes with COLOMBIA and CHILE, although he was strongly criticized for compromising on the latter. Leguía undertook an ambitious infrastructure program financed by foreign loans in LIMA and other cities throughout the country. The nation's health care was improved with the construction of new hospitals and drainage systems in Peru's larger cities. However, a drop in exports following World War I contributed to an economic slowdown that climaxed when the Great Depression began in 1929.

In response to his dictatorial rule and the economic calamity, General Luis Miguel Sánchez Cerro (b. 1889–d. 1933) engineered a coup d'état on August 22, 1930. Leguía was arrested on charges of misappropriating government funds and remained incarcerated until his death on February 6, 1932.

See also CIVILISTA PARTY (Vol. III); GUANO AGE (Vol. III).

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**Lescot, Élie** (b. 1883–d. 1974) *president of Haiti* Born on December 3, 1883, in Saint-Louis du Nord, HAITI, Élie Lescot was a member of a wealthy mulatto fam-

ily. He served as Haitian ambassador to the DOMINICAN REPUBLIC during the 1930s and to the United States immediately prior to being selected president. During the 1930s, Lescot formed a close friendship with Dominican dictator RAFAEL TRUJILLO, which lasted until 1943, when for unknown reasons, Trujillo and Lescot became enemies. In 1944, Trujillo supported an unsuccessful coup against Lescot. While in Washington, D.C., Lescot formed a close friendship with Franklin D. Roosevelt. During Lescot's years in power (1941–46), he consistently pursued a pro-American foreign policy and declared war on the Axis Powers after the Japanese attack on Pearl Harbor.

In 1941, after Sténio Vincent (b. 1874–d. 1959) resigned, Lescot came to power with the assistance of the mulatto elite, the Haitian National Guard, Trujillo, and the United States. Although he established a brutal dictatorship, Lescot supported U.S. war efforts during World War II and received American economic and MILITARY assistance. In 1941, Lescot agreed to support the SOCIÉTÉ HAÏTIENNE-AMÉRICAINNE POUR LE DÉVELOPPEMENT AGRICOLE (SHADA), an American plan that would supply needed raw materials to the United States. Haitian land was expropriated from peasants for the production of rubber and sisal. Lescot's policies, which resulted in food shortages, decreased his popularity among rural peasants. A devout Catholic, Lescot attempted to limit the practice of Vodou, which also alienated him from the wider population. Trujillo's revelation of the bribes he paid Lescot further undermined Lescot's popularity. In the aftermath of World War II, Lescot's undemocratic political tactics became an anachronism in a world order supposedly dedicated to democratic principles. In 1946, PAUL MAGLOIRE led a military coup that brought Dumarsais Estimé (b. 1900–d. 1953) to power. Lescot died in Port-au-Prince on October 20, 1974.

See also VODOU (Vol. III).

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**leva** The *leva* is a forced MILITARY draft, and the term is commonly associated with the MEXICAN REVOLUTION, when local and national leaders often filled the ranks of their militaries by forcibly conscripting prisoners, vagrants, and drunks. Citizens who had been arrested for petty crimes were easy targets for the *leva*. Military leaders often patrolled the streets late at night, detaining anyone not behind closed doors after certain hours. Favorite recruiting spots in urban areas included cantinas, cinemas, and even factories after the night shift left work. Many rural villages saw a large percentage of the male population forcibly conscripted either by the national army or by militias of the various revolutionary

factions. In some regions, indigenous men were specifically targeted for the *leva*.

Forcible conscription was a policy used by 19th-century dictator Porfirio Díaz throughout his rule (1876–1911), known as the Porfiriato. Relying on large numbers of soldiers serving involuntarily and treating those soldiers in a harsh manner resulted in a poorly trained and ineffective fighting force. VICTORIANO HUERTA (1913–14) became notorious for using the *leva* to keep the national military supplied with fresh recruits. Huerta's tactics provoked numerous uprisings throughout MEXICO as people came to despise the *leva* and the leaders associated with it. The *leva* tore families apart and removed able-bodied workers from poor communities. Frequently, those carried off were never seen or heard from again by their loved ones. After the violence of the revolution subsided, memories of the *leva* caused many in Mexico to protest any notion of returning to a system of forced conscription.

See also DÍAZ, PORFIRIO (Vol. III); PORFIRIATO (Vol. III).

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**Lewis, Vaughan** (b. 1940– ) *prime minister of St. Lucia* Born on May 17, 1940, on SAINT LUCIA, Vaughan Lewis earned a Ph.D. in political science from the University of Manchester in England. He subsequently taught politics, government, and international relations at the University of the West Indies and Florida International University. Lewis was director general of the ORGANIZATION OF EASTERN CARIBBEAN STATES

(OECS) from 1982 to 1995. He resigned his position at OECS in December 1995 and returned to St. Lucia.

On January 21, 1996, in anticipation of Prime Minister JOHN COMPTON's retirement, Lewis was elected leader of the United Workers Party (UWP). On February 16, 1996, Lewis was elected to Parliament to represent Central Castries. As Compton's handpicked successor, he became prime minister on April 2, 1996. Lewis, however, was defeated on May 23, 1997, by KENNY ANTHONY's St. Lucia Labour Party (SLP). While remaining leader of the UWP, Lewis continued his academic career. He subsequently taught at the University of Florida and the University of the West Indies. In 2005, Compton regained leadership of the UWP, which left Lewis embittered. Following months of speculation, Lewis left the UWP and joined the SLP. In 2006, Lewis, supported by the SLP, lost his bid to secure the seat in Parliament representing Central Castries. He returned to the University of the West Indies, where he currently teaches. Lewis has published significant studies of Caribbean political systems.

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**Lima** Lima, PERU, was founded in 1535 by the Spanish conquistador Francisco Pizarro. Eight years later, in 1543, it became the capital of the Viceroyalty of Peru, and following its declaration of independence from Spain on July 21, 1828, Lima became the capital of the new nation. Originally located in the Rimac river valley, the city continually expanded in the 19th century until the 1920s, when the international market for Peruvian cotton



The affluent area of Miraflores in Lima, Peru (Thomas M. Leonard Collection)



and sugar collapsed. Urban expansion continued in the years after World War II, as rural NATIVE AMERICANS migrated to Lima in search of jobs in the textile, clothing, oil derivatives, chemicals, and food-processing industries. In 2005, an estimated 9.6 million people resided within Lima's 310 square miles.

Lima is divided into several clearly defined districts. The city center is home to the presidential palace, government buildings, the cathedral, and museums that date to the Spanish colonial period. In 1988, the United Nations declared El Centro, as this sector is called, a World Heritage Site. Lima has two upscale neighborhoods, San Isidro, the city's financial center, and Miraflores, which is built on cliffs overlooking the Pacific Ocean. Both are noted for their culture and nightlife, shopping, cafés and restaurants, and schools. The two most densely populated areas are located on the northern and southern ends of Lima, where Andean indigenous migrants have squatted. Known as *pueblos jóvenes*, or "young towns," these slum areas often lack basic services such as electricity, water, and sewerage. Lima's industrial sector lines the highway leaving the city for the nearby port at Callao. The majority of Lima's population is mestizo, the descendants of white and Amerindian unions that date to colonial times, followed by Native Americans, whites, and Asians.

Intracity TRANSPORTATION is difficult. A metropolitan bus system moves people but not in the most efficient manner. Construction of a metropolitan rail transit system and intracity highway started in the 1980s but stalled a decade later due to a lack of government funding.

See also CALLAO (Vol. II); LIMA (Vols. I, II, III); PERU, VICEROYALTY OF (Vol. II); PIZARRO, FRANCISCO (Vol. I).

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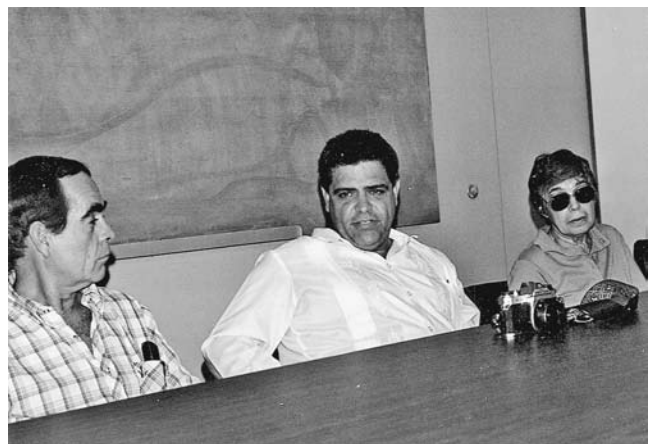
Lily Ludeña Uquiroy. *Lima: Historia y urbanismo, 1820–1970* (Lima, Peru: Ministerio de Vivienda, 2004).

**literature** The nationalism and romanticism that characterized 19th-century Latin American literature gave way to modernism on the eve of the 20th century. Influenced by the French Parnassian and symbolist schools, Latin American writers suddenly believed in ART for art's sake. Accordingly, they often presented exotic themes and experimented with language. They also created a truly Latin American literature for the first time. Nicaraguan Rubén Darío's (b. 1867–d. 1913) *Azul* (1888) is often cited as the first work of Latin American literary modernism. Uruguayan Enrique Rodó (b. 1872–d. 1917) awakened Latin Americans to their own culture in "Ariel" (1900).

Twentieth-century modernism, which encompassed the years 1900 to 1945, was greatly influenced by World War I (1914–18), the Russian Revolution (1917), and the Mexican Revolution (1910–17), which ushered in new groups of writers. One group—the *vanguardistas*—rejected the established order and its elitist privileges. Truth and

beauty became antiquated concepts to be replaced by the free and disorderly flow of the mind. The most important *vanguardista* figure was the Chilean Vicente Huidobro (b. 1893–d. 1948), who argued that the writer, and the poet in particular, possessed divine powers in his own realm of endeavor. A second dominant *vanguardista* was the Peruvian César Vallejo (b. 1892–d. 1948), whose works took a political stance that highlighted a tragic vision of human existence. Chilean Nobel laureate Pablo Neruda (b. 1904–d. 1973) abandoned theoretical visionary concepts in favor of the ever-changing world around him. His works spanned five decades, and poetry proved his most fertile genre. His most famous work remains *Viente poemas de amor y una canción desesperada* (1924). Neruda's later works demonstrated his commitment to Marxism. His *Canción de gesta* (1960), a favorable view of the CUBAN REVOLUTION, and his scathing attack upon the United States in *Incitación Nixonicidio* (1973) illustrate that point.

The modernists also championed the plight of Latin America's indigenous and poor peoples. Many authors produced novels and short stories depicting their cultures and the injustices they endured. Writers in PERU and MEXICO, with their large indigenous communities, pursued this theme with vigor: Peruvians Manuel González Prada (b. 1844–d. 1918) and JOSÉ CARLOS MARIÁTEGUI (b. 1894–d. 1930) dealt with the plight of NATIVE AMERICANS in their writings; Mexican Rosario Castellanos (b. 1925–d. 1974) presented the case of Mexico's indigenous in her autobiographical *Balún Canán* (1957). The plight of European immigrants in Latin America's urbanization process during the early 20th century was described by Robert Arlt (b. 1910–d. 1932) in several longer works and more than 2,000 newspaper columns. Pedro Henríquez Ureña (b. 1884–d. 1946) described the poverty endured by Africans and Afro-Dominicans in the DOMINICAN REPUBLIC. The MEXICAN REVOLUTION produced many firsthand accounts of the poor during the revolution, such as Mariano Azuela's (b. 1873–d. 1952) *The Underdogs* (1915).



Cuban literary scholar José B. Fernández (center) with colleagues at the University of Havana in Cuba (Thomas M. Leonard Collection)

After World War II, Latin American writers were influenced by the works of North American and European writers, such as William Faulkner, James Joyce, and Virginia Woolf. Coinciding with a period of Latin American economic prosperity, these works presented a form of magic realism (magical realism). Illustrative of this writing trend were GUATEMALA'S Nobel Prize-winning Miguel Ángel Asturias's (b. 1899–d. 1974) *The President* (1946) and Cuban Alejo Carpentier's (b. 1904–d. 1980) *The Lost Steps* (1953). Some literary critics suggest that this boom in Latin American literature peaked in 1974 with the publication of Augusto Roa Bastos's *I, the Supreme*. Other notable writers during this period included recipients of the Nobel Prize in literature: Mexicans Octavio Paz (b. 1914–d. 1998) and Carlos Fuentes (b. 1928– ), Colombian Gabriel García Márquez (b. 1927– ), and Chilean Pablo Neruda (b. 1904–d. 1973).

By the end of the 20th century, critics around the world applauded the style and content of Latin American literature. Many works have been translated into English and other languages.

See also "ARIEL" (Vol. III); LITERATURE (Vols. I, II, III); MODERNISM (Vol. III); ROMANTICISM (Vol. III).

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**Lomé Convention** The Lomé Convention was actually a series of four conventions entered into by the European Community (EC) and eventually the European Union (EU) with 71 African, Caribbean, and Pacific (ACP) countries between 1975 and 1999. Through TRADE with and grants from the EC, the underdeveloped countries were to advance their economies. At the time of the initial convention signing in Lomé, Togo, the plan was applauded as an effort to create a more equitable world.

The convention provided for the duty-free introduction of ACP agricultural and mineral exports into the EC. A quota system for sugar and beef was put in place so they would not compete with the same European products, and the EC advanced some 3 million British pounds for aid and development. The amount of funds increased with each agreement, with a total of 27 million European currency units (ECUs) committed through 1999. The European Development Bank distributed development aid, and the European Investment Bank channeled investment monies to the ACP countries.

The Lomé Convention included the Caribbean countries of ANTIGUA AND BARBUDA, BAHAMAS, BARBADOS, BELIZE, CUBA, DOMINICA, DOMINICAN REPUBLIC, GRENADA, GUYANA, HAITI, JAMAICA, SAINT CHRISTOPHER AND NEVIS,

SAINT LUCIA, SAINT VINCENT AND THE GRENADINES, SURINAME, and TRINIDAD AND TOBAGO. With the exception of the Bahamas, Barbados, and Trinidad and Tobago, the primary exports of these countries included sugar, tobacco, and bananas and other tropical fruits. The world market prices for these products frequently fluctuated. With Europe as a protected market, the Caribbean share of total EC imports increased by 11 percent from 1975 to 1985. Each Caribbean country also turned to tourism as a means of earning valued hard currency to be used for purchasing manufactured goods from abroad, but given the high protective tariffs throughout the Caribbean, imports from Europe dropped by nearly 5 percent during the same period. Economically, the Bahamas, Barbados, and Trinidad and Tobago did better than most other Caribbean nations. The Bahamas tourist industry capitalized on its proximity to the United States, but more important, the Bahamas became a center for OFFSHORE BANKING. Barbados, at the far end of the Caribbean, developed a technologically savvy workforce, which enabled it to become an important service center for the global ECONOMY. Oil refining and its ancillary industries set Trinidad and Tobago apart from its neighbors. In addition to fluctuations in the global price of the Caribbean countries' primary products, there was no accountability for the development monies advanced by the EC. Nonetheless, European banks continued to extend grants and soft loans to the island nations.

The 1992 Maastricht Treaty that established the EU led the Caribbean island nations to argue for continued privileged access for their produce to EU countries. They argued that without such protection, Europe would be flooded by African and Asian sugar, bananas, and other tropical fruits at the Caribbean's expense. After a year of negotiations, the EU agreed to extend the protected market privilege until 1999, the end of the Lomé IV convention. The United States took issue with the EU decision because it discriminated against its Central American friends who produced the same goods. The United States took the case to the World Trade Organization (WTO). In 1995, the WTO ruled against the EU protective shield as a violation of WTO guidelines. As a result of that decision, the EU and the ACP countries began negotiations in 1997 that resulted in the COTONOU AGREEMENT, signed on June 23, 2000.

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**López Portillo, José** (b. 1920–d. 2004) *president of Mexico* José López Portillo was a lawyer and politician who served as president of MEXICO in the late 1970s. He

is best known for overseeing the discovery and development of extensive oil reserves in the Gulf of Mexico and for implementing economic policies that set off the nation's debt crisis in the 1980s.

López Portillo was born on June 16, 1920, in MEXICO CITY. He studied law and political science and worked for a time as a professor at the National University of Mexico. López Portillo later pursued a political career and worked in the administrations of Gustavo Díaz Ordaz (1964–70) and LUIS ECHEVERRÍA (1970–76). López Portillo won the presidency in 1976, inheriting an ECONOMY in decline and a recently devalued peso. The new president faced the prospect of having to impose austerity measures and accept an assistance package from the International Monetary Fund. But, shortly after he took office, López Portillo announced that PEMEX—the state-owned oil company—would develop large oil reserves that had been discovered two years before. The expectation of large oil profits was enough to lure foreign banks into making sizable loans to Mexico.

López Portillo's presidency was characterized by massive government spending. Expenditures on public works and social services increased, but much of the spending was surrounded by corruption. López Portillo sank money into ventures that offered little profit and by the final years of his presidency was facing an unprecedented economic crisis. One of López Portillo's last acts as president in 1982 was to devalue the peso, thus beginning an era of economic decline known as the “lost decade.”

López Portillo died in Mexico City on February 17, 2004.

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**López Pumarejo, Alfonso** (b. 1886–d. 1959) *president of Colombia* Alfonso López Pumarejo was born in Honda, in COLOMBIA's western department of Tolima. After completing his primary and secondary education in Colombia, he studied business and economics at Bright College in England and worked for business firms in New York before returning to Colombia on the eve of the Great Depression in 1929.

López Pumarejo was the second Liberal president in the 1930s on his inauguration on August 7, 1934, after Enrique Olaya Herrera (b. 1880–d. 1937). Needing to address the continuing problems caused by the depression and the economic-social issues that were legacies of the Spanish colonial period, López Pumarejo determined to carry out his “revolution on the march.” Sanctified by constitutional amendments, the program guaranteed the government's role in the diversification of exports; the expropriation of lands for the common good; and

the protection of LABOR, including the right to strike. López Pumarejo also sought to implement a progressive income tax, grant titles to squatters on unused state and private land, and further separate the church and state. From 1904 to 1909, he also sought to advance INDUSTRY through tariff and tax protection, similar to the policies of President RAFAEL REYES (b. 1849–d. 1921). Coffee grower's benefited from Germany's Aski mark system, whereby credits were established in the German Central Bank for the purchase of coffee, but the funds could be spent only in Germany. The protectionist policies and shortage of manufactured goods in the global market momentarily spurred industrial growth. The industrialization also brought rural families to the cities and contributed to the growth of labor unions. The outbreak of World War II in 1939 temporarily halted economic development.

López Pumarejo returned to the presidency on August 7, 1942, succeeding Eduardo Santos (b. 1888–d. 1974). His second administration was not as effective as the first. Wartime economic hardships were exacerbated by López Pumarejo's pro-Allies foreign policy, which not all Colombians accepted (see WORLD WAR II AND LATIN AMERICA). Conservative congressional strength was sufficient to block López Pumarejo's legislative initiatives. Public discontent became so strong that in July 1944, López Pumarejo and some of his cabinet officers were held prisoner during an abortive military coup d'état. Finally, on July 19, 1945, López resigned in favor of his first presidential designate, Alberto López Camargo (b. 1906–d. 1990). López Pumarejo died in London on November 20, 1959, while serving as Colombia's ambassador to Great Britain.

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**lucha libre** *Lucha libre* is a type of professional wrestling practiced in MEXICO and some other areas of Latin America. Wrestlers (*luchadores*) wear masks and take on alternate identities in the ring. Many hide their true identity throughout their career. They perform a series of sophisticated and generally unscripted acrobatic moves in the ring, although the outcome of most matches is choreographed to conform to a predetermined soap opera-like storyline.

*Lucha libre* grew in popularity in Mexico in the 1930s, and with the advent of television after World War II, the sport became a nationwide phenomenon (see SPORTS). Wrestlers take on a specific personality and are charac-

terized as either a “*rudo*” (bad guy) or “*técnico*” (good guy) in the ring. Mexican professional wrestling has produced a number of star performers, the most notable of whom is El Santo (The Saint) who first appeared in the 1940s. El Santo took on a type of superhero status, appearing in comic books and movies in the 1950s and 1960s. He remained active until 1982 and died only two years later. His son became a professional wrestler, taking the name El Hijo del Santo (The Son of the Saint), and also has led a successful career.

One *luchador*-turned-activist gained notoriety when he donned his mask and cape and went on missions to help local neighborhoods in MEXICO CITY after the EARTHQUAKE OF 1985. Known as Super Barrio, this *luchador* helped mobilize the people to demand social and political reform in the late 1980s and 1990s.

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**Lula da Silva, Luiz Inácio** (b. 1945– ) *president of Brazil* Born in Garanhuns, Pernambuco, BRAZIL, Luiz Inácio Lula da Silva, or Lula, as he is popularly known, had little formal education. He did not learn to read until the age of 10 and quit school a year later. Eventually, he earned a high school equivalency degree. At age 14, Lula began working in a copper factory and subsequently became a lathe operator and a LABOR leader. His first wife, Maria de Lourdes, died of cancer in 1969. In 1974, Lula married Marisa, with whom he had three sons. He also had a daughter out of wedlock. In 1982, he legally added the nickname *Lula* to his full name.

As president of the Metallurgical Workers Union in SÃO PAULO between 1979 and 1981, Lula gained notoriety for leading several labor strikes. He was elected a federal deputy in 1986, which enabled him to participate in the 1988 constitutional convention. He voted in favor of the nationalization of Brazil’s mineral reserves and for agrarian reform, protection of national enterprises, and a 40-hour workweek, all of which railed against the principles of the conservative elite. He also advocated direct election of the president.

The Workers’ Party (Partido dos Trabalhadores, or PT) nominated Lula to challenge Fernando Collor de Mello (b. 1949– ) for the presidency in 1989. Although Lula lost, he received 47 percent of the vote. Lula again

lost presidential bids in 1994 and 1998 to Fernando Henrique Cardoso (b. 1931– ) but in each contest received 44 percent of the popular vote. Finally, in 2002, he defeated the government-sponsored candidate José Serra (b. 1942– ) in a runoff election on October 27. His campaign called for linking payment of Brazil’s foreign debt to a thorough audit, which raised fears of a possible Brazilian default similar to that of ARGENTINA during its financial crisis of 2001–02. Lula’s background, record, and appeal to the working class also raised concern that his administration would pursue socialistic policies. These issues diminished demand for government bonds and led to an attack on the Brazilian currency, the real, and an inflationary spike.

The anxiety lessened as Lula’s cabinet took form and with the appointment of market-oriented economist Henrique Meirelles (b. 1945– ) as president of Brazil’s Central Bank. Lula continued the austerity measures the Cardoso administration had agreed to with the International Monetary Fund (IMF). At the same time, he pursued an aggressive export policy, which led to a \$49-million favorable balance of TRADE by 2006. The continued government austerity and increased revenues from trade enabled the Brazilian government to pay off its IMF loan in 2005, two years ahead of schedule.

In addition to trade agreements with the European Union (EU), China, and South Africa, Lula challenged U.S. leadership in the creation of the FREE TRADE AREA OF THE AMERICAS, and his strong opposition to farm subsidies within the EU and the United States led to a walkout of developing nations from the 2003 Cancún talks of the World Trade Organization.

As the 2006 elections approached, Lula’s administration was plagued by scandals, but investigations could not link the president to them. With campaign promises to address the nation’s social ills, Lula remained popular, as evidenced by his reelection in the October 28, 2006, presidential contest.

Continued corruption within the Brazilian Worker’s Party and, although caused by the global recession that began in 2008, Lula’s inability to rapidly implement continued social reform programs tarnished the president’s image. Lula’s popularity slipped further in August 2009 when he attempted to secure the party’s 2010 presidential nomination for his chief of staff, Ms. Dilma Rouseff (b. 1945). The maneuver smacked of traditional Brazilian politics.

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# M

**Machado y Morales, Gerardo** (b. 1871–d. 1939) *president of Cuba* Born into a planter class family, Gerardo Machado y Morales became a successful tobacco grower. He joined the Cuban Liberation Army and rose to the rank of brigadier general during the war of independence. After the war, Machado returned to farming but also participated in several U.S. joint economic ventures in CUBA. He gained control of the Liberal Party in the early 1920s and was elected president in 1924.

Machado came to the Cuban presidency promising economic development and improvement in EDUCATION but was well aware of the rising tide of Cuban nationalism that demanded an end to the U.S. presence on the island. Thanks to the high price of sugar on the world market, Machado's government was able to carry out an extensive public works program, encouraged Congress to pass the 1927 Tariff Law designed to promote agricultural diversification and industrialization, and directed increased funding for the University of Havana. After 1927, the world sugar price plummeted, however, and Cuban growers were further hurt by the 1930 Smoot-Hawley Tariff, which cut the Cuban share of the U.S. sugar market from 40.9 percent to 25.3 percent. The weakening Cuban ECONOMY contributed to increased public dissatisfaction with the Machado administration.

Numerous interest groups appeared on the scene during the 1920s. For example, the merchant organization, the National Association of Retailers (Asociación Nacional de Detallistas), demanded an end to the monopolies enjoyed by company stores and foreign-owned sugar firms. The Junta Cubana de Renovación called for a new TRADE treaty with the United States that would protect Cuban industry and commerce. A variety

of LABOR groups came forward and in 1925 convened a national labor congress that resulted in the establishment of the National Workers' Confederation of Cuba (Confederación Nacional Obrera de Cuba, or CNOC). That same year the Cuban Communist Party (Partido Comunista Cubano, or PCC) was founded. Several student groups also emerged. All had one thing in common: disdain for the PLATT AMENDMENT that permitted U.S. intervention in Cuba's internal affairs. As the Cuban economy worsened with the Great Depression that began in late 1929, these groups increased their pressure on Machado to address the country's problems.

As the 1928 election approached, Machado determined to extend his term in office. Although the U.S. government did not favor the idea, it did nothing to stop Machado from having the constitution amended to make him eligible for another six-year term, ending in 1935. Machado won the November 1, 1928, election unopposed, which fueled the opposition's demand for his resignation. As the pressure increased, Machado became increasingly repressive, particularly against student groups. To bring political stability and to protect U.S. interests on the island, in May 1933, U.S. president Franklin D. Roosevelt dispatched Assistant Secretary of State Sumner Welles to Cuba to mediate a solution. Machado would not budge and, in fact, called Welles's bluff regarding possible U.S. intervention by asserting that he would arm the Cuban people to defend national sovereignty against it. An August 12, 1933, Havana bus drivers' strike escalated to the point where the national TRANSPORTATION system was paralyzed, which prompted the Cuban army to act. It engineered a coup against Machado on August 22, 1933, who immediately left for Miami, Florida, where he died in 1939.

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**Madero, Francisco** (b. 1873–d. 1913) *revolutionary leader and president of Mexico* Francisco Madero initiated the MEXICAN REVOLUTION when his Plan de San Luis Potosí sparked widespread revolts throughout the country. He is often considered the “Apostle of Democracy” in MEXICO for his insistence that political reform would eventually lead to the sweeping and varied changes that disparate revolutionary factions were demanding.

Madero was born on October 30, 1873, to a wealthy hacienda-owning family in the state of Coahuila. He was educated in the United States and became increasingly convinced that Mexico needed democratic reform to correct the social injustices rendered by the Porfiriato. When dictator Porfirio Díaz declared in a 1908 interview to U.S. journalist JAMES CREELMAN that he would not seek reelection in 1910, Madero announced his candidacy and began campaigning throughout the country. He published a book entitled *The Presidential Succession of 1910* (*La sucesión presidencial en 1910*) in which he called for democratic reform. Díaz, however, reneged on his word and had Madero arrested on the eve of the presidential election. After Díaz was elected once again, Madero escaped to the United States and issued a call to arms in his Plan de San Luis Potosí. Rebellions sprang up throughout Mexico in November 1910, led by FRANCISCO VILLA and PASCUAL OROZCO in the north and EMILIANO ZAPATA in the south. Within six months, the revolutionaries had forced Díaz from office, and he fled the country.

Madero’s revolution seemed to achieve early success. He was elected president in a special October 1911 election and began implementing modest social reforms. Some revolutionaries who had initially supported Madero argued that his reforms did not go far enough. Zapata and Orozco both rose in rebellion, and other counterrevolutionary revolts destabilized Madero’s presidency. In 1913, a major rebellion led by Díaz’s nephew, FÉLIX DÍAZ, shut down MEXICO CITY in a 10-day siege. Madero’s trusted general VICTORIANO HUERTA turned on the president and led a coup that placed himself in power. Madero was executed on February 22, 1913, most likely on Huerta’s orders.

See also DÍAZ, PORFIRIO (Vol. III); PORFIRIATO (Vol. III).

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**Mafia in Cuba** As the growth of U.S. investments in CUBA reached a peak in the late 1920s, Cuban hotels, nightclubs, and gambling facilities attracted U.S. workers to the island, along with well-to-do Cubans and North American tourists. While this “rumba era,” as it was known, fizzled with the Great Depression in the 1930s, the presence of U.S. organized crime in Cuba did not. U.S. syndicate interest in Cuba began during the Prohibition era of the 1920s, when the island served as a source of alcoholic beverages surreptitiously brought into the United States. Following the end of Prohibition in 1933, the Mafia shifted its emphasis to gambling. In 1937, a member of the Mafia’s leadership, Meyer Lansky, established control over gambling operations at Havana’s Hotel National, and after WORLD WAR II, Lansky was the mob’s designated “boss” in Cuba.

Shortly after World War II ended, Lansky convened a meeting in HAVANA that was attended by leading crime figures including Frank Costello, Lucky Luciano, Alberto Anastasia, Tommy Luches, Joe Banana, Vito Genovese, and Santo Trafficante. The Mafia steadily expanded its operations until FULGENCIO BATISTA Y ZALDÍVAR’s coup d’état in March 1952. President Batista was then brought under the mob’s control: He personally received up to \$250,000 for issuing gambling licenses to Mafia members, and his brother-in-law, army general Roberto Hernández y Miranda, regularly collected 20 percent of each club’s profits and deposited them into private offshore bank accounts. Havana also experienced a building boom in the early 1950s, which included numerous Mafia-operated hotels: the Capri, the Riviera, the International, the Commodore, and the Hilton. Reportedly, Lansky provided \$14 million for the Riviera’s construction, operated the Capri Hotel, and had interests in several others. Lansky also established a casino school at his Montmartre Club to teach young Cubans the art of cards and other games. By the time FIDEL CASTRO RUZ began his revolution in 1956, the Mafia had expanded its Havana operations into horse racing, prostitution, and abortion clinics and had begun plotting to expand their activities across the island. One measure of their success was the 80 flights per day arriving in Cuba from the United States.

On January 1, 1959, the day after Batista fled the island, thousands of euphoric Cubans took to Havana’s streets where they broke into casinos, gambling houses, and brothels, destroying everything in their path, including U.S.-made parking meters, which had become a source of private income for Batista’s brother-in-law Hernández. While the destruction of these “symbols of corruption” represented Castro’s call for morality, they also represented Cuban nationalism, which opposed U.S. dominance of the island’s ECONOMY. With a false passport, Lansky was spirited off the island to Miami, Florida,

eventually settling in Las Vegas, Nevada, where he died in 1983. Subsequently, Castro decreed an end to gambling and prostitution as part of the CUBAN REVOLUTION'S moral crusade but later permitted gambling houses to reappear, as they became a source of funds for the financially strapped government, particularly after the loss of Soviet support in 1991.

One of Batista's corrupt policemen, José Miguel Battle, also escaped to the United States in 1959, where he established working relationships with the New York Mafia. Battle soon introduced the illegal lottery (*botila*), a game popular among expatriate Cubans and Puerto Ricans. The game netted Battle some \$45 million per year in the 1970s. By the mid-1980s, Battle relocated to Miami, from where, according to the Federal Bureau of Investigation, he directed the 2,500-man East Coast operation that netted him \$175 million annually. In 2004, Battle was arrested on racketeering charges and was convicted of the same on March 4, 2007. He is currently serving a 16-year term at a Miami correctional facility.

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Anoinette Giancana, John R. Hughes, and Thomas H. Jobe. *JFK and Sam: The Connection between the Giancana and Kennedy Assassination* (Nashville, Tenn.: Cumberland House, 2005).

**Magloire, Paul** (b. 1907–d. 2001) *president of Haiti* Born on July 19, 1907, in Cap-Haïtien (Cape Haitiien), HAITI, Paul Magloire was the son of General Eugène Magloire, a black peasant who rose through the ranks of the MILITARY and died in a shooting accident in 1908. During the 1920s, Magloire earned a degree in arts and letters from the National School in Port-au-Prince. After teaching school for a year, Magloire decided that he could not earn enough money to support himself through this job and joined the U.S.-organized Haitian National Guard. Like his father, he rapidly rose through the ranks, increasing his social and economic status. A member of the growing black middle class, Magloire participated in the overthrow of mulatto elite president ÉLIE LESCOT in 1946 that brought Dumarsais Estimé (b. 1900–d. 1953) to power. Estimé, the first black president of Haiti since the end of the American military occupation in 1934, encouraged social reforms and promoted blacks to high official positions, which angered the mulatto elite. In 1950, the mulatto elite convinced Magloire, who had come to enjoy the elite lifestyle, to overthrow Estimé.

During Magloire's rule (1950–56), Haiti became a popular destination for American tourists. Magloire's attempts to develop the ECONOMY were facilitated by high prices for coffee on the world market. He initiated

numerous infrastructure projects and granted WOMEN the right to vote. Magloire's staunch anticommunist foreign policy during the early years of the cold war earned him the support of the U.S. government, especially after the election of Dwight Eisenhower in 1952. The early years of Magloire's rule were a time of peace and prosperity. Increased corruption and ostentatious consumption, however, cost Magloire the support of the large black population. Magloire was fond of wearing elaborate military uniforms and staging vast military reenactments of battles fought against French forces during the Haitian Revolution (1791–1804). Following the devastation of Hurricane Hazel in 1954, which killed more than 1,000 Haitians and destroyed 40 percent of the coffee trees, accusations that Magloire stole relief funds further decreased his popularity.

By 1956, Magloire had lost the support of the Haitian National Guard and fled into exile in the United States. After he came to power in 1957, FRANÇOIS DUVALIER, who had opposed Magloire's 1950 coup, denied Magloire his Haitian citizenship. Magloire lived in New York City until 1986, when he returned to Haiti after the overthrow of JEAN-CLAUDE DUVALIER. In 1988, the military honored Magloire by naming him an adviser to the Haitian military. By the end of that year, however, Magloire had retired. During the turbulent 1990s, he refused to make comments on the political situation and seldom appeared in public. Magloire died on July 12, 2001, in Port-au-Prince.

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**Malvinas/Falklands War** (1982) The 54-day (April 21–June 12, 1982) conflict between Great Britain and ARGENTINA revolved around possession of two main islands (East and West Falkland) and another 776 smaller and largely uninhabited nearby islands. The islands are located in the South Atlantic Ocean, 300 miles (483 km) east of the Argentine coast and 600 miles (966 km) north of Britain's Antarctic Territory. The British refer to them as the Falkland Islands and the Argentines as the Malvinas. Wool, fishing, and tourism are the main industries pursued by the islands' nearly 3,000 residents, 70 percent of whom are of British descent. In 2007, the Argentines withdrew from an agreement with the British for joint exploration of oil in the region. This will now be undertaken by the world's largest primary resource company, BHP, an Australian-British conglomerate. The Falklands/Malvinas also serve as an important reference point for ships traversing the South Atlantic and house a tracking station for the U.S. outer space program.

With independence in 1822, Argentina claimed jurisdiction over the islands but was expelled by the British in 1833. Sovereignty over the Falklands/Malvinas was disputed thereafter. The Argentines began to press their claim aggressively in the early 1900s, and during the post-World War II nationalistic presidency of JUAN DOMINGO PERÓN, “*Las Malvinas por los argentinos*” became a popular slogan, at least until the 1982 war. The Argentine case was strengthened with two United Nations resolutions: 1) Number 1514 in 1960 called for self-determination for colonial possessions, and 2) Number 2065 in 1965 urged direct Argentine-British negotiations, but with consideration for the islands’ inhabitants. For the next 17 years, talks remained stalemated. The Argentines insisted on sovereignty over the islands, while the British argued that the islands’ inhabitants preferred British rule.

The situation came to a head in early 1982 as the Argentine economy sputtered and the Argentine people pressed for an end to military government. The president, General LEOPOLDO GALTIERI (b. 1926–d. 2003), persuaded his colleagues that a victory in the Falklands/Malvinas would ease the pressures on the government. The Argentine leadership gambled that the British would not defend the bleak islands so distant from the homeland and that the United States would, at best, remain neutral because Argentine army officers were busy training the Contras in HONDURAS for their guerrilla war against the Sandinistas in NICARAGUA. The generals were wrong on both counts.

On April 2, 1982, the Argentines commenced Operation Rosario with an assault on East Falkland Island. By the month’s end, 12,000 Argentine army troops were scattered throughout the islands, and in BUENOS AIRES, the government declared Argentine sovereignty over the Malvinas, to the delight of Argentineans. As the Argentines scurried troops across the islands, U.S. secretary of state Alexander Haig shuttled between Buenos Aires and London in an effort to mediate an end to the conflict and to tell the Argentine generals that the United States would support the British should Prime Minister Margaret Thatcher decide to act. The international community was of divided opinion on the matter. United Nations Security Council Resolution 502 on April 3, 1982, called for the Argentine withdrawal from the Malvinas/Falkland Islands and for a diplomatic solution to the crisis. In contrast, on April 26, the ORGANIZATION OF AMERICAN STATES (OAS) membership, except for CHILE, COLOMBIA, and the United States, which abstained from voting on the resolution, supported the Argentine cause.

Thatcher wasted little time in responding to the Argentine occupation of the Malvinas/Falklands. On April 6, she ordered a 28,000-strong task force to set sail on the 8,500-mile (13,680-km) journey to the islands. The United States provided the British with logistic and intelligence support and cooperated with the European Economic Community in imposing economic sanctions on Argentina. On May 27, the British launched an assault

at Goose Green on Argentine conscripts, who were no match for the British forces. The British announced the end of the war on June 20, 1982. The British lost 256 troops, another 777 were wounded, and the destroyer *Sheffield* was sunk. The Argentines lost 746 troops, 1,336 were wounded, and 11,400 became temporary prisoners of war. Argentina also lost its major battleship, the *Belgrano*.

The loss of the war forced the Galtieri government to resign, putting Argentina back on the path to democratic government. In Britain, Thatcher enjoyed renewed popularity, while the United States endured harsh criticism from its Latin American neighbors.

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**Manley, Michael** (b. 1924–d. 1997) *prime minister of Jamaica* Born on December 10, 1924, in St. Andrew, JAMAICA, Michael Manley was the second son of Norman Washington Manley (b. 1893–d. 1969), the founder of the People’s National Party (PNP). In 1943, while studying at McGill University in Montreal, he volunteered for the Royal Canadian Air Force. After the war, he studied politics and economics at the London School of Economics. After graduation in 1950, he worked for the British Broadcasting Corporation for a year before returning to Jamaica. In 1953, he became a member of the PNP Executive Committee and helped form the National Workers’ Union. Primarily representing sugar workers and miners, it was an alternative to ALEXANDER BUSTAMANTE’s Industrial Trades Union. In 1962, Manley was elected president of the Caribbean Bauxite and Mineworkers Union. In 1967, he won a seat in Parliament, representing East Kingston Central.

Manley became the leader of the PNP a few months before his father’s death in 1969. He easily defeated the unpopular Jamaica Labour Party (JLP) prime minister Hugh Shearer (b. 1923–d. 2004) in the 1972 elections. Although he was a light-skinned member of an elite family, Manley was a dynamic leader who felt comfortable with Jamaica’s black population. Abolishing the jacket and tie requirement for members of Parliament, he encouraged representatives to wear bush jackets and other informal attire. Whereas the previous JLP government sought a close diplomatic and economic alliance with the United States and the United Kingdom, Manley decided that Jamaica needed to reorient its foreign policy. He established close diplomatic relations with CUBA and developed an amicable working relationship with FIDEL CASTRO RUZ and other socialist leaders. Relations between Jamaica and the United States deteriorated when Manley supported Cuban interventionism in Africa. In



1979, at a meeting of the nonaligned movement nations, Manley called for closer ties with the Soviet Union to counteract Western imperialism (see SOVIET UNION AND LATIN AMERICA).

The PNP won the 1976 elections, which were plagued by political violence. Manley declared a state of emergency and accused the JLP of attempting to overthrow the government. During his second term, Manley attempted to limit private enterprise and implement state-run industries. Purchasing virtually all of Jamaica's sugar plantations at a time when the international demand for sugar had plummeted due to overproduction and the introduction of artificial sweeteners, Manley's government was plagued by economic difficulties. Further complicating the nation's economic woes was the oil crisis during the 1970s, as Jamaica was an importer of oil.

The JLP defeated the PNP in the 1980 elections and EDWARD SEAGA became Jamaica's fifth prime minister. Manley was an outspoken critic of Seaga's conservative government. Following Seaga's support of OPERATION URGENT FURY, the U.S.-led military invasion of GRENADA in 1983, Manley gave a series of lectures in American and British universities denouncing what he perceived as a manifestation of Western imperialism. In the 1989 elections, Manley, who had softened his socialist platform and advocated a greater role for private capital, won the elections and returned as prime minister. In 1990, Manley was diagnosed with cancer. In 1992, citing health reasons, he retired and was succeeded by Deputy Prime Minister PERCIVAL PATTERSON. Despite his illness, Manley led the Commonwealth Observer Mission to oversee the 1994 South African elections that ended apartheid in that country. Manley died of prostate cancer in Kingston on March 6, 1997, the same day as GUYANA'S CHEDDI JAGAN, a man who had followed a similar socialist agenda that was later tempered with a more moderate approach.

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**Manning, Patrick** (b. 1946– ) *prime minister of Trinidad and Tobago* Born on August 17, 1946, in San Fernando, Trinidad, to Afro-Trinidadian parents, Patrick Manning worked as a geologist for Texaco Trinidad, Ltd., after graduating from the University of the West Indies in 1969. A member of People's National Movement (PNM), an Afro-Trinidadian political party led by ERIC WILLIAMS, Manning won a parliamentary

seat representing San Fernando East in 1971 and is currently the longest continuously serving member of the House of Representatives in TRINIDAD AND TOBAGO. From 1981 to 1986, he served as minister of energy and natural resources.

In the parliamentary 1986 elections, the PNM was defeated by the National Alliance for Reconstruction (NAR). Manning was one of only three PNM candidates to retain his seat. As George Chambers (b. 1928–d. 1927), Trinidad and Tobago's second prime minister, lost his seat in those elections, Manning became the leader of the opposition. In 1987, the PNM elected Manning to the leadership of the PNM. In 1991, the PNM won the elections, and Manning became Trinidad and Tobago's fourth prime minister. In November 1995, Manning called early elections. The PNM and the United National Congress (UNC) both won 17 seats, and the NAR won two seats. The NAR allied with the UNC, which allowed BASDEO PANDAY to become the first Indo-Trinidadian prime minister.

In the 2001 elections, the PNM and the UNC both won 18 seats. President A. N. R. ROBINSON appointed Manning prime minister, despite the fact that Panday was the sitting prime minister and the UNC had won the popular vote. In the 2002 elections, Manning's party won 20 of the 36 seats in the House of Representatives. During Manning's second administration, taxes were drastically cut, primarily due to high natural gas and oil prices, as well as increases in natural gas production. Construction of government-funded low-cost housing in marginal neighborhoods has increased Manning's popularity. In 2007, Manning won his third term as prime minister.

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**maquiladora** A maquiladora is an assembly plant, usually located along the U.S.-Mexican border, that manufactures goods for export using low-cost LABOR in MEXICO and taking advantage of duty-free tax laws. In 1965, the Mexican government developed a plan to reabsorb laborers returning to Mexico after the termination of the BRACERO PROGRAM. The Border Industrialization Program allowed foreign firms to build assembly plants along the border and waived import fees on equipment and supplies as long as the final product was exported back to the United States. U.S. customs duties only applied to the value added to the manufactured product.

Although maquiladoras started as border plants, today *maquila* factories can be found throughout Mexico.

The *maquila* sector of the country's economy grew during the 1980s and experienced another boom after the passage of the NORTH AMERICAN FREE TRADE AGREEMENT in 1994. Especially during times of economic decline in Mexico, the maquiladora sector has benefited from a relatively weak peso and from high levels of unemployment. Detractors of the program criticize the assembly plants for ignoring environmental and safety standards. Others claim that factory managers exploit Mexican workers, many of whom are young women with little education. Many factories require workers to be single and female, and many supervisors dismiss female workers who marry or become pregnant. In recent years, the maquiladora sector of Ciudad Juárez has attracted worldwide attention as hundreds of young female *maquila* workers have been kidnapped and killed.

Since 2001, maquiladora production in Mexico has been in a state of constant decline as many companies have shifted their operations to cheaper labor markets in China. Many experts question the future viability of the maquiladora industry.

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**Mariátegui, José Carlos** (b. 1894–d. 1930) *influential Peruvian intellectual* Born into a poor family in Moquegua, PERU, José Carlos Mariátegui received only a primary school education, yet went on to become one of Peru's and Latin America's leading essayists and political thinkers. At age 15, Mariátegui began working as a copy boy for the LIMA daily newspaper *La Prensa* and four years later became a reporter. In 1919, he was dispatched to Europe to report on WORLD WAR I. When he returned to Peru in 1923, Mariátegui brought with him a new sense of reality, an affinity for Marxism, and an Italian wife, Ana Chiappe, with whom he had four children.

In Lima, Mariátegui worked closely with VICTOR RAÚL HAYA DE LA TORRE until the latter was deported in 1923 by President AUGUSTO B. LEGUÍA. This left Mariátegui to edit the magazine *Claridad*, which he used to espouse his Marxist ideas, devoting an entire issue to Lenin. Mariátegui's home became a center for avant-garde intellectuals, students, artists, and LABOR leaders. In 1926, he began to publish the journal *Amauta*, which served as a forum for the discussion of socialism, ART, and culture in Peru and Latin America. The Leguía administration viewed Mariátegui with trepidation, as it had Haya de la Torre, and had him interned in a MILI-

TARY hospital in 1927 and later placed him under house arrest.

Disenchanted with Haya de la Torre's AMERICAN POPULAR REVOLUTIONARY ALLIANCE, Mariátegui left the organization in 1928 to found Peru's Socialist Party. It later became the Communist Party of Peru. That same year Mariátegui published *Seven Interpretative Essays on Peruvian Reality*, a Marxist critique of Peru's oligarchic society (see LITERATURE). It was subsequently translated into several languages.

Mariátegui, who never recovered from leg injuries suffered as a child, had both his legs amputated in 1925 and died from complications of this on April 16, 1930.

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**Mariel boatlift** (1980) Between April and September 1980, an estimated 125,000 Cubans left the island nation to find political asylum in the United States and other Latin American countries, particularly PERU. The incident began on April 1, when a group of Cubans crashed their way into the Peruvian embassy compound in HAVANA. Two Cuban policemen were killed in the process. Another 10,000 Cubans stormed the grounds the next day after an angry FIDEL CASTRO RUZ ordered the fence surrounding the compound to be torn down. Further inflamed, Castro then announced that all Cubans who wished to leave the island could do so. The announcement sent thousands of Cubans to government offices seeking exit visas but also prompted the Peruvian government to announce that it could absorb only 1,000 of those people and to turn the problem over to the United Nations. The long-term causes of the crisis lay in the abuse of civil and HUMAN RIGHTS by CUBA's dictatorial government, as well as poor economic conditions on the island. The immediate causes can be traced to the thousands of U.S. visitors to the island in 1979 and 1980, who brought with them television sets and other electronic gadgets, clothing, and stories of freedom and prosperity in the United States, all of which contradicted Cuban realities and propaganda. The visitors pumped an estimated \$100 million into the Cuban economy.

In his response, U.S. president Jimmy Carter quickly denounced Castro and Cuba's internal conditions and announced that Cubans would be welcome in the United States, while the Justice Department advised that any private U.S. effort to bring the Cubans stateside would be illegal. The contradictory statements did not stop

the exodus of thousands of Cubans, however, who made their way to the port of Mariel, where a variety of privately owned U.S. boats awaited to bring them to the United States. The mass exodus brought international criticism to Castro and his system. Over the summer of 1980, Castro sent signals of his willingness to settle the problem. In early September, presidential adviser Peter Tarnoff traveled to Havana, where he secured Castro's promise to close Mariel on September 26 and, at Carter's request, to restart talks aimed at easing tensions between the two countries. Although the exodus stopped, the meetings never materialized.

By the time Mariel closed, a total of 125,262 Cubans had traveled to the United States, including an estimated 5,000 criminals and infirm and mentally ill people and, as subsequently discovered, approximately 2,000 secret government agents. Much smaller numbers of émigrés went to Canada, COSTA RICA, ECUADOR, Peru, Spain, and VENEZUELA. Despite the criticisms of President Carter, the incident indicated that Castro and no one else controlled Cuba's MIGRATION policy.

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**Martí, Agustín Farabundo** (b. 1893–d. 1932) *communist rebel leader in El Salvador* The son of a moderate landowner in Teotepeque, EL SALVADOR, Agustín Farabundo Martí went on to the National University in San Salvador, where he enrolled in the School of Jurisprudence and Social Science. He soon lost interest in his studies and spent most of his time reading communist and anarchist literature in the university library. Martí also participated in several LABOR strikes in the capital. For provoking university professor Victoriano López Ayala into a duel, Martí was exiled to GUATEMALA. From 1920 to 1925, he lived among the K'iche' (Quiché) Maya and learned much about the plight of poor rural labor to the benefit of large landowners. He also worked as a day laborer in Guatemala and HONDURAS. He also visited MEXICO, where he found the workers still victimized by capitalists despite the promises of the MEXICAN REVOLUTION. He left Mexico an admirer of Leon Trotsky, the exiled Soviet Marxist leader whom he met in Mexico, and for the remainder of his own life wore a lapel pin given him by the Russian.

In 1928, Martí returned to El Salvador, but President Alfonso Quiñonez (b. 1873–d. 1970) exiled him to NICARAGUA for attempting to organize and raise the

social consciousness of peasant workers. He met with Nicaraguan dissident AUGUSTO CESÁR SANDINO, who failed to convert Martí to the communist ideology.

In 1930, Martí again returned to El Salvador, where he helped establish the local Communist Party. By the time of the December 2, 1931, coup that brought General MAXIMILIANO HERNÁNDEZ MARTÍNEZ, who represented conservative elite landowners, to power, the party had made inroads into the rural labor force. Martí and his associates—Alfonso Luna, Miguel Mármol, and Mario Zapata—clandestinely organized coffee workers for a simultaneous uprising on January 22, 1932, in the western part of several provinces that bordered Lake Ilopango. The feeble attack was quickly crushed by the Salvadoran MILITARY, which learned of the plan four days earlier and arrested its leadership. All four rebels were found guilty of treason by a military court on January 25, and only Mármol escaped the February 1, 1932, firing squad by fleeing into exile. To ensure a government victory and to intimidate the coffee workers, Hernández Martínez directed the military to massacre the rebels (La Matanza). Exact figures are not known, but an estimated 10,000 to 30,000 peasants lost their lives, and the Pipal Indian culture was obliterated from El Salvador's western provinces because survivors abandoned their heritage for fear of reprisals. Martí's failed rebellion so frightened landowners that they became forever suspicious of the intention of labor organizers, always branding them as communists. Martí's death, however, did not extinguish his cause. It was taken up two generations later by the FARABUNDO MARTÍ NATIONAL LIBERATION FRONT, which prosecuted a civil war against the elitist El Salvadoran government in the 1980s (see CENTRAL AMERICAN WARS).

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**Menchú Tum, Rigoberta** (b. 1959– ) *K'iche' Maya activist and Nobel Peace Prize recipient* Born into a K'iche' (Quiché) peasant family, Rigoberta Menchú Tum spent much of her early childhood in GUATEMALA's northern highlands and during harvest season with her family working on Pacific Coast coffee plantations. The government's confiscation of Indian lands in Quiché Province in the 1970s prompted a violent response from local indigenous groups. Under the Guatemalan MILITARY's brutal suppression of that revolt and subsequent control of the region, Menchú's parents and brother lost their lives, between 1979 and 1981. Menchú recorded her experiences of these times in *I, Rigoberta Menchú* (1987). In 1992 she

was awarded the Nobel Peace Prize in recognition of her activism, including her writing. Her account, however, was challenged by David Stoll in his *Rigoberta Menchú and the Story of All Poor Guatemalans* (1999). The controversy led some to demand that Menchú's prize be recalled, but the Nobel committee refused to do so, explaining that the award recognized the totality of her work.

As a teenager, Menchú became involved in CATHOLIC CHURCH social reform activities and in 1979 joined the Committee of the Peasant Union (CUC). She taught herself Spanish and several of the other indigenous dialects spoken in Quiché Province in order to teach WOMEN there ways to resist suppression by the military. In 1980 and 1981, she was an activist in the Quiché and GUATEMALA CITY demonstrations calling for improvement in rural Native Americans' living and working conditions. Because of her activities, Menchú went into exile in MEXICO in 1981, returning on three occasions during the next decade to participate in various pro-indigenous movements. On each occasion, she returned to exile after receiving death threats.

In 1991, Menchú played a prominent role in preparing the United Nations Declaration of the Rights of Indigenous People. When military rule came to an end in Guatemala in 1992, she returned home to continue her work on behalf of indigenous peoples in Guatemala and elsewhere in the Western Hemisphere. Because of their previous work in addressing violations of international human rights agreements and declarations, Menchú campaigned for Spanish courts to try Guatemalan political and military officials for HUMAN RIGHTS violations from 1960 to 1992. Finally, on December 23, 2006, Spain called for the extradition of seven Guatemalan political officials, including former military presidents Efraín Ríos Montt (b. 1926– ) and Humberto Mejía Victores (b. 1930– ), to stand trial on charges of genocide and torture; the Guatemalan government refused to extradite them. Menchú also joined forces with the Mexican pharmaceutical industry in a program entitled "Health for All," with the goal of offering low-cost generic medicines to indigenous people. On January 27, 2007, Menchú announced she would run for the Guatemalan presidency as the coalition candidate of the Winaq and Encounter for Guatemala parties. In the September 9, 2007 election, she finished seventh with just 103,316 popular votes.

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**Menem, Carlos Saúl** (b. 1930– ) *president of Argentina* Carlos Saúl Menem was born to Syrian immigrants in the northern Argentine province of La Rioja. He was educated in local schools and as a youngster converted to Catholicism. While at university, Menem became active in politics, supporting President JUAN DOMINGO PERÓN. In 1955, at age 25, he was elected to Rioja's provincial legislature and subsequently, on three occasions (1973, 1983, and 1987), was elected governor of the province on the Peronist Party ticket. Following the MILITARY coup d'état that ousted President ISABEL MARTÍNEZ DE PERÓN, the military cracked down on all *peronista* leaders, including Menem, who served a three-year prison sentence. Following the failed 1982 MALVINAS/FALKLANDS WAR with Great Britain, the military fell from power and was replaced by a civilian government headed by President Raúl Alfonsín (b. 1927– ) of the Radical Civic Union (Unión Cívica Radical, or UCR) party. For the next six years, ARGENTINA endured high inflation and unemployment that severely affected working-class Peronists. In 1989, against heavy odds, Menem secured the presidential nomination of the Peronist Party and impressively won the March 24 elections.

As president, Menem confronted a 150 percent monthly inflation rate; additionally, the government was \$4 billion in arrears in payments on external debts. Menem immediately imposed a strict austerity program. Having abandoned the principles of Peronism in favor of the neoliberal economic philosophy, in 1991, Menem found a like-minded colleague in Domingo Cavallo (b. 1946– ), whom he appointed minister of the economy. They commenced the privatization of state-owned industries, including the national airlines, subway systems, and port facilities; the telephone and electric companies; and the coal and natural gas industries. Under Cavallo's "Convertibility Plan," the Argentine peso was placed on a par with the U.S. dollar. The influx of cash from the sale of state-owned industries and the confidence created by the "dollarization" of the ECONOMY reduced the national debt by nearly half by 1994, slashed inflation to a 4 percent annual rate, and initiated a period of economic recovery. Menem's administration also benefited from the establishment in 1991 of the SOUTHERN CONE COMMON MARKET, which sought to create a free TRADE area between Argentina, BRAZIL, PARAGUAY, and URUGUAY by 1995. The arrangement stimulated the Argentine economy by providing markets for the country's goods and commodities. On the downside, the Menem administration introduced austerity and privatization programs that contributed to layoffs in former government-owned industries. Workers demonstrated in an effort to regain their jobs and recapture the wages they had lost in the earlier inflation spiral. The government suppressed their demonstrations and strikes, often forcefully.

The opposition did not prevent Congress from amending the constitution in 1994 to permit second presidential terms. Menem capitalized on this and

declared himself a candidate in the May 1995 election, a contest he won with 50 percent of the vote. About the same time, the Argentine economy began to slow down. Unemployment increased as productivity decreased. Critics quickly blamed the Convertibility Plan, which prevented the Argentine peso from keeping pace with global price increases and led to the loss of markets and a decrease in direct foreign investment. Others pointed to Menem's abolishing of export taxes and the decrease in import duties, which failed to protect Argentine INDUSTRY from foreign competition and deprived the government of its main source of income. As a result, the Menem administration slashed government safety net programs, which further infuriated working-class Peronists. The international financial crisis in 1997 and 1998 aggravated the situation, but the full impact came with Argentina's economic collapse in 2000–02, after Menem had left the presidency (see ARGENTINA, ECONOMIC COLLAPSE IN).

Menem flirted with a third presidential term in 1999, but his increased unpopularity due to the country's economic woes caused him to abandon this thought. He ran for the presidency again in 2003 and finished second in the initial electoral round but withdrew from the runoff when he recognized he could not win the contest. NÉSTOR KIRCHNER then assumed the presidency by default.

Menem's public image was tarnished in other ways too. For example, in 1991, he had pardoned officers and terrorist leaders found guilty of HUMAN RIGHTS violations during the DIRTY WAR and ended further prosecutions. He also came under suspicion after a superficial investigation of the bombings of the Israeli embassy and the AMIA Jewish community center in BUENOS AIRES in 1992. After leaving office, Menem was charged with illegal arms sales to ECUADOR and Croatia in 1991 and 1996, respectively, and for reportedly having \$10 million in Swiss bank accounts. These allegations were never proven, but Menem spent two years in CHILE while the government in Buenos Aires attempted to extradite him to answer questions regarding corruption and embezzlement during his presidency. He returned to Argentina on December 22, 2004, after the Argentine Supreme Court ruled that the constitution does not permit extradition for the purpose of questioning only. In 2009, Menem still faced charges of embezzlement and for failing to declare illegal funds he holds outside Argentina.

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**MERCOSUR** See SOUTHERN CONE COMMON MARKET.

**Mexican Revolution (1910–1920)** The Mexican Revolution was a bloody conflict that began as a revolt to overthrow the 34-year dictatorship of Porfirio Díaz (1876–1911) and turned into a 10-year power struggle among revolutionary leaders. It was MEXICO's deadliest war and defined many aspects of the national character for the remainder of the 20th century.

The dictatorship of Díaz, known as the Porfiriato, began in 1876. For the next 34 years, positivist thinkers became Díaz's trusted advisers and encouraged policies to modernize the nation. Relying largely on foreign investment, the Mexican ECONOMY expanded through industrialization and modern agricultural techniques. The progress achieved during the Porfiriato, however, masked underlying inequalities. Large numbers of peasants and urban workers sank further into poverty while a few elite Mexicans and many foreign business owners became increasingly wealthy. Díaz maintained order by suppressing individual freedoms and curtailing political participation.

After more than three decades of dictatorial rule, several leaders emerged demanding reform. The FLORES MAGÓN BROTHERS (Ricardo, Enrique, and Jesús) began speaking out against the Díaz administration and were forced to flee to the United States. There, they published an activist newspaper and established the Mexican Liberal Party (Partido Liberal Mexicano, or PLM). The Flores Magón brothers advocated land and LABOR reform and demanded a more transparent political system. Though no longer in the country, the brothers' message reached many of the lower classes throughout Mexico. Díaz ruthlessly put down several strikes at factories and MINING facilities throughout the country. Then, in 1908, during an interview with U.S. journalist JAMES CREELMAN, Díaz announced that he would not run for office again in the 1910 presidential election. Believing that the political arena was finally opening, FRANCISCO MADERO announced his candidacy and began campaigning for president. Díaz, however, had Madero arrested, and the dictator won the presidency once again in highly fraudulent elections. Madero escaped to San Antonio, Texas, where he began plotting to overthrow Díaz.

In October 1910, Madero issued a general call to arms in an attempt to incite widespread revolt against Díaz. Madero's Plan de San Luis Potosí called for a violent uprising to return Mexico to democracy. On November 20, a rebellion led by FRANCISCO VILLA and PASCUAL OROZCO erupted in the state of Chihuahua. EMILIANO ZAPATA, a peasant leader who had already formed a resistance movement in the southern state of Morelos, also joined Madero's cause. Díaz was unable to put down the numerous revolts occurring simultaneously throughout the country and stepped down in May 1911. Madero became president in a special election held later that year.

Madero's presidency was plagued by instability from the beginning. Zapata, Orozco, and other local revo-

lutionaries throughout the country refused to disarm, demanding more immediate attention to various issues such as agrarian reform and labor laws. Madero also faced a constant threat of counterrevolution by supporters of the former dictator. In February 1913, a massive uprising in MEXICO CITY, led by Díaz's nephew FÉLIX DÍAZ and known as the Tragic Ten Days, ended with the ousting of Madero, who was later executed. VICTORIANO HUERTA became president, but his dictatorial tendencies angered many local leaders, who demanded a return to democracy as stipulated in the Constitution of 1857. Villa formed the Constitutionalist alliance with VENUSTIANO CARRANZA from the state of Coahuila and ÁLVARO OBERGÓN (1920–24) from the state of Sonora. The Constitutionlists led a massive uprising against Huerta for more than a year. U.S. president Woodrow Wilson denounced Huerta's dictatorship and sent a naval force to blockade Veracruz. In July 1914, Huerta resigned and fled into exile.

Huerta's departure left yet another power vacuum in a nation already beleaguered by war and political instability. Revolutionary leaders met at the CONVENTION OF AGUASCALIENTES to select a provisional president. When delegates selected Eulalio Gutiérrez (b. 1881–d. 1931), Carranza refused to acknowledge the convention's authority, and civil war erupted between Carranza and the Constitutionlists on one side and the Conventionists, led by Zapata and Villa, on the other. The alliance between Zapata and Villa soon broke down, and the nation was beset by a multisided civil war. In one of the most decisive confrontations, at the Battle of Celaya, Villa suffered a devastating defeat against Obregón's forces. A year later, Villa attacked a small town in New Mexico, provoking the U.S. government into sending an expeditionary force into northern Mexico.

By 1917, Carranza's forces had gained the upper hand, and Carranza had been recognized as "first chief." He convened a new convention in Querétaro, and delegates produced the CONSTITUTION OF 1917. The new governing document addressed nearly all of the reform issues that the various revolutionary factions had been demanding, but Carranza and subsequent presidents only selectively enforced them. Despite numerous unresolved issues, the fighting phase of the revolution came to an end by 1920. The implementation of revolutionary reforms continued to define Mexican politics and society for the remainder of the 20th century.

See also DÍAZ, PORFIRIO (Vol. III); MEXICO (Vol. III); PORFIRIATO (Vol. III); POSITIVISM (Vol. III).

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**Mexico** Mexico is a country of just under 800,000 square miles (2.07 million km<sup>2</sup>) that shares its northern border with the United States. It was colonized by the Spanish in the 16th century, and its population is made up of Europeans, NATIVE AMERICANS, Africans, and mestizos. Mexico was the main seat of Spanish authority in the Americas for more than 300 years, and many Spanish institutions left a pervasive legacy after the nation achieved independence in 1821. Conservative defenders of the CATHOLIC CHURCH and adherents to a strong centralized political system often clashed with Liberal leaders, and the nation witnessed infighting and instability through much of the 19th century. Although Mexico experienced a period of relative calm during the Porfiriato, many of the unresolved conflicts of the 19th century lingered. These culminated in the MEXICAN REVOLUTION OF 1910.

Much of Mexico's 20th-century history was defined by the revolution and its aftermath. The conflict started when FRANCISCO MADERO issued a call to arms in protest of the dictatorial political practices of Porfirio Díaz (1876–1911). Díaz was ousted after only six months of fighting, and the revolution devolved into a struggle over how to replace the political, economic, and social system that had prevailed under the dictator. Some local revolutionary leaders, such as FRANCISCO VILLA, PASCUAL OROZCO, and EMILIANO ZAPATA, fought to improve the plight of the wider populace. Zapata advocated revolutionary reform based on significant changes in agrarian policy, while others pushed for sweeping reforms to benefit the growing LABOR sector and the urban poor. VENUSTIANO CARRANZA wanted only modest reform and a return to political stability. The revolution quickly became a power struggle, and the revolutionary factions descended into civil war. The disputes began to subside only after revolutionary leaders promulgated the CONSTITUTION OF 1917, which included provisions to satisfy nearly every faction's objectives.

While the ratification of the Constitution of 1917 did begin to curtail hostilities among competing revolutionary leaders, protests mounted as the Carranza administration only selectively implemented various social reform measures. Zapata, who refused to disarm

until his agrarian reform demands were met, was assassinated in 1919. The subsequent administration of ÁLVARO OBREGÓN (1920–24) implemented agrarian and labor reform more aggressively, but political infighting continued into the 1920s. PLUTARCO ELÍAS CALLES (1924–28) finally achieved relative political stability, but his anti-clerical policies created a backlash that culminated in the CRISTERO REBELLION from 1926 to 1929. Despite the violence, Calles oversaw the creation of the first of several POLITICAL PARTIES to emerge out of the revolution.

Even after his tenure as president had expired, Calles continued to dominate national politics behind the scenes by controlling a series of puppet presidents in an era known as the Maximato, from 1928 to 1934. Calles's control was finally broken during the presidency of LÁZARO CÁRDENAS (1934–40). Cárdenas became known as a man of the people and oversaw the most aggressive implementation of revolutionary reforms to date. He worked closely with labor groups to meet the needs of the working class and pushed through a series of land expropriations designed to help the rural peasantry return to an *ejido*-based land control system. Cárdenas also nationalized Mexico's railroad and oil industries, wresting control from foreign owners and placing it in the hands of the Mexican government (see PEMEX). In the early years of his presidency, Cárdenas made nationalism and social reform programs a priority. Those policies earned him a reputation as one of the most ardent defenders of the Mexican Revolution of all 20th-century presidents.

The end of Cárdenas's presidency coincided with the outbreak of World War II in Europe and a new approach to U.S.-MEXICAN RELATIONS. The war allowed the Mexican government to work closely with the United States, while still promoting a message of national unity. Wartime agreements between the two countries called for economic and technical assistance that allowed Mexican industrialists to develop new products and to modernize existing economic sectors. Mexico emerged from World War II with a growing middle class and a powerful industrial base that fueled economic growth in the coming decades. Between 1945 and 1972, Mexico's gross domestic product grew more than 6 percent per year on average. Economic observers watched in awe as the once-embattled Third World nation experienced more than two decades of nearly uninterrupted economic growth, with many dubbing this the "Mexican Miracle." Furthermore, WOMEN achieved nationwide suffrage in the 1950s, and by most outward measures, the nation seemed to be benefiting from the successes of the revolution.

Despite the perceived gains, however, signs of discontent were simmering under the surface. Political corruption ensured that the Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI)—the dominant revolutionary political party—controlled local and national politics. The party also used a complex system of cronyism to keep LABOR GROUPS in check. Those close to the party leadership grew wealthy through fraud and the

payment of bribes throughout the 1950s and 1960s, while millions languished in poverty. Discontentment with the status quo manifested in the 1968 STUDENT MOVEMENT, which emerged just as MEXICO CITY was set to host the summer Olympic Games. Hundreds of thousands of high school and university students went on strike and marched in peaceful demonstrations through the streets of the capital, demanding changes in government policy. On the night of October 2, security forces opened fire on a group of students who had gathered at the Plaza of Three Cultures in the middle-class neighborhood of Tlatelolco. Hundreds of unarmed young people were gunned down by government troops, and many more were arrested in the coming months. Although government officials attempted to blame foreign agitators for the incident, middle-class families began to question the so-called success of the revolution after 1968.

The Mexican Miracle came to an abrupt halt after 1972 as massive government spending projects reached a point where they were no longer sustainable. Official corruption and misspending, combined with massive borrowing by the administrations of LUIS ECHEVERRÍA (1970–76) and JOSÉ LÓPEZ PORTILLO (1976–82), left the Mexican government with a major economic crisis as the peso collapsed, inflation rose, and the TRADE deficit worsened. The discovery of large deposits of petroleum reserves off the coast of Tampico temporarily delayed the inevitable, but by 1982, Mexico's ECONOMY was in a tailspin. An International Monetary Fund bailout package forced the government to divest itself of all unnecessary spending. As a result, state-owned industries were privatized and social programs were cut according to the economic model of neoliberalism. The impact of these policies was devastating for Mexican society, and the 1980s became known as the "lost decade." Economic stagnation was made worse by the EARTHQUAKE OF 1985 that leveled much of Mexico City. The quake killed thousands and left many more homeless. As the national government found itself ill equipped to address the needs of victims, grassroots organizations stepped in to fill the void. Opposition parties, such as the National Action Party (Partido Acción Nacional, or PAN), gained momentum. The conservative political party built up important bases of local support and began winning municipal elections. By 1989, PAN had won its first governorship, in Baja California.

A leftist opposition party was formed by Cuauhtémoc Cárdenas (b. 1934– )—son of the former President Cárdenas—who ran against the PRI candidate in the 1988 presidential election. CARLOS SALINAS DE GORTARI (1988–94) narrowly won that contest, but the defeated Cárdenas went on to become mayor of Mexico City and leader of a viable opposition party, the Party of the Democratic Revolution (Partido de la Revolución Democrática, PRD). After 1988, it became increasingly clear that the days of the PRI's monopoly on power were numbered. Salinas oversaw an impressive economic

turnaround during his six-year administration, but as he prepared to leave office, the 1994 presidential campaign was marred by political assassinations and charges of corruption. At the same time, the Zapatista Army for National Liberation (Ejército Zapatista de Liberación Nacional, or EZLN) rose in revolt in the southern state of Chiapas to oppose the recent passage of the NORTH AMERICAN FREE TRADE AGREEMENT. Salinas's successor, ERNESTO ZEDILLO (1994–2000), inherited a devastating peso crisis, a guerrilla movement in the south, and investigations into the corrupt dealings of the Salinas family. The country's faith in the PRI was shattered, thus it was no surprise when PAN candidate VICENTE FOX (2000–06) became the first non-PRI president in 71 years.

On December 1, 2006, Felipe de Jesús Calderón (b. 1962– ) replaced Fox in *Los Pinos*, the presidential residence in Mexico City. Calderón, the son of a PAN cofounder, is a devout Catholic and a neoliberal with regard to economic policies yet supports Mexican laws that permit abortion under certain conditions and favors the legalization and use of small quantities of drugs in the rehabilitation of addicts. He also supports the U.S. call for immigration reform but has not clearly stated his position. He has asked for U.S. military assistance in combating the ever-increasing violence brought about by drug traffickers and with the United States launched the Mérida Initiative, an undefined plan to combat crime and drug trafficking in Central America. He decreed a 10 percent pay cut for 546 top-level government employees and has asked the Mexican congress for legislation to also cut compensation for all government workers. As a neoliberal, he favors free trade and argues that competitive markets are the only way to successfully deal with economic problems. Still, he confronts Mexico's persistent problems of high unemployment, widespread poverty, and the need for educational, infrastructural, and medical modernization. With only a 0.58 percent margin of victory, Calderón will not have a commanding public voice with which to speak out on behalf of his programs until, possibly, 2012.

Debates over revolutionary ideals that had defined Mexico in the early decades of the 20th century had subsided by its end, though remnants of the revolution are still visible. IMMIGRATION, global commerce, and the DRUG TRADE have emerged as central national issues today, but the nation is still struggling over issues to do with land, labor, and poverty.

See also DÍAZ, PORFIRIO (Vol. III); MEXICO (Vols. I, III); NEW SPAIN, VICEROYALTY OF (Vol. II); PORFIRIATO (Vol. III).

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**Mexico City** Mexico City sits 7,350 feet (2,240 m) above sea level in MEXICO's central valley, surrounded by volcanic mountains. The Mexica, a group of Nahuatl Indians often referred to as the Aztecs, founded the city in 1325, in the middle of Lake Texcoco. The city of Tenochtitlán became the center of the Aztec civilization by the time Spanish conquistador Hernando Cortés arrived in 1519. Visual reminders of the Aztec culture are today found on the emblem of Mexico's national flag, the Templo Mayor located just off Mexico City's central plaza, and on the city's wide boulevards, which originally served as aqueducts.

Mexico City was the capital of the Viceroyalty of New Spain, whose administrative tentacles reached east into Florida and north from Texas to Washington State in modern-day United States, east to CUBA, south to COSTA RICA, and west to the Philippines. In 1824, three years after independence from Spain, the Federal District was established as the nation's capital, but its administrative relationship with the surrounding municipalities was often blurred. A 1993 constitutional amendment folded Mexico City and the Federal District into one entity. Today, Mexico City includes 58 municipalities of Mexico State and one in the state of Hidalgo and has a population of approximately 21 million people, making it the largest metropolitan area in the Western Hemisphere and the third largest in the world. Most of the population growth occurred after World War II. The city is also home to approximately half a million U.S. expatriates and uncounted numbers of expatriates from South and Central America, western Europe, and the Middle East.

In addition to being the seat of national government, Mexico City is the country's economic center, with a gross domestic product (GDP) of \$315 billion in 2005, making it the 8th richest urban center in the world. At present growth rates, it is predicted to become by 2015 the 30th largest ECONOMY in the world, with a GDP larger than that of Sweden and Switzerland. Its industrial sector accounts for 15.8 percent of the national GDP, and its service sector, for 25.3 percent. While its per capita GDP stands at \$22,696, the highest of all Latin American cities, approximately 25 percent of its residents live below the poverty line, compared to 36 percent of the country's total population. Because of the surrounding mountains,





Located on Mexico City's Zócalo (main square), the Metropolitan Cathedral was built between 1573 and 1813 and is the oldest and largest cathedral in Latin America. (Thomas M. Leonard Collection)

Mexico City is one of the world's most polluted cities. In an attempt to correct the problem, government programs have encouraged industries to relocate to suburbs outside the city and instituted limited car use within the city itself.

Mexico City is a cultural mecca with more than 160 museums, including the world famous Anthropological Museum, as well as art galleries and concert halls. Soviet and Communist dissident Leon Trotsky's fortress is located in the Coyoacán neighborhood. With approximately 265,000 students, the National Autonomous University of Mexico is Latin America's largest educational institution and in 2007 was named a United Nations World Heritage Site. Soccer, or *fútbol*, is the most popular sport, and the 105,000-seat Aztec Stadium is the site of competitions between Mexico's best teams. In the recent past, U.S. professional baseball, basketball, and football teams have penetrated the Mexico City market.

See also AZTECS (Vol. I); CORTÉS, HERNANDO (Vol. I); MEXICO CITY (Vols. I, II, III); TENOCHTITLÁN (Vol. I); UNIVERSITY OF MEXICO (Vol. II).

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**migration** The peopling of Latin America involved not only NATIVE AMERICANS, whose ancestors crossed the Bering Straits, but also Europeans, Africans, and, in smaller numbers, Asians. Because of the dominance and methodology of Spanish and to a lesser degree Portuguese colonization, a Hispanic/Iberian culture emerged. Characteristics of the indigenous lands and cultures remained and can still be found in the ART, LITERATURE, MUSIC, and dance of any given Latin American society.

With the development of Latin America's export-based economies from 1880 to 1930, an influx of Europeans, particularly from southern and central Europe, were attracted to the New World. For example, Spanish and Italian émigrés flocked to ARGENTINA, where they found employment in the beef, wheat, and wool-processing plants and TRANSPORTATION industries. In BRAZIL, eastern Europeans filled the LABOR void in the coffee industry. The German government encouraged outmigration as a means to indirectly find markets for its manufacturers. Germans could be found throughout Latin America but were most prevalent in Argentina, CHILE, COLOMBIA, and CENTRAL AMERICA, where many became successful businessmen and agriculturalists. Japanese migrants settled mostly in PERU and Brazil, and many of them also became successful entrepreneurs. The British

who settled in the New World during this period usually were associated with the export economies and therefore closely linked to the elites of their adopted country. Argentina is the most obvious example in this regard. Chinese and Indian workers usually came as indentured servants or contract laborers to work in the fields or build railroads. Almost all rejected repatriation at the end of their contracts and instead migrated to urban areas where they opened small textile shops, laundries, and restaurants. The impact of these migrants today is most evident in GUYANA and SURINAME on South America's northeast coast. By contrast, Mexico, with its large indigenous and mestizo population and lack of industrial base, drew very few foreigners. In all, some 21 million people, representing 30 different countries, came to Latin America from the time of colonization until 1970.

Outmigration initially affected the sugar-based Caribbean economies when slavery was outlawed in the early 19th century. While the freed blacks were often encouraged to relocate, few had the economic means to do so. Thus, many became contract laborers for short periods throughout the Caribbean. The most notable example is the 20,000 West Indians who performed the back-breaking labor in building the Panama Canal (see PANAMA CANAL, CONSTRUCTION OF). An estimated 121,000 Jamaicans worked in Cuban sugar fields during the *zafra*, or cane-cutting season. Under the terms of the U.S. War Manpower Act, during World War II, thousands of Caribbean workers were brought to the United States to help fill voids in defense-related industries. The most notable example was the BRACERO PROGRAM, under which Mexicans were brought to the United States to work on farms.

Latin American political crises prompted many members of the elite class to move outside their native country, at least until they felt it was safe to return. Cuban political history is replete with examples. More recently, the CUBAN REVOLUTION, the Latin American MILITARY governments during the 1970s and 1980s, the CENTRAL AMERICAN WARS of the 1980s, the continuing Haitian collapse, and the Mexican economic and population crisis since the 1990s resulted in more migrants seeking permanent resident status in the United States. During the cold war atmosphere of the 1960s, Cubans were received with welcome arms but were mostly upper- and middle-class people with skills that permitted them to enter the workforce easily. When the skill set and skin color later changed, as it did during the 1980 MARIEL BOATLIFT and with the *BALSEROS* in the 1990s, Americans and Cubans residing in the United States alike protested the new migrants' arrival. The same points remain an undertone toward Haitian migrants, although the public debate focuses on whether they are political exiles who are eligible for admission or economic exiles, in which case they are not eligible for admission.

U.S. TRADE policy since the 1980s also contains provisions designed to discourage Latin American outmigration to the United States. While the 1984 CARIBBEAN BASIN

INITIATIVE had political overtones related to Central American conflicts at the time, it provided for job opportunities throughout the circum-Caribbean region. The 1994 NORTH AMERICAN FREE TRADE AGREEMENT envisioned job creation in MEXICO that would curtail illegal immigration to the United States (see IMMIGRATION FROM MEXICO TO THE UNITED STATES). For that reason alone, Florida Democratic senator Bob Graham and Republican representative Sam Gibbons proposed NAFTA's extension to the Caribbean. The governments of the DOMINICAN REPUBLIC and Central America, except COSTA RICA, readily viewed U.S. "807" assembly industries and investment provisions of the 2005 DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT as means to spur employment, while U.S. authorities saw the programs as limiting migration of the unemployed to the United States.

See also MIGRATION (Vols. I, II, III).

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**military** Since the colonial period, the military has been an important component of national life across Latin America. Following independence and throughout the 19th century, the military defended national borders and maintained internal security. In the latter case, the military often served the personal interests of caudillos, charismatic figures who often became heads of state.

In 1859 and 1941, PERU and ECUADOR confronted each militarily before finally settling their boundary dispute in 1999. In the early 20th century, heads of state such as Venezuelan JUAN VICENTE GÓMEZ and Colombian LAUREANO GÓMEZ acted as caudillos and used the military to sustain their political power. In part, U.S. interventions in the circum-Caribbean region from 1900 to 1923 sought to dampen the role of the military in politics (see U.S. CARIBBEAN INTERVENTIONS, 1900-1934). The United States established apolitical national constabularies in the DOMINICAN REPUBLIC and NICARAGUA to serve the state's interests rather than those of the elite. These efforts failed. The constabularies became national guards used to serve the personal interests of dictators RAFAEL TRUJILLO, ANASTASIO SOMOZA GARCÍA, and ANASTASIO SOMOZA DEBAYLE. Haitian dictator FRANÇOIS DUVALIER created the TONTON MACOUTES and Panamanian strongman MANUEL NORIEGA had the "Dobermans" to serve as personal protective forces that brutally repressed any political opposition.

Latin American governments continued to use the military for internal security. In ARGENTINA, BRAZIL, and CHILE, troops were used in 1918 and 1919 to suppress LABOR MOVEMENTS allegedly run by anarchists,



A Chilean military musical band preparing for a ceremony in front of La Moneda, the presidential office, in Santiago de Chile (Thomas M. Leonard Collection)

communists, or socialists that threatened the existing socioeconomic and political order (see COMMUNISM IN LATIN AMERICA). These same three nations used the military in the mid- to late 20th century to brutally suppress labor leaders, journalists, academics, and anyone else suspected of being sympathetic to the CUBAN REVOLUTION. The elite feared that the impact of the Cuban Revolution would spread across the continent. In the 1970s and the 1980s, the Argentine generals conducted a DIRTY WAR (1975–83), the Brazilian military received international condemnation for its brutal torture of alleged communists and other dissenters, and Chilean strongman AUGUSTO PINOCHET UGARTE was held responsible for thousands of “disappeared ones.”

Until World War II, Latin American governments obtained most of their arms from and arranged training through Europeans. Few U.S. citizens participated in the training, and when they did, it was via private contract. Thus, by the 1930s, European-style uniforms, armaments, marching formations, field tactics, and the like permeated Latin American militaries. In 1939 and 1940, the U.S. military surveyed the capabilities of its southern neighbors and found their militaries to be inadequately trained, poorly disciplined, and ill equipped to contribute to the hemisphere’s defense. After the outbreak WORLD WAR II in 1939, Latin Americans accepted U.S. offers of military assistance and training but showed greater interest in the former than the latter (see U.S. MILITARY ASSISTANCE PROGRAM). Although MEXICO sent a fighter

squadron to the Pacific theater, and Brazil sent ground troops to Italy, Latin America contributed little to the defense of the hemisphere during the war, and they received only 10 percent of the military assistance promised them under early wartime agreements.

As World War II drew to a close, the U.S. Army Command planned for a hemisphere-wide security plan under U.S. leadership and the uniform use of U.S. military equipment. Congress rebuffed the idea on the grounds that it would only perpetuate the presence of military dictators and, in so doing, further tarnish the U.S. image in Latin America. Only in 1952, after the cold war began, did Congress relent, fearing the spread of communism to Latin America. For the next 40 years, U.S. military largesse strengthened Latin American militaries with modern equipment and training. That training included counterinsurgency, civic-action, and interrogation programs to root out guerrilla groups, though the last faded into the background beginning in the late 1960s as Presidents Lyndon B. Johnson and Richard Nixon focused their attention on Vietnam. The military spigot remained open, and the equipment was used by Latin American military regimes to brutally suppress civil and HUMAN RIGHTS until the mid-1980s.

CUBA benefited from these policy parameters from the outbreak of World War II until early 1958, when the U.S. government ended military assistance to dictator FULGENCIO BATISTA Y ZALDÍVAR. When FIDEL CASTRO Ruz secured power in 1960, he sought outside assistance

to secure Cuba against an anticipated U.S. invasion. For reasons that had nothing to do with the defense of Cuba, Soviet premier Nikita Khrushchev placed Soviet missiles on the island. Castro learned the reality of Soviet *realpolitik* as the 1962 CUBAN MISSILE CRISIS unfolded, but this did not stop him from warning the Cuban people of a potential U.S. invasion (see BAY OF PIGS INVASION). The upshot of this was that the Cuban military remains the strongest institution in Cuban society today.

The impact of the Vietnam War on the U.S. populace and the impact of the United States's pro-British policy during the 1982 FALKLANDS/MALVINAS WAR on the Latin Americans, coupled with President Jimmy Carter's human rights policy, contributed to a significant slowdown of U.S. arms shipments to Latin America. Some countries, such as Argentina, Brazil, and Chile, established their own small arms industries. They and others purchased larger military equipment on the world's open market, particularly Mirage jet fighter planes from the French and modern field equipment from Israel.

During the 1980s, Latin America marched toward a "return to democracy." Military regimes gave way to elected governments. Many analysts insist that Latin American militaries are now a shell of their former selves. Others disagree, arguing that the military is lurking in the background, awaiting internal calamities that will require their attention. VENEZUELA may be an instructive case. Its president, HUGO RAFAEL CHÁVEZ FRÍAS, came to office in 1998 as a populist determined to correct the ills of Venezuelan society. Since then, his increasingly assertive foreign policy has angered COLOMBIA and Ecuador, while his anti-U.S. rhetoric must await a new U.S. president's response. Externally, he has been generous with oil credits to Cuba and BOLIVIA and has negotiated oil contracts with China but has not adequately addressed domestic issues. By constitutional manipulation, he controls upper-rank military appointments so that the officer corps remains loyal to him. In the past, this same combination often resulted in a coup d'état.

In addition to Chávez, the leftward drift of Latin American politics potentially threatened U.S. interests, according to President George W. Bush. Beginning in 2004, he directed increased supplies to the Latin American military. Some analysts suggest the aim is regime change should domestic politics become tumultuous, rather than international hemispheric security. In 2009, new U.S. president Barack Obama promised a new direction in U.S. policy toward Latin America, but at this writing that policy has yet to take shape.

See also MILITARY (Vols. II, III).

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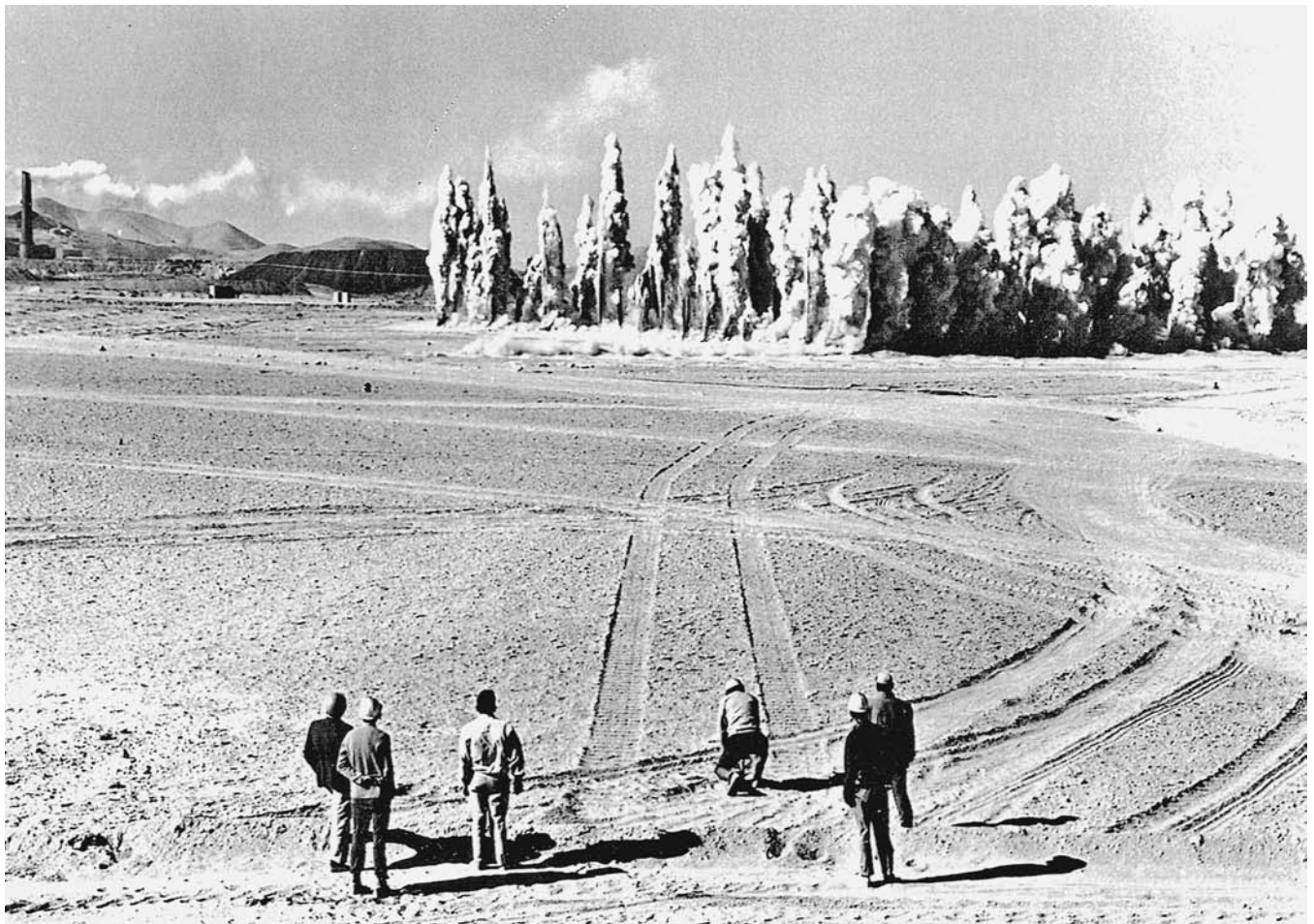
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**mining** Mining lost its importance in the economies of BRAZIL, MEXICO, and PERU shortly after Latin America's independence in the early 19th century. A reduction in European demand for ores, along with the devastation wrecked during the wars of independence, resulted in the collapse of mining as a profitable economic pursuit. Not until the late 19th century did mining reemerge as an important economic activity in some countries. For example, guano (bird droppings) became an important Peruvian export commodity. Nitrates, followed by copper, became the mainstays of the Chilean ECONOMY. Other extracted minerals included bauxite, iron ore, manganese, and tin. Coal mining became an important part of the Colombian and Venezuelan export economies and were also somewhat significant in ARGENTINA, Brazil, and CHILE. Over time, oil and natural gas became important products in the economies of Argentina, Brazil, COLOMBIA, ECUADOR, MEXICO, TRINIDAD AND TOBAGO, and Peru.

During the first quarter of the 20th century, foreign concessionaires dominated the exploitation of minerals in Latin America. States granted foreign companies the right to harvest minerals in return for a percentage of the money earned on the world market, ranging to about 20 percent. The concessionaire financed the exploitation of the minerals, the internal infrastructure to get the product to port, and its TRANSPORTATION to the world market. With the onset of the Great Depression in 1929, the global demand for these commodities plummeted. This was a significant factor in the nationalization and expropriation of the mining industries in Latin America and the creation of state monopolies to control the exploitation of mineral wealth. State monopolies in the hydrocarbon industries drew most international attention, including the Bolivian and Mexican nationalization of oil companies on the eve of World War II. The non-petroleum industries did not escape state control; these included tin in BOLIVIA (COMIBOL), mineral ores in Peru (MineroPeru), and copper in Chile (Codelco).

State interference in the ECONOMY fizzled with Latin America's economic slowdown in the 1970s and the governments' acceptance in the 1980s of the neoliberal economic model, which encouraged the sale of state-owned enterprises to the private sector on the assumption that the latter would more efficiently manage mineral exploitation. Thus, every Latin American country offered



An explosion to clear the surface for the mining of copper ore at the Exotica Copper Mine in Chile, which is a subsidiary of the U.S.-owned Anaconda Copper Company (*Anaconda Company*)

mining concessions to domestic and industrial investors, although some continue to regulate the amount of foreign investment in any given mining venture.

CUBA and Chile were unique in the region. The United States TRADE embargo with Cuba beginning in 1960 prompted FIDEL CASTRO RUZ to order the nationalization of all U.S. industries on the island (see CUBA, U.S. TRADE EMBARGO OF). These included oil and sugar-refining operations and bauxite exploitation that were significant contributors to the Cuban economy. Due to international factors beyond Castro's control and his government's mismanagement of the economy, these industries eventually lost their importance in the overall Cuban economy. In Chile, President EDUARDO FREI MONTALVA "Chileanized" U.S.-owned copper companies in July 1966. The Chilean government now owned 51 percent of these companies and used a portion of its newfound profits to compensate the companies for the portions that were Chileanized. However, in 1971, new president and self-proclaimed Marxist SALVADOR ALLENDE GOSENS nationalized the companies without compensation for their lost investments. That changed again with military dictator AUGUSTO

PINOCHET UGARTE, who returned the companies to their former U.S. owners.

In the early 21st century, most Latin American economies are sufficiently diversified and are not dependent on mineral exports. VENEZUELA, with its oil, is an exception; as is Mexico, whose oil reserves have peaked and which is emphasizing other modes of industrial development. Nevertheless, mineral resources remain important commodities across the continent. Chile, for example, is home to the world's largest copper mine (Chuquibambilla). Brazil's iron-ore reserves are sufficient to meet current demand for the next 530 years. With the exception of China's early 21st-century investments in Latin American oil reserves, U.S. and European investors are moving out of mineral exploitation in Latin America because of ever-increasing restrictions on foreign investors (see CHINA AND LATIN AMERICA, PEOPLE'S REPUBLIC OF).

See also MINING (Vols. I, II, III).

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**Mitchell, James** (b. 1931– ) *prime minister of St. Vincent and the Grenadines* Born on the island of Bequia in the Grenadines on May 15, 1931, James Mitchell was educated at the Imperial College of Tropical Agriculture in TRINIDAD AND TOBAGO and the University of British Columbia. Mitchell entered politics in 1966, when he won a legislative seat as a candidate of the St. Vincent Labour Party (SVLP). Mitchell subsequently declared himself an independent and forged a political alliance with the People's Political Party (PPP) in 1972. After defeating the SVLP in the 1972 elections, Mitchell served as prime minister of SAINT VINCENT AND THE GRENADINES until 1974. Mitchell founded the New Democratic Party (NDP) in 1975. He was the opposition leader in Parliament until his party won the 1984 elections after Prime Minister R. MILTON CATO called for early elections. With 89 percent of the eligible voters participating in the election, Cato suffered a surprising defeat.

Mitchell came to power in 1984 on a platform calling for closer economic and political relations with his Caribbean neighbors. He was a strong supporter of the ORGANIZATION OF EASTERN CARIBBEAN STATES. Able to reinvigorate the ECONOMY during the 1980s, Mitchell's party was able to win all 15 seats in the 1989 parliamentary elections. During the 1990s, Mitchell encouraged economic diversification strategies. Special attention was devoted to developing the tourism INDUSTRY. In 1992, a \$55-million airport named after Mitchell opened on Bequia. One of the longest-serving prime ministers in Caribbean history, Mitchell voluntarily resigned on October 27, 2000. He was briefly succeeded by fellow party member Arnhim Eustace (b. 1944– ), who served as prime minister only until the newly reformed SVLP, now known as the United Labor Party (ULP) and led by Ralph Gonsalves (b. 1946– ), won the March 2001 elections by a landslide.

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**MLN–T** See NATIONAL LIBERATION MOVEMENT.

**MNR** See NATIONAL REVOLUTIONARY MOVEMENT.

**Monterrey** Designated the capital of the Nuevo León region of the Viceroyalty of New Spain in 1596, Monterrey remained an outpost throughout the colonial period and into the late 19th century following the country's independence from Spain in 1821. Today, 1.1 million people reside within the city's 320 square miles (892 km<sup>2</sup>), and another 2.7 million, in the 2,228-square-mile (5,770.5-km<sup>2</sup>) metropolitan area.

Monterrey's industrial growth began during the U.S. Civil War (1861–65) with the development of the cotton textile INDUSTRY. By the end of the 19th century, Monterrey had taken on new significance as a railroad hub that connected it with the United States, MEXICO CITY, and the Caribbean coast. The TRANSPORTATION system and the liberal economic policies of President Porfirio Díaz and Nuevo León governor Bernardo Reyes (b. 1850–d. 1913) contributed to the city's economic growth. The Garza-Sada family provided much of the economic leadership in the 20th century. The Cervezería Cuauhtémoc, which opened in 1899, evolved into a division of FEMSA (Coca-Cola Latin America) and today produces eight brands of beer for the national and international markets. In 1903, Monterrey became home to Latin America's first iron and steel plant, an industry that today accounts for about half of Mexico's steel production. Cemex, the world's third-largest cement producer, and Alfa, which processes petrochemicals and food and produces telecommunications equipment and auto parts, are among the other 15,000 plants that operate in metropolitan Monterrey.

In 2006, the Mercer Human Resource Consulting firm ranked Monterrey fifth in all of Latin America in terms of quality of life. The city's higher educational institutions include the Instituto Tecnológico y de Estudios Superiores de Monterrey and the Universidad Regiomontés. Like other Mexican cities, soccer, or *fútbol*, as it is known locally, dominates the athletic calendar. And starting in the 1960s, Monterrey became the center of *norteño* MUSIC, a regional trademark.

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**Morales Ayma, Juan Evo** (b. 1959– ) *president of Bolivia* Juan Evo Morales Ayma won the December 18, 2005, Bolivian presidential election with 54 percent of the popular vote to become the country's first indigenous president. He is one of six children born into a family of Aymara Indian descent in the highlands of Orinoca, in Oruro, BOLIVIA. Poverty forced Morales to drop out of high school, though he went on to fulfill his mandatory MILITARY service. When the effects of the 1980 El Niño ravaged his native agricultural region, Morales joined his family in leaving Orinoca to participate in a government-sponsored agricultural project in the tropics of Cochabamba.



Evo Morales speaking to crowds below in the street, 2005 (AP Photo/Ismael Lizarasu)

Morales commenced his activities on behalf of coca growers and became head of his local union four years later. In 1988, he was elected general secretary of the Tropics Federation and in 1996 elected president of the Coordinating Committee of the Six Federations of the Tropics in Cochabamba State. Morales's rise to union leadership resulted from his strong criticism of the Bolivian government support for the U.S.-sponsored drug eradication program. Asserting that the coca leaf had been a staple in the life of Bolivian NATIVE AMERICANS dating to the precolonial period, he claimed its eradication would destroy their way of life. He charged that the United States should curtail the demand for refined coca at home and shut down the drug traffickers' operations, including money laundering (see DRUGS). His protestations fell on deaf ears. By 2005, legal coca growing had been reduced to some 29,000 acres (11,736 ha) of land in the Yungas Valley and Chaparé river region, and almost all cocaine refining operations had relocated to PERU and COLOMBIA. Substitute agricultural production failed to fill the financial void for the local coca farmers, and owing to the government's neoliberal economic policies and the lack of a diversified ECONOMY, the indigenous were left without employment opportunities.

Morales appealed to these displaced and unemployed rural indigenous in winning a seat to Congress in the 1997

elections and two years later became a founding member of the Movement Toward Socialism (Movimiento al Socialismo, or MAS). His second-place finish in the June 30, 2002, presidential election made him a celebrity across South America. For the next three years, the Bolivian economy continued to spiral downward, and in response, workers demonstrated. The situation prompted President Carlos Mesa Gisbert (b. 1953– ) to resign on June 6, 2005, and Congress to move up the scheduled 2007 elections to December 18, 2005. Morales campaigned on a pledge to nationalize the country's natural gas industries, restore coca production, require the teaching of indigenous languages in the schools, terminate the teaching of RELIGION in public schools, and convene a constitutional assembly to prepare a new document that better served the needs of the indigenous populace. His electoral victory and constant verbal assault on the United States and its capitalist system placed him in the same corner as VENEZUELA'S HUGO RAFAEL CHÁVEZ FRÍAS and CUBA'S aging FIDEL CASTRO RUZ. Since his inauguration, Morales has decreed a 50 percent increase in the minimum wage, nationalized the natural gas industry, and announced intentions to nationalize others but has backed off the pledges he made to improve EDUCATION.

Morales's emphasis on social policies that favored the indigenous and his use of executive prerogatives met

stiff resistance from state governors, particularly from the rich southern lowlands. Four departments—Santa Cruz, Tarija, Beni and Pando—announced in December 2007 that they would seek more autonomy and self-government, a proposal declared unconstitutional by Bolivia's National Electoral Court. The autonomy movement received two severe setbacks. First, on August 10, 2008, Morales received 67 percent of the vote, affirming his rule and his programs. Second, a national referendum on January 26, 2009, approved a new constitution. The new document declares Bolivia a “unitary plurinational” and “secular” society, a clear reference to the indigenous population. The government was also granted the authority to limit private landholdings to 12,400 acres (5,000 ha). The increased government role in the economy will do little to assuage the concerns of the current economic elite.

See also BOLIVIA (Vols. I, II, III); COCA (Vols. I, II, III).

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**Mora Valverde, Manuel** (b. 1909–d. 1994) *labor and social activist and Costa Rican politician* Born into a working-class family, Manuel Mora Valverde experienced a childhood filled with the deprivations of COSTA RICA's lower socioeconomic groups, the most poignant being the death of two sisters because his family could not afford the necessary oxygen bags to sustain them. As a law student, he was exposed to some of his nation's most renowned intellectuals, such as Joaquín García Monge (b. 1881–d. 1958) and Carlos Luis Sáenz (b. 1899–d. 1983). Mora became a student activist on behalf of the poor and in 1929 became a leading organizer of the Workers and Peasants Bloc, a communist party that in 1943 changed its name to the People's Vanguard Party (PVP). Mora and his colleagues capitalized on the adverse impact of the Great Depression on LABOR to organize a union whose membership grew precipitously throughout the 1930s. Labor's influence became apparent in the 1940 presidential election and again in the 1942 congressional elections. The party reached its zenith during WORLD WAR II. Reportedly, Mora helped to author the 1943 labor code, and he supported the successful presidential candidacy of Teodoro Picado (b. 1900–d. 1960) in 1944 in return for Picado's promise to implement Mora's social program. Mora served two stints in the national congress, in 1934–48 and again in 1970–74.

Although Mora claimed that his social philosophy was based on Pope Leo XIII's encyclical *Rerum Novarum*, that called for social justice for the poor, political leaders from 1936 until 1974 charged Mora with being a communist and an agent of the Soviet Union. Following the

1948 civil war, JOSÉ FIGUERES FERRER outlawed the party (see CIVIL WAR OF 1948, COSTA RICA). Nevertheless, many of the nation's leaders, particularly Figueres, presented social programs that closely paralleled that of Mora. U.S. ambassador to Costa Rica Nathaniel P. Davis noted the similarities during the 1948 civil war, prompting him to conclude that the Figueres-Mora feud was in the *personalismo* tradition of Costa Rican politics, a political conflict between individuals not political ideologies.

After leaving Congress in 1974, Mora remained a labor and social activist but garnered little political support as the National Liberation Party (Partido de Liberación Nacional, or PLN) had already implemented most of his proposals. He finally retired from politics in 1988. Just prior to his death on December 29, 1994, the Universidad de Costa Rica and the Universidad Estatal a Distancia presented him with honorary degrees and the national legislature bestowed on him the title Benemérito de la Patria (Hero of the Fatherland) for his contributions to Costa Rican society.

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**Morínigo, Higinio** (b. 1897–d. 1983) *president of Paraguay* Higinio Morínigo was born to middle-class parents in the town of Paraguari, some 40 miles (64.4 km) from Asunción, PARAGUAY. The family relocated to the capital city in 1906 and there, Morínigo Higinio entered the national MILITARY academy. He graduated from the school in 1922 as a second lieutenant. Thereafter, Morínigo rose steadily through the ranks. He served in the CHACO WAR (1932–35) with BOLIVIA, where he attained the rank of colonel and was placed in charge of the important garrison at Concepción. In 1938, Morínigo became the army's chief of staff; in 1939, interior minister; and in 1940, minister of war under President José Félix Estigarribia (b. 1888–d. 1940). When Estigarribia died in a plane crash on September 5, 1940, the army's high command recommended Morínigo complete the former's presidential term. Unopposed, Morínigo won the February 15, 1943, elections and remained in the presidential office until deposed by a coup d'état on June 3, 1948.

Despite declaring his country officially neutral and being courted by the United States, Morínigo sympathized with the Nazi cause during WORLD WAR II and permitted its agents to pass along information to their colleagues in ARGENTINA (see WORLD WAR II AND LATIN



AMERICA). Only with an Allied victory in sight in February 1945 did Morínigo declare war on the Axis.

Following the war, Morínigo attempted to force out right-wing members of his administration and create a coalition government that included members of the Colorado Party and the Febrerista Revolutionary Party. Rather than pacify the country, Morínigo's conciliation effort led to bloody civil war. Morínigo defeated the rebels but only with the help of Colorado militias and troops brought in from Argentina. No longer an effective ruler, Morínigo resigned on June 3, 1948, and departed Paraguay for self-exile in Argentina.

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**MRTA** See TÚPAC AMARU REVOLUTIONARY MOVEMENT.

**Muñoz Marín, Luis** (b. 1898–d. 1980) *writer and governor of Puerto Rico* Luis Muñoz Marín abandoned his career as a journalist and poet to enter Puerto Rican politics in 1938. He served as a four-term elected governor of the island. His achievements earned him the U.S. Medal of Freedom in 1962 and the title “Father of Modern Puerto Rico.”

The son of a newspaper publisher and resident commissioner of PUERTO RICO to the U.S. Congress, Luis Muñoz Rivera (b. 1858–d. 1916), and Amalia Marín Castilla, Muñoz Marín spent his early years traveling between Puerto Rico and the United States. Owing to his father's illness and subsequent death, Muñoz Marín was unable to complete his law studies at Georgetown University. He returned to Puerto Rico in 1916 and in 1919 married American feminist writer Muna Lee, with whom he had two children. The marriage ended in divorce in 1946, after which Muñoz Marín married his longtime mistress, Inés Mendoza.

Muñoz Marín entered Puerto Rican politics when he joined the Socialist Party (Partido Socialista) in 1920. He advocated on behalf of LABOR for better wages and working conditions and greater job opportunities. Muñoz Marín also called for Puerto Rican independence from the United States. He left the Socialist Party for the Liberal Party (Partido Liberal) in 1932 but remained an advocate for labor, particularly rural labor. Along with Liberal Party founder Antonio R. Barceló (b. 1868–d.

1938), Muñoz Marín was elected to the Puerto Rican Senate for the 1933–37 term. He changed POLITICAL PARTIES again in 1938 when he joined the Popular Democratic Party (Partido Popular Democrático), under whose banner he won a Senate seat in the 1940 and 1944 elections.

Muñoz Marín shared many of the reform ideas held by Rexford G. Tugwell (b. 1891–d. 1979), who became governor of Puerto Rico in 1942. As a result, basic reforms in land tenancy, natural resources, TRANSPORTATION, and EDUCATION were enacted. New accounting systems and oversight helped curb government corruption. The World War II era also stirred the beginnings of Puerto Rico's industrial development. These accomplishments contributed to Muñoz Marín's change of heart about independence; he now believed that Puerto Rico's future held greater promise if it secured U.S. assistance rather than attempt to go it alone. He recognized that the island lacked sufficient resources, and its people, the political experience for complete independence.

Muñoz Marín's legislative accomplishments contributed to his victory as the first elected governor of Puerto Rico in 1948. His first objective—to provide for greater Puerto Rican self-government—was accomplished in 1952 with a Puerto Rican constitution and the island becoming an associated free state, or commonwealth, of the United States. Under this arrangement, the islanders retained their U.S. citizenship and tax-exempt status. It also lifted the stigma of colonial status for the Puerto Rican people.

The roots of OPERATION BOOTSTRAP, which led to Puerto Rico's industrialization, can be found in the World War II era, when the Puerto Rican Industrial Development Company (PRIDCO) was established to attract foreign INDUSTRY, the U.S. government invested in textile manufacturing, military installations were constructed across the island, and educational opportunities for Puerto Ricans were improved. The heyday of industrialization came in the 1950s and 1960s when U.S. and Puerto Rican tax incentives, grants, and cheaper labor costs brought U.S. companies to the island in the textile, pharmaceutical, and electronics industries and subsequently in heavy industry, such as oil refining and petrochemicals. For his efforts regarding Puerto Rico's relations with the United States, the island's industrialization, and his emphasis on the island's ARTS and culture, Puerto Ricans came to call Muñoz Marín the “Father of Modern Puerto Rico.”

Muñoz Marín decided not to seek another term as governor in 1964, preferring to turn over the office to his hand-chosen successor, Secretary of State Roberto Sánchez Vilella (b. 1913–d. 1997). Muñoz Marín continued to serve in the Senate until 1970, at which time he retired to private life. Owing to complications from heart disease, Muñoz Marín died at age 92 on April 30, 1980.

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**muralists, Mexican** Mexico's muralist movement emerged during the 1920s when Education Minister José Vasconcelos (b. 1882–d. 1959) commissioned some of the country's foremost artists to paint national history on public buildings. Diego Rivera (b. 1886–d. 1957), David Alfaro Siqueiros (b. 1896–d. 1974), and José Clemente Orozco (b. 1883–d. 1949) transformed the MEXICAN REVOLUTION into an artistic message; they became known as “*Los Tres Grandes*,” or the “Big Three,” of the muralist movement. Together, they defined Mexican ART for several decades and ensured that a specific version of national identity was proliferated in public spaces.

President ÁLVARO OBREGÓN appointed Vasconcelos education minister in 1922 and charged him with overseeing the dissemination of the government's revolutionary message throughout MEXICO. The work of a rising group of artists caught his eye. Rivera, Siqueiros, and Orozco had been trained during the violent phase of the Mexican Revolution and experimented with a variety of new painting techniques as an expression of revolutionary solidarity. They incorporated images of NATIVE AMERICANS and the working classes into their constructions of national identity, and their artistic style became part of a larger celebration of native cultures known as *indigenismo*.

Vasconcelos commissioned grand murals to be painted on the walls of government buildings in the early 1920s. Rivera became one of the most famous of the muralists. He completed projects at the National Preparatory School, the offices of the Ministry of Education, and the Agricultural School at Chapingo. Many of his murals depict indigenous people being exploited by powerful politicians and capitalists. His idealized portrayals of the peasantry reflect sympathy for their plight and clearly define revolutionary ideals. Rivera's work became internationally renowned, and he was commissioned for work in the Soviet Union and the United States. In 1929, Rivera married Frida Kahlo (b. 1907–d. 1954), a young artist and admirer who became a globally recognized artist in her own right. Rivera completed his most famous mural between 1934 and 1945 on the walls of the National Palace in MEXICO CITY. That work depicts the nation's history from pre-Columbian times through the Mexican Revolution.

Orozco and Siqueiros also painted public murals to express their revolutionary ideologies. The works

of Siqueiros and Rivera are featured on the sides of buildings on the campus of the National Autonomous University of Mexico (Universidad Nacional Autónoma de México, or UNAM). Orozco, who started his career as a cartoonist, is famous for his works in Guadalajara. Many of his murals are outwardly violent and grotesque, as he aimed to show the realities of the revolution and of life more generally.

Many of Mexico's famous muralists were heavily involved with communist politics. Rivera and Kahlo were well-known supporters of the Communist Party and helped secure asylum in Mexico for the exiled Soviet leader Leon Trotsky in 1937. Siqueiros was a self-proclaimed communist and was eventually arrested for his political activities in the 1960s. Orozco never claimed a close affiliation with communism, although many of his works were criticized as leftist propaganda.

Throughout the 20th century, the works of Mexico's muralists have been perceived as a nationalist project and an important component in the evolution of national identity.

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**Musa, Said** (b. 1944– ) *prime minister of Belize* Born on March 19, 1944, in San Ignacio, British Honduras (later BELIZE), to Hamid and Aurora Musa, Said Musa is of Palestinian and Lebanese ancestry. He attended St. Andrew's Primary School in San Ignacio and high school at St. Michael's College in Belize City. Musa earned a doctorate in law at the University of Manchester in 1966. Musa returned to Belize in 1967 and went into private practice. He joined the People's United Party (PUP) in 1974 and was elected to the first Belizean National Assembly in 1979, where he served on the committee that wrote the Belizean constitution.

Musa was attorney general and minister of economic development during GEORGE PRICE's first term as prime minister (1981–84). During Price's second term (1989–93), Musa was minister of foreign affairs and education. He orchestrated negotiations with GUATEMALA that resulted in that country's recognition of Belize in 1991. When Price retired in 1996, Musa took over leadership of the PUP. He led the PUP to victory in the 1998 and 2003 parliamentary elections. During his tenure, Musa fostered significant economic growth, especially in the tourism INDUSTRY. His popularity suffered during his second term due to allegations of corruption. In 2008, he stepped down as party leader. On June 9, 2009, Belize's

chief justice, Abdullai Conteh, declared that because of insufficient evidence against Musa, he could not stand trial on corruption charges, a ruling that the director of public prosecution, Cheryl Lynn Branker-Taitt, promised to appeal. Musa's son Yasser (b. 1970– ) heads the National Institute of Culture and History and serves as director of public relations for the PUP.

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**music** Latin America's Spanish colonizers attempted to repress the indigenous music of the time and replace it with their own religious themes and tempos, which eventually led to a proliferation of church choirs supported by the organ. During the 1600s, church music flourished in the Spanish New World, while in the mid-1700s, public theaters in many cities held performances of Spanish musicals. In the 19th century, the Italian opera made its way to Latin America and contributed to the development of a new genre that surfaced at the turn of the century: nationalism. A purely Latin American folk music took root until the next significant change in music occurred during the 1950s. Beginning with the rock and roll revolution of the 1950s and 1960s, Latin American music borrowed heavily from these genres.

In addition to borrowing from abroad, Latin America has produced musical styles that have had a lasting local and international influence. Indigenous folk music and instruments, such as the traditional Andean flute, or *quena*, remain popular, particularly in BOLIVIA and PERU, and performances are well received throughout the Southern Cone nations. MEXICO, the largest Spanish-speaking nation in the Western Hemisphere, has a long history of mixing Indian folk and Spanish music, as, for example, in the internationally renowned Ballet Folklórico de México. The so-called northern music, or *música norteña*, of borderland Mexico utilizes the accordion to play waltzes and polkas borrowed from the United States. Mexican influence is also found in Central American music, although Guatemala's national instrument, the marimba, which is most likely of African descent, sets its music apart. Cuban music probably has had the most influence internationally, particularly in the United States. Music from Cuba, the capital of cross-cultural relationships dating to colonial times, has a heavy African influence that first gained notoriety from 1880 to 1920. Thereafter, a steady stream of Cuban artists, such as Xavier Cugat (b. 1900–d. 1990), made their way to the United States and beyond.

South American artists also contributed to the international scene. The tango became a dance phenomenon across the globe during the 1930s, as did its

songs sung by Carlos Gardel (b. 1887–d. 1935) that described the plight of immigrant urban workers in ARGENTINA. Venezuelan Edmundo Ros (b. 1910– ) was a bandleader of that era who gained fame and fortune in the United States and Great Britain. BRAZIL produced its own form of the tango in the late 19th century, but it was the samba, a nationalistic music-dance form developed in the early 20th century, which has had the most staying power. Artist Ary Barboso's (b. 1903–d. 1968) 1939 hit "Aquarela do Brasil" also became a hit in the United States on several occasions, under the title "Brazil." The samba derivative influenced by U.S. jazz, the bossa nova, received worldwide fame in the early 1960s, but of more long-lasting influence was Astrud Gilberto's (b. 1940– ) "The Girl from Ipanema." Songs and music movements out of the DOMINICAN REPUBLIC and PUERTO RICO have also received international recognition. Music cross-fertilization is strong among many Latin American countries, such as Argentina and CHILE, and ECUADOR and Peru.

The Cuban Revolution produced *nueva canciones*, which reflect socially progressive themes and commentary influenced by the troubador tradition and singer-songwriter confessionalism. It ranges in presentation from individual acts such as those of Cuban Silvio Rodríguez (b. 1946– ) to folk-style groups such as Inti Illimani from Chile.

Beyond Cuba, Caribbean music is a diverse grouping of musical genres. They are each syntheses of African, European, Indian, and native influences. Some of the styles to gain wide popularity outside the Caribbean include salsa, reggae, bomba, plena, and merengue.

In the 1960s and 1970s, New York City's Latino melting pot became home to the modern salsa and the merengue that blends rock, jazz, and Latin American and Puerto Rican musical traditions. Salsa soon gained wide acceptance in Europe. Reggae no longer is a Jamaican genre. Jamaican music and dancehall styles helped to create the Puerto Rican bomba and plena as well as hip-hop and rap in the United States and, more recently, in Latin America. The merengue was created by Níco Lora, a Dominican of Spanish descent, in the 1920s. In the Dominican Republic, it was promoted by Rafael Trujillo, the dictator from the 1930s through the early 1960s, and became the country's national music and dance style. Merengue's most popular song at the time, "Compadre Pedro Juan," by Luis Alberti, became an international hit. Angel Vilorio and his band, Conjunto Típico Cibaeño, made the merengue popular in the United States. Other Caribbean music that gained international notoriety includes the Trinidadian calypso and Antiguan soca. Visitors to Trinidad and Tobago are usually greeted at the pier or airport by a steel band. This band of musicians is dominated by a group of steel drummers, an instrument forged from a 55-gallon oilcan, hence the name steel drum. Its origins



A steel band, common throughout the Caribbean region, performs for tourists at the port in Bridgetown, Barbados. (Thomas M. Leonard Collection)

are traced to Trinidad and Tobago's early 19th-century Carnival percussion groups.

A unique cross-cultural form is Tejano music, a blend of country, rock, and rhythm and blues, born in southern Texas and made famous by latina singer Selena Quintanilla-Pérez (b. 1971–d. 1995), is performed in both Spanish and English, particularly in the United States and Mexico.

Other styles of popular music with a distinctively Latin style include Latin jazz, Argentine and Chilean

rock, and Cuban and Mexican hip-hop. Each is based upon the respective styles from the United States.

See also *MUSIC* (Vols. I, II, III).

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**NAFTA** See NORTH AMERICAN FREE TRADE AGREEMENT.

**National Liberation Movement (Movimiento de Liberación Nacional–Tupamaros; MLN-T)** The National Liberation Movement (MLN-T), often called the Tupamaros, was a major Uruguayan guerrilla group between 1967 and 1972. It was one of several urban guerrilla groups that also afflicted ARGENTINA, BRAZIL, and VENEZUELA during the same period. In the urban setting, guerrilla warfare was often indistinguishable from acts of terrorism. In most cases, including those in Latin America, urban guerrilla warfare failed and created or led to the further entrenchment of existing MILITARY dictatorships.

Founded in 1962 by a group of dissident Socialist Party members, the Tupamaros took their name from the 18th-century indigenous leader Túpac Amaru II. Its first leader and spokesman, Raúl Sendic (b. 1926–d. 1989), a law student and organizer of sugarcane workers, founded the group, which never presented a coherent philosophy. The MLN-T’s writings appeared to be nationalist, Marxist, and revolutionary. Rather than taking control of government itself, the MLN-T hoped to incite mass action against URUGUAY’S stagnant political structure.

Influenced by the Cuban model, the MLN-T initially did not directly challenge the government or its military, instead organizing itself into clandestine cells to steal food and other provisions from the rural elite for distribution to the urban poor and to kidnap prominent persons for ransom to fund their operations. In 1967, amid a string of well-publicized robberies and kidnappings, the MLN-T issued a letter through vari-

ous newspapers asserting that its goal was to awaken the public conscience and to change Uruguay’s political and economic structures. In response, President Jorge Pacheco (b. 1920–d. 1998) instituted a ruthless suppression program that from 1967 to 1972, escalated into the capture, torture, and killing of prominent individuals by both government forces and the MLN-T.

On August 10, 1970, the Tupamaros assassinated U.S. Agency for International Development public safety officer Dan Mitrione in retaliation for the U.S. training of the Uruguayan military in torture techniques. On January 8, 1971, they kidnapped and held captive for eight months British ambassador Geoffrey Jackson as leverage to ensure the fair participation of the left-leaning Frente Amplio (Broad Front) candidates, in the November 1971 elections. When more than 100 MLN-T members escaped from Punta Carretas prison on September 9, 1971, President Pacheco put the army in charge of all antiguerrilla activity. Newly elected president Juan María Bordaberry (b. 1928– ) went further on April 14, 1972. He declared a “state of internal war,” suspended all civil liberties, and adopted a State Security Law that empowered the military to suppress the MLN-T, which it did by the year’s end. Those MLN-T members who survived the military suppression, which included death squads, went into exile. Until 1985, the military continued to administer the country through a junta established on June 27, 1973.

When democracy was restored in Uruguay in 1985, the MLN-T transitioned into a legal political party. It joined with other leftist forces to found the People’s Participation Movement (Movimiento de Participación Popular, or MPP) in 1989. In 1995, José Mujica (b. 1935– ), a founding member of the MLN-T, was

elected to Congress. Subsequently, the MPP joined Frente Amplio's broader-based coalition of leftist political groups headed by former mayor of Montevideo and the current president of Uruguay Tabaré Vázquez (b. 1940– ). The 2004 elections that brought Vázquez to the presidency also brought two old-time MLN-T members to Congress: Mujica and Nora Castro (b. 1947– ).

See also TUPAC AMARU II (Vol. II).

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**National Revolutionary Movement (Movimiento Nacional Revolucionario; MNR)** The National Revolutionary Movement (MNR) is considered by many analysts to be the most important political party in BOLIVIA'S 20th-century historical experience. Among its founders in 1941 were future presidents VICTOR PAZ ESTENSSORO (b. 1907–d. 2001) and Hernán Siles Zuazo (b. 1914–d. 1996). Since its beginnings as a leftist reform party, it appealed to the needs of the tin miners, Bolivia's largest LABOR sector. Over time, however, it drifted to the political right, and in the 1980s, the MNR leadership accepted the principles of neoliberalism. The MNR first came to political prominence in 1943 when it supported the regime of General Gualberto Villarroel (b. 1908–d. 1946) because of his reformist tendencies. Following his inauguration as president on April 15, 1952, Paz Estenssoro launched a social revolution based on the MNR's fascist principles, including the establishment in 1952 of a corporate state. The Mining Corporation of Bolivia (COMIBOL) became the state agency that administered the nationalized tin mines and the Bolivian Labor Federation (COB) became a semiautonomous umbrella for the labor unions. The government also implemented a land reform program, and universal suffrage was introduced.

Personal conflicts at the center of intraparty squabbles caused the MNR to split into several factions and led to the departure of JUAN LECHÍN OGUENDO and Siles to establish their own political parties: the National Revolutionary Movement of the Left (Movimiento Nacionalista Revolucionario de Izquierda, or MNRI) and Revolutionary Party of the National Left (Partido Revolucionario de la Izquierda Nacional, or PRIN), respectively. In time, Siles's MNRI replaced Paz Estenssoro's MNR as labor's most effective political voice. When Paz Estenssoro assumed the presidency for

the fourth and last time in 1985, he had accepted the principles of neoliberalism.

Gonzalo Sánchez de Lozada (b. 1939– ) succeeded Paz Estenssoro as party leader and continued neoliberal economic policies during his 1993–97 presidential term. Thereafter, the party's percentage of the popular vote steadily declined. In the December 18, 2005, elections, its presidential candidate Michiaki Nagatani Morishita (b. 1960– ) garnered only 6.5 of the popular vote, seven of 127 seats in the Chamber of Deputies, and one of 27 seats in the Senate. In the 2005 election, Bolivia's electorate moved further to the left with the election of JUAN EVO MORALES AYMA as president.

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**Native Americans** The Native Americans are the indigenous peoples of the Western Hemisphere whose ancestors, most scholars believe, entered the Americas from Asia by way of the Bering Strait during the glacial period, which ended some 11,000 years ago. Because precise figures are lacking, the number of Native Americans in the Spanish New World during the colonial period is unknown. After a century of colonization, the best studies point to a 95 percent drop in the indigenous population in MEXICO, to 1.5 million in 1605, and a 50 percent drop in PERU to approximately 600,000 by 1620. Scholars attribute the sharp declines mainly to disease: The Europeans brought smallpox, measles, influenza, and various venereal diseases, among other illnesses, to the New World. The number of Latin American indigenous during the colonial period is blurred by the emergence of the mestizo, the offspring of a white and an Amerindian, and in BRAZIL, in particular, by the *mulacco*, or *zambo*, the offspring of an Amerindian and a black, and their descendants. In 1830, approximately 28 percent of independent Spanish America's population was of mixed blood, as was almost 18 percent of Brazil's population.

In the 150 years that followed Latin America's independence, the Native American population slowly recovered in size so that in the early 21st century, Native Americans account for approximately 11 percent of the region's total population, while mestizos account for nearly 15 percent. Because of discriminatory census policies, an accurate count of *mulaccos* is difficult to ascertain. Native Americans are spread across 15 Latin American countries but make up the majority only in BOLIVIA, where they account for 55 percent of the population. They are significant minority groups in other countries: GUATEMALA, 40 percent of the population; Peru, 37 percent; ECUADOR, 25 percent; and Mexico, 12



An 18-year-old Schmer Indian mother with her 18-month-old daughter in Ecuador (Thomas M. Leonard Collection)

percent. The mestizo population is a majority in most countries: PARAGUAY, 95 percent; HONDURAS and EL SALVADOR, 90 percent; Mexico, 75 percent; PANAMA, 70 percent; NICARAGUA, 69 percent; Ecuador, 65 percent; and COLOMBIA, 58 percent. The most rural of the indigenous groups have done much to maintain their traditional culture, as publically expressed in their language, dress, RELIGION, and civil authority. Throughout the 20th century, indigenous groups have been largely neglected by their governments, as seen in Bolivia, Guatemala, Mexico, and Peru. In Paraguay, government indifference toward Amerindians has resulted in the near obliteration of the Aché hunters and gatherers, while the devastation wrecked on the Brazilian Amazon has pushed Amazonia Indians deeper into the jungle's uncharted lands.

The plight of Native Americans contributed to the United Nations declaring in December 1994 the years 1995–2005 the International Decade of the World's Indigenous People. During that period, Latin America's indigenous exercised extensive political influence, which raised international awareness of their plight. Mexico saw the Zapatista uprising in 1994, and Ecuador's indigenous

took to the streets on several occasions to protest for socioeconomic and constitutional changes that would improve their quality of life and give them civil guarantees (see EZLN). Similar demonstrations in Bolivia resulted in the collapse of the Sánchez-Lozada government on October 17, 2003. The three-decade-old civil war in Guatemala was brought to an end on September 17, 1996, and the peace accords included an agreement on the identity and rights of indigenous peoples. With Latin America's transition to more democratic governments in the 1990s, indigenous groups became more politically active. Their voting strength vaulted Alejandro Toledo (b. 1946– ) and JUAN EVO MORALES AYMA to the Peruvian and Bolivian presidencies, respectively.

Nevertheless, despite programs during the 1990s aimed at improving EDUCATION and health care among indigenous peoples, Amerindians remain behind other social sectors in educational achievement as measured by standardized testing and as health care recipients. Employment levels vary from country to country, but none present a marked improvement for indigenous workers or an increase in skilled laborers. The obstacles make it unlikely that the Latin American countries will achieve the United Nations Millennium Development Goal (MDG) of halving the 1990 poverty rate by 2015.

See also DISEASE (Vol. I); NATIVE AMERICANS (Vols. I, II, III).

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**Nicaragua** Nicaragua is the largest country in CENTRAL AMERICA and also its most sparsely populated. Sixty-nine percent of its 5.48 million people are mestizo. The volcanic central highlands are home to the majority of the population and are flanked by the narrow Pacific coastal plain and the more tropical and remote Caribbean coast. Service industries in commerce, construction, government, banking, TRANSPORTATION, and energy provide 58 percent of the gross domestic product (GDP), while AGRICULTURE and INDUSTRY provide 22 percent and 21 percent, respectively. Nicaragua endures a wide disparity in the distribution of wealth and is the second poorest nation in Central America, after HONDURAS.

Following its discovery by Francisco Hernández de Córdoba in 1524, Nicaragua remained an outpost of Spain's New World empire. Following independence in 1821, Nicaragua joined the United Provinces of Central America, and after its collapse in 1839, a Liberal-Conservative struggle characterized the country's politics until 1893, when Liberal JOSÉ SANTOS ZELAYA became

president. Zelaya's Liberal policies opened Nicaragua to foreign investment, largely North American; encouraged coffee and banana production; and led to the construction of schools and improved infrastructure, in particular roads and port facilities. With time's passage, Zelaya became increasingly dictatorial, which intensified Conservative and Liberal opposition against him. Zelaya's subsequent tax policies raised the ire of both foreign residents and foreign investors. Zelaya's maneuvering for dominance of Central American political affairs and, after the United States began its canal project at Panama, his search for a Japanese or German partnership to construct a transisthmian canal through Nicaragua, led to increased U.S. interest in Nicaraguan affairs.

#### YEARS OF U.S. PRESENCE, 1909–1934

In 1909, when Conservative and dissident Liberal forces joined to oust Zelaya in a coup d'état during which two U.S. mercenaries lost their lives at the hands of government troops, the United States intervened, which began 24 years of U.S. involvement in Nicaraguan political affairs. During that time, U.S. Marines supervised elec-

tions, protected U.S. properties, and trained a national guard, ostensibly to replace the army and to be apolitical. In a policy described as "dollar diplomacy," U.S. banks paid off Nicaragua's foreign loans, and marines supervised Nicaraguan customhouses to ensure repayment, with government-owned infrastructure and buildings used as collateral. The U.S. presence further fueled the Liberal-Conservative struggle for power.

In an effort to bring political calm, in 1927, U.S. secretary of war Henry L. Stimson was dispatched to Nicaragua to mediate a settlement among the competing factions. The resultant Treaty of Tipitapa, signed on May 4, 1927, provided for U.S. supervision of the 1928 presidential elections, which were won by Liberal José María Moncada (b. 1870–d. 1945).

AUGUSTO CÉSAR SANDINO was among those opposed to the Treaty of Tipitapa, and for the next four years, he used the agreement as a rallying point for his supporters to oust the United States from Nicaragua. Sandino, the illegitimate son of a wealthy landowner and a mestizo servant, left home at an early age to travel in Central America and Mexico, an experience that nurtured his



Members of the Sandino guerrilla forces in Nicaragua, circa 1927 (*Records of the U.S. Marine Corps*)



anti-American nationalism and awakened his social consciousness. On his return to Nicaragua in 1923, Sandino supported the Liberal cause in national politics but viewed the 1927 Tipitapa agreement as a sellout to U.S. interests. He refused to disarm his ragtag army and for the next four years led a guerrilla war against U.S. Marines. He inflicted heavy damage on U.S. properties, particularly mining and lumber enclaves. The war became unpopular in the United States and contributed to President Herbert Hoover's withdrawal of U.S. Marines from Nicaragua on January 1, 1933, as well as the GOOD NEIGHBOR POLICY, announced by President Franklin D. Roosevelt during his inaugural address on March 2, 1933. Immediately after the U.S. Marines withdrew on January 1, 1933, Liberal Juan Batista Sacasa (b. 1874–d. 1936) moved into the presidential office, while Sandino and his followers relocated to a sanctuary along the Cocos River.

### THE SOMOZA DYNASTY

Sacasa attempted to reach an agreement with Sandino. Following a meeting between them at the presidential palace on February 21, 1934, Sandino was assassinated by National Guard officers at the direction of its chief, ANASTASIO SOMOZA GARCÍA. Somoza, who assisted the United States in its battle against Sandino, sought power for himself. He constantly confronted Sacasa until the latter's resignation on June 6, 1936. Somoza won the December 8, 1936, election by a remarkable 107,201 to 108 margin and took office on January 1, 1937. This marked the beginning of 19 years of personal rule and of a family dynasty that lasted until July 19, 1979. During his tenure, Somoza and his National Liberation Party (Partido de Liberación Nacional, or PLN) controlled the national legislature through rigged elections and intimidation of the opposition. Somoza appointed family members and close associates to government posts and to direct private-sector operations. The Somozas expanded their control of the ECONOMY during WORLD WAR II, and by the time of Somoza García's assassination in 1956, the family owned the national railroad, national bank, port facilities, construction facilities, and countless acres of agricultural land. Somoza and his sons were staunchly pro-United States, and Somoza García used every opportunity he could to show his alleged closeness to President Roosevelt. During World War II, Somoza openly supported the Allied cause and followed the U.S. lead in controlling German influence in the country but would not accept U.S. training of National Guard troops to meet civilian needs. After the war, he was stridently anticommunist. Opposition to Somoza surfaced at the end of World War II and intensified until 1956, when he again sought to manipulate the constitution in order to extend his presidency. On September 21, 1956, poet Rigoberto López (b. 1935–d. 1956) fatally shot Somoza García, whose National Guard security forces quickly shot López. López's motivation is not fully understood.

### REVOLUTION AND CONTINUED TURMOIL

Eldest son Luis Somoza Debayle (b. 1922–d. 1967) assumed the presidency and won it outright in the 1963 elections. During his term in office, he restored the constitutional ban on reelection and lifted many controls on society, including press censorship. René Schick Gutiérrez (b. 1904–d. 1966) succeeded Luis in 1963, and when he died in office three years later, Vice President Lorenzo Guerrero Gutiérrez (b. 1900–d. 1981) followed. In the wings was ANASTASIO SOMOZA DEBAYLE (b. 1925–d. 1980), who assumed directorship of the National Guard on his father's death in 1956. The younger Somoza continued to use the National Guard to suppress the regime's opposition. Somoza won the February 8, 1967, presidential elections, at least according to the official count. Long-standing elite and middle-sector opposition to the Somoza dynasty, coupled with U.S. pressure for political change, became so intense that Somoza stepped aside on May 1, 1972, in favor of a three-man ruling junta until the 1974 elections. Somoza, however, retained control of the National Guard.

Somoza's removal from the presidency opened the door to broad-based opposition. PEDRO JOAQUÍN CHAMORRO CARDENAL used his newspaper *La Prensa* to blame the Somoza dynasty for the nation's poverty, poor health and educational facilities, and inadequate housing. Catholic archbishop Miguel Obando y Bravo (b. 1926– ) published a series of pastoral letters critical of the Somoza dynasty. A lesser-known opposition group at the time was the SANDINISTA NATIONAL LIBERATION FRONT (FSLN), a small communist-leaning organization. These disparate factions slowly crystallized following the December 23, 1972, devastating earthquake that destroyed Managua and killed an estimated 16,000 people. Somoza's response set in motion an ever-increasing confrontation against him. The National Guard did not keep order following the tragedy, instead itself engaging in the looting. Somoza used reconstruction aid to restore the elite sections of Managua but not the poorer districts of the city. His construction companies benefited handsomely. By late 1978, Somoza's National Guard had lost control of the countryside and important rural cities and towns. Somoza became increasingly isolated yet failed to compromise with the opposition groups despite the mediation efforts pursued by the ORGANIZATION OF AMERICAN STATES (OAS) and U.S. president Jimmy Carter. Somoza was further weakened in February 1979 when Carter cut off all U.S. military assistance to him. The Nicaraguan government collapsed on July 19, 1979, and Somoza fled the country, first to the United States and then to PARAGUAY, where he was assassinated on September 17, 1980. As the Somoza regime collapsed, the FSLN took control of the Nicaraguan government.

While Carter appeared willing to work with the leftist FSLN, in 1981, incoming U.S. president Ronald Reagan did not. Reagan canceled the \$8 billion in reconstruction funds that Carter had promised, closed the U.S.

market to Nicaraguan exports, and engineered through the Central Intelligence Agency a clandestine war against the FSLN. The so-called Contra War eventually became public and ignited a national debate in the United States. Reagan and his supporters portrayed the war as a Soviet effort to extend its influence in Central America, while opponents viewed the FSLN victory as a culmination of the long struggle for social and economic injustice in Nicaragua. The U.S. Congress took the latter view and in 1986 terminated U.S. funding in support of the war. This prompted officials within the Reagan administration to make secret arrangements with foreign funding sources in an effort to sustain the contras. These illegal acts led to the eventual indictment of 19 individuals, including Secretary of Defense Casper Weinberger. President George H. W. Bush pardoned all of them.

During the 1980s, the Nicaraguan economy slowly collapsed, not solely because of Reagan's policies. The FSLN lacked experience in directing a national economy, which was evident in their mismanagement of the confiscated Somoza commercial properties. The FSLN antagonized cotton and tobacco producers by dictating production and controlling exports. Their failure to deliver on promises for housing, health, and educational improvements brought further discontent. The economic shortcomings, coupled with the postponement of elections, establishment of Committees for the Defense of the Revolution, and mass organizations meant only that the Nicaraguans traded one dictator for another.

The 1989 peace accords that ended the CENTRAL AMERICAN WARS also paved the way for presidential elections on February 25, 1990, which resulted in the victory of the National Opposition Union (Unión Nacional Opositora, or UNO) candidate VIOLETA BARRIOS DE CHAMORRO over FSLN leader DANIEL ORTEGA SAAVEDRA. Chamorro inherited a broken economy and demands for social justice, FSLN-led LABOR unions, and a national army led by FSLN general Humberto Ortega (b. 1951– ). Over the next 17 years, peaceful and relatively fraud-free elections were held, followed by the peaceful transfer of presidential power. Each president confronted monumental postwar reconstruction problems, exacerbated by Hurricane Mitch in 1998, that included reconstruction of the national infrastructure, the procurement of international assistance to develop the economy, and the need to address massive social inequalities. The situation was exacerbated by the continued FSLN ownership of many of the Somoza and other properties that had been nationalized in the 1980s. Today, Nicaragua endures a nearly 50 percent combined unemployment and underemployment rate and a national debt that matches 82 percent of the GDP. The gross disparity of wealth further inhibits economic growth. The poorest 10 percent of the population receives only 1.2 percent of the gross national income (GNI), while the wealthiest 10 percent receive 45 percent of the GNI. When Daniel Ortega won the November 5, 2006, presidential elec-

tions with 38 percent of the vote, he did not receive a mandate to address these issues.

See also HERNÁNDEZ DE CÓRDOBA, FRANCISCO (Vol. I); NICARAGUA (Vols. I, II, III); UNITED PROVINCES OF CENTRAL AMERICA (Vol. III).

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**Noriega Moreno, Manuel Antonio** (b. 1934– ) *de facto ruler of Panama* The illegitimate son of an accountant and his maid, Manuel Antonio Noriega Moreno rose to be the *de facto* ruler of PANAMA. Adopted by a schoolteacher at the age of five, he attended the prestigious National Institute School in Panama City and then PERU's MILITARY academy. Subsequently, he studied at the U.S. School of the Americas in the Panama Canal Zone. In 1962, he was commissioned as a sublieutenant in Panama's National Guard; in October 1968, he supported the Guard's coup that ousted President ARNULFO ARIAS MADRID; and in 1969, he supported Colonel Omar Torrijos (b. 1929–d. 1981) in an attempted counter coup. As a reward for his services, Torrijos appointed Noriega chief of the National Guard's G-2 intelligence unit.

During the 1970s, Noriega directed the arrest and deportation of Panamanian businessmen opposed to Torrijos's dictatorial rule. During the same period, Noriega became involved in drug trafficking and also served as an "asset" for the U.S. Central Intelligence Agency in gathering information about CUBA. He proved to be a double agent. There is also some evidence that Noriega was linked to the plane crash that took Torrijos's life on July 31, 1981. Although he participated in the secret March 8, 1982, agreement among Guard officers to rotate the presidency among themselves in the 1980s, Noriega manipulated his own rise to power. He became the Guard's chief of staff in August 1983 and used that position to isolate the head of state, Colonel Rubén Darío Paredes (b. 1934– ). By September 1983, clearly anyone seeking the presidency needed Noriega's approval. A month later, he had the National Legislature change the Guard's name to the Panama Defense Forces (PDF), which combined the Guard with the navy, air force, and police under his own leadership. In fraudulent elections

on May 6, 1984, Noriega placed Nicolás Andito Barletta (b. 1938– ) in the presidency but forced him from office on October 11, 1984, over concern that Barletta would direct an honest investigation into the brutal killing of Noriega's civilian opponent Hugo Spadafora (b. 1940–d. 1985), which Noriega allegedly ordered.

Also in the 1980s, Noriega became a useful U.S. agent in supplying the Nicaraguan Contras, but at the same time he supplied the Nicaraguan Sandinista leader with U.S. intelligence information and the Salvadoran rebels with arms from Cuba (see *CENTRAL AMERICAN WARS*). By 1986, Noriega had expanded the PDF from 4,000 to 15,000 men, created two new combat battalions, and brought selected PDF officers into the government's policy-making bodies. Opposition to Noriega began to crystallize by the mid-1980s. While in June 1986, U.S. journalist Seymour Hersh revealed Noriega's involvement in activities including money laundering, *DRUGS* and arms trafficking, and working as a double agent, the elite and middle sectors challenged his regime's political repression and violation of *HUMAN RIGHTS*. PDF officers outside of Noriega's inner circle also decried his dictatorial rule and illegal activities. When the U.S. Congress curtailed its support for the wars in El Salvador and Nicaragua, Noriega no longer served U.S. interests. In an effort to depose Noriega, U.S. Presidents Ronald Reagan and George H. W. Bush cut economic and military assistance to the dictator. An August 1987 Gallup poll revealed that 75 percent of the people residing in Panama City and Colón wanted Noriega to resign, but he refused to go. Instead, he used the specially trained forces known as the “Dobermans” to brutalize those who came out in protest. He organized marginalized blacks and mestizos into the Coalition of Popular Organizations to hold counterdemonstrations, during which they placed responsibility for the country's plight on the United States and the Panamanian elite. While Noriega could count on support only from his inner circle of officers, the Panamanian people awaited the May 1989 elections.

In those elections, the eight-party progovernment Coalition for National Liberation (Coalición para Liberación Nacional, or COLINA) nominated Carlos Duque (b. 1938– ) for president, and the Civil Opposition Democratic Alliance (Alianza Democrática de Oposición Civil, or ADOC) put forward Guillermo Endara (b. 1936– ), an ally of former president Arias. Noriega became the centerpiece of a campaign plagued with violence, with Duque promising to keep Noriega on as PDF leader and Endara promising to fire him. The May 7 election was one of Latin America's most widely supervised. The *CATHOLIC CHURCH*'s exit polls reported that Endara held a three-to-one victory margin, but the Electoral Tribunal announced on May 8 that preliminary results indicated that Duque was ahead by six percentage points. Public outrage followed the board's May 10 declaration that Duque had won the election by a two-to-one margin. In the violence that followed, Endara and

his running mate, Guillermo “Billy” Ford (b. 1937– ), were brutally beaten by Noriega's Dignity Battalions (paramilitary forces employed by Noriega to suppress his opponents), an event witnessed by millions on international television. In response, Noriega voided the elections, and the *ORGANIZATION OF AMERICAN STATES* subsequently failed to mediate a solution to the crisis. Finally, on August 31, 1989, Noriega named a former high school classmate, Francisco Rodríguez (b. 1938– ), as provisional president with a promise to consider holding new elections six months hence.

As events unfolded in Panama, in Washington, D.C., President Bush planned a U.S. response. He now ordered the dispatch of a brigade-size force (about 3,000 men) to the Panama Canal Zone to augment troops already there and quietly instructed the Pentagon to design a plan of action within Panama. The aim of apprehending Noriega in Panama for trial in the United States was reinforced on June 21, 1989, when the Justice Department granted the U.S. president legal authority to order the abduction of a fugitive residing in a foreign country for violation of U.S. law. The first opportunity to seize Noriega came on October 1, 1989, when a group of dissident PDF officers, with U.S. encouragement, attempted a coup d'état. The Pentagon was not prepared to intervene, however, and the coup failed. Henceforth Noriega increasingly taunted President Bush, and PDF forces harassed U.S. troops on the canal zone's border, as well as U.S. citizens in Panama. At the same time, U.S. forces increased their readiness to enter Panama.

The breaking point came on December 16, 1989, when U.S. Marine lieutenant Robert Paz was fatally shot by PDF forces in Panama City and also in December, when U.S. Navy lieutenant Adam J. Curtis and his wife were detained by the PDF. The lieutenant was beaten and his wife sexually harassed. On December 17, President Bush ordered the implementation of Operation Just Cause, the invasion of Panama and Noriega's apprehension. U.S. troops landed in the canal zone on December 19, 1989, and entered Panama the following day. Although the worst of the fighting was over within 18 hours, the conflict lasted nearly a week because Noriega's Dignity Battalions refused to surrender. Noriega took refuge in the Panama City residence of the Papal Nuncio and finally surrendered to U.S. authorities on January 4, 1990. Endara, the reported victor in the 1989 elections, became president.

The U.S. Defense Department put the cost of the invasion at \$163 million, with 23 military and three civilian deaths and another 323 military personnel wounded. It also reported 314 Panamanian military deaths and 124 wounded, and subsequent investigations by human rights groups estimated that some 2,500 Panamanians lost their lives. Property damage was in the millions, with businesses and residences burned and looted. Hardest hit was El Chorillo section of Panama City, closest to the PDF's headquarters and home to the poorest Panamanians.

Noriega languished in a Miami jail until his trial began in September 1991. He was found guilty of drug trafficking on April 10, 1992, and on July 10 the same year was sentenced to 40 years in prison. At his sentencing, a defiant Noriega charged President Bush with illegally invading Panama and warned that the Panama Canal would not exist by January 1, 2000, the day Panama was scheduled to take control of the waterway. After serving 15 years in a Miami federal facility, Noriega was scheduled for parole on September 7, 2007. Noriega, who wishes to return to Panama, remains incarcerated while his lawyers fight a French extradition request to put him on trial for drug-trafficking charges.

See also ARIAS MADRID, ARNULFO (Vol. IV); PANAMA CANAL, CONSTRUCTION OF (Vol. IV); PANAMA CANAL TREATIES (Vol. IV).

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**North American Free Trade Agreement (NAFTA)** (1992) Signed on December 17, 1992, and ratified by the Canadian, Mexican, and U.S. legislatures in 1993, the North American Free Trade Agreement (NAFTA) went into effect on January 1, 1994. At the time, NAFTA was the world's largest free TRADE ZONE, encompassing nearly 360 million people and a three-nation total gross national product (GNP) of \$6.5 trillion. Although modeled after the 1968 U.S.-Canadian Free Trade Agreement, NAFTA's immediate origins can be traced to the Mexican financial crisis of the early 1980s. Successive presidents Miguel de la Madrid (b. 1934– ) and CARLOS SALINAS DE GORTARI attempted to liberalize the Mexican ECONOMY by removing trade and investment restrictions put in place after the MEXICAN REVOLUTION from 1911 to 1917. Although Salinas de Gortari drastically reduced MEXICO's tariff barriers, loosened its investment laws, and sold off government-owned industries (except oil) during his administration from 1988 to 1994, the quality of life for the Mexican people did not appreciably improve. Hence, it was considered that the removal of all barriers would lead to further economic development. Although U.S. president George H. W. Bush and Canadian Prime Minister Brian Mulroney



U.S. researchers arrive at the U.S. Embassy in Santo Domingo, Dominican Republic, to discuss NAFTA's impact on the country's assembly industries. (Thomas M. Leonard Collection)

shared Salinas's vision for Mexico, each focused on their own national interests. For his part, Bush fretted over the potential effect that a Mexican economic downturn would have on the United States. Mulroney understood the need to protect Canada's access to the U.S. market and hoped Canada would benefit from free trade with Mexico.

The agreement provided for the elimination of tariffs on 9,000 categories of goods by 2009. Only goods produced in North America would be allowed to move freely across the three borders. Goods not containing North American content must be substantially transformed within the borders of one of the signatory partners to qualify for duty-free entry to another. The nationality of a manufacturing company does not matter. At the time, this meant that Japanese cars produced in Mexico could be shipped to the United States duty free. NAFTA also permits banking, telecommunications, information technology, and services ranging from insurance to trucking to conduct cross-border operations without discrimination. Provisions for the protection of intellectual property are included within the agreement. Bill Clinton's administration successfully negotiated two-side agreements on environmental and working conditions and wages in order to gain U.S. congressional passage of the NAFTA agreement.

NAFTA's accomplishments are a matter of conjecture and have become an emotional issue in the United States and Mexico. In the United States, NAFTA and Mexico receive blame for the outsourcing of U.S. jobs, but in the era of globalization the exact number of displaced workers due to NAFTA is hard to ascertain. Special sectors have been hard hit, among them growers of tomatoes and other table vegetables in south Florida,

who have lost U.S. market share to Mexican producers. In 2007, the U.S. trucking industry claimed that its survival was threatened by the admission of Mexican trucks into the United States, as they will carry goods more cheaply and avoid taxes for the maintenance of the highways they use.

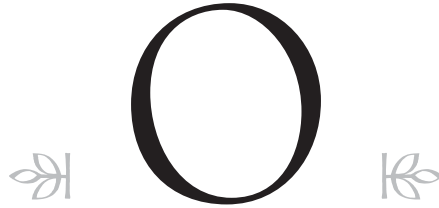
The Mexicans also have their complaints. Small grain growers have lost out to the more efficient and larger U.S. and Canadian agro-industries. There have been significant population shifts from southern and central Mexico as workers seek employment in the assembly plants (MAQUILADORAS) along the U.S.-Mexican border. In the era of globalization, Mexico has also suffered from the relocation of assembly industries to the cheaper labor markets in Southeast Asia and China.

And while U.S. investment in Mexico has increased, its contribution to job growth has not kept pace with the growth of the Mexican LABOR market. The United States remains a safety valve for Mexico's poor and unemployed and contributes to the controversy in the United States over its immigration policies (see IMMIGRATION FROM MEXICO TO THE UNITED STATES).

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**Obregón, Álvaro** (b. 1880–d. 1928) *revolutionary leader and president of Mexico* Álvaro Obregón was one of the principal leaders of the MEXICAN REVOLUTION; he became president of MEXICO in 1920. He was known as an adroit MILITARY commander, and as a politician, he gained the support of workers and peasants. He was the first president to implement any meaningful social reform after the revolution.

Obregón was born on February 19, 1880, on an hacienda in the state of Sonora. He witnessed the outbreak of revolution in 1910 but refrained from joining the movement until after the assassination of FRANCISCO MADERO in 1913. At that time, he joined the Constitutionalist Army of VENUSTIANO CARRANZA and helped overthrow the dictator VICTORIANO HUERTA. Obregón remained loyal to Carranza as the country descended into civil war in 1914 and Carranza split with fellow revolutionaries FRANCISCO VILLA and EMILIANO ZAPATA. Obregón supported Carranza's conservative stance at the CONVENTION OF AGUASCALIENTES and in the deliberations for drafting the CONSTITUTION OF 1917. Nevertheless, when Obregón announced his plans to run for president in 1920, Carranza supported another candidate. Obregón and his political allies ADOLFO DE LA HUERTA and PLUTARCO ELÍAS CALLES then led a revolt to overthrow Carranza, and Obregón won the presidency.

Obregón served as president during a time of rebuilding after the Mexican Revolution. Unlike Carranza, who had not instituted the reforms called for in the Constitution of 1917, Obregón began implementing modest reforms. He supported LABOR GROUPS IN MEXICO and devoted national resources to improving EDUCATION. Obregón ran for president in 1928 after sitting out one term. He won the election but before he could take

office was assassinated by a supporter of the CRISTERO REBELLION on July 17, 1928.

**Further reading:**

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**OECS** See ORGANIZATION OF EASTERN CARIBBEAN STATES.

**Office of the Coordinator of Inter-American Affairs (OCIAA)**

The Office of the Coordinator of Inter-American Affairs (OCIAA) was established by presidential executive order on July 30, 1941, to coordinate the cultural and commercial relations of the Western Hemisphere during World War II. U.S. president Franklin D. Roosevelt appointed Nelson R. Rockefeller (b. 1908–d. 1979) as coordinator of the office, a position that reported directly to the president. The executive order directed Rockefeller to work with the State Department in planning and implementing various policies and programs in public relations, the ARTS, EDUCATION, cinema, and commercial activities that would advance the economies of the Western Hemispheric nations. From the start of its operations, the OCIAA found itself in a turf battle with the State Department, a situation intensified by Rockefeller's close relationship with Roosevelt.

Despite the interagency conflict, the OCIAA implemented several programs. Its public-relations programs, in reality, a pro-Allied propaganda campaign, included

editorial writing for Latin American newspapers, radio news programs that emphasized Allied successes, and an English-language program that emphasized anti-Nazi examples (see *WORLD WAR II AND LATIN AMERICA*). Walt Disney Films was enlisted to produce pro-Allied films geared for Latin American audiences. Educational exchanges for nurses and teachers were implemented. Local U.S. residents were formed into coordination committees to host U.S. art exhibits and visiting entertainers and to sponsor local athletic contests that often included participation by in-country U.S. military personnel. Medical clinics were established in urban centers, and traveling medical teams reached out to rural communities. The OCIAA also sponsored the development of nontraditional agricultural crops, such as abaca, rubber, and quinine in an effort to offset wartime economic losses. Measuring the effectiveness of the various programs proved elusive. The written and radio news propaganda programs reached the upper and middle sectors, while the cinema productions reached the urban and rural masses, but these groups did not communicate with one another. The economic programs did little to offset the wartime losses in the neediest countries, such as the Central American republics.

As the war neared its conclusion in late 1944 and into 1945, Rockefeller and several policy makers in Washington, D.C., advocated a continuation of the educational and technical help programs, particularly for the wider populace. The OCIAA's informational activities were transferred to the State Department by executive order on August 31, 1945, and the office itself was closed by a similar order on April 10, 1946.

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**offshore banking** Offshore banking is the cross-border exchange of funds and provision of services to nonresident individuals and corporate entities by banks in offshore financial centers (OFCs). These centers, often referred to as “tax havens,” are separated physically or by law from the major regulating units. The International Monetary Fund recognizes 16 offshore financial centers in the Caribbean region: Anguilla, Antigua, BAHAMAS, BARBADOS, British Virgin Islands, Cayman Islands, DOMINICA, GRENADA, Montserrat, Netherlands Antilles, PUERTO RICO, SAINT CHRISTOPHER AND NEVIS, SAINT LUCIA, SAINT VINCENT AND THE GRENADINES, and Turks and Caicos. In CENTRAL AMERICA, BELIZE, COSTA RICA, and PANAMA host such centers, as does URUGUAY in South America.

Offshore financial centers are jurisdictions that have large numbers of financial institutions engaged in business with nonresidents and typically have external assets and liabilities out of proportion to domestic financial indicators. For example, a 2002 report indicated some 13,000 persons worked in Panama's OFC and that these banks generated 11 percent of Panama's gross domestic product (GDP), with deposits of more than \$27 billion. In 2006, the Cayman Islands had 300 registered banks with \$500 billion in assets, but the Cayman's GDP was only \$2 billion.

Offshore banks are attractive to those wishing to protect assets, hide assets, or launder money gained from activities such as drug trafficking, prostitution, or gambling. Offshore accounts benefit from a lack of local and home taxation and secrecy of accounts. In the early 21st century, the U.S. government assumed a more aggressive policy in pursuing persons and corporations with offshore accounts.

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**Operation Bootstrap (Operación Manos a la Obra)** To meet the widespread poverty and burgeoning population that characterized PUERTO RICO in the 1940s, government leaders designed a plan, popularly known as Operation Bootstrap (Operación Manos a la Obra), to industrialize the island's ECONOMY and reduce its dependence on the sugar industry. However, owing to wartime demands, the newly established (1942) government-owned Puerto Rican Development Company (PRIDCO) found few partners abroad. Puerto Rico's wartime industrial progress instead resulted from the needs of the U.S. MILITARY on the island, which led to the local manufacture of textiles, food processing, road construction, and the like. When the war came to an end in 1945 and PRIDCO lacked sufficient funding to pursue private capital on the island, the Puerto Rican government turned to a program of “industrialization by invitation.” The promise of low wages and rent subsidies, along with exemptions from local and federal taxes, made Puerto Rico an attractive place for subsidiaries of large U.S. corporations. These incentives were augmented in 1979 by Section 936 of the Internal Revenue Code, which permitted tax exemptions to the foreign subsidiary as well as on the profits repatriated to the U.S. parent company. By special legislation, the 42 manufacturing plants already established in Puerto Rico qualified for the program. In essence, goods manufactured in Puerto Rico had free access to the U.S. market.

Governor LUIS MUÑOZ MARÍN appointed University of Michigan-educated Teodoro Moscoso (b. 1910–d. 1992)

to direct Operation Bootstrap. According to some analysts, it is Moscoso, not Muñoz Marín, who deserves credit for the successes of Operation Bootstrap and for providing U.S. president John F. Kennedy with an ALLIANCE FOR PROGRESS success story in the face of the popularity of FIDEL CASTRO RUZ's CUBAN REVOLUTION in Latin America. Moscoso had no long-term strategy, simply the creation of well-paying jobs. The first wave of industries brought to Puerto Rico under Operation Bootstrap were labor intensive: Textiles, apparel, footwear, electronics, fishing tackle, and plastic goods made in Puerto Rico were shipped to the United States. In the 1960s, more capital-intensive industries arrived, including pharmaceuticals, oil-refining, petrochemicals, and high-tech industries. During the same period cutbacks in sugar production occurred because of LABOR lost to the industries and increased international competition. Today, sugar is of minimal importance to the Puerto Rican economy.

Initially, the new industries attracted unskilled rural labor, but the capital-intensive plants required more skilled labor. This change had several implications for Puerto Rico. At first, male laborers dominated the employment scene, but in the 1960s, the demand moved toward skilled workers, including WOMEN. By the mid-1960s, official unemployment figures showed an 11.7 percent unemployment rate, but it was much higher among males. And while emigration slowed to about 10,000 persons annually from a high of 61 percent in 1952, the number of returning Puerto Ricans is put at 200,000 annually. Because of an overall population increase during the same time period, the United Nations Economic and Social Commission (ECOSOC) reports that nearly 1 million Puerto Ricans are unemployed at the present time.

In the latter part of the 20th century, Puerto Rico faced economic challenges from outside its border. The 1983 CARIBBEAN BASIN INITIATIVE extended U.S. special trading privileges to other Caribbean nations, and the 1993 NORTH AMERICAN FREE TRADE AGREEMENT threatened the relocation of U.S. Caribbean-related industries to MEXICO. Finally, in 1996, the U.S. Congress repealed Section 936 of the tax code, thereby threatening Puerto Rico's competitive advantage. Thereafter, into the 21st century, Puerto Rican industries faced global competition. Operation Bootstrap collapsed, as did the mixed blessings it brought to the island.

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**Operation Just Cause** See NORIEGA MORENO, MANUEL ANTONIO; PANAMA.

**Operation Power Pack** (1965) Operation Power Pack was the code name for the U.S.-led MILITARY intervention of the DOMINICAN REPUBLIC to protect U.S. hegemony after a group of civilian and military supporters of former Dominican president JUAN BOSCH launched a coup to restore the ex-president to power. Whereas the military intervention was initially a unilateral act on the part of the United States, within a few weeks the United States was able to obtain support from a majority of the members of the ORGANIZATION OF AMERICAN STATES (OAS).

On April 24, 1965, a group of military officers led by Francisco Caamaño Deñó (b. 1932–d. 1973) staged a countercoup to return to power former Dominican president Juan Bosch, who had been overthrown in a military coup in 1963. Elements in the Dominican Republic supporting Bosch's return called themselves Constitutionalists. Those who continued to support the military-supported government of Donald Reid Cabral (b. 1923–d. 2006) called themselves Loyalists. While Bosch was still in exile in Puerto Rico, the Constitutionalists took control of the National Palace and immediately swore in Bosch's former vice president, José Molina Ureña, as the provisional president. Meanwhile, the Loyalists fortified their position in San Isidro, a military base located a few miles east of the capital. On April 28, the Loyalists formed a junta led by Colonel Pedro Benoit (b. 1921) to resist the Constitutionalists. As the death toll in the civil war mounted and it became increasingly apparent that Caamaño Deñó's Constitutionalists were taking control of the capital city of SANTO DOMINGO, U.S. ambassador W. Tapley Bennett and Colonel Benoit met at the U.S. embassy on April 24 to discuss the situation. Bennett informed the Lyndon B. Johnson administration that a communist takeover was eminent.

On April 28, 1965, President Johnson sent 1,700 U.S. Marines to the Dominican Republic ostensibly simply to assist in the evacuation of American citizens. Within a month, the United States had deployed more than 23,000 troops in the country, and it quickly became apparent that the U.S. government was concerned about threats to U.S. hegemony in the region. The extent of communist influence over the Constitutionalists, however, was minimal at best. Although initially a unilateral U.S. military intervention, the OAS voted to support the intervention by a two-thirds majority on May 28. Six Latin American nations—BRAZIL, HONDURAS, NICARAGUA, EL SALVADOR, PARAGUAY, and COSTA RICA—joined the international peacekeeping force, which was officially known as the Inter-American Peace Force (IAPF). Whereas less than three dozen IAPF troops lost their lives, more than 3,000 Dominicans, mostly civilians, died in the conflict.



U.S. intervention resulted in the return of democracy to the Dominican Republic. On September 3, 1965, the United States implemented a provisional government, led by Héctor García Godoy (b. 1921–d. 1970), thus paving the way for the resumption of civilian rule. Bosch was allowed to return from exile on September 25, 1965, exactly two years after being deposed in a military coup. On June 1, 1966, in OAS-supervised elections, Dominican voters were presented with two candidates: Bosch and JOAQUÍN BALAGUER. With 57 percent of the vote, Balaguer was the winner. U.S. vice president Hubert Humphrey represented the United States at Balaguer's inauguration on July 1, 1966. On September 21, 1966, the last U.S. troops left Dominican soil. In the postintervention period, the United States and the Dominican Republic enjoyed close diplomatic relations. In addition, the Dominican Republic has experienced democratic elections and the expansion of constitutional rule.

President Johnson used the Dominican Republic to further his containment policy abroad and gather support for “Great Society” legislation at home. Although Johnson's domestic agenda, especially the Great Society, was important to him, the containment of communism was even more so. By quashing a potential communist insurrection in the Dominican Republic, he hoped to demonstrate to the American people that COMMUNISM IN LATIN AMERICA was contained in CUBA and that it was possible to contain it in Southeast Asia as well.

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**Operation Uphold Democracy (1994)** Operation Uphold Democracy was a U.S.-led plan to restore democracy in HAITI in 1994. Following the overthrow of democratically elected president JEAN-BERTRAND ARISTIDE on September 30, 1991, in a military coup staged by Raoul Cédras (b. 1949– ), the United States and other members of the international community became increasingly concerned about the failure of democracy in Haiti. In June 1993, the United Nations (UN) imposed an oil and arms embargo on the country, which forced the Haitian military to negotiate a settlement. On July 3, 1993, Aristide and Cédras signed the UN-sanctioned Governors Island Agreement, which called for Aristide's return to Haiti by October 30. The Haitian military, however, in defiance of the international community, reneged on the agreement, and the UN reimposed economic sanctions. The escalation of

HUMAN RIGHTS abuses in Haiti convinced the UN that more strenuous steps needed to be taken to restore democracy in Haiti.

On July 31, 1994, with strong encouragement from Bill Clinton's administration, the UN adopted Resolution 940, which authorized member states to use all necessary means to convince the Haitian military to restore constitutional rule in Haiti. The United States, taking the lead in forming a multinational force to carry out the UN mandate, began preparations for a military intervention, code-named Operation Restore Democracy, with the ultimate goal of fostering democratic government in Haiti and stemming the flow of illegal Haitian immigrants to the United States. Despite repeated promises from the military government to relinquish power, Cédras increased his authoritarian control over Haiti. The ECONOMY deteriorated, political repression increased, and tens of thousands of poor Haitians fled the country.

In August 1994, the United States began military planning for Operation Uphold Democracy. The Clinton administration, in fact, simultaneously planned for two possible scenarios: Operation Uphold Democracy, which entailed an intervention with the permission of the Haitian military, and Operation Restore Democracy, which entailed an intervention without the permission of the Haitian military. On September 18, as American forces were already on their way to Haiti, a negotiating team led by Jimmy Carter secured an agreement from Cédras calling for a peaceful transition to democracy and a permissive entry of American forces. The U.S.-led multinational force, composed of more than 20,000 American troops and more than 2,000 troops from other countries, was deployed peacefully. Cédras and several of his henchmen went into exile. Aristide returned to Haiti on October 15, 1994. After Aristide was restored to power, the international community provided financial and technological support to rehabilitate the political, economic, and social infrastructure in Haiti. On March 31, 1995, the United States transferred peacekeeping functions in Haiti to a UN peacekeeping force.

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- Philippe Girard. *Clinton in Haiti: The 1994 U.S. Invasion of Haiti* (Stuttgart, Germany: Holtzbrinck Publishers, 2004).

**Operation Urgent Fury (1983)** Operation Urgent Fury was the code name for the U.S.-led MILITARY intervention of GRENADA to restore order and stability in the aftermath of a bloody internal power struggle of Grenada's New Jewel Movement (NJM), which resulted in the death of Prime Minister MAURICE BISHOP. The joint U.S.–Caribbean task force quickly restored order

and turned power over to a provisional civilian government before the end of 1983.

On October 18, 1983, the NJM, which had ruled Grenada since a military coup in 1979, imploded when Minister of Finance Bernard Coard (b. 1944– ), who wanted to pursue a more pro-Soviet, anti-U.S. policy, overthrew Prime Minister Bishop with the support of the Grenadian army. Bishop and many of his closest associates were arrested, then executed the next day. On October 25, U.S. president Ronald Reagan unleashed Operation Urgent Fury, a coalition force with troops from BARBADOS, JAMAICA, DOMINICA, SAINT LUCIA, ANTIGUA AND BARBUDA, and SAINT VINCENT AND THE GRENADINES. Especially vocal in her support of the U.S.-led invasion was Prime Minister MARY EUGENIA CHARLES of Dominica. The invasion, which quickly defeated the fierce resistance offered by Grenadian and Cuban soldiers, was immensely popular in the United States, the English-speaking Caribbean, and Grenada. Grenadians celebrate October 25 as a national holiday, calling it Thanksgiving Day.

Between 1979 and 1983, the NJM, which aligned itself with the Soviet Union and CUBA, had begun a massive military buildup. The NJM had also begun construction of an international airport. Although ostensibly a move to foster increased tourism, Reagan and Charles were concerned that the airport, being built with Cuban assistance, would be used as a Soviet-Cuban airbase to support the spread of communism in the Caribbean. Following Coard's October 18 military coup, the ORGANIZATION OF EASTERN CARIBBEAN STATES (OECS) petitioned the United States, Barbados, and Jamaica for assistance. U.S. officials cited the presence of American students at the St. George's Medical School as a justification for military intervention.

The military intervention began on October 25, 1983, at 5:00 A.M. More than 7,000 U.S. troops were supported by 300 troops from the English-speaking Caribbean. The invading forces encountered stiff resistance from more than 1,500 Grenadian and 700 Cuban combatants. U.S. forces suffered 19 fatalities. The Grenadians suffered 45 military and 24 civilian fatalities. Two dozen Cubans were also killed in battle. Unlike veterans of the Vietnam War, the American veterans of the Grenada invasion were welcomed home as heroes. Public and official opinion in the United Kingdom, Grenada's former colonial master, was critical of the military intervention. The British government was particularly annoyed that it had not been advised of the invasion. Regardless, Governor General Paul Scoon, the official representative of Queen Elizabeth II in Grenada, who had been placed under house arrest by forces loyal to Coard, supported the invasion. Following the successful invasion, Scoon organized an interim civilian government, restored the constitution, and laid plans for parliamentary elections in 1984. U.S. coalition forces had withdrawn from Grenada by the end of 1983.

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### Organization of American States (OAS; Organización de los Estados Americanos; Organização dos Estados Americanos; OEA)

The Organization of American States (OAS) is a regional organization that was established at the Ninth Pan-American Conference in BOGOTÁ, COLOMBIA, March 30–May 2, 1948. It replaced the PAN-AMERICAN UNION, the world's oldest regional organization at the time. Some analysts see it as the fulfillment of the Bolivarian dream, or PAN-AMERICANISM. Originally having 21 members, the organization added 13 more over the years until 1994. The OAS mission is to promote hemispheric peace; prevent interstate difficulties and provide for peaceful solutions when they arise; provide for common action in case of aggression against member states; seek solutions to hemispheric political, juridical, and social problems; and promote cooperative action for Latin American development. The OAS attempts to achieve its objectives through seven subunits. The OAS also played a significant role in the establishment of the INTER-AMERICAN DEVELOPMENT BANK, which is funded by member states.

Before 1990, the cold war cast its long shadow over the OAS's operations as the United States, CUBA, and MEXICO held different visions of regional security. The United States dominated OAS political decisions, most obviously in the 1954 invasion of GUATEMALA, 1961 BAY OF PIGS INVASION, 1962 CUBAN MISSILE CRISIS, 1965 invasion of the DOMINICAN REPUBLIC, 1983 invasion of GRENADA, and the political isolation of Chilean president SALVADOR ALLENDE GOSSENS from 1971 to 1973 (see GUATEMALA, U.S.-SPONSORED INVASION OF).

After the cold war ended in 1991, the OAS passed resolutions against corruption, illegal DRUGS and arms trafficking, and violence against WOMEN. Its Resolution 1080 calling for a meeting of foreign ministers to discuss hemispheric action against any government that comes to power via a coup d'état or other illegal means has been used four times: in HAITI, in 1991; PERU, 1992; Guatemala, 1993; and PARAGUAY, 1996. The OAS has also supervised several Latin American elections for the purpose of certifying the fairness of the process.

In the social field, the OAS promotes educational programs throughout the hemisphere through the

Health Organization and the Institute for History and Geography. The OAS also has active institutes designed to assist the welfare of its target groups: women, children, and NATIVE AMERICANS.

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### Organization of Eastern Caribbean States

**(OECS)** The Organization of Eastern Caribbean States (OECS) was established on June 18, 1981, by the Treaty of Basseterre; Basseterre is the capital city of SAINT CHRISTOPHER AND NEVIS. Full membership is accorded to ANTIGUA AND BARBUDA, DOMINICA, GRENADA, Montserrat, St. Christopher and Nevis, SAINT LUCIA, and SAINT VINCENT AND THE GRENADINES. Anguilla and the British Virgin Islands are associate members. On several occasions since 1990, the U.S. government has discouraged the request of the UNITED STATES VIRGIN ISLANDS from joining OECS. Saba, an island in the Netherlands Antilles and St. Martin attend meetings of the OECS Forum on Tourism while they work to gain full membership into the organization.

At the OECS 35th meeting in January 2002 in Anguilla, the seven regular members agreed to an economic union, but almost immediately suggestions were made to improve this agreement. A new agreement went into effect on January 1, 2007. Known as the OECS Economic Union, the agreement provides for the free circulation of goods and services and the free movement of LABOR and capital (through the Eastern Caribbean Central Bank) among its members, a common external tariff (CET), and a regional parliamentary assembly.

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**Orozco, Pascual** (b. 1882–d. 1915) *Mexican revolutionary leader* Pascual Orozco was a merchant from Chihuahua, MEXICO, who joined the revolutionary movement of FRANCISCO MADERO against Porfirio Díaz (1876–1911) in 1910. He was instrumental in leading the forces of the MEXICAN REVOLUTION to victory in the decisive battle of Ciudad Juárez, which forced Díaz to resign and flee the country. Orozco initially supported the presidency of Madero, but when Madero failed to pursue social reforms quickly enough, the Chihuahuan MILITARY hero issued the Plan Orozquista. The 1912 plan denounced Madero as corrupt, demanded social

reform, and called for a general uprising against the government.

Orozco's rebellion posed a major challenge for the new president. Madero sent his trusted general, VICTORIANO HUERTA, to suppress the revolt, and Orozco was temporarily subdued. But, Orozco's rebellion was a symptom of larger problems, and isolated revolts against Madero continued to plague the country. In February 1913, the once-loyal Huerta led a coup that removed Madero from office. Orozco supported Huerta's dictatorship, hoping the general would stabilize the country enough to institute meaningful social reforms. Instead, Mexico descended even further into chaos as a Constitutionalist alliance between VENUSTIANO CARRANZA, ÁLVARO OBREGÓN, and FRANCISCO VILLA rebelled against Huerta. By January 1914, Orozco had fled to Texas. Huerta was forced to step down six months later. Orozco joined up with Huerta once again in the United States, and the two began planning another insurrection. They were eventually captured by U.S. authorities and placed under house arrest. Orozco escaped but was killed in 1915 while trying to avoid recapture. He represents many of the ambiguities and shifting alliances that characterized the Mexican Revolution.

See also DÍAZ, PORFIRIO (Vol. III).

#### Further reading:

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**Ortega Saavedra, Daniel** (b. 1945– ) *revolutionary leader and president of Nicaragua* Daniel Ortega Saavedra was born into a middle-class family in the rural town of La Libertad, NICARAGUA. His parents had fought with AUGUSTO CÉSAR SANDINO in the 1920s and were arrested on various occasions by ANASTASIO SOMOZA GARCÍA in the 1940s. After the family moved to Managua, Ortega received a Catholic education, including at the Christian Brothers Pedagogic Institute, where he met future Sandinista colleague Jaime Wheelock. Ortega also briefly studied for the priesthood in EL SALVADOR under Bishop Miguel Obando y Bravo, who subsequently sympathized with the revolution of the SANDINISTA NATIONAL LIBERATION FRONT (FSLN).

Ortega commenced his political activism in the early 1960s with the recruitment of students for the Nicaraguan Patriotic Youth League. He joined the FSLN in 1963 and soon became an organizer of urban groups. Ortega joined his colleagues in acts of violence against government officials and buildings. In 1967, his involvement with the assassination of a National Guard officer earned him an eight-year prison sentence. He was freed in December 1974 in a prisoner exchange program and a year later joined the Sandinista National Directorate. Ortega gained special recognition for his leadership role

in the Sandinistas' 1979 final offensive, which resulted in the ouster of ANASTASIO SOMOZA DEBAYLE on July 19, 1979.

Ortega served on the Governing Junta for National Reconciliation that followed Somoza's ousting, but as the moderate members resigned over growing Sandinista power, Ortega further consolidated his hold over government. He stood as the FSLN's presidential candidate in 1984, an election he won with 67 percent of the vote. His administration was confronted with the U.S.-sponsored Contra War that took a heavy toll on the Nicaraguan economy, particularly from the destruction of infrastructure and agricultural fields (see CENTRAL AMERICAN WARS). The FSLN's reform programs in EDUCATION, health, and housing fell victim to the cost of defending the country against the Contras. The government's control of private-sector production created further scarcities. Together, these economic factors contributed to a 675 percent inflation rate by 1987. The appointment of his friends to government positions and their corrupt practices further eroded support for Ortega.

With the war's end in 1989, Ortega again stood for the presidency in the 1990 elections, only to lose

to VIOLETA BARRIOS DE CHAMORRO. He again failed in bids for the presidency in 1997 and 2001. During that period, the Nicaraguan economy worsened, as did social conditions. The government accepted the principles of neoliberalism, but its policies did not bring prosperity to the country or improve the quality of life for the poor. Furthermore, corruption and graft characterized each administration.

Against this backdrop, Ortega again sought the presidency in the 2007 election and won, but with only 38 percent of the popular vote. He appears to have rejected his Marxist background, yet finds himself linked to VENEZUELA'S HUGO RAFAEL CHÁVEZ FRÍAS in blaming the United States for all that is wrong with Latin America. In addition to the need to end government corruption, Ortega must deal with a 50 percent unemployment rate, the need for rural development, and the strengthening of property rights.

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# P

**Panama** Panama is the southernmost nation on the Central American isthmus and consists of 30,193 square miles (11,657.5 km<sup>2</sup>) of land, making it slightly smaller than the state of South Carolina. Its strategic location at the southern end of the Central American isthmus contributed to its independence in 1903 and the construction of a transisthmian canal through its territory (see PANAMA CANAL, CONSTRUCTION OF). Seventy percent of Panama's 3.2 million inhabitants are classified as mestizos, a mixture of Amerindian and European ancestry, followed by the descendants of Amerindians and West Indians, 14 percent; whites, 10 percent; and Amerindians, 6 percent.

In 1501, Rodrigo de Bastidas became the first European to set foot on Panama, and in 1513, Vasco Núñez de Balboa trekked across the land bridge that gave Panama its geographic importance. In 1524, King Charles I of Spain ordered a survey of the territory to investigate the possibility of building a canal, but it would be nearly 400 years before such a canal was constructed. Until the 1770s, Panama served as a center of Spanish commercial traffic in the New World, but TRADE liberalization policies introduced by the Bourbon rulers in Madrid led to the rapid decline in the country's importance.

Panama was initially governed by the Viceroyalty of Peru and from 1739 by the Viceroyalty of New Granada. Panama declared its independence on November 28, 1821, but remained part of the New Granada nation (Gran Colombia) until its breakup in 1830, after which it was incorporated into the government of COLOMBIA. As an outlying district of Colombia, Panama fell victim to the centralized government at BOGOTÁ throughout the 19th century. Resistance to Colombia's authority was seen in 50 riots and rebellions, five attempted secessions, and seven U.S. interventions under the terms of

the 1846 Bidlack-Mallanaro Treaty. Much of this conflict centered around the liberal-conservative conflict that characterized 19th-century Latin American politics, which erupted in Colombia's War of the Thousand Days from 1899 to 1902, setting the stage for Panamanian independence in 1903.

The War of the Thousand Days further distanced the Panamanians from Colombia. The former, particularly the commercial and internationally orientated elite, considered that the government in Bogotá wanted only to extract wealth from the province, not develop it economically. José Agustín Arango (b. 1841–d. 1909) and others affiliated with the Panama Railroad concluded that if Colombia failed to ratify the proposed Hay-Herrán Treaty, Panama would declare its independence. The Panamanians were further encouraged by reports that the United States might tacitly support their independence movement, which came at a time of increasing U.S. interest in a transisthmian canal. Phillipe Bunau-Varilla (b. 1859–d. 1940), representing the New French Panama Canal Company, entered the arena. Based on his conversations with U.S. president Theodore Roosevelt and Secretary of State John Hay, Bunau-Varilla gave the Panamanians assurances of U.S. protection and recognition if they pursued independence. Bunau-Varilla also understood that his company could lose its canal rights if Panama became independent. These factors came together on November 3, 1903, when Panamanians did indeed declare their independence. With U.S. warships off both coasts of Panama, Colombia was denied the right to intervene. On November 6, the United States extended recognition to Panama. Meanwhile, Bunau-Varilla hurried to Washington, D.C., to meet with Hay and conclude a treaty bearing their names just prior to

the arrival of Panamanians Manuel Amador (b. 1869–d. 1952) and Federico Boyd (b. 1858–d. 1924). For a one-time payment of \$10 million and an annual subsidy of \$250,000, the United States guaranteed Panama's independence in return for the right to build a transisthmian canal through a 10-mile-wide zone of Panamanian territory and to act "as if it were sovereign" within that zone. Although disgruntled with the Hay–Bunau Varilla Treaty, Amador and Boyd, and subsequently the Panamanian legislature, had little choice but to accept it. Otherwise, the canal and Panama's independence would be lost to Colombia. The 1903 treaty provided the framework that governed U.S.–Panamanian relations until the 1977 Carter–Torrijos Treaties (see PANAMA CANAL TREATIES). The 1903 treaty also became the focal point of Panama's fractured society.

### CHALLENGE TO THE OLD ORDER, 1903–1930

Immediately after the November 3, 1903, revolt, three Conservatives—Arango, Boyd, and Tomás Arias (b. 1856–d. 1932)—formed a ruling junta, while a constituent assembly completed a governing document that provided for the selection of Amador as Panama's first president for a four-year term beginning on February 21, 1904. Reflecting the country's Spanish heritage, the constitution provided for a centralized government at the expense of provincial power. Article 136 sanctified potential U.S. intervention to maintain political order, which was also a proviso of the 1903 Hay–Bunau Varilla Treaty. Many analysts and Panamanian Liberals at the time argued that the Conservatives had the provision incorporated into the constitution as a means of preserving their political power.

For a quarter-century following independence, Panamanian politics remained a contest between the Conservative and Liberal POLITICAL PARTIES. The Conservatives drew their support from the interior elite and high-ranking Panamanian employees of the Panama Railroad Company. The Liberals drew their support from a greater cross-section of society, which divided the party into several factions. One segment included white and mestizo cattlemen from around the port cities of Colón and Panama. A second faction consisted of the urban working class, which included mostly blacks and mulattoes. Belisario Porras (b. 1856–d. 1942) appealed to these groups. The immigrant businesspeople attracted to Panama first by the Panama Railroad and then by the canal made up the third Liberal Party faction, which was led by the Chiari family. Members of both parties shared a dislike of the black West Indian LABOR force and their descendants. The political diversity contributed to personalized politics, with each group seeking its own benefit in Panama's political arena and in the country's relationship with the United States regarding the canal.

Serving three presidential terms (1912–16, 1918–20, and 1920–24), Belisario Porras became Panama's most

dominant political figure during this period. He is credited with extending the railroad into Chiriquí Province as well as road construction into other parts of the interior to promote agricultural development, directing the construction of telephone and telegraph lines, and modernizing Panama City. He also established the country's first university and teacher's training college, as well as modern hospitals at Santo Tomás and Panama City. He appointed a committee to draft Panama's legal code, which went into effect on August 22, 1917. Despite these successes, Panama was beset with a multitude of internal problems. Porras's infrastructure projects were financed by \$18 million in U.S. loans and bonds. The North Americans invested another \$29 million in Panama's infrastructure, such as roadways and railways and electric and telephone systems. The United Fruit Company owned an estimated \$8 million in land for the cultivation of bananas for export, which brought little to the Panamanian ECONOMY. In addition, rural cattle farmers, urban labor, and middle-sector professionals and businesspeople failed to benefit from the Panama Canal operation. Their frustration turned into violent demonstrations against the proposed 1926 Kellogg–Alfaro canal treaty and the refusal by Panama's Congress to consider its adoption. These groups banded together on August 19, 1923, to form a secret society, ACCIÓN COMUNAL (AC), which opposed the policies and practices of the political elite. The West Indian labor force remained outside these circles. Discriminated against and kept from joining the Labor Federation of Panama, they established a protective subculture that included churches, schools, and fraternal and labor groups. On the eve of the Great Depression, the West Indians remained a group awaiting a political party or leader to appeal to it.

### THE TRIUMPH OF PANAMANIAN NATIONALISM, 1931–1979

On January 2, 1931, members of AC engineered the ouster of President Florencio Arosmena (b. 1872–d. 1945) and paved the way for the presidency of Harmodio Arias (b. 1886–d. 1962), which began on June 5, 1932. The Arias administration opened Panama's political arena to the growing demands of the middle and laboring social sectors, which increasingly placed responsibility for their plight on the U.S.-owned and operated canal that dissected their country. Additionally, Arias's 1931 appointment of JOSÉ ANTONIO REMÓN CANTERA to lead the National Police resulted in the National Police becoming the final arbiter of politics from 1952 until 1989.

As president, Arias initiated a small rural land reform program, established a savings bank for the poor, established the University of Panama in 1935, and was responsible for the 1936 Hull–Alfaro Treaty that opened the canal zone to Panamanian businesspeople, increased job opportunities for Panamanian workers, and

terminated the U.S. right to intervene in Panamanian politics. He also instituted a policy of *bispanidad*, which emphasized Panama's Spanish past and required the use of the Spanish language in all official communication, as well as schools. Arias's newspaper, the *Panama-American*, became the mouthpiece for these programs. While Harmodio Arias's nationalistic programs frightened Panama's traditional elite, those of his brother ARNULFO ARIAS MADRID threatened other sectors. After taking office on October 1, 1940, Arnulfo directed the writing and implementation of a new constitution on January 2, 1941. It extended the president's term to six years and granted him new and extensive powers over the economy that could limit foreign investment in the country, hinted at the nationalization of foreign-owned properties, and established state control over the export of agricultural goods; it also furthered the cause of *bispanidad*. Arnulfo Arias also threatened West Indians with deportation. His program appealed only to urban day and skilled Panamanian workers in Colón and Panama City, who overwhelmingly supported his 1940 election. The elite, middle sector, and West Indians stood in opposition and found an ally in the United States, which had been antagonized by Arias's refusal to agree to defense site agreements on the eve of WORLD WAR II. These forces coalesced in October 1941 to prevent Arias from returning to the presidency following a visit to his mistress in CUBA. Arias's ouster did not suppress student, professional, and working-class nationalism. For the next eight years, the presidency became a game of musical chairs among Panama's elite families—the de la Guardia, Jiménez, Arosemena, Chanis, and Chiari—until Arias returned in 1949.

In the meantime, Remón transformed the National Police into the National Guard, a modern organization of approximately 2,000 men with both cavalry and motorized units. Taking advantage of the U.S. GOOD NEIGHBOR POLICY, he received technical advice from U.S. canal zone authorities, recruited like-minded officers, and implemented riot control training. By the mid-1940s, he was poised to act, and the opportunity came in 1951 following the death of President Daniel Chanis (b. 1892–d. 1951) and his replacement by Arnulfo Arias. Owing to an economic downturn following World War II, Arias inherited a tense environment that he exacerbated with graft and nepotism until his impeachment and ouster on May 9 of that year. Remón seized the moment. He resigned from the National Police to become the 1952 presidential candidate of the five-party National Patriotic Coalition (Coalición Nacional Patriótica, or CNP). Inaugurated on October 1, 1952, Remón instituted programs that emphasized industrial-agro businesses rather than the small farmer; attempted to redirect traditional commercial lines away from the canal; focused on improving health care and EDUCATION; and denied unions the right to strike. He completed a new treaty with the United States in 1955. The Eisenhower-Remón Treaty provided

Panamanian merchants with greater access to ship sales, increased the annual U.S. annuity to \$1.9 million, and expanded job opportunities for Panamanians working in the canal zone. In effect, Remón became a quasi-dictator similar to NICARAGUA'S ANASTASIO SOMOZA GARCÍA. This brought him opposition from the traditional elite, middle-sector business community, workers, and students. Remón's unexplained assassination on January 2, 1955, ended the CNP's role in national politics and resulted in the reemergence of traditional Conservative and Liberal leaders until a MILITARY coup on October 11, 1968. But, the return to traditional politics did not stem the rising tide of nationalism that found expression in the 1960, 1964, and 1968 riots that increasingly focused on U.S. responsibility, real or imagined, for Panamanians' socioeconomic plight.

The 1968 presidential election was a turning point in Panamanian political history. Whereas the elections until 1931 were contests among the elite, those after that date pitted the second generation of Panamanians against the old guard and among themselves. In 1968, a new group of reformers appeared, whose programs appealed to the poor at the expense of the oligarchs. Arias won his third presidential bid and took office on October 1, 1968, this time with the support of West Indian laborers. His efforts to consolidate power in his own hands and to control the National Guard led its upper-echelon officers to direct a coup d'état on October 11, 1968, after which Lieutenant Colonel OMAR EFRAÍN TORRIJOS HERRERA became head of state and, by Article 277 of the 1972 constitution, "Maximum Leader." Other provisions extended his term to six years, granted him the power to appoint most government officials, and replaced the National Assembly with an Assembly of Corregimientos, which effectively denied business and commercial elites influence over government policy. The National Guard, whose size grew to 8,000 men, became an instrument of repression. Torrijos ruled as a dictator whose programs to stimulate economic growth, provide land for the rural poor, and limit the power and influence of labor unions encouraged the opposition against him. Panama was also beset with other problems during Torrijos's tenure, including rapid urbanization and with it the growth of slums, the unequal distribution of wealth, and economic stagnation. In 1977, the Panamanians lost the anti-American issue with the completion of the Carter-Torrijos Treaties, which provided for ownership of the canal to be transferred to Panama on January 1, 2000, and withdrawal of other U.S. government operations from the canal zone, including the School of the Americas and the U.S. Army's Southern Command post.

For reasons never fully explained, in October 1978, 10 years after he came to power, Torrijos "returned to the barracks" so the nation could return to a democracy. The question of whether Torrijos intended to play a future role in national politics died with him in an unexplained plane crash on July 31, 1981. Politically, he left

Panama as fractured as before he took office. The elite wanted to restore its power and prestige, the middle sector sought democracy and greater economic opportunities, the poor wanted to improve their quality of life, and the National Guard looked to ensure its place in the nation's future.

### TRANSITION TO DEMOCRACY AND AN EXPANDED CANAL

The vacuum created by Torrijos's death ignited a power struggle within the National Guard that led the officers to forge an agreement that provided for successive commanders in chief through 1991, but the jockeying for power continued until September 1983 when General MANUEL ANTONIO NORIEGA MORENO emerged as the man in charge. An illegitimate child, Noriega was abandoned by his father at an early age and subsequently raised by a Panama City schoolteacher, Luisa Sánchez. He had little interest in advancing his education beyond high school until an older half brother arranged for him to attend PERU's Chorillos Military Academy. After graduation in 1962, Noriega returned to Panama to join the National Guard, where he became an associate of Torrijos and eventually chief of the guard's intelligence unit. Noriega's reputation as a womanizer and his obsessive religiosity gained him more notoriety than his position of power within the Torrijos administration.

In October 1983, as commander in chief, Noriega persuaded the legislature to change the National Guard's name to the Panama Defense Forces (PDF), provide for the expansion of its membership, confirm Noriega's leadership over it, and place all Panamanian military forces—along with the police, traffic, and immigration departments—under the PDF's control. The law also permitted the PDF to close down the media and intern individuals for actions offensive to the government. The extent of Noriega's power became evident when he manipulated the presidential election of Nicolás Andito Barletta Vallarino (b. 1938– ) over Arias on May 2, 1984. The margin of victory, 1,713 votes, was a number allegedly chosen by Yolanda Pulice, a friend of Noriega's who sat on the National Election Board. A "CHICAGO BOY," Barletta cut government spending, reduced protective tariffs, instituted a wage freeze, raised local taxes, and fired some 15,000 public employees. These policies struck hard at the middle and lower socioeconomic groups, which in turn staged demonstrations and turned to the media to offer criticisms of the government. In response, Noriega used the 1983 law to suppress the opposition, often ignoring civil and HUMAN RIGHTS. Distracted, the Panamanian people prepared for the May 1989 election. The progovernment, eight-party Coalition for National Liberation (Coalición de Liberación Nacional, or COLINA) nominated Carlos Duque (b. 1938– ) for president; and the Civil Opposition Democratic Alliance (Alianza Democrática de Oposición Civilista, or ADOC), Guillermo Endara

(b. 1936– ), but it was Noriega who became the election's focal point. The former promised to keep Noriega as head of the PDF, while the latter promised to fire him. Violence plagued the campaign and despite international supervision, including a team headed by former U.S. president Jimmy Carter, the May 7 election was fraudulent. Exit polls indicated that Endara was the victor, but the National Election Board, pushing aside Carter's public plea for honesty, declared in favor of Duque. During the public outrage that followed, Noriega's Dignity Battalions (a paramilitary force) brutally beat Endara and his running mate Guillermo Ford (b. 1936– ), which was witnessed on international television. Noriega voided the elections, shunned mediation efforts by the ORGANIZATION OF AMERICAN STATES (OAS), and finally, on August 31, 1989, named a high school classmate, Francisco Rodríguez (b. 1938– ), as provisional president in September 1989.

Just as Noriega consolidated his hold on the Panamanian government in the mid-1980s, he ran afoul of the United States. Once an important conduit for arms and money for the Contras in the war against NICARAGUA'S SANDINISTA NATIONAL LIBERATION FRONT (FSLN), he no longer served U.S. policies when the U.S. Congress cut off funds for the war in 1986. By that time, Panama had become a haven for hidden bank accounts of drug traffickers, and Noriega himself became involved in the illicit trade (see DRUGS). Secure in the thought that the United States feared an international backlash if he exposed his role in the Contra War and that any intervention would be viewed as a U.S. effort to void the 1977 canal treaties, Noriega increasingly chided the United States and President George H. W. Bush in particular. Bush, however, did not back down. He used the detention and harassment in Panama City of a U.S. naval officer and his wife by PDF forces to order the U.S. invasion of Panama on December 21, 1989. Operation Just Cause, as the invasion was named, led to the capture of Noriega and his deportation to Miami, Florida, where he was eventually found guilty of drug manufacturing and trafficking drugs into the United States and on July 10, 1992, was sentenced to 40 years in prison.

On December 29, 1989, Endara was declared president of Panama in accordance with the May 7 election results. He inherited a country in economic ruin, and despite nearly \$70 billion in economic assistance from the United States, economic recovery did not come until after 2004. Endara is credited with terminating the PDF and creating a civilian-controlled police force. But, his administration and that of his immediate successors, Ernesto Pérez Balladares (b. 1924– ) in 1994 and Mireya Moscoso (b. 1946– ), headed coalition governments that reflected the fractured nature of Panamanian society. Each administration was also plagued by graft and corruption. The son of Torrijos, Martín Torrijos (b. 1963– ), won the May 2, 2004, presidential election, and with it, his Democratic Revolutionary Party (Partido



Revolucionario Democrático, or PRD) won control of the national legislature. Torrijos has delivered on his campaign promise to end government corruption and has made its transactions more transparent.

Since the mid-1990s, the Panamanian economy has continued to grow steadily, reaching a high of 8.3 percent annual growth in 2006. Nearly 80 percent of the \$15 billion gross domestic product (GDP) is generated from finance, commercial endeavors (insurance, canal, and maritime services), telecommunications, and tourism. Industry and manufacturing account for only 14 percent of the GDP. Nevertheless, Panama has an 8.8 percent unemployment rate. The United States remains Panama's largest trading partner, and on December 16, 2006, the two countries completed a free TRADE agreement. The Panama legislature approved the agreement on July 11, 2007. However, the "fast track" authority that gave the U.S. president power to negotiate a free trade agreement that Congress can only vote yes or no on expired on July 1, 2007. Congress has yet to reapprove such presidential authority, and the treaty was never considered by Congress. On October 22, 2006, Panamanian voters approved a referendum to expand the Panama Canal with a third set of locks to accommodate modern cargo ships well into the future. Initial construction began on September 3, 2007, with a 2015 projected completion date. An estimated 7,000 to 9,000 workers will be employed on the project at the peak of its construction in 2009 and 2010.

See also BALBOA, VASCO NÚÑEZ DE (Vol. I); BASTIDAS, RODRIGO DE (Vol. I); BOURBON REFORMS (Vol. II); CONSERVATISM (Vol. III); GRAN COLOMBIA (Vol. III); LIBERALISM (Vol. III); NEW GRANADA, VICEROYALTY OF (Vol. II); PANAMA (Vols. I, II, III); PANAMA RAILROAD (Vol. III); PERU, VICEROYALTY OF (Vol. II); TRANSISTHMIAN INTERESTS (Vol. III); WAR OF THE THOUSAND DAYS (Vol. III).

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**Panama, flag riots in** (January 9–12, 1964) On January 9, 1964, a group of Panamanian students marched to Balboa High School in the Panama Canal Zone where they raised PANAMA's flag. Although the high school was one of 15 zone locations designated by U.S. president John F. Kennedy at which the Panamanian flag could be flown, defiant residents of the zone had resisted. The confrontation led to four days of riots, 12 deaths, scores of injuries, and uncounted thousands of dollars of damage to U.S. properties in Panama. In the face of the crisis, Panamanian president Roberto Chiari (b. 1904–d. 1984) severed diplomatic relations with the United States. In turn, U.S. president Lyndon B. Johnson suspended U.S. economic assistance to the republic and called to the zone all U.S. workers, including those in the Peace Corps.

The root of the trouble can be found in the 1955 Eisenhower-Remón Treaty, which provided for an equal display of each country's flags. In accordance with the treaty, on November 3, 1959, Panamanian students had unsuccessfully attempted to raise their national flag in the zone, as a sign of Panama's sovereignty over it. In the ensuing violence, U.S. properties in Panama were burned, and several demonstrators were injured. In 1961, newly elected Presidents Chiari and Kennedy recognized the need to address several canal-related issues, but Kennedy appeared to move too slowly for Panamanian nationalists. Following his designation of 15 zone locations where the Panamanian flag could be flown, a resident of the zone sued to prevent both flags from flying there. The incident fueled tensions on both sides. Subsequently, the ORGANIZATION OF AMERICAN STATES (OAS) investigated the incident and cleared the United States of alleged brutality.

Johnson, who ascended to the presidency on November 23, 1963, following the assassination of Kennedy, held the upper hand in the diplomatic maneuvering that followed the incident, since Panamanians were aware that the United States was considering other Central American locations for the construction of a canal. Additionally, as the stalemate continued, the Panamanian ECONOMY spiraled downward. President Chiari finally resumed diplomatic relations with the United States on April 3, 1964. Despite his strong stand, Johnson understood that the 1964 riots demonstrated the need to reassess the U.S. position. He understood the canal's vulnerability to sabotage and that the underdevelopment of Panama's economy and concomitant social ills fueled Panamanians' determination to end the sovereignty clauses contained in the 1903 treaty (see PANAMA CANAL TREATIES).

Talks for treaty revisions began in July 1964, and by September 1965, an understanding had been reached for new treaties. Although flawed, the proposed treaties advanced the Panamanian cause but soon were set aside by domestic politics in both countries. In Panama, frustration with elitist politics led to the short-lived



From January 9 to 12, 1964, Panamanians demonstrated in front of the Fence of Shame that separated the republic from the canal zone. The protesters demanded that the Panamanian flag be flown next to the U.S. flag in the zone. (*United States Information Agency*)

ARNULFO ARIAS MADRID administration in October 1968 and the emergence of strongman OMAR EFRAÍN TORRIJOS HERRERA. Johnson, meanwhile, fell victim to the public pressure against the war in Vietnam, which led to the 1968 presidential election of Richard M. Nixon, who came to office with no clearly defined Latin American policy.

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**Panama Canal, construction of** The construction of the Panama Canal dates to May 4, 1904, when U.S. Army Corps engineer Lieutenant Mark Books received the keys to storehouses and the hospital at Ancón, a township in central PANAMA formerly owned by the New French Canal Company, whose rights for canal construction had been acquired by the United States

under the 1903 Hay–Bunau Varilla Treaty. The three main problems faced by the North Americans at the beginning of the Panama Canal project were sanitation, organization, and engineering. U.S. Army Corps Chief Sanitary Officer William C. Gorgas developed a comprehensive program of drainage, spraying, and trash cleanup and oversaw the construction of water and sewerage systems both in the construction zone and at the terminal cities of Panama and Colón. By 1907, Gorgas's programs had eliminated yellow fever and brought malaria under control in the region.

With these diseases under control, a LABOR force could be recruited and supporting infrastructure built. By 1913, nearly 45,000 workers were on the project's payroll, the majority coming from the West Indies (primarily BARBADOS, Guadeloupe, Martinique, and Trinidad), with another 12,000 arriving from southern Europe (Spain, Italy, and Greece). Some 5,600 North Americans filled managerial, supervisory, and skilled-labor positions. Panama provided less than 1 percent of all workers. Within the canal zone, the United States constructed housing and eating facilities and a commissary to satisfy workers' personal needs. As specified in

the 1903 Hay–Bunau Varilla Treaty, the United States brought all construction materials into the zone duty free.

In view of the failed French effort to build a sea-level canal (that is, one that includes only one level), the project's chief engineer, John F. Stevens, convinced U.S. president Theodore Roosevelt to build a lock canal (that is, a multilevel canal that includes “lock” sections to move ships up and down between levels). On June 27, 1906, the U.S. Congress concurred. Stevens, however, did not see the project to its completion. Personal conflicts with Roosevelt led to his resignation from the project on April 1, 1907. He was replaced by U.S. Army Corps engineer Lieutenant Colonel George W. Goethals.

The construction plan called first for damming the Chagres River to create an artificial lake, through which a sea-level channel would be dredged. The channel would flow from the newly constructed Caribbean harbor, adjacent to Colón, to the lake, known as Gatun Lake, where a set of locks would raise ships 85 feet. At the western end of the lake, another eight-mile-long (nearly 13 km) channel was dug through the Continental Divide to link with the Pedro Miguel and Miraflores Locks, where

ships would be lowered to a third dredged channel and harbor on the Pacific side of Panama. Design changes were made as work progressed. For example, at the U.S. Navy's request, locks were enlarged from 95 to 110 feet (from 29 to 33.5 m) and the channel in the Calebra Cut was widened from 200 to 300 feet (from 61 to 91.5 m) to accommodate larger vessels.

The magnitude of the canal project was without precedent at the time. The 1.5-mile-long (2.4-km) Gatun Lake was the largest artificial lake in the world, and the Culebra Cut, later named the Gailard Cut, was the largest excavation in history: Some 268.8 million cubic yards (205.5 million m<sup>3</sup>) of rock, shale, and dirt were excavated. The locks, with the largest gates ever swung, surpassed any others in the world and were operated by state-of-the-art electric generators and motors. When it opened to traffic on August 14, 1914, the Panama Canal stood as an extraordinary engineering accomplishment. Its total cost was nearly \$375 million, and some 5,600 lives were lost during its 10-year construction. The outbreak of WORLD WAR I on August 1, 1914, however, overshadowed its opening before a contingent of just 200 dignitaries, including Panamanian president Belisario



View of the Panama Canal locks (*Records of the Department of State*)

Porrás (b. 1856–d. 1942), U.S. secretary of war Lindley M. Garrison, and members of the diplomatic corps.

The Panama Canal served its commercial and military purposes well until the early 1960s, by which time cargo, container, cruise, and military vessels had grown precipitously in size. By the time of the 1964 flag riots in the Panama Canal Zone (see PANAMA, FLAG RIOTS IN), U.S. authorities had recognized that the canal would soon be outdated, but public debate of the issue was lost in the discussions that resulted in the 1977 Carter-Torrijos Treaties (see PANAMA CANAL TREATIES). Likewise, in the early 1990s, international discussion about a new canal faded over the issue of using nuclear power for excavation. Finally, on April 24, 2006, Panamanian president Martín Torrijos (b. 1963– ) presented a plan for a third set of locks to parallel the site of the present canal. Seventy-eight percent of Panamanians approved of the plan in a national referendum on October 22, 2006. The internationally financed expansion project began on September 3, 2007, with an estimated 2015 completion date, and is expected to accommodate very large vessels well into the future.

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**Panama Canal treaties** Until the French diplomat and developer Ferdinand de Lesseps attempted to construct a transisthmian canal at PANAMA in 1879, the U.S. government envisioned an interoceanic waterway opened to world commerce and free of international intrigue. The de Lesseps project altered the U.S. policy from idealism to reality. As Europe roamed the globe in search of colonies in the late 19th century, the United States concerned itself with European presence near the canal and, as a result, pursued a policy that would secure the canal route for itself.

The canal also dictated U.S. relations with PANAMA. Always determined to ensure the safety of the canal's defense and operation, the United States consistently defended its sovereignty over the canal zone and hoped to placate the Panamanians with economic concessions. Toward that end, the U.S. government preferred to deal with Panamanian leaders who acquiesced to these objectives, not to others who had their own agendas. In the late 20th century, new realities led to a new U.S. policy that enabled the Panamanians to gain control of their most precious resource.

#### HAY–BUNAU VARILLA TREATY, 1903

By the late 1890s, the United States focused its attention on NICARAGUA as the most viable and cost-effective location for a transisthmian canal. In 1899 and again in 1901,

the Walker Commission, a group of engineers appointed by President William McKinley, recommended the Nicaraguan route at an estimated cost of \$189 million, compared to the \$144 million in estimated construction costs, plus an additional \$149 million for the rights at Panama being asked for by the New (French) Panama Canal Company, the successor to the de Lesseps project. Fearing the loss, the French company lowered its asking price to \$44 million and dispatched Phillipe Bunau-Varilla to Washington, D.C., to meet with Secretary of State John Hay and others. This came after the Walker Commission issued its third report in January 1902, this time favoring the Panama route. At the same time, the Costa Rican and Nicaraguan governments, in hopes of gaining larger rewards, delayed making any agreements with the United States for use of the San Juan River that straddled their common border. Also seeking greater financial reward, a year later the Colombian government refused to consider the proposed Hay-Herrán Treaty. The stalemate frustrated the Panamanians, who wanted independence from COLOMBIA; Bunau-Varilla, who sought compensation for his company's effort; and U.S. president Theodore Roosevelt, who wanted to start the canal project before his anticipated 1904 presidential campaign. As a result of the intrigue that followed, Panama gained its independence on November 3, 1903, and U.S. recognition three days later.

Having maneuvered his own appointment as Panama's representative to the United States, Bunau-Varilla was in New York at the time of Panama's birth. At New York City's Waldorf-Astoria he met with Hay and accepted the U.S. drafted treaty that bears their names. When Panama's delegation arrived on November 18, 1903, they were presented with a *fait accompli*. Fearing that their new republic would revert to a province of Colombia, the Panamanians signed the treaty, and on December 2, 1903, the Panamanian legislature ratified the agreement. The U.S. Senate did the same on February 20, 1904. As a result, Panama got its independence, Bunau-Varilla his money, and Roosevelt his canal route.

According to the treaty, for a \$10 million one-time payment and a \$250,000 annual subsidy, Panama conveyed to the United States two sets of rights regarding the construction, operation, and protection of the canal. The first set of rights, allowing the United States to protect Panama from foreign and internal political instability, are found, respectively, in Articles 1 and 7. The second set of rights dealt with the canal zone and over time caused more lasting resentment in Panama. Article 2 granted the United States not only a 10-mile-wide (16-km) strip, but also other lands and waters outside the zone for the canal. Article 3 granted the United States all rights, authority, and powers within the zone as "if it were sovereign of the territory." Finally, Article 13 permitted the United States to import into the zone, duty free, all goods "necessary and convenient" for U.S. employees, workmen, laborers, and their families and "necessary" for the construction,

maintenance, and operation of the canal (see PANAMA CANAL, CONSTRUCTION OF). In other words, Panama retained residual sovereignty, but the United States gained effective ownership of the canal and its ancillary needs.

#### PROPOSED KELLOGG-ALFARO TREATY, 1926

During the canal's construction period, the U.S. authorities adopted a protective paternalism toward Panamanian politics, fearing that conflict between the Liberals and Conservatives would adversely affect the canal project. Apparently, the North Americans favored the Conservative elite over the Liberals who appealed to middle and lower sectors. To prevent political turmoil, U.S. officials and zone police supervised elections in 1906, 1908, 1912, and 1921. To legitimize their broad rights to maintain order within Panama, the United States pressured the Panamanians to incorporate Article 136 into their 1903 constitution. Armed with such police power, the United States disarmed Panama's so-called army and used zone police to quell disorders in Panama in 1918, 1921, and 1925. The zone police also attempted to control liquor sales and prostitution in the canal's terminal cities. Because Panama could not satisfy the needs of an estimated 17,000 workers during the construction period, U.S. authorities established commissary operations in the zone. Taking advantage of cheaper shipping rates and treaty privileges that exempted such goods from coming into the zone, the commissary operation militated against the development of the Panamanian economy. This was exacerbated by continued U.S. direct investment in the country. By 1920, U.S. businessmen invested an estimated \$10 million into the Panamanian economy. The most notable was Minor Keith's banana plantations in Boca del Toro Province that later became part of the United Fruit Company. Wages also became an irritant to the Panamanians. U.S. workers received a 25 percent wage differential over Panamanians performing the same tasks, and both groups were paid in gold. In contrast, Panamanian and West Indian laborers were paid in silver, which pitted the Panamanian against his elite brethren paid in gold and the black West Indians. The Panamanians argued that the United States had created a colony in their midst, and from the start, Panamanian leaders demanded limitations on U.S. privileges. By the 1920s, Panamanian nationalists emphasized that the 1903 treaty, hastily signed under duress, did not represent Panamanian interests. It should be replaced by a document that would permit Panama to realize the anticipated benefits from the canal.

With time's passage, new circumstances awakened U.S. canal zone governors to the vagueness of the Hay-Bunau Varilla Treaty. The development of radio, telegraphy, and aircraft brought about the need for new explicitness. But, U.S. officials refused to budge on their jurisdiction over the zone; they were determined only to define more clearly their rights.

Talks for treaty revisions began in March 1924. Because the negotiators started from opposite poles, the talks dragged on until July 26, 1926. The resultant proposed Kellogg-Alfaro Treaty provided for joint consultation regarding the control of radio, telegraphy, and aircraft and U.S. land use outside the zone, but it also made the United States the final arbiter of each case. Nothing was done to restrict the commissary operation or expand opportunities for Panamanian commercial interests and Panamanian LABOR (but not West Indian) in the zone. Only the Panamanian elite were satisfied with the promise of expanded job opportunities in the zone. When the treaty became public in Panama in December 1926, demonstrations, violence, and death threats against legislators who might approve the treaty followed. Finally, on January 26, 1927, Panama's National Assembly suspended consideration of the proposed treaties.

Although the U.S. State Department dismissed the treaty discussions as minor in character, the Panamanians did not. Merchants wanted measurable TRADE benefits; laborers, increased pay and job opportunities; and landowners, security against future expropriations. In contrast, Washington, influenced by improvements in technology, wanted more rights to defend the canal that further impinged on Panama's sovereignty.

#### HULL-ALFARO TREATY, 1936

The United States brushed off Panama's efforts to restart treaty negotiations in 1927 and 1928, and when talks resumed in 1934, a new environment prevailed. In Panama, a vibrant sense of nationalism followed the 1931 coup d'état engineered by ACCIÓN COMUNAL that brought Harmodio Arias (b. 1886–d. 1963) to the presidency. This nationalism was further fueled by the adverse impact of the Great Depression upon the republic. Canal traffic dropped precipitously by 1933, resulting in many job layoffs in the zone and otherwise brought commercial activities in the zone to a near halt. Simultaneously, the Panamanian economy also suffered and increasingly, the Panamanians placed responsibility at the U.S. doorstep.

During the same time period, the United States was moving away from its 30-year-old policy of intervention in the internal affairs of the circum-Caribbean nations. It culminated in President Franklin D. Roosevelt's announcement of the GOOD NEIGHBOR POLICY in his March 2, 1933, inaugural address. As a result, when President Arias visited Washington, D.C., in October 1933 he found a receptive Roosevelt. Panama found its concerns addressed in the joint communiqué issued at the end of their meetings, and they became the focal point for treaty revision negotiations that began in early 1934. The 110 sessions, some attended by Roosevelt, finally resulted in the Hull-Alfaro Treaty on March 2, 1936.

The Panamanians did not achieve all of their objectives but came away pleased with the abrogation of the U.S. protectorate over the republic as found in the 1903 document and the termination of U.S. eminent domain

over the terminal cities of Panama and Colón. The Panamanians gained a sense of sovereignty over the zone with the provisions for joint responsibility over future land acquisitions for canal purposes and control over radio stations. The restrictions placed upon commissary sales and the opportunity for Panamanian private businesses to enter the zone market gave the hope for increased prosperity for Panamanian merchants. In an accompanying note, Roosevelt promised equal job opportunities for Panamanian laborers in the zone, but nothing was mentioned about repatriation of the West Indians for which the president had indicated support in the 1933 joint communiqué. The adjustment of the annual annuity from \$250,000 to \$430,000 only reflected the devaluation of the U.S. dollar that Roosevelt introduced as an anti-depression measure. The Panamanian upper and middle sectors and labor organizations were pleased with the treaty, a fact that contributed to the treaty's quick ratification by the National Assembly on April 20, 1936.

U.S. Senate ratification of the Hull-Alfaro Treaty was delayed until 1939 because the War Department was reluctant to surrender control of radio communications and the ability to confiscate land for future canal operations, while the zone authorities resisted the equal opportunity labor provisions. Owing to pressure from Roosevelt and in anticipation of the forthcoming hemispheric conference of foreign ministers in Panama scheduled for September 1939, the Senate finally ratified the agreement, but only after preserving better-paying jobs for North Americans. The treaty went into effect on July 25, 1939.

#### DEFENSE SITES AGREEMENTS, WORLD WAR II

The outbreak of war in Europe on September 1, 1939, brought new concerns to U.S. authorities regarding the defense of the Panama Canal (see *WORLD WAR II AND LATIN AMERICA*). The waterway was no longer immune to attack from existing army fortifications within the canal zone. Since World War I, military technology had changed appreciably, making real the canal's risk of attack by airplanes and submarines. To contend with the new danger, the U.S. War Department identified 71 sites within Panama needed for defense purposes over which it wanted complete control for 999 years. Whatever sense of cooperation existed in 1939 disappeared when ARNULFO ARIAS MADRID ascended to the presidency on October 11, 1940. Representing Panama's rising tide of nationalism, Arias indicated that he would permit the United States to have the defense sites for the duration of his presidential term, only after settling a host of other issues surrounding the canal's operation, including the repatriation of West Indian workers and their families. Arias's obstinacy contributed to his ouster on October 9, 1941, while on an unauthorized visit to CUBA to visit his mistress. New president Ricardo de la Guardia (b. 1898–d. 1969) acknowledged his country's obligation

to cooperate in wartime defense of the canal under the terms of the 1936 Hull-Alfaro Treaty.

On May 7, 1942, Panama agreed to the U.S. requests with the proviso that the sites would be returned to Panama within one year after a definitive treaty was signed ending World War II. By an accompanying executive agreement, the United States also granted Panama control over sanitation and Panama Railroad facilities in the republic and promised to build a bridge across the canal to connect the divided country. But, the United States refused to repatriate any West Indians.

The United States built 134 defense sites in Panama during the war and wanted to retain control over most of them after the war. President Enrique Jiménez (b. 1886–d. 1970) agreed to satisfy U.S. wishes, but opposition came from Panama's middle sector—students, technocrats, skilled workers, managers, professionals, and shopkeepers. Their demonstrations before Panama's National Assembly in December 1947 forced the legislature to reject the proposed extension of U.S. rights. By the end of 1948, the United States abandoned all but the sprawling Río Hato airbase in Panama.

#### EISENHOWER-REMÓN TREATY, 1955

The rising tide of Panamanian nationalism expressed in opposition to the World War II defense site agreements and their extension further intensified with the country's economic slowdown that followed the war. Panamanians came to blame the United States for all that was wrong within their country. To satiate Panamanian demands, in 1953, President JOSÉ ANTONIO REMÓN CANTERA appealed directly to U.S. president Dwight D. Eisenhower. To press his case, Remón orchestrated demonstrations in Panama City, a precedent-setting tactic to exert pressure on the United States. Eisenhower also appeared receptive, at least to Panamanian economic rights within the canal zone territory. Subsequent negotiations resulted in a new treaty signed on January 27, 1955. It increased Panama's annual annuity to \$1.9 million, further restricted commissary sales, contained a U.S. promise to equalize salaries, gave Panama the right to tax the salaries of its citizens working in the zone, returned to Panama all railroad properties and granted the republic control of sanitation facilities in Panama City and Colón, granted Panama the right to fly its flag within the zone, and included a U.S. commitment to pay for the construction of a transisthmian canal bridge to connect the dissected country. In return, the United States retained its rights to the Río Hato air base.

While the Panamanian legislature quickly approved the treaty, a wave of protest delayed U.S. Senate ratification until August 24, 1955. Owing to the increased annuity, shippers feared higher canal tolls, "Zonians" protested pay equalization and potential job losses to Panamanians, the MILITARY wanted assurance of continued defense rights, and a coterie of nationalists did not want anything to change from the 1903 treaty.

### CARTER-TORRIJOS TREATIES, 1977

Rather than quell Panamanian nationalism, the Eisenhower-Remón Treaty appeared to encourage it, particularly among the elite and middle-sector groups who increasingly demanded Panamanian control over the canal. Encouraged by Egypt's 1956 takeover of the Suez Canal, VENEZUELA's arrangements for equal sharing of oil revenues, and FIDEL CASTRO RUZ's overthrow of Cuba's established order in 1959, Panamanians increased their demands for sovereignty over the canal zone. Protests and demonstrations began in 1956 and increased in intensity until the January 9, 1964, flag riots when Panamanian students marched into the zone to plant their flag at Balboa High School, one of 15 sites designated by President John F. Kennedy for the Panamanian flag to fly (see PANAMA, FLAG RIOTS IN). Defiant Zonians resisted. Four days of violence ensued, resulting in the death of two dozen persons and the destruction of thousands of dollars of U.S.-owned property in Panama. Diplomatic relations were temporarily severed. While most analysts understood that the United States held the upper hand in the crisis, President Lyndon B. Johnson recognized that the changing world conditions legitimized some of the Panamanian concerns. The canal could no longer be defended against modern military weaponry, and the ever-increasing size of cargo and naval ships could make the canal obsolete. Treaty negotiations began in July 1964 and dragged on until June 1967 when four tentative agreements were reached, including one abrogating the 1903 Hay-Bunau Varilla Treaty but guaranteeing U.S. administrative and defense interests for another 100 years. Political events in both Panama and the United States stymied further progress. In Panama, OMAR EFRAÍN TORRIJOS HERRERA engineered a coup that ousted President Arias in October 1968. A month later, Richard M. Nixon captured the U.S. presidential elections but came to the White House without a clearly defined Latin American policy.

If Nixon put the canal issue on the proverbial back burner, Torrijos did not. He quickly internationalized the issue by lining up support for the Panamanian cause through COSTA RICA, Colombia, Venezuela, and Cuba. At the United Nations, where Panama held an elective seat on the Security Council, Torrijos convinced that body to hold a meeting in Panama City in March 1973. At that meeting, the Security Council approved a Peruvian-sponsored resolution that Panama receive full sovereignty over all of its territory. Only the United States voted against the resolution. Great Britain abstained. Following the council's approval of the resolution, Torrijos added insult to injury by warning that unless the United States moved swiftly to correct the injustice, Panamanian frustration would soon burst into open violence.

Other factors also influenced the Nixon administration to act. The Vietnam War and the 1973 Arab-Israeli conflict illustrated the strength of Third World

nationalism. If the Organization of Petroleum Exporting (OPEC) countries could reap the benefits of their major resource, by extension, so could Panama. Finally, the National Security Council (NSC) advised Nixon that the time had come to redefine the U.S. relationship with Panama. Negotiations began in 1974, but progress was hampered by the impact of the Watergate scandal and Nixon's resignation, a U.S. Senate resolution denouncing Panama's sovereignty over the zone, and Ronald Reagan's declarations during the 1976 Republican Party presidential primary campaign against any limitations on U.S. rights and sovereignty in the canal zone.

Jimmy Carter came to the White House in January 1977 determined to correct the image of U.S. hegemonic influence in Western Hemispheric affairs. To Carter, new Panama Canal treaties could serve as a harbinger of a new relationship between the United States and Latin America. What proved to be the final round of talks began in February 1977. An agreement was reached on August 11, 1977, and signed by Carter and Torrijos on September 7. The treaties satisfied Panama's long-standing demand for control of the zone. Panama's jurisdiction would begin three years after the treaties' ratification, and complete jurisdiction would be established on January 1, 2000. Although the Panamanians took over the commissary operation, North American jobs related to the canal's operation were protected. The United States also retained the right permanently to defend the canal. The toll system was restructured to provide Panama with another \$20 million in revenues, and Carter agreed that the United States would provide nearly \$350 million in economic and military assistance to Panama over 10 years.

Carter also insisted that before he would submit the treaty to the U.S. Senate for approval, the Panamanians would first have to ratify the agreements. Torrijos acted quickly. In an October 25, 1977, national plebiscite, two-thirds of the Panamanians voted in favor of the treaties. Only the West Indians and their descendants stood in opposition. If Panamanian nationalism demanded control of the canal, U.S. nationalism insisted upon its retention of control over the waterway. An August 1977 public opinion poll revealed that 77 percent of the North Americans did not want to give up the canal. U.S. opposition to the Carter-Torrijos Treaties focused on U.S. sovereignty over the zone as spelled out in the 1903 treaty, the character of the Panamanian government and volatility of its politics, and the canal's importance to U.S. defense and economic needs. Following acrimonious debate, the U.S. Senate finally ratified the treaty on September 26, 1979, and President Carter signed it the next day.

As the 1980s progressed, some analysts questioned whether the United States would carry through on its treaty commitments owing to the ever-increasing tense relations with Panamanian strongman MANUEL ANTONIO NORIEGA MORENO. The December 1989 U.S. invasion of Panama to apprehend Noriega on DRUG charges only heightened that suspicion. As the date for transfer



Panamanian head of state Omar Torrijos (*right*) and U.S. president Jimmy Carter (*left*) sign treaties that provide for the transfer of the Panama Canal from the United States to Panama by 2000. (*Courtesy of the Jimmy Carter Presidential Library*)

approached, Panama's middle and upper sectors questioned the wisdom of gaining control over the zone and the canal. Panamanian jobs and U.S. spending in the local economy would be lost, and the elite's privileged position would come into question. None of these concerns translated into action. On January 1, 2000, Panama took possession of its most valued resource, the canal.

See also KEITH, MINOR COOPER (Vol. III); PANAMA RAILROAD (Vol. III); TRANSISTHMIAN INTERESTS (Vol. II).

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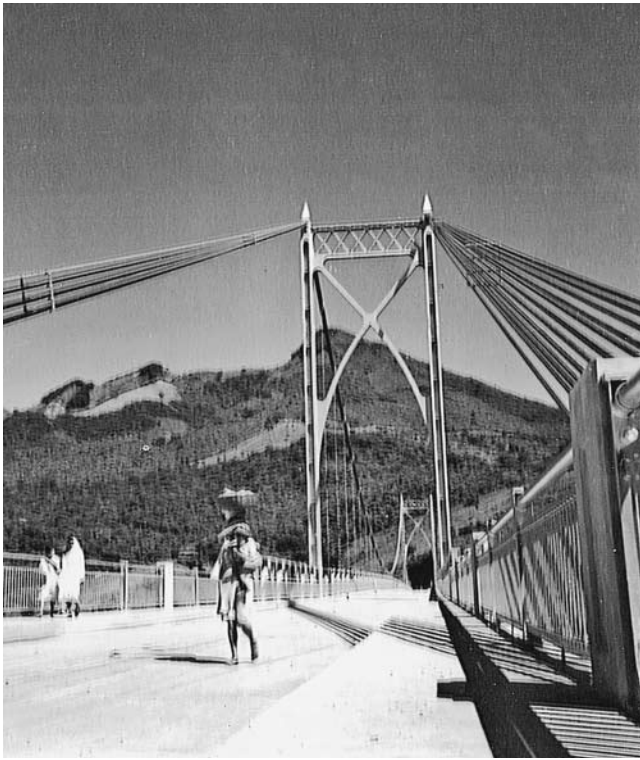
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**Pan-American Highway** The Pan-American Highway is a 16,000-mile (25,750-km) system of roadways stretching the hemisphere, from Alaska in the north southward to the tip of CHILE and then northeastward

to BUENOS AIRES, in ARGENTINA. Except for a 54-mile (87-km) gap at the Panamanian-Colombian border, the roadway fills a void that dates to colonial times, when Spanish TRADE policies provided for intra-American trade only via tightly controlled shipping routes. The highway passes through many diverse ecological zones, including dense jungles, high mountain passes, and deserts. Since the highway traverses many countries, it is far from uniform. Some stretches of the road are passable only during the dry season, and in many regions, driving is at times hazardous.

The concept of such a highway can be traced to the 1923 Fifth International Conference of American States meeting in SANTIAGO DE CHILE. Two years later, at Buenos Aires, the initial Pan-American Highway Conference concluded that construction of such a highway would contribute significantly to the economic, social, and political development of the American countries. Throughout the 1920s, the Highway Education Board, organized by the U.S. automobile industry and affiliated with the PAN-AMERICAN UNION, sponsored tours for Latin American engineers to study highways in the United States. As a result, the Sixth International Conference of American States, meeting in HAVANA in 1928, approved a "longitudinal road" across the continent. The following year, the U.S. Congress approved a \$50,000 study, followed by a \$1 million appropriation in 1934 to initiate construction of the road.





A bridge along El Salvador's section of the Pan-American Highway constructed during World War II (Office of Inter-American Affairs, Photography and Research)

World War II served as a catalyst for further development of the highway, especially through MEXICO and CENTRAL AMERICA to PANAMA in order to meet the defense needs of the Panama Canal in light of the German submarine threat in the Atlantic Ocean and Caribbean Sea (see WORLD WAR II AND LATIN AMERICA). In 1941, the U.S. Congress appropriated \$20 million for this portion of the project and another \$12 million in 1943. Substantial progress was made through Central America, but owing to the declining German threat and the inability of the Central American countries to meet their financial obligations for construction, this portion of the road remained incomplete at the war's end.

In the 1950s, supporters of the highway convinced the U.S. Congress that the highway and its accompanying economic and social development would serve as a deterrent to communist penetration of Latin America (see COMMUNISM IN LATIN AMERICA). As a result, for the next decade, the U.S. Congress regularly approved monies to meet the U.S. contributions required for the completion of specific sections of the highway. The highway was finally opened in 1963, except for the Darien Gap, a stretch between northern COLOMBIA and southern Panama. The highway contributed to the development of the tourist industry, particularly in Mexico and Central America. It also has facilitated the transportation of goods between the Andean countries of ECUADOR, PERU, and Chile.

The Darien Gap received new attention in the 1990s with the anticipated FREE TRADE AREA OF THE AMERICAS. For economic reasons, the Colombians appeared more anxious than the Panamanians to complete this section of the road through harsh mountainous and jungle territory. Opponents of the project include those who want to save the rain forest, contain the spread of tropical diseases, protect the livelihood of NATIVE AMERICANS along the route, prevent foot and mouth disease from entering North America, and create a buffer for anti-drug trafficking from Colombia. Interest in the highway waned after construction began on a third set of locks for the Panama Canal in 2004.

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**Pan-Americanism** Pan Americanism is an elusive term that implies some kind of Western Hemispheric solidarity in relation to social, economic, cultural, and political issues. The term first appeared in the New York City press on the eve of the 1888–89 Inter-American Conference that convened in Washington, D.C., but the origins of hemispheric unity can be traced to the interests and activities of Liberator Simón Bolívar of South America. Bolívar envisioned the unification of former Spanish colonies to resist possible European intervention in the newly independent region. Bolívar's plan did not include BRAZIL because of its Portuguese heritage or the United States because he feared it would dominate hemispheric affairs.

The Pan-American movement, as it became known, can be divided into five time periods. The first period, or Old Pan-Americanism, ran from 1826 to 1889, a time when Spanish Americans concerned themselves with imagined and real European interventions. For example, the 1826 Panama Congress dealt with Spain's potential reclamation of its former New World colonies, and the 1864 conclave at LIMA, PERU, focused on Spanish, British, and French encroachments in the Caribbean and west coast of South America. The Latin American mistrust of the United States intensified with the latter's mid-century expansion, which cost MEXICO one-third of its territory, and alleged plots to incorporate CUBA and CENTRAL AMERICA and purchase the DOMINICAN REPUBLIC. The 1847–48 Lima Conference and the 1856 Washington meeting focused on U.S. expansion.

The WAR OF THE TRIPLE ALLIANCE (1865–70) and the WAR OF THE PACIFIC (1879–84) intensified Latin American

nationalism and provided an opening for the United States to assume the leadership role of the Pan-American movement. Secretary of State James G. Blaine initiated the “New Pan-Americanism” by convening the first International Conference of American States in Washington, D.C., in 1888. Owing to the Latin American’s mistrust of the United States and its economic links with Europe, Blaine’s hope for a continental customs union failed to materialize. Over the next 45 years, five international conferences were held: in MEXICO CITY (1901–02), RIO DE JANEIRO (1906), BUENOS AIRES (1910), SANTIAGO DE CHILE (1923), and HAVANA (1928). These shared common characteristics: The United States dominated the agenda of each meeting and focused attention on economic and cultural issues, rather than political problems such as U.S. interventions in the circum-Caribbean region, as the Latin Americans wished. The undercurrent of U.S. hegemony was one of many factors that led to the U.S. announcement of the GOOD NEIGHBOR POLICY at the 1933 MONTEVIDEO, URUGUAY, meeting of American states, which marked the end of the Pan-American movement. According to the new policy, the United States promised henceforth not to interfere in the internal political affairs of Latin American nations.

This third period of Pan-Americanism lasted through the late 1960s and was characterized by a reduction of hemispheric tensions and a spirit of solidarity that focused on cooperation during World War II and the early cold war years and efforts toward Latin America’s economic development. The establishment of the ORGANIZATION OF AMERICAN STATES in 1948 was the high water mark of this time period, while the breakdown in the hemisphere’s cooperative spirit began in 1954 with the U.S.-SPONSORED INVASION OF GUATEMALA, when not all Latin American governments shared the U.S. view that JACOBO GUZMÁN ARBENZ was a communist. The rift was complete by 1973. Although many Latin Americans shared the U.S. disdain for the CUBAN REVOLUTION of 1956–61, they equally disliked Washington’s unilateral actions during the 1962 CUBAN MISSILE CRISIS, the 1965 invasion of the Dominican Republic, and U.S. policies that contributed to the overthrow of Chilean president SALVADOR ALLENDE GOSSENS in 1973, all of which led to a new era of Pan-Americanism.

Since 1973, the Latin Americans have demonstrated a great degree of independence in the effort to satisfy their own interests. Although the Latin American governments accepted the neoliberal economic model espoused by the United States in the 1980s, they also resisted U.S. advances toward economic unity such as the proposed FREE TRADE AREA OF THE AMERICAS. Yet, Latin American regional pacts, such as the SOUTHERN CONE COMMON MARKET and the ANDEAN COMMUNITY OF NATIONS, and international agreements and individual linkages such as Brazil, CHILE, and ECUADOR with the People’s Republic of China further weakened the Pan-American ideal in the early 21st century (see CHINA AND LATIN AMERICA, PEOPLE’S REPUBLIC OF).

See also BOLÍVAR, SIMÓN (Vol. II); PANAMA CONGRESS (Vol. III); U.S.-MEXICAN WAR (Vol. III); WAR OF THE PACIFIC (Vol. III); WAR OF THE TRIPLE ALLIANCE (Vol. III).

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**Pan-American Union** The establishment of the International Union of American Republics (Pan-American Union) on April 14, 1890, was the most notable achievement of the Conference of American States that convened in Washington, D.C., from October 2, 1889 to April 14, 1890. In fact, April 14 came to be known as Pan-American Day. In turn, the Pan American Union created the Commercial Bureau of the American Republics to be supervised by the U.S. secretary of state in Washington. The bureau collected and distributed commercial information among the Latin American republics and the United States. Over time, it expanded its activities and its staff to do this work. The Pan-American Union became the organization’s official name at the 1910 Buenos Aires conference.

Although the delegates did not set dates for future meetings, they left Washington with a clear understanding that they would convene again. Nothing happened until 1899, when U.S. president William McKinley called for another meeting. This prompted the Commercial Bureau to issue invitations and set the agenda for the union’s second meeting in MEXICO CITY, held from October 22, 1901, to January 22, 1902. Except during the two world wars, meetings thereafter were convened every four or five years, in various Latin American capitals: RIO DE JANEIRO, 1906; BUENOS AIRES, 1910; SANTIAGO DE CHILE, 1923; HAVANA, 1928; MONTEVIDEO, 1933; LIMA, 1938; BOGOTÁ, 1948; and CARACAS, 1954.

The issues that recurred most prominently at these meetings included arbitration, hemispheric peace, TRADE, the forcible collection of debts, U.S. dominance of the organization, intervention by one state in the affairs of others and, in the 1920s, arms control. Accomplishments, however, were more modest. Resolutions, conventions, and treaties were often debated, but major solutions were rarely reached or ratified. One exception was the 1923 Gondra Treaty, which was designed to create machinery for the peaceful settlement of American disputes. U.S. secretary of state Charles Evans Hughes prevented the passage of one of its resolutions, however, declaring that no state had the right to intervene in the internal affairs of another. In so doing, Hughes made the Gondra Treaty useless. U.S. policy changed in 1933 with the pronouncement of the GOOD NEIGHBOR POLICY, under which the United States promised no longer to interfere in the

internal affairs of Latin American states. As the world drifted into World War II, U.S. concerns with hemispheric solidarity and prosecuting the war preempted Pan-American activities (see WORLD WAR II AND LATIN AMERICA). The accomplishments of the foreign ministers' meetings during the war accounted for the sense of Pan-Americanism that characterized the agency from 1938 until the founding of the ORGANIZATION OF AMERICAN STATES in 1948.

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**Panday, Basdeo** (b. 1933– ) *prime minister of Trinidad and Tobago* Born on May 25, 1933, in Princes Town, Trinidad, Basdeo Panday was the son of first-generation Indo-Trinidadian parents. He went to London in 1957, where he studied law at Lincoln's Inn, economics at London University, and drama at the London School of Dramatic Arts. Panday returned to TRINIDAD AND TOBAGO in 1965 to practice law, work with LABOR unions, and pursue a political career. By 1973, he was the leader of the All Trinidad Sugar and General Workers' Trade Union.

In 1976, Panday was one of the cofounders of the United Labour Front (ULF), which won 10 of the 36 parliamentary seats in the 1976 elections. In 1981, the ULF allied itself with the Democratic Action Congress (DAC), led by A. N. R. ROBINSON, and the Tapia House Movement (THM), led by Lloyd Best (b. 1934–d. 2007), to form the National Alliance. In the 1981 elections, the ULF won eight seats, and the DAC won two seats. In 1986, the National Alliance joined the Organization for National Reconstruction to create the National Alliance for Reconstruction (NAR), which defeated the People's National Movement (PNM) in the 1986 elections. This was the first time since 1956 that the PNM had not been the majority party.

Panday's ally, Robinson, became prime minister. In 1988, however, Panday had a disagreement with Robinson and left the NAR to form the United National Congress (UNC). In November 1995, Prime Minister PATRICK MANNING called early elections. The PNM and UNC both won 17 seats, and the NAR won two seats. The NAR allied with the UNC, which allowed Panday to become the first Indo-Trinidadian prime minister. In the 2001 elections, the PNM and the UNC both won 18 seats. Robinson, serving as president, appointed Manning prime minister, despite the fact that Panday was the sitting prime minister. In 2005, Panday was arrested on corruption charges. His 2006 conviction, however, was overturned in the Court of Appeals in 2007. Panday continues to lead the Indo-Trinidadian-dominated UNC.

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**Paraguay** Paraguay is home to approximately 6.5 million people, 95 percent of whom are of mixed Spanish and Amerindian descent (mestizo). Nearly the size of California, at 157,047 square miles (406,752 km<sup>2</sup>), Paraguay is bordered on the northwest by BOLIVIA, on the northeast and east by BRAZIL, and on the southeast by ARGENTINA. The Paraná River, which forms Paraguay's border with Brazil, flows southward to the Río de la Plata, which provides Paraguay with its only land-based access to the Atlantic Ocean. Paraguay has two distinctive geographic features: grassy plains and tropical forests characterize the eastern sector, while the Chaco region in the western and northern sectors turns to desert as it approaches the Bolivian border.

Guaraní Indians dominated the region when Spanish conquistador Juan de Salazar (d. 1566) founded the city of Asunción on August 15, 1537. Several Jesuit missions dotted the interior landscape, but Paraguay remained a backwater of the Spanish Empire because of its location and lack of resources. Paraguay declared its independence on May 14, 1811, after which three dictators dominated the political scene—José Gaspar Rodríguez de Francia, Carlos Antonio López, and his son Francisco Solano López—setting a pattern of authoritarian government that lasted until 1989. Paraguay also endured long-term consequences from the War of the Triple Alliance (1864–70), which pitted it against combined Argentine, Brazilian, and Uruguayan forces. Paraguay lost an estimated 18 percent of its prewar male population in the war, as well as some 17,500 square miles (45,325 km<sup>2</sup>) of its economically valuable territory in the Misiones region to Argentina. Most of its INDUSTRY, located mainly in Asunción, was destroyed. From 1870 until 1904, a string of Conservative presidents administered the country. During the same time period, Paraguay experienced an influx of Europeans. Additionally, the ECONOMY recovered in line with increased external demand for yerba maté, tannin, and quebracho. Still, Paraguay remained an economically and politically underdeveloped country at the start of the 20th century.

#### COLORADOS V. LIBERALS: POLITICS OF THE STATE

Although two political parties, the Colorados and the Liberals, dominated the Paraguayan political arena, their ideologies differed little, and each was highly factionalized. In 1904, a group of Liberal exiles supported by

Argentine businessmen and the Argentine navy seized power, but this did not bring political stability. Indeed, 21 different governments administered the country from independence until 1940. While the Liberals dominated Asunción, they did nothing to prevent a small group of Conservative *hacendados* (hacienda owners) from gaining control of the countryside. A small, but vociferous middle sector made up of intellectuals, students, and white-collar and skilled workers emerged in the 1920s to protest Paraguay's corrupt political system. In 1928, the intellectuals formed the National Independent League to press their demand for a "new democracy." With the adverse impact of the Great Depression on Paraguay in the early 1930s, the middle sector added a call for reform in working conditions, public services, and EDUCATION to their agenda. The movement reached a momentary high-water mark in October 1931 when government troops fired on student demonstrators in front of the Government Palace. The ingredients for political and social upheaval were present, despite the fact that peasants, Paraguay's largest sector, remained outside the country's political dynamics, focusing instead on their own survival as workers on the large haciendas, day laborers, or squatters who had settled on unclaimed or unused lands. Instead, the CHACO WAR (1932–35) postponed the upheaval.

Bolivia had long claimed sovereignty over the Chaco, believing that the territory would be of economic value and the construction of a port on the Paraguay River in the northeastern corner of the disputed region would provide it with an access route to the sea, which had been lost in the War of the Pacific (1879–83). The Chaco conflict began on June 15, 1932, when Bolivian and Paraguayan troops clashed at Lake Pitiantuta. For two years, the Paraguayans defeated the Bolivian army in a series of battles at small forts throughout the Chaco but in so doing overextended their lines. With both sides exhausted and drained of men, money, and arms, the combatants agreed to a cease-fire on June 12, 1935. Not until June 21, 1938, did a peace treaty bring the war to a formal end. While the Paraguayans gained control of the disputed territory, the Chaco War illustrated the fragility of their government.

After the 1935 truce, thousands of Paraguayan soldiers returned home dismayed by the Liberals' ineptitude in preparing for, prosecuting, and supporting the war. They also resented the government's refusal to pay pensions to disabled war veterans, while providing MILITARY generals with monthly pensions of 1,500 gold coins. Finally, on February 17, 1936, supported by members of the dissident middle sector, they marched on the Government Palace to force President Eusebio Ayala's (b. 1875–d. 1942) resignation that same day and the installation of General RAFAEL FRANCO. The Paraguayans enthusiastically greeted the arrival of the Febrerista Revolutionary Party (Partido Revolucionario Febrerista, or PRF). Other than the distribution of more than 495,000 acres (200,319 ha) of land to 10,000 peasant

families, the Febreristas did not bring a clearly defined philosophy with them. Franco's cabinet represented almost every political ideology found in Paraguay. The government's fragility became evident on August 13, 1937, when the military ousted Franco after he ordered a retreat from some captured Chaco territories. General José Félix Estigarribia (b. 1880–d. 1940), a Chaco War hero, took office. He began a land reform program aimed at providing every Paraguayan family with a small plot of land, balanced the budget, increased the capital of the national bank, instituted municipal reforms, and laid the plans for national highways and public works projects. A new constitution in 1940 enhanced presidential powers and empowered the national government to deal directly with social and economic development issues. If there were to be a new Paraguay, the possibility came to a sudden end on September 5, 1940, however, when Estigarribia died in a plane crash. He was succeeded by War Minister HIGINIO MORÍNIGO.

#### THE DICTATORS: MORÍNIGO AND STROESSNER

Morínigo inherited the dictatorial powers set down in Estigarribia's constitution and used them to ban the Febreristas and the Liberals and to clamp down on free speech and individual liberties. With the support of a group of young military officers, Morínigo was able to stave off a number of plots to oust him from office until June 3, 1948. Morínigo's pro-Axis stance throughout World War II brought him both criticism and rewards from the United States (see WORLD WAR II AND LATIN AMERICA). The United States attempted to lure him to the Allied cause with a multitude of economic assistance dollars, and in June 1943, he became the first Paraguayan president to visit the United States. Although Morínigo severed diplomatic relations with the Axis Powers in February 1942, he permitted German agents to live in the country and to pass information on to their superiors in Argentina, with whom Morínigo maintained a close relationship. Only when victory appeared in sight in February 1945 did he declare war on the Axis. Under pressure at home and from the United States, Morínigo relaxed restrictions on the political opposition and allowed political exiles to return home, but he gave no indication that he intended to step down from the presidency. In March 1947, Morínigo, with the assistance of Lieutenant Colonel ALFREDO STROESSNER, stymied a coup attempt led by Franco and his Febrerista, Liberal, and Communist followers. As a result, only the Colorado Party remained in the political arena, but it quickly split into factions, a hardline group headed by publisher Natalicio González (b. 1897–d. 1966) and the moderate *democráticos* led by Federico Chávez (b. 1881?–d. 1978). González ran unopposed in the May 15, 1948, presidential election, but his presidency was short-lived. Again the military, including Stroessner, intervened by forcing him to leave the country on December 30,

1948. Nine months later, on September 10, 1949, the military allowed Chávez into the presidential palace. Despite a reputation as a Democrat, three weeks into his term, Chávez declared a state of siege. Throughout the political infighting, Morínigo's political influence drastically declined. When Chávez declared a state of siege, Morínigo agreed to leave Paraguay and permanently reside in exile in Buenos Aires.

Two decades of political and social unrest that included depression, war, and civil conflicts had left Paraguay's economy shattered. Both the gross national product (GNP) and per-capita income had dropped drastically, while inflation and a black market characterized the national consumer economy. In early 1954, former Central Bank director Epifanio Méndez Fleitas (b. 1917–d. 1985) joined with Stroessner, now a general and commander in chief of the army, against Chávez. When the latter attempted to dismiss a Stroessner-appointed military officer, the general removed Chávez from office and moved himself into the presidential palace on August 15, 1954. Stroessner immediately declared a state of siege and continued to do so, except for a brief period in 1959, every three months for the interior of the country until 1970 and until 1987 for Asunción. He exiled González and Méndez Fleitas. Stroessner implemented an austerity program and denied workers pay increases. At the

same time, Argentina cancelled a TRADE agreement with Paraguay, and the Colorado Party declined to support Stroessner, giving him every appearance of an isolated leader. Nevertheless, he won a national plebiscite in 1958. This was followed by a guerrilla war against him, allegedly aided by Cuban dictator FIDEL CASTRO RUZ. Stroessner gave the military a free hand to suppress the guerrilla insurgency, which led to a terrorist campaign against all the regime's opponents. Because of his strong anticommunist stance, Stroessner received U.S. military and economic assistance during the 1960s and 1970s. The former was used for internal security, while the latter enabled Stroessner to modernize the country's infrastructure. Stroessner also benefited from Brazil's granting Paraguay duty-free access at its Atlantic Coast ports and from the construction of the Itaipú Dam on the Paraná River between the two countries. When opened in 1982, it was the world's largest hydroelectric dam, and because of its own underdevelopment, Paraguay became a net exporter of electric power to Brazil and then Argentina.

#### RETURN TO DEMOCRACY

By the 1980s, Stroessner faced several opposition groups. The landed elites wanted to return to political power, high-ranking military officers began to jockey among themselves as possible successors to Stroessner, lower-



Paraguay's Government Palace building in Asunción (Thomas M. Leonard Collection)

ranking military officers chafed under limitations on promotions and access to graft and corruption opportunities, while peasants and laborers became openly discontent with their continued lack of economic opportunity. Externally, the United States drastically cut back on its military and economic assistance, and Argentina and Brazil, which had jettisoned their military regimes in the early 1980s, pressured Paraguay to do the same. The catalyst to change came in 1987, when the Stroessner faction in the Colorado Party openly anticipated that Stroessner's son, Gustavo (b. 1945– ), would become Paraguay's next president. Finally, on February 2, 1989, General Andrés Rodríguez (b. 1923–d. 1997) ousted the Stroessners and their Colorado supporters from power. The Stroessners quickly departed for Brazil.

Rodríguez, linked by marriage to the Stroessner family, became president in 1989, but rather than consolidate his power, he oversaw the rewriting of electoral laws and a new constitution that paved the way for the presidential election of Colorado candidate JUAN CARLOS WASMOSY on May 15, 1993, Paraguay's first civilian president in 40 years. But, political stability did not come quickly. In April 1996, the United States initiated a regional response to prevent General Lino Oviedo (b. 1943– ) from ousting Wasmosy. Colorado Party candidates captured the next two presidential elections: Raúl Cubas Grau (b. 1943– ) in 1998 and ÓSCAR NICANOR DUARTE FRUTOS (b. 1956– ) in April 2003. Although Duarte has made progress in addressing corruption during the Cubas regime and the economy appears to have registered gains in 2006 and 2007, on a per-capita basis, real income appears to have stagnated at 1980 levels. Although Paraguay boasts of a market economy, it has a large informal sector, which makes it impossible to obtain accurate economic data. This sector is engaged in the re-export of goods to the neighboring countries of Argentina and Brazil, as well as thousands of microenterprises and urban street vendors. In addition, a large percentage of the population derives its living from agricultural activities, mostly on the subsistence level.

See also ASUNCIÓN (Vol. II); COLORADO PARTY, PARAGUAY (Vol. III); FRANCIA, JOSÉ GASPAR RODRÍGUEZ DE (Vol. III); GUARANÍ (Vols. I, II); LÓPEZ, CARLOS ANTONIO (Vol. III); PARAGUAY (Vols. I, II, III); SOLANO LÓPEZ, FRANCISCO (Vol. III); WAR OF THE PACIFIC (Vol. III); WAR OF THE TRIPLE ALLIANCE (Vol. III).

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**Patterson, Percival** (b. 1935– ) *prime minister of Jamaica* Born on April 10, 1935, in Westmoreland, JAMAICA, Percival Patterson earned a B.A. in English from the University of the West Indies in 1958. He subsequently studied at the London School of Economics and was admitted to the Jamaican bar in 1963. A member of the People's National Party (PNP), Patterson entered politics in 1969 after winning a seat representing Western Kingston in a special by-election. During MICHAEL MANLEY's first term as prime minister during the 1970s, Patterson served as minister of tourism. In 1981, as BELIZE prepared for independence, Patterson served as an adviser to the Belizeans and helped them draft their constitution. When Manley returned to power in 1989, Patterson was appointed deputy prime minister.

Citing health reasons, Manley retired in 1992 and was succeeded by Patterson, Jamaica's first black prime minister. Patterson remained in office until 2006, making him the longest continuously serving prime minister in Jamaican history. Patterson revised banking practices, reorganized the taxation system, and implemented numerous incentives in the tourism industry. Significantly, his pragmatic stance on political and economic issues greatly diminished the political violence between Jamaica's two main parties. In 1994, Patterson announced that Jamaica would not recognize the internationally installed government of Gérard Latortue (b. 1934– ) in HAITI after the resignation of JEAN-BERTRAND ARISTIDE. Following Aristide's exile from Haiti, Patterson allowed the former Haitian leader to reside temporarily in Jamaica. In February 2006, when Patterson announced his impending retirement, Portia Simpson-Miller (b. 1945– ), the vice president of the PNP since 1978, became the party's leader and was sworn in as prime minister on March 30, 2006.

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**Paz Estenssoro, Víctor** (b. 1907–d. 2001) *president of Bolivia* Born into a landowning family in the Tarija, a department in southern BOLIVIA, Víctor Paz Estenssoro

graduated from high school in 1922 and went on to earn a law degree from the national university in La Paz. He held several government positions until conscripted into the army during the CHACO WAR (1932–35). In 1941, Paz Estenssoro cofounded the NATIONAL REVOLUTIONARY MOVEMENT (MNR).

Disillusioned by Bolivia's failure in the Chaco War, Paz Estenssoro became part of the "Chaco Generation" group of middle-sector people who called for an end to elitist control of government and for social reform for NATIVE AMERICANS. His interest in the rights of the indigenous led to his appointment in the Ministry of Housing during the brief presidency (1937–38) of DAVID TORO RUILOVA and to his election to the 1938 constitutional convention that authored a document granting the government the right to intervene in the national ECONOMY and to address social problems.

Paz Estenssoro came to the national forefront in 1941 when he joined with others to form the MNR. A year later, he gained greater notoriety when before Congress he condemned the MILITARY for the December 22–23 slaughter of an estimated 400 miners and their families in the city of Catavi as they demonstrated for higher pay from the Patiño Mining Company (see MINING). Subsequently, Paz Estenssoro and the MNR joined with lower-ranking officers—colonels and lieutenant colonels—who advocated for their greater participation in government. The alliance resulted in the presidential installation on December 20, 1943, of Colonel Gualberto Villarroel (b. 1908–d. 1946), who appointed Paz Estenssoro as minister of finance. Although Paz Estenssoro supported the framework of import-substitution-industrialization, the U.S. State Department saw him as a fascist who had to go. Under U.S. pressure, Paz Estenssoro resigned on July 7, 1946, two weeks before Villarroel fell from power. He went into exile in ARGENTINA, where he witnessed much of the JUAN DOMINGO PERÓN era.

When the military annulled the May 15, 1951, elections and denied Paz Estenssoro the presidency, the MNR organized its miners, who stormed out of the mountains and into La Paz. In 1952, after a three-day bloody confrontation with the military, from April 13 to April 15, the army capitulated, permitting Paz Estenssoro to assume the presidency on April 15, 1952. Under Paz Estenssoro's leadership, the government restructured the military, nationalized the tin INDUSTRY, instituted a land distribution program, and extended suffrage to all Bolivians. Constitutionally ineligible to immediately succeed himself, Paz Estenssoro waited until 1960 to run for the presidency again and was reelected. During this administration, differences between him and Vice President JUAN LECHÍN OQUENDO fractured the party, resulting in the latter's expulsion from it in 1964. Paz Estenssoro amended the constitution to enable him to be reelected on May 31, 1964, but was overthrown by his vice president and air force general René Barrientos (b. 1919–d. 1969) on November 4, 1964. Over the next two decades,

Paz Estenssoro moved in and out of Bolivia, returning in 1979 and 1980 to make unsuccessful presidential bids.

Former dictator HUGO BANZER SUÁREZ defeated Paz Estenssoro in the June 29, 1985, presidential contest, but neither received the 50 percent threshold required for victory. Thus, the National Congress had the final authority and chose Paz Estenssoro. When Paz Estenssoro took office on August 6, 1985, he was committed to neoliberal economic principles to deal with an economy plagued by staggering inflation. In application, this meant a government austerity program that included firing 30,000 miners, repressing LABOR unions, and privatizing government-owned industries. Despite these measures, Bolivia remained South America's poorest nation when Paz Estenssoro retired from politics at the end his term on August 6, 1989. He died of a circulatory ailment at age 93 on June 7, 2001.

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**Pelé (Edson Arantes do Nascimento)** (b. 1940– ) *Brazilian soccer player* Pelé is the nickname given to Edson Arantes do Nascimento, who was born into poverty in the town of Três Corações but spent his childhood and early teenage years in Bauru, SÃO PAULO, BRAZIL. Taught soccer by his father, João Ramos do Nascimento (Dondinho), himself a soccer star, Pelé played street soccer, where he earned his nickname (see SPORTS). One year after joining the Santos Football Club in 1956, Pelé earned a starting position at the age of 16. He would go on to play 1,363 games and score 1,280 goals. He played on the Brazilian national team that won World Cup championships in 1958, 1962, and 1970. He retired from Brazilian soccer in 1972 but three years later joined the New York Cosmos of the North American Soccer League (NASL). Pelé led the Cosmos to the NASL championship in 1977, the same year that the league folded. Known more for his flamboyant style and pleasant personality rather than his fundamental skills, Pelé became an ambassador of international soccer. The International Olympic Committee named him athlete of the century in 1999.

Twice married, Pelé is the father of five children. Following his soccer career, Pelé labored in public relations, journalism, film, and music. He also authored two novels. Although critics denounced his failure to criticize Brazil's MILITARY regime, Pelé epitomized the culture and optimism of most Brazilians.

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**PEMEX (Petróleos Mexicanos)** PEMEX is Mexico's state-owned oil company. It is one of the nation's largest companies and is in charge of all oil exploration, extraction, refining, processing, and marketing in MEXICO. PEMEX has been a major part of the Mexican ECONOMY throughout the 20th century. It accounts for a large portion of government income and a significant percentage of export revenue.

PEMEX was created in 1938 by President LÁZARO CÁRDENAS when Mexico expropriated foreign-owned oil operations and nationalized the industry. National control of the country's natural resources had been one of the objectives of the MEXICAN REVOLUTION, and government authority to nationalize major industries had been outlined in the CONSTITUTION OF 1917. Cárdenas's expropriation of the petroleum INDUSTRY elicited strong feelings of nationalism in Mexico, but it also angered foreign oil companies, which launched a boycott against Mexican oil. U.S. and European companies protested Mexico's initial settlement offers, and a standoff ensued until the late months of 1941. The exigencies of World War II contributed to the resolution to the conflict (see WORLD WAR II AND LATIN AMERICA).

Since its inception, PEMEX has dominated the Mexican economy. From the 1950s to the 1970s, it served as a hallmark of the Mexican economic policy of import-substitution industrialization, under which the government nationalized major industries. These policies ended with the economic crises of the 1980s, and many major industries were privatized, but the government has retained control of PEMEX. The company has helped Mexico become one of largest petroleum-producing countries in the world. PEMEX remains an important source of government income and a symbol of ardent Mexican nationalism.

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**Pérez, Carlos Andrés** (b. 1922– ) *president of Venezuela* Born in the Andean village of Rubio, VENEZUELA, Carlos Andrés Pérez was influenced by the policies of dictator JUAN VICENTE GÓMEZ, which led him down the path of political populism to work on behalf of LABOR in his home region and then to the Venezuelan Democratic Action (Acción Democrática, or AD) party. As a teenager, Pérez became active in the party and served as personal secretary to RÓMULO ERNESTO BETANCOURT BELLO during his first presidency from October 18, 1945, until his ouster by the MILITARY on February 17, 1948. Pérez fled into exile in COSTA RICA, where he

and Betancourt authored antimilitary works. Pérez also spent time in CUBA and PANAMA and occasionally made clandestine trips into Venezuela. Pérez later became a champion of Third World causes and proposed that it unite in its dealings with the industrialized world. He returned to Venezuela following the overthrow of dictator MARCOS PÉREZ JIMÉNEZ on January 23, 1958, to become Betancourt's minister of finance.

Nominated as the AD's presidential candidate, Pérez campaigned in almost every Venezuelan village before winning the December 9, 1973, elections with 48 percent of the popular vote. His first presidency (1974–79) was best known for the government's nationalization of the petroleum and iron ore industries. "CAP," as Pérez was popularly known at the time, used the newfound oil revenues to initiate state-sponsored welfare programs. When Pérez commenced his second presidential term on February 2, 1989, he immediately confronted a precipitous drop in global oil prices. He accepted International Monetary Fund assistance that required a government austerity program. The loss of oil revenues and the austerity measures contributed to his growing unpopularity and an increasing number of protests against his administration. Finally, after two failed coup attempts, on February 4, 1992, Lieutenant Colonel HUGO RAFAEL CHÁVEZ FRÍAS engineered Pérez's ouster. After being sentenced to a two-year prison term for corruption, Pérez left Venezuela, first for the DOMINICAN REPUBLIC and then to Miami, Florida, where he currently resides.

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**Pérez Jiménez, Marcos** (b. 1914–d. 2001) *president of Venezuela* Born in the Michelena municipality of Táchira District, in VENEZUELA, Marcos Pérez Jiménez received his education in local schools before entering Venezuela's MILITARY academy in 1931, from which he graduated in 1934 at the top of his class. He subsequently studied at PERU's military college.

In 1943, Pérez Jiménez organized the Patriotic Military Union (Unión Patriótica Militar, or UPM) that stood in opposition to President Isaiás Medina (b. 1897–d. 1953) and led to Pérez Jiménez's arrest on October 18, 1945. His arrest instigated the military overthrow of Medina and installation of RÓMULO ERNESTO BETANCOURT BELLO in the presidential palace. Betancourt quickly dispatched an infuriated Pérez Jiménez on a lengthy diplomatic tour abroad. Pérez Jiménez returned



to Venezuela three years later to organize another military coup, ousting President Rómulo Gallegos (b. 1884–d. 1968) on November 24, 1948, and ending three years of civilian rule. Pérez Jiménez served as a member of the junta until December 2, 1952, when it overthrew the caretaker government of Germán Suárez Flamerich and named Pérez Jiménez president. He remained in office until removed by another military coup on January 23, 1958.

Pérez Jiménez's administration was noted for its abuse of civil and political rights, as well as corruption and fraud. On the positive side, Pérez Jiménez undertook an extensive infrastructure program including the construction of roads and bridges, government buildings, public housing, and the glittery Humboldt Hotel overlooking CARACAS. After being ousted from office in 1958, Pérez Jiménez went into exile in the United States until his extradition home in 1963 to face charges that he grafted for himself \$200 million in government funds during his presidency. Pérez Jiménez remained in prison during his five-year trial. After being found guilty of the charges, the government released him from prison. Pérez Jiménez returned to Spain, residing in Alcobendas until his death on September 20, 2001, at the age of 87.

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**Permanent Treaty of 1934** The Permanent Treaty of 1934 went into effect on June 9, 1934, following its ratification by the U.S. and Cuban Senates. It replaced the 1903 Permanent Treaty (see PLATT AMENDMENT). The treaty resulted from converging influences within CUBA and the United States. During the 1920s, Cuban student groups emerged as the most vocal nationalist group criticizing U.S. presence in the country. The climax came in September 1933 with the so-called Sergeant's Revolt, which brought RAMÓN GRAU SAN MARTÍN to the presidency. When he unilaterally abrogated the Platt Amendment, Grau's assertion momentarily satisfied Cuban nationalists but did not meet the requirements of the 1903 treaty that legalized the Platt Amendment between the two countries. The 1903 treaty required a negotiated termination of the agreement.

During the same time period, the United States was moving away from its interventionist policies in the Caribbean region toward a noninterventionist stance, as found in the GOOD NEIGHBOR POLICY of President Franklin

D. Roosevelt. For Cuba, this meant negotiations that led to the Permanent Treaty of 1934. While terminating the 1903 agreement, the 1934 treaty certified that all acts of the U.S. military government in Cuba from 1898 to 1902 had been ratified by the Cuban government and that they would remain in effect permanently. Additionally, the United States maintained its lease rights to Guantánamo Naval Base and that the lease could be terminated only by mutual agreement.

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#### Perón, Isabel Martínez de (María Estela Martínez de Perón) (b. 1931– )

*president of Argentina* The third wife of Argentine president JUAN DOMINGO PERÓN, Isabel Martínez de Perón served as vice president during his 1973–74 presidency and succeeded him as president following his death on July 1, 1974. Born María Estela Martínez to a lower-middle-class family in La Rioja, ARGENTINA, Isabel, as she was called, pursued a career as a cabaret dancer. She met her future husband in PANAMA while he was in exile. She went with him to Spain in 1960, where they married. They returned to Argentina in 1973, and Martínez de Perón stood as his running mate in the presidential election. She came to the presidency without political experience or the charisma of MARÍA EVA DUARTE DE PERÓN, Perón's second wife. Martínez de Perón inherited a country plagued by a fledgling guerrilla war, rising oil prices, LABOR unions pressing for significant wage increases, and a fractured Peronist Party. She fell under the influence of right-wing Peronist José López Rega (b. 1916–d. 1989), who convinced her to purge the cabinet of moderate ministers and crack down on labor unions. The confrontation between government and labor resulted in strikes, demonstrations, and the assassination of the regime's political and intellectual opponents and labor leaders. The ECONOMY careened out of control, with a drastic drop in exports and an inflation rate of 335 percent in 1975. Given the chaotic conditions, the military deposed Isabel Perón on March 4, 1976, replaced her with General Jorge Rafael Videla (b. 1925– ), and launched a vicious campaign known as the DIRTY WAR against all leftists, real or imagined. Perón retired to Spain, where she maintained close ties with the family of one-time Spanish strongman Francisco Franco. On January 12, 2007, the 75-year-old Perón was arrested

in Spain on an Argentine warrant for her alleged role in the political assassinations during her brief presidency. She was released from prison and placed under house arrest pending further judicial actions in Argentina and Spain.

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**Perón, Juan Domingo** (b. 1895–d. 1974) *president of Argentina* Considered the mastermind of a coup d'état in June 1943 that toppled civilian president Ramón Castillo (b. 1879–d. 1944), Juan Domingo Perón became ARGENTINA'S most dominant political figure in the 20th century. He served as president in 1946–55 and again in 1973–74. His influence remains present today.

Although his parents later married, Perón was born on October 8, 1895, the illegitimate son of Mario Tomás Perón, a farmer, and Juana Sosa Toledo, reportedly a mestizo, in Lobos, Buenos Aires Province. Following his graduation in 1913 as a second lieutenant from the national MILITARY academy, Perón moved slowly through the ranks, earning distinction as an instructor of noncommissioned officers and being appointed in 1926 to Argentina's Superior War School. Following his graduation in 1929, Perón was assigned to the General Staff Headquarters, where he became involved in 1930 in General José F. Uriburu's (b. 1868–d. 1932) plan to overthrow President Hipólito Yrigoyen (b. 1892–d. 1943). At the last moment, Perón switched his allegiance to another plotter, General José Augustín P. Justo (b. 1876–d. 1948), a move that proved costly because Uriburu acted first. For his misjudgment, Perón spent two years on the Bolivian frontier until Justo finally pushed Uriburu out in 1932. Perón benefited from the change with subsequent assignments at the Superior War School and in Argentina's embassies in CHILE and in Italy. The latter assignment enabled Perón to observe Benito Mussolini's fascist state, which confirmed his own political and economic thoughts. Returning to Argentina in 1941, Perón joined commercial and agricultural isolationist groups that benefited financially from the conflict and who labored to keep Argentina out of WORLD WAR II. With colleagues in the Group of United Officers (Grupo de Oficiales Unidos, or GOU), Perón engineered the overthrow of President Ramón Castillo on June 4, 1943.

Perón had himself appointed head of the LABOR department in the new government, a position he used to launch his political career. He granted labor many rights, but most important, he encouraged and then settled strikes on the worker's behalf. He also supported labor's nationalism that challenged oligarchic rule and British and U.S. presence in the Argentine ECONOMY. Concerned with his growing popularity and political ambitions, the

military officers forced Perón into exile in October 1945, but it lasted only eight days because of massive demonstrations on his behalf. A year later, Perón was elected Argentina's president.

Perón moved quickly to implement his campaign promises for economic independence, national sovereignty, and social justice. He established a corporate state by which the agriculturalists, industrialists, and laborers were organized into separate units supervised by the state. The government paid the *estancieros*, or ranchers, a fixed below-market price for their beef, wheat, and wool and then sold the products globally at market prices through the Institute for the Promotion of Trade (Instituto Argentino de Promoción del Intercambio, or IAPI), a state-owned trading monopoly created in 1947. Perón used the profits for his other projects. To achieve economic independence he encouraged the development of new industries through government subsidies and loans and protective tariffs and by nationalizing foreign-owned infrastructure, such as electricity, railroads, docks, and warehouses. Perón used some of the profits from the IAPI to pay the British, French, and North American owners for their losses. He also paid off Argentina's foreign debt. Perón's policies provided the workers with increased wages, health benefits, paid vacations, and improved working conditions. His wife, MARÍA



This 1950 photo shows Juan and Eva Perón of Argentina. (AP Photo)

EVA DUARTE DE PERÓN, herself a product of Argentina's poorer classes, provided significant assistance to her husband through her own social foundation that, in part, had been well financed by forced pledges of funds from society's elite sectors. The *descamisados*, or "shirtless ones," as the workers were called, vaulted Perón to reelection in 1951, following the amendment of the 1853 constitution permitting consecutive presidential terms.

Not pleased with the loss of profits, the *estancieros* boycotted the administration by withholding production of their primary products, meaning that Perón had less to offer the world market, a market where demand and prices had also declined as the European and other economies recovered from war. Within Argentina, the upper and middle sectors increasingly protested Perón's appeal to urban labor, whose increasingly violent demonstrations appeared to threaten Argentina's stability. The threat became a reality in 1955 when Perón legalized divorce and proposed to end the CATHOLIC CHURCH'S involvement in public EDUCATION. These acts resulted in Perón's excommunication and public criticism of him by the church's higher clergy. In turn, mobs of Peronists demonstrated against the church's leadership and took the torch to many historic churches in BUENOS AIRES. The conservative military officers forced Perón's resignation on September 15, 1955, and sent him into exile, first to PARAGUAY and then to Spain, where he remained until 1973.

During Perón's 18-year absence, the Peronists—by then the largest singular group of voters in urban areas—showed their political strength either by boycotting elections or electing their own leaders to congressional or provincial office. In this same time period, the Peronists suffered significantly from the government-imposed economic austerity measures. Understandably, they welcomed Perón's return to Argentina and to the presidency in 1973. Perón, however, knew that the Argentine economy could not sustain the worker's demands, but before he could earn their wrath for doing nothing on their behalf, Perón died of heart disease on July 1, 1974.

Peronism did not pass with the president's death. The Peronist party remained the country's most potent political group, but its leadership fell victim to the military's DIRTY WAR during the late 1970s. Following Argentina's return to democracy, the Peronists overwhelmingly supported CARLOS SAÚL MENEM'S bid for the presidency in 1994 and again in 1999. Despite labor's support, Menem's neoliberal policies continued the practice of selling state-owned industries, mostly to foreign companies, whose downsizing increased unemployment. Menem also pegged the Argentine peso to the U.S. dollar, a move that drained the country's financial reserves and contributed to the economic meltdown that beset Argentina in 2000 (see ARGENTINA, ECONOMIC COLLAPSE IN). Following a period of political and economic instability, President NÉSTOR KIRCHNER used support from the International Monetary Fund to stabilize the economy and restore eco-

nomie growth, but he has yet to deal with labor's demand for improved wages and job security.

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**Perón, María Eva Duarte de (Evita)** (b. 1919–d. 1952) *influential and popular First Lady of Argentina* María Eva Duarte de Perón, popularly known as Evita, was the illegitimate daughter of Juan Duarte and Juana Ibargurén. She became the second wife of Argentine president JUAN DOMINGO PERÓN and First Lady of ARGENTINA. Raised and schooled in the town of Junín, some 150 miles from BUENOS AIRES, Evita moved to the capital city at age 15 to seek a career in theater and film, but fame and fortune in those endeavors eluded her. Her breakthrough came in 1942 when she signed a long-term radio contract for the popular radio program *Great Women in History*, which gave her a vast public audience. A year later, with others she founded the LABOR union known as the Argentine Radio Syndicate, a position that gave her entry into Argentine politics.

Evita met Perón during a fund-raising event for earthquake victims in San Juan, Argentina. Shortly thereafter the two lived together, which shocked many Argentines at the time and impeded Perón's political ambitions. Evita used her radio program to extol Perón's virtues. His growing influence over and popularity among the Argentine working class alarmed many of his colleagues within the ruling military junta and led to his arrest on October 9, 1945. For the next six days, crowds estimated as high 350,000 demonstrated in front of the presidential residence in Buenos Aires, demanding his release. Evita's role in this affair is not clear. On one side, she is portrayed as organizing and stirring people to protest, while on the other side, she reportedly did little more than press for a writ of habeas corpus. Perón was released on October 17, and on October 21, the two were married.

Perón resigned his MILITARY position in order to be constitutionally eligible to seek the presidency in 1946. Evita played an important role in his campaign, often

traveling with him outside Buenos Aires. She also used her radio program to promote Perón as a populist who would address the problems of the *descamisados* (shirtless ones), as the workers were known. Perón won the February 24, 1946, presidential election. As she had during the campaign, Evita sat in strategy sessions with the president and his advisers, which infuriated the elite. She is known to have played a crucial role in policy making during Perón's first administration.

Evita's popularity grew following the establishment of the Eva Perón Foundation, which served the poor. Government funds were augmented by monies reluctantly donated by the Argentine elite to build schools and medical clinics in poorer communities across Argentina. Once constructed, the government assumed operational expenses. The foundation also paid medical and utility bills for the poor and distributed food and clothing to them. As a result, Evita developed a strong following, particularly among women. Her popularity at home did not transcend the Atlantic Ocean in 1947 when she visited Europe as a stand-in for her husband. Only in Spain, where she met dictator Francisco Franco, did she receive a warm reception. Visits to Rome and Paris were more subdued, and in Germany and Switzerland, she faced protests. Evita canceled a scheduled visit to Great Britain after the British government denied her request to stay at Buckingham Palace.

In the political arena, Evita established the women's branch of the Peronist Party, which numbered nearly 500,000 persons by 1951, the same year that Congress rewrote the 1853 constitution to permit Perón to seek another six-year term and granted women the right to vote. But the Peróns' desire to have Evita serve as Juan's vice-presidential running mate in the 1952 presidential election was too much for the military officer corps and the Argentine elite. Without a vice-presidential running mate, Perón won the October 27, 1952, elections with 67 percent of the popular vote and was the overwhelming choice among female participants.

By mid-1951, Evita's declining health became apparent. A victim of cervical cancer, operations, and chemotherapy, which was new at the time, could not save her life. She died on July 26, 1952. Countless thousands lined the route of her funeral procession. For two years, Evita's embalmed body remained in her office at the General Confederation of Workers headquarters. Before the completion of the crypt and monument that was to serve as her final resting place, the military ousted President Perón on September 19, 1955, and clandestinely dispatched Evita's body to a secret burial site in Milan, Italy, where it remained for 16 years. It was exhumed in 1971 and sent to Spain, where the exiled Perón kept it in his home. Following his death in 1974, his third wife, ISABEL MARTÍNEZ DE PERÓN, brought Evita's body to Argentina for burial in BUENOS AIRES's most prestigious Recoleta neighborhood cemetery. Her legacy lives on through numerous books, documentaries, films, and the continu-

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**Peru** Peru is located on the Pacific coast of South America, bordered on the north by ECUADOR and COLOMBIA, the east by BRAZIL, the southeast by BOLIVIA, and the south by CHILE. Totaling 496,225 square miles (191,593.5 km<sup>2</sup>), Peru is South America's third-largest country and approximately three times the size of the U.S. state of California. Peru has three identifiable geographic regions: the western and coastal plains, the central rugged Andean mountains, and the eastern lowlands with tropical forests that are part of the Amazon Basin. Forty-five percent of Peru's 28.8 million inhabitants are NATIVE AMERICANS, mostly Quechua and Aymara; 37 percent are mestizo; 15 percent are European; and 3 percent are African, Japanese, Chinese, and other groups. From 1940 to 2005, a steady flow of rural-to-urban MIGRATION contributed to the growth of cities so that in 2005, 74.6 percent of the total population lived in urban centers. Peru has 21 cities with more than 100,000 people.

Although there is evidence of human presence in Peru dating to 11,000 B.C.E., organized societies appeared around 3000 B.C.E. At the time of Francisco Pizarro's arrival in 1532, the Incas were the dominant group and, in fact, were the largest indigenous society in pre-Columbian America, with an empire stretching from northern Ecuador to central Chile. Spanish conquistadores completed the Incas' capitulation by 1533 and in 1542 established the Viceroyalty of Peru, from which the Spanish initially governed all of South America. For the next 200 years, the Spanish used forced Amerindian LABOR to work Peru's vast silver and gold mines. Although Peruvian independence was declared on July 18, 1821, it was not until the Spanish lost the Battle of Junín on August 6, 1824, and the Battle of Ayacucho on December 9 the same year that Peru became free for all practical purposes. Spain finally recognized Peru's independence in 1879. Key features of 19th-century Peru included the Liberal-Conservative political conflict, the exploitation of guano by foreigners, and the loss of the Tarapaca and Arica Provinces to Chile in the War of the Pacific (1879–83).

### THE OLD ORDER UNDER DURESS

After the War of the Pacific, new coastal elites emerged through the production and exportation of cotton and sugar, and the MINING of lead, zinc, iron, and copper.

Peruvians dominated the agricultural elite, while foreign, mostly U.S., companies dominated the mining sector. The Peruvian elites coalesced into the Civilista Party, which dominated the country's presidency through World War I. Although property qualifications and literacy tests served to limit the electorate, the Civilistas also resorted to fraud to ensure that their candidates won elections. The economic changes contributed to new social patterns. While coastal peasants continued to work the agricultural estates, additional Amerindian laborers were brought in from the Andean sierra as *enganchados*, or workers indebted by cash advances. The mining INDUSTRY attracted rural labor and contributed to the establishment of urban communities. Neither labor group, however, shared in the distribution of wealth. The system contributed to a growing social consciousness, which surfaced in 1919 at the end of World War I.

The urbanization of Peru also gave rise to a nascent labor movement, as seen in the labor strikes of 1910 and 1911. The strikes only intensified with the loss of overseas markets that accompanied the war in 1914 (see WORLD WAR I AND LATIN AMERICA). The ideals of the Mexican and Russian Revolutions prompted new schools of intellectual thought. *Indigenismo* caught the attention of many artists and writers who wished to celebrate the glories of the indigenous past. The movement also brought to the forefront the marginalized Amerindian and mestizo middle sector and laboring groups. In 1918 and 1919, university students joined the protest against the status quo, and all found solace in a new group of reformers headed by VÍCTOR RAÚL HAYA DE LA TORRE and JOSÉ CARLOS MARIÁTEGUI. In 1919, the Regional Peruvian Labor Federation (Federación Obrera Regional Peruana, or FORP) and socialist and workers' parties were established. Considered moderate in its tone, FORP unsuccessfully sought industrywide and nationwide collective bargaining, while the two POLITICAL PARTIES were Marxist in their orientation and, therefore, an anathema to the elites.

The immediate political beneficiary of these changes was former president AUGUSTO B. LEGUÍA, who returned from abroad to win the May 1919 presidential election. Sensing that the elite would oust him from office, Leguía acted first. On July 4, 1919, he engineered a coup d'état against President José Pardo (b. 1864–d. 1947) and set in motion an 11-year period of dictatorial rule known as the Ocenio. Leguía legitimized his position through a new constitution in 1920. The constitution gave the central government authority over the ECONOMY, including the power to set prices, impose taxes, and manage labor-management relations. Leguía suppressed the indigenous, labor, and student movements and purged Congress of opposition, exiling many members. Leguía also had the constitution amended so he could run for the presidency again in 1924 and 1929. He pursued an export-based economic policy and opened the door to foreign investment on favorable terms, but neither provided sufficient

tax revenues to pay for his extensive infrastructure program. In addition, Peru's reliance on the importation of consumer and industrial goods resulted in an unfavorable balance of TRADE.

Leguía was not without opposition. Two of his most significant critics who had a long-term influence on Peruvian society and politics were Mariátegui and Haya de la Torre. A Marxist, in 1928, Mariátegui founded the Peruvian Socialist Party (later the Peruvian Communist Party, or PCP). He accepted the class conflict view of history that saw revolution as the only way to correct inequitable socioeconomic systems. Mariátegui believed the long history of Peru's peasant rebellion could be melded into a Marxist movement. In 1924, Haya de la Torre organized the AMERICAN POPULAR REVOLUTIONARY ALLIANCE (APRA), which he envisioned as a continent-wide, anti-imperialist alliance that would incorporate the middle class, peasants, and workers to create a new society. With the onset of the Great Depression in 1929, Leguía's popularity dwindled to an all-time low, prompting the MILITARY to oust him from office on August 25, 1930.

For two generations after Leguía's ouster, the military and the landed elite supported each other as actors on the political right, confronting the forces on the left, particularly APRA and the PCP. The 1930s were dominated by General Óscar R. Benavides (b. 1876–d. 1945), who benefited from increased exports of cotton, lead, zinc, and petroleum after 1933, which restored economic growth and resulted in a doubling of trade by 1936. In 1934, he commenced the state-directed development of petroleum. He used a significant portion of the associated government tax receipts for public works and social projects, including the construction of roads and working-class housing and setting up a compulsory social security system. Benavides's economic development policies were modified by his two successors, Manuel Prado (b. 1889–d. 1967) and José L. Bustamante (b. 1894–d. 1989), by strengthening the government's role in the economy and reducing the country's reliance on exports. In the midst of post-World War II food shortages and inflation, Bustamante approved a contract in 1946 giving the International Petroleum Company (IPC) permission to search for oil in the Sechura Desert (see WORLD WAR II AND LATIN AMERICA). While the sugar barons seethed at the government's trade restrictions, the oil concession to the Canadian subsidiary of Standard Oil initiated a nationalist chorus of protest.

The coastal elite turned to the military for redress, and on October 29, 1948, General Manuel A. Odría (b. 1897–d. 1974) ousted President Bustamante. Odría's pro-planter policies included the return to an export-based economy, the lifting of trade restrictions, and the encouragement of foreign investments in oil and mining. Odría sought U.S. advice on currency stabilization. Odría also reached out to the coastal urban workers and extended suffrage to WOMEN in 1955. For these actions,

some analysts have compared Odría to Argentina's JUAN DOMINGO PERÓN. Odría, however, turned on his critics, particularly the *apristas*. To escape deportation, Haya de la Torre took refuge in the Colombian embassy, where he remained for five years. Regime dissenters found their civil rights violated.

The Odría-oligarchy alliance came under increasing attack in the 1956 presidential election and reached its climax in the June 10, 1962, contest when APRA's Haya de la Torre captured the largest number of popular votes but only 33 percent of the total vote. Believing that Congress might favor Haya de la Torre, the military dismissed Congress and established a ruling junta until a new election was held on June 9, 1963. This was won by Acción Popular candidate FERNANDO BELAÚNDE TERRY with support from the Partido Democrático Cristiano (PDC), which represented the rural poor. The military-oligarchy belief that Belaúnde Terry would not change the existing socioeconomic order quickly dissipated. Although he attempted to form a national consensus among all sectors, his focus on the needs of workers and peasants, increasing the state's role in the economy and social services, and call for land reform only fostered opposition from the elite and military officers. While Congress emasculated his land reform program, the proposal itself inspired some 300,000 peasants in 1966 to rise up and seize land. Belaúnde Terry sent the military into the countryside to suppress the peasant movement with bombs and napalm. The military action left some 8,000 dead, another 19,000 homeless, countless wounded, and about 34,600 acres (14,000 ha) of land destroyed. Belaúnde Terry's standing fell further in 1967 when the public became aware of the government's claims settlement with IPC. The agreement failed to settle the government's claim to back taxes. It also left the government in control of the depleted La Brea-Pariñas oil fields while granting IPC access to new fields in the Amazon and allowing it to purchase government-produced crude oil at fixed low prices. Similar to the 1946 contract, this agreement resulted in a national protest. The proposed land reform and the IPC contract coupled with the nation's downward economic slide led to the military's again seizing the presidential palace, on October 3, 1968.

### CHALLENGE FROM THE POLITICAL LEFT

General Juan Velasco Alvarado (b. 1910–d. 1977) led the junta that replaced Belaúnde Terry. Instead of seeing itself as a caretaker government, the junta declared its intention to bring far-reaching changes to Peru. The group of military officers that accompanied Velasco to power did not represent the Peruvian elite but rather came from middle- and lower-class mestizo and "*cholo*" (Amerindian) backgrounds from provincial areas. Velasco himself was a *cholo*. These officers had a genuine sympathy with the plight of the long-oppressed peasantry. Resembling the concept of a corporate state, the government took control of each of the nation's economic sectors. Among

Velasco's first measures was the expropriation of the large coastal sugar haciendas for distribution to peasant cooperatives through a government agency, the Agricultural Society for Social Interest (SAIS). By 1979, nearly 27.2 million acres (11 million ha) of agro-grazing land had been distributed in this manner.

The government instituted an "industrial community" law that required all manufacturing enterprises employing more than six workers to allow these employees to acquire 50 percent of the operation and have representatives sit on the company's board of directors. By 1974, 3,500 such communities with more than 200,000 members controlled 13 percent of the total shares in their firms. The government also reduced the amount of foreign investment in the country. At the time of Velasco's government takeover, 242 firms controlled 44 percent of Peru's industrial production. To stem the tide of future investment, the government's regulation board prohibited the foreign purchase of viable local firms and restricted foreign involvement in certain industrial sectors. The government also nationalized IPC and established Petro Perú to operate the oil industry. The government took over other foreign-owned operations in banking and mining, most of which were U.S. firms.

The blighted squatter settlements in Peru's urban centers stood as the most significant social challenge to the Velasco regime. LIMA alone had an estimated 750,000 such residents in 1970. Lacking such basic infrastructure as clean water, sewerage facilities, and electricity, these settlements served as a potential source of disease, crime, and exploitation by political activists. The government organized them into "young towns" (*pueblos jóvenes*), granted land titles, and implemented infrastructure programs. The National System for Support of Social Mobilization (SINAMOS) served as the integrating institution for peasants and urban workers. This medium of supervision enabled the government to keep abreast of the pulse of the downtrodden and attempt to meet their needs, arbitrate their disputes, and hopefully contribute to political stability.

Velasco was not without opposition. The local elite and their allies within the military, the U.S. firms whose Peruvian operations were nationalized, and the middle sector whose civil rights had been trampled upon by the military stood in protest. Rural and urban workers, feeling more secure under the Velasco administration, increased their demands for better wages and working and living conditions. In 1975 alone, there were 779 work stoppages.

Owing to a circulatory problem, Velasco resigned on August 30, 1975, and was replaced immediately by General Francisco Morales Bermúdez (b. 1921– ). Amid a slowing economy and worker protest, in 1976 Bermúdez accepted an International Monetary Fund (IMF) financial assistance package and announced Plan Túpac Amaru to deal with the situation. In addition to the IMF-imposed government austerity program, Bermúdez

set about dismantling the Velasco reform program. This included a return to direct foreign investment, privatization, and economic decentralization.

In the aftermath of military rule and the adverse impact of economic policies on the people, Peruvian politics moved to the left during the 1980s, first under Belaúnde Terry, who returned to the presidency from 1980 to 1984, and then under APRA candidate ALAN GARCÍA PÉREZ from 1985 to 1990. Belaúnde Terry's implementation of neoliberal economic programs and acceptance of an IMF financial bailout ran afoul of the Latin American debt crisis triggered by MEXICO's default on its international loans in 1982, followed by a global recession. García attempted to address the economic adversity through a stimulus package that reduced interest rates, froze prices, and devalued the currency. After a brief boom, the crisis worsened, and García announced a government default on its international debt. As a result of its economic failure, analysts describe the 1980s as Peru's "lost decade." Amid Peru's doldrums, a self-professed antiestablishment champion of the people, not affiliated with any political party but supported by an ad-hoc organization, Cambio 90 (Change 90), ALBERTO KENYA FUJIMORI won the June 11, 1990, elections.

When he took office on July 28, 1990, Fujimori inherited a country wracked by hyperinflation: 7,482 percent in 1990 and a -7 percent annual gross domestic product (GDP) rate. Fujimori also confronted two ruthless guerrilla movements that had surfaced and grown during the 1980s: the SHINING PATH and the TÚPAC AMARU REVOLUTIONARY MOVEMENT (MRTA). While both groups operated in the rural highlands, MRTA also took its violence to urban centers, particularly Lima. Fujimori addressed the country's problems in a fashion similar to that of CHILE'S AUGUSTO PINOCHET UGARTE. He introduced neoliberal reforms and a government austerity program that had reduced inflation to an annual rate of 139 percent by 1992 and advanced the annual GDP to 6.7 percent in 1995. He also privatized several state-owned companies, removed barriers to foreign investment, and generally improved public finances. The military was set loose to effectively crush the Shining Path and MRTA, despite the latter's 127-day seizure of the Japanese embassy in Lima, which began in April 1997. The military also silenced civilian opposition without recourse for its civil and HUMAN RIGHTS violations. Fujimori ordered censorship of the press and directed the weakening of labor unions. With the opposition significantly weakened, he captured the April 9, 1995, presidential election. One analyst asserted that Fujimori had effectively established an "illiberal democracy," that is, despite free elections, political and human rights are ignored. Although constitutionally questionable, Fujimori captured a third presidential term in 2000 when his opponent, Alejandro Toledo (b. 1946– ) of the Possible Peru party, withdrew from the race on May 24 that year. His term, however, was short lived. Amid cries of corruption and continued

civil and human rights violations, Fujimori resigned from office on November 22, 2000, while "visiting" Japan. In November 6, 2005, he fled to Chile. On September 25, 2007, the Chilean Supreme Court ordered his extradition to Peru to stand trial on charges of government corruption and human rights violations.

Peru's economic conditions improved measurably under Presidents Toledo, who took office on July 28, 2001, and García, who was returned to the presidency in the June 4, 2006, election with 52.4 percent of the popular vote. The GDP steadily improved from an annual rate of 4.9 percent in 2002 to 8 percent in 2008, while inflation was down to a 2 percent annual rate in 2007. Construction, mining, textiles, and agricultural exports brought about general economic expansion, while political stability encouraged foreign investment. Peru concluded the Trade Promotion Agreement with the United States on April 19, 2006, that provided greater access to the Peruvian market for U.S. agricultural goods, while permitting Peru greater flexibility on its tariff policies. Following legislative ratification in both countries, the agreement went into effect on December 14, 2007. Despite the progress, however, an estimated 44 percent of Peruvians live below the poverty level. In an effort to address that problem, President García intends to pursue the economic development program in Peru's southern and central highlands, home to the majority of indigenous people, whom the government has historically neglected.

See also CIVILISTA PARTY (Vol. III); CONSERVATISM (Vol. III); INCAS (Vol. I); LIBERALISM (Vol. III); PERU (Vols. I, II, III); PERU, VICEROYALTY OF (Vol. II); PIZARRO, FRANCISCO (Vol. I); QUECHUA (Vol. I); WAR OF THE PACIFIC (Vol. III).

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**Pindling, Lynden** (b. 1930–d. 2000) *premier and prime minister of the Bahamas* Born on March 22, 1930, to middle-class black parents in Nassau, the BAHAMAS, Lynden Pindling graduated from Government High School in Nassau in 1946. For two years, he worked as a clerk in the Post Office Savings Bank. In 1948, he went to London to study law at the University of London, where he graduated in 1952. Pindling returned to the Bahamas in 1953 to help establish the Progressive Liberal Party (PLP). Dissatisfied with white minority rule, the PLP sought to achieve a greater political voice for the black population.

In 1967, Pindling defeated ROLAND SYMONETTE'S United Bahamian Front (UBF), a political party dominated by white political and economic interests. While both the PLP and the UBF won 18 seats in the House of Assembly, one of the independent representatives chose to sit with the PLP, enabling Pindling to form a government. Pindling led the nation to independence in 1973, becoming the first prime minister of the Bahamas. Pindling encouraged tourism, developed the local infrastructure, and initiated numerous social welfare services. He was knighted by Queen Elizabeth II in 1983.

Despite allegations of abuse of state-owned companies, nepotism, and involvement in international drug trafficking during the 1980s, Pindling was able to maintain control of the government in free elections. In 1992, although Pindling retained his South Andros seat in the House of Assembly, his party was defeated by the Free National Movement (FNM), a socially liberal and economically conservative political party formed in 1971 by conservative dissidents from the PLP and members of the UBF. Pindling retired from politics and leadership of the PLP in 1997 and died of prostate cancer on August 25, 2000. The Nassau International Airport was renamed in his honor in 2006. Pindling has also been honored by having his portrait depicted on the Bahamian \$1 bill.

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**Pinochet Ugarte, Augusto** (b. 1915–d. 2006) *dictator of Chile* Born into a middle-class family in Valparaíso, CHILE, Pinochet entered Chile's Army Academy at age 17 in 1933 and graduated in 1938. On January 30, 1943, he married Lucía Hiriart, with whom he had five children. Pinochet rose through the ranks of the army, in 1971 becoming division general and commandant of the garrison in SANTIAGO DE CHILE, considered the most prestigious and influential MILITARY assignment. A year later, he was appointed chief of staff of the army and in 1973 commander in chief. Pinochet

was part of the military triumvirate that ousted President SALVADOR ALLENDE GOSSENS on September 11, 1973, and the governing junta that replaced him.

Pinochet had had a distinguished military career. He undertook assignments throughout Chile and was a member of the Chilean military mission to the United States. Throughout the 1950s and 1960s, he held teaching positions at Chile's Military School and War Academy and at ECUADOR'S War Academy. He was considered a specialist in geopolitics and military geography. His 1968 book, *Geopolítica*, went through seven editions. During his military career, Pinochet, a staunch constitutionalist, became frustrated with the stagnation in Chilean politics and its drift to the left. The turbulence that accompanied President Allende's 1970–73 administration convinced Pinochet that the country was spiraling into anarchy. He was not alone in this belief. On August 22, 1973, the Chamber of Deputies approved a resolution asserting that Chilean democracy had broken down and called for Allende's ouster, by military force if necessary. Allende, who was maneuvering for his own survival, appointed Pinochet commander in chief of the army the following day. If he had reasoned that Pinochet and the military would remain loyal to him, he was wrong. Over the next few weeks, Pinochet and his fellow chiefs of staff Admiral José Toribio Merino Castro (b. 1915–d. 1996) and air force commander Gustavo Leigh Guzmán (b. 1920–d. 1999), plotted Allende's ouster, which occurred on September 11, 1973. Two controversies emerged from the coup itself: While Pinochet asserted his leadership role in the affair, critics questioned his claim; and, despite the evidence, including a 1990 autopsy, Allende supporters asserted that the military had killed the president, as opposed to the generally accepted version that Allende had committed suicide in the presidential office.

Within a year of the coup, Pinochet had become the chairman of the ruling junta. On June 27, 1974, he proclaimed himself "Supreme Chief of the Nation" but on December 17, 1974, changed his title to "President," a title he held for the next 16 years until stepping down on March 11, 1990. Pinochet further consolidated his power in 1980 when 67 percent of voters approved a new constitution, which replaced the 1925 document and strengthened the presidency at the expense of the legislature.

Pinochet's regime was highly repressive. Not only were Congress and POLITICAL PARTIES disbanded, the administration did not tolerate any opposition. LABOR unions were silenced, the media controlled, and a state of siege imposed. While accurate numbers are difficult to ascertain, HUMAN RIGHTS organizations place the number of people killed by the regime at 3,000, another 30,000 jailed and tortured, and an estimated 30,000 who went into mostly self-imposed exile. The regime reached outside Chile to assassinate former members of the Allende administration, including General Carlos Prats (b. 1915–d. 1974) on September 30, 1974 in BUENOS





Augusto Pinochet (*left*) is named commander in chief of the Chilean army in 1973 by President Salvador Allende (*right*). (AP Photo/Enrique Aracena)

AIRES, ARGENTINA. Prats had preceded Pinochet as commander in chief of the army under Allende. A former Allende confidant, Orlando Letelier (b. 1932–d. 1976), fell victim to a car bombing in Washington, D.C., on September 21, 1976. The government’s repressive measures, however, did not prevent the armed branch of the outlawed Communist Party, the Manuel Rodríguez Patriotic Front (Frente Patriótica Manuel Rodríguez, or FPMR), from attempting to assassinate Pinochet on September 7, 1976, or from smuggling a wide array of arms into the country in 1986.

The government’s economic policies during the Pinochet years were directed by the “CHICAGO BOYS,” a group of Chilean economists who had studied at the University of Chicago under economists Milton Friedman and Albert Harberger. They applied neoliberal economic principles to Chile, which resulted in the sale of government-owned enterprises and drastic cuts in government spending and opened Chile to unrestricted foreign investment and unhindered profit repatriation. The policies were accompanied by a harsh austerity program imposed by the International Monetary Fund. From 1973 to 1976, Chile endured a deep recession, followed by six years of economic recovery often referred to as an “economic miracle.” Critics assert, however, that this miracle was little more than a recovery to pre-1973 levels. A global recession in 1982 adversely affected the Chilean economy, prompting Pinochet to appoint new

advisers, who implemented further neoliberal economic reforms. By 1988, the economy had advanced to pre-1982 levels, but critics quickly pointed out that wages lagged far behind price increases and that the purchasing power of the Chilean currency had declined drastically. Still, at the macroeconomic level, the Chilean economy was far more robust than that of most of its Latin American neighbors by 1988.

With a picture of prosperity and political opposition and other groups suppressed, Pinochet approached the 1988 election with confidence. As required under the 1980 constitution, the plebiscite would determine if the Chilean people wished to continue the Pinochet regime for another decade. In a simple “yes” or “no” vote, 55 percent of Chileans voted to send Pinochet into retirement on October 5, 1988. To the surprise of many analysts at the time, Pinochet accepted the result and handed the presidential sash over to Patricio Alwyn (b. 1918– ) on March 11, 1990. Alwyn and his presidential successors into the 21st century came from Concertación, a coalition of 17 political parties representing mainly the middle class.

Pinochet did not leave the political scene, however. In accordance with the 1980 constitution, he became a senator for life and retained his position as commander in chief of the armed forces until 1998. Over the next 17 years, Concertación kept Pinochet’s economic policies in place, but in 2007, newly elected president Michelle Bachelet (b. 1951– ) called for greater government involvement in addressing the nation’s socioeconomic ills.

In October 1998, while in London for medical treatment, Pinochet was arrested on a Spanish warrant on charges of human rights violations against Spanish citizens living in Chile during his regime. While Pinochet lived under house arrest, diplomatic discussions led to his return to Chile in March 2004 on humanitarian grounds. Over the next two years, the Chilean court system wavered on a decision to indict Pinochet on human rights crimes during his administration. Finally, on November 25, 2006, he was indicted, arrested, and confined to his home for his role in the arrest and subsequent killing by firing squad of two Allende bodyguards: Wagner Salinas (b. 1943–d. 1973) and Francisco Lara (b. 1951–d. 1973). Three days earlier, on November 22, a Chilean court indicted Pinochet on income-tax evasion using secret bank accounts abroad. In so doing, the Chilean courts linked Pinochet’s dealings to those of his wife, four of his children, and two advisers who had been indicted on similar charges a year earlier.

To mark his 91st birthday on November 25, 2006, which was also the date of his second indictment, Pinochet delivered a radio address to the nation in which he accepted responsibility for all that had occurred during his administration but explained that his motive had been to avoid the nation’s disintegration. He died on December 10, 2006, in Santiago.

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**Platt Amendment** (1901) The Platt Amendment was tacked on to the 1901 U.S. Army Appropriations Bill and appended to the 1902 Cuban constitution and the Permanent Treaty of 1903 between the United States and CUBA. Named after its sponsor, Republican senator Orville H. Platt of Connecticut, the amendment resulted from U.S. policy makers' consensus that the Cuban people were incapable of self-government, as evidenced in the emergence of Cuba's lower classes from 1898 to 1902. The Platt Amendment also reflected larger U.S.–Caribbean policy at the time, which sought to keep Europeans out of the region in order to protect the Panama Canal (see U.S. CARIBBEAN INTERVENTIONS, 1900–1934). The amendment became a focal point of Cuban nationalism until its termination in 1934.

From its inception, three of the amendment's provisos irritated Cubans because they directly affected Cuban sovereignty. The Platt Amendment granted the United States the right to intervene in Cuba to protect it from a foreign power or to maintain public order. It also prohibited the Cuban government from entering into a treaty with any foreign power that threatened Cuban independence and from granting control over any portion of the island to a foreign power. Cuba, furthermore, could not assume a foreign debt without sufficient reserves to pay the debt. The 1898 Treaty of Paris opened the door to future U.S. territorial aggrandizement in Cuba by granting the U.S. government the right to acquire any land necessary for naval and coaling facilities anywhere in Cuba. At the time, U.S. naval authorities focused their attention on the Isle of Pines and what eventually would become Guantánamo Bay, but the State Department did not want to rile Cuban nationalism any further. While the Cubans would fret over these infringements of its sovereignty, they did not object to the Platt Amendment's requirement that its government ratify all acts of the U.S. MILITARY government during its occupation from 1898 to 1902 nor to the United States continuing the construction of sanitation facilities throughout the island.

The set of provisos allowing the United States to intervene in Cuban affairs caused the most difficulty over the following 30 years. Once the U.S. Navy determined that the Isle of Pines was unsuitable for a naval base or coaling station, the United States assigned it to Cuba.

Reluctantly, the Cubans accepted the U.S. GUANTÁNAMO NAVAL BASE in 1903, and it has remained a contentious issue ever since.

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**political parties** At the beginning of the 20th century, two types of government dominated Latin America's political arena: personal dictatorships and those controlled by the elite. Both shared common characteristics, including the advocacy and support of export-based economies, limited political participation by the middle and lower socioeconomic sectors, and the need for an orderly society that was free of protest. The origins of Latin American political parties can be traced to the region's independence in the 1810s and 1820s, when each nation's political leadership divided itself into two camps, conservative and liberal, whose differences lay in the Spanish colonial system. The conservatives believed in continuing the practices of a strong central government and the privileges of the CATHOLIC CHURCH. They also had little interest in pursuing international commerce. The liberals held distinctly opposite positions on each issue. They argued for decentralized government, stripping the church of its privileged position in society, and looked favorably on entering the global markets. However, both shared the belief that the lower classes should not enter the political arena because of their size, color, illiteracy, and the cost of fulfilling their demands. For approximately 50 years after independence, conservatives controlled national governments, but by the 1880s, liberals had moved to the forefront.

As the 20th century progressed, conservatives and liberals benefited from export-based economies and wished to continue their privileged economic, social, and political positions at the expense of the lower socioeconomic groups. They were, however, willing to permit the entry of the middle class into the political arena. The elite's attitude helps explain, for example, the formation of CHILE's Democratic Party in 1887 and ARGENTINA's Radical Civic Union in 1891. The 1917 Bolshevik Revolution in Russia intensified the elite and middle sector's disdain for urban and rural LABOR, contributed to the use of force to suppress labor strikes and deport labor leaders from Argentina and Chile in 1918 and 1919, and led to legislation that provided for government control over workers.

The Great Depression that gripped the world in the 1930s brought significant changes to the Latin America's political landscape. The populace and the MILITARY came to mistrust the “professional politicians”



The Justicialista Party office in the San Telmo section of Buenos Aires, Argentina. The party appeals to urban workers in the tradition of former president Juan D. Perón. (Thomas M. Leonard Collection)

who had dominated the scene since 1900 and who were blamed for the depression. New political parties emerged, including the Communist and Socialist Parties. So, too, did political populists, such as BRAZIL'S GETÚLIO DORNELLES VARGAS and Argentina's JUAN DOMINGO PERÓN. Both catered to and drew support from urban labor, the largest single voting bloc in each country, and became populist heroes. In Chile, the Christian Democratic Party understood that the dichotomy between the traditional elite and left-wing groups could lead to destruction of the political system.

Communism threatened to destroy the elite's privileged economic, social, and political position, as well as its military and religious props, and replace them with a dictatorial and closed party, as in the Soviet Union (see COMMUNISM IN LATIN AMERICA). This fear led Latin America's elite to label any person or group that challenged the existing order as "communist." Throughout the 1920s and into the 1930s, Communist Parties or their leading representatives became victims of government repression. In Brazil, the Communist Party was outlawed, and in EL SALVADOR, its leader, AGUSTÍN FARABUNDO MARTÍ, was killed. President Vargas in Brazil

and President Perón in Argentina appealed to urban labor for political support and in so doing claimed they had saved their countries from communism. The Communist Parties in COSTA RICA, Chile, and CUBA were founded in the 1930s and survived the anticommunist crusade. Subsequently, each became influential in national politics. Some individuals sought only to rectify socioeconomic disparities and were socialists rather than communists. JOSÉ BATLLE Y ORDÓÑEZ, twice president of URUGUAY between 1903 and 1915, is an example. Portions of his social safety net remained in effect in the early 20th century.

The MEXICAN REVOLUTION (1910–20) produced a constitution in 1917 that bore similarities to the Soviet document of the same year. The Mexican government's control of the nation's economic policies in the 1920s and 1930s and its practice of "democratic centralism," which effectively closed the political arena to other actors, earned MEXICO the communist label in some quarters. Until the 2000 election of President VICENTE FOX, Mexico remained a one-party state; that party was the Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI).

As the cold war took hold after World War II, the debate over communist influence in reform efforts intensified. Nicaraguan dictator ANASTASIO SOMOZA GARCÍA quickly labeled his country's Socialist Party as communist. In 1948, Costa Rican JOSÉ FIGUERES FERRER led a rebellious army in a 44-day civil war to save the country from communism, although the U.S. ambassador in San José, Nathaniel P. Davis, saw little difference between Figueres's philosophy and that of Communist Party leader MANUEL MORA VALVERDE. GUATEMALA proved more vexing. Presidents JUAN JOSÉ ARÉVALO and JACOBO GUZMÁN ARBENZ were labeled communists by the local elite, newspapers, and spokesmen for the Catholic Church for their policies on behalf of urban and rural labor. There were indeed members of Guatemala's Communist Party in government positions, but whether they had links to the Soviet Union was unknown. The question led State Department analysts to caution that U.S. policy makers must distinguish between communism and legitimate nationalism when deciding foreign policy. Dwight D. Eisenhower's administration decided that international communism had arrived in Guatemala and ordered the Central Intelligence Agency to direct the overthrow of the Arbenz regime in July 1954 (see GUATEMALA, U.S.-SPONSORED INVASION OF). Guatemala's old order was reestablished, but the nation soon embarked on a 40-year civil war to overthrow it.

FIDEL CASTRO RUZ's CUBAN REVOLUTION of 1956–61 ignited a similar debate, and Castro's links to the Soviet Union by mid-1961 sealed his fate (see SOVIET UNION AND CUBA). He was considered part of the international communist community. At the height of the cold war, communism was to be prevented from spreading throughout Latin America. The perceived need to contain communist expansion guided U.S. policy on its invasion of the DOMINICAN REPUBLIC in 1965, Chile in 1973, GRENADA in 1983, and in the CENTRAL AMERICAN WARS of the 1980s. In Latin America, the fear of communism contributed to the emergence of military governments for the next generation. These authoritarian regimes suppressed political parties, censored the press, denied civil rights and violated HUMAN RIGHTS, all in the name of saving their nations from communism. Argentina, Brazil, and Chile are often most cited as the worst examples of military rule.

Starting in the early 1980s, with the Latin American economies stagnating and the region's collective international debt standing at \$213 billion, military regimes crumbled. In the subsequent "return to democracy," a plethora of new political parties appeared to challenge the traditional elites. Notable among the new leaders were Argentina's CARLOS SAÚL MENEM and Brazil's LUIZ INÁCIO LULA DA SILVA, whose appeals to labor vaulted them to the presidential palaces in Buenos Aires and Brasília in 1989 and 2002, respectively. On the opposite end of the political scale, Fox of Mexico's conservative National Action Party (Partido Acción Nacional, or

PAN) won the 2000 presidential election, replacing the PRI in Los Piños for the first time in 70 years. Despite their political differences, each accepted the neoliberal economic model that had been in vogue across Latin America since the 1980s. While neoliberalism brought badly needed structural reforms and opened local economies to globalization, the quality of life for the majority of Latin Americans did not improve. This helps to explain the political victories of Venezuelan HUGO RAFAEL CHÁVEZ FRÍAS in 1998 and Bolivian JUAN EVO MORALES AYMA in 2005. Their election and the civic protests against government economic policies may suggest that Latin America is on the verge of another political shift in the early 21st century.

See also CONSERVATISM (Vol. III); LIBERALISM (Vol. III).

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**Price, George** (b. 1919– ) *prime minister of Belize*  
Born on January 15, 1919, in Belize City, George Price attended high school at St. John's College in Belize City. A Roman Catholic, Price briefly attended a seminary, has never married, and has no children. He won a seat on the town board of Belize City in 1947. On September 29, 1950, Price cofounded the People's United Party (PUP). Eventually elected the leader of the PUP in 1956, he led a nonviolent independence movement against British colonialism in British Honduras. Throughout his career, Price, although cognizant of BELIZE's identity as both a Central American and a Caribbean nation, has emphasized closer ties with Central American nations.

In 1954, the British government offered Belizeans the first step toward autonomy, calling for elections to choose seats on a nine-member legislative council. Price won one of the eight seats won by the PUP, which campaigned on a platform opposed to a WEST INDIES FEDERATION. Price claimed that the British plan would destroy Belize's ECONOMY. Price's opponents frequently accused him of collusion with GUATEMALA, which has made claims against Belizean territory since the 1850s. Nevertheless, by 1956, Price was the undisputed leader of the PUP. Following the devastation wreaked on Belize City by Hurricane Hattie in October 1961, Price called for the establishment of an inland capital at Belmopan, which became a reality later in the 1960s. On January 1,

1963, Belize achieved internal self-government, while the British continued to control foreign affairs and national defense. As the leader of the majority party, Price, who served as premier, presided over the gradual transformation from an economy based on forestry to one based on sugar. Whereas Price sought immediate independence, the main opposition party, the United Democratic Party (UDP), preferred to delay this until Guatemalan claims to Belizean territory were completely resolved.

From 1975 to 1980, the United Nations General Assembly affirmed the sovereignty of Belize and called on the British and Guatemalans to reach a compromise and grant Belize independence by the end of 1981. In January 1981, Price returned from a series of talks in London with a proposal, known as the Heads of Agreement, to appease Guatemalan territorial claims. One of the possible points of concession was to grant the Guatemalans free access to the Caribbean, a proposition that set off a wave of unrest in Belize. Without achieving a peaceful settlement with Guatemala and facing unrest in Belize, on September 21, 1981, the British granted Belize independence, and Price became the first prime minister. The British promised to defend Belize against possible Guatemalan attempts to forcibly acquire Belizean territory. Price's party lost to the UDP in 1984 but was returned to power in 1989. Price remained in power until 1993, when the UDP regained power. Price turned over leadership of the PUP to SAID MUSA on November 10, 1996. In 2000, the Belizean government awarded Price the First Order of National Hero, the country's highest honor.

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**Puerto Rico** Puerto Rico is a 3,508-square-mile (1,355-km<sup>2</sup>) Caribbean island that lies approximately 1,000 miles (1,609 km) south-southeast of Miami, Florida. Its territory includes VIEQUES ISLAND and Culebra, Mona, Desecheo, and Caja de Muertos Islands, but only the first two are inhabited. Puerto Rico is the easternmost and smallest island in the Greater Antilles chain, but with the Mona Passage to its immediate west and the Virgin Passage separating Culebra Island from the eastern tip of St. Thomas Island, it strides the two most important northern access routes to the circum-Caribbean region.

Puerto Rico is home to some 3.9 million people in a self-governing commonwealth in association with the United States. When Christopher Columbus arrived on November 19, 1493, the Taino Indians inhabited the island but were soon decimated by European diseases and

the harsh LABOR conditions to which they were subjected. African slave laborers were brought in to replace the NATIVE AMERICANS. Lacking natural wealth and with few inhabitants, Puerto Rico became an economic outpost in the Spanish Empire. When Spanish America achieved its independence in the early 19th century, Puerto Rico and CUBA remained as the last remnants of Spain's New World empire. Poverty and political repression led to an uprising in Puerto Rico in 1868. Although it was quickly suppressed, it ignited an independence movement that culminated in 1897, when Spain granted Puerto Rico a charter of autonomy that gave the islanders home rule within the Spanish Empire. The charter went into effect in 1898 but was short lived. Puerto Rico's strategic position brought a North American expeditionary force to the island in July 1898, during the War of 1898. Anticipating the construction of an interoceanic canal somewhere on the Central American isthmus, the U.S. Navy understood that Puerto Rico would play an important role in securing that future waterway. The 1898 Treaty of Paris that ended the war also granted Puerto Rico to the United States.

A U.S. MILITARY government administered Puerto Rico for two years until Congress approved the FORAKER ACT in 1900, which provided for U.S. administrative authority over the island through U.S. presidential-appointed officials, from governor to judges. A locally elected Chamber of Deputies provided the nearly 950,000 Puerto Ricans with a local government, but the U.S. Congress could invalidate any of its legislation. The 1917 JONES ACT granted Puerto Ricans U.S. citizenship and provided for the election of a Senate to complete the bicameral legislature. Later that same year, Puerto Rican males became eligible for U.S. military service.

Puerto Ricans fared poorly under the first two generations of U.S. tutelage. Until Governor Rexford Tugwell arrived on the island in 1940, U.S. administrators tended to take a superior attitude toward Puerto Ricans and displayed indifference to their history and culture. The teaching of English, beginning in primary school, and the establishment of the University of Puerto Rico in 1904 became the administrators' most visible means of "Americanizing" the locals. Puerto Rico's ECONOMY did not change during the same period. It remained agriculturally based and dependent primarily on sugar and coffee that had to compete in the world market, unlike Cuban sugar, which enjoyed special market access to the United States. The population, however, doubled by 1930 to 1.8 million people, and nearly 80 percent of them lived in rural areas where land ownership was dominated by a few creoles and three large foreign-owned sugar corporations. In the depression-battered era of the 1930s, the Puerto Rican political leadership encouraged these people to migrate to the United States in hopes of finding employment; this began a trend that continued until the end of the 20th century (see MIGRATION).



Sugar baron inspecting his cane. Sugar was a major agricultural product in several circum-Caribbean nations, including Puerto Rico. (*Library of Congress*)

Puerto Ricans began debating their relationship with the United States immediately after the island became a U.S. territory in 1900. That year, the Federalist Party was founded to campaign for U.S. statehood; meanwhile, the Unionist Party of Puerto Rico, founded in 1904, fought against the “colonial” government established by the Foraker Act but did not advocate total independence from the United States. That call came in 1912 with the formation of the Independence Party. Lacking broad-based popular appeal, each of these movements was short lived. That changed in the 1930s, when a greater number of educated Puerto Ricans could not find employment in the depressed economy and better understood the island’s political relationship with the United States. Two political parties set the framework of the debate. The Nationalist Party (*Partido Nacionalista*), founded in 1922 and led by Pedro Albizu Campos (b. 1891–d. 1965), advocated complete independence, and in 1938, LUIS MUÑOZ MARÍN (b. 1898–d. 1980) established the Popular Democratic Party (*Partido Popular Democrático*) to advocate reform within the system. Albizu resorted to violence to achieve his objective, and this netted him a long-term sentence in an Atlanta prison. Muñoz Marín’s less aggressive style, on the other hand, found a sympathetic ear in

Tugwell, appointed governor of Puerto Rico in 1941 by President Franklin D. Roosevelt.

Tugwell and Muñoz Marín understood the need for economic and government reform. World War II prompted diversification in AGRICULTURE, which lessened the island’s dependence on sugar production and helped trigger industrialization in Puerto Rico (see WORLD WAR II AND LATIN AMERICA). Tugwell improved the civil service and established less corrupt and more efficient government accounting procedures. During Tugwell’s governorship, the question of Puerto Rican–U.S. relations became more tense, however.

Some U.S. political leaders took up the *independentista* cause. In 1943, Maryland Democratic senator Millard E. Tydings introduced a bill calling for Puerto Rican independence. The bill stalled in Congress, but this did not prevent President Harry S. Truman from appointing Jesús T. Piñero (b. 1897–d. 1952) as the first native-born governor of Puerto Rico. A year later, in 1947, Truman signed the Elective Governor’s Act, which allowed Puerto Ricans to elect their own governor. In 1948, Muñoz Marín became Puerto Rico’s first elected governor, a position in which he would be reelected for the next 16 years. Amid these U.S. actions, the Puerto Rican Independence Party (*Partido Independentista*

Puertorriqueño, or PIP) was founded in 1946, and on November 1, 1950, Puerto Rican nationalists attempted to assassinate President Truman.

The U.S.–Puerto Rican relationship changed again in 1950, when the U.S. Congress approved Public Law 600, which required Puerto Ricans to choose between either continuing the status quo or creating a commonwealth model after the British pattern. In a three-step process, Puerto Ricans elected a constituent assembly, approved the document it composed, and selected Muñoz Marín as governor, who declared the Associated Free State of Puerto Rico on July 25, 1952. As a result, Puerto Rico has authority over all its internal matters, while the U.S. federal government controls its international affairs, as well as citizenship, the postal system, radio and television communications, and commerce. While Puerto Ricans do not pay U.S. federal income tax, local levies are on a par with those in the United States. Puerto Ricans do participate in the U.S. Social Security system. In response to this action, in 1973, the United Nations General Assembly declared that Puerto Rico was no longer a territory of the United States but resolved that Puerto Rico had the right to become independent. The issue of Puerto Rico's connection to the United States continues to simmer, and the choice remains between continuing as a commonwealth or becoming a state within the United States. In a 1998 referendum, as well as in the 2004 governorship election, votes were split almost evenly—48 percent—between the pro-statehood New Progressive Party (Partido Nuevo Progresista, or PNP) and the pro-commonwealth Popular Democratic Party (Partido Popular Democrático, or PPD), while splintered *independentista* groups gained less than 3 percent of the popular vote. The issue was at the forefront of the November 4, 2008, governorship election won by the PNP candidate Luis Fortuño (b. 1960– ) by an 11 percent margin over PPD incumbent Aníbal Acevedo Vilá (b. 1962– ). While the PNP is committed to becoming the 51st state of the United States, such a status remains controversial in Puerto Rico.

As Puerto Rico's political relationship with the United States evolved, so, too, did its economy. In 1942,

the Puerto Rican government commenced an industrial growth program, “Manos a la Obra,” or OPERATION BOOTSTRAP as it is known in English. Using local tax and U.S. tax incentives, along with grants and the promise of cheaper labor, the Puerto Rican landscape changed appreciably starting in the 1950s. Manufacturing accounted for 40 percent of the island's gross national product and employed 170,000 workers in 1992, compared to 24,000 in 1953, and the number of factories multiplied from 83 to more than 2,000 during the period. Despite these apparent successes, the Puerto Rican economy endures a 24 percent unemployment rate and a drain of skilled and technical workers to the United States. In fact, since the start of World War II, an estimated 2 million Puerto Ricans have left for the United States, and today, more Puerto Ricans live in New York City than in San Juan, the capital of Puerto Rico. Furthermore, in 1996, the United States voted to phase in Section 936 of the U.S. tax code, which serves as an enticement for U.S. industries to relocate their assembly operations to Puerto Rico. Nevertheless, as globalization continues, goods are being produced elsewhere at cheaper costs than can be had in Puerto Rico. As the new century begins, Puerto Rico confronts the age-old problem of achieving both political independence and economic prosperity.

See also PUERTO RICO (Vols. I, II, III); TAINO (Vol. I); WAR OF 1898 (Vol. III).

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# R

**Radio and TV Martí** Radio Martí is a shortwave radio station sponsored by the U.S. government that has broadcast into CUBA since 1985 under the charter for the Voice of America. TV Martí was added in 1990. In September 1981, President Ronald Reagan signed Executive Order 12323, which established the Presidential Commission on Broadcasting to Cuba, and in 1983, Congress appropriated funding for the project. Radio Martí broadcasts soap operas, news, and popular music, while TV Martí sends poor-quality transmissions of news, documentaries, soap operas, and movies.

Today, Salvador Lew serves as director for both Radio and TV Martí, with an approximate \$25 billion budget for 120 employees, with operating stations in Marathon Key, Florida; Greenville, North Carolina; and Delano, California.

Technically, the Voice of America was responsible for the programming, but in reality, this was undertaken by the Office of Cuban Broadcasting, directed by Jorge Mas Canosa, head of the Miami-based CUBAN AMERICAN NATIONAL FOUNDATION from 1981 until his death in 1997, an open advocate of the ouster of FIDEL CASTRO RUZ and a supporter of President Reagan's policies toward Cuba. This connection led to charges that propaganda and not news is being sent to Cuba by Radio and TV Martí. The Cuban government jams both signals but has not been able to cut off all transmissions or shut down the stations.

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**rapprochement, U.S. and Cuban** On five occasions between 1963 and 1984, high-level secret talks were held between U.S. presidential emissaries and FIDEL CASTRO RUZ's representatives on improving relations between the two countries.

The first came in the fall of 1963 when delegates from each met to discuss a possible secret meeting in CUBA that might include Castro. The Cuban suggestion came at a time when Castro had been burned by the Soviets in their not coming to his rescue during the 1962 CUBAN MISSILE CRISIS, Moscow's lack of support for spreading revolution throughout Latin America, and his need for spare parts for U.S.-made machinery in Cuba (see SOVIET UNION AND CUBA). U.S. president John F. Kennedy accepted his advisers' suggestion that French journalist Jean Daniel be dispatched to Cuba for secret talks. Daniel's trip was scheduled for November 22, 1963, but the meetings were canceled after the president's assassination the following day. New president Lyndon B. Johnson did not pursue the matter or two other offers put forward by Castro in a July 6, 1964, *New York Times* interview and in his speech marking the fifth anniversary of the CUBAN REVOLUTION, on July 26, 1964. Johnson was more interested in expelling Cuba from the ORGANIZATION OF AMERICAN STATES and having the organization help tighten the U.S. embargo on trade with the island (see CUBA, U.S. TRADE EMBARGO OF).



The third initiative came in June 1974 from Henry A. Kissinger, secretary of state and national security advisor to President Richard M. Nixon. Kissinger was motivated by the U.S. congressional opposition to continuing the U.S. embargo on Cuba, the fact that many European and Latin American nations had opened TRADE relations with Cuba, and that improved relations fit into the larger administration policy of rapprochement with the Soviet Union and China. For the next 18 months, several secret meetings were held in HAVANA, New York, and Washington, D.C., between Kissinger's and Castro's advisers. Although the embargo issue dominated the conversation, a wide range of topics were discussed, including HUMAN RIGHTS and compensation for U.S. properties in Cuba that had been nationalized. The United States abruptly ended the discussions in February 1976, allegedly because of Cuban support for Puerto Rican independence and because it sent troops to participate in the civil war in Angola.

Jimmy Carter came to the White House in January 1977 with a greater interest in Latin America than his two predecessors and desirous of improving relations with Cuba. While calibrated steps were taken on both sides, including the establishment of "interests sections" in each nation's capital, the U.S. embargo and the presence of Cuban troops in Africa remained stumbling blocks to significant progress. In early 1978, Castro signaled his willingness to seek further accommodation. The first set of private talks began in May 1978 and led to the release and deportation of 2,500 political prisoners in Cuba to the United States that November. Several meetings were held throughout 1980 in Havana and Cuernavaca, MEXICO, but nothing of significance materialized from these. U.S. policy makers stiffened their position because of Castro's support of MAURICE BISHOP in GRENADA and the SANDINISTA NATIONAL LIBERATION FRONT in NICARAGUA and the continuing presence of Cuban troops in Angola.

The final rapprochement proffer came in 1981 from Castro. Although not known publicly at the time, Soviet economic support of Cuba was beginning to weaken. Castro also understood that in President Ronald Reagan he faced an ardent anticommunist who would be pleased to topple the Cuban regime. Reagan set as a precondition for reaching any understanding that Cuba sever its relationship with the Soviet Union, which was something no one expected in 1981. Given this, the discussions were meaningless when Secretary of State Alexander Haig met with Cuban vice president Carlos Rafael Rodríguez (b. 1913–d. 1997) in MEXICO CITY in November 1981 and Special Ambassador Vernon Walters with Castro in Havana in March 1982. Castro made one more appeal in December 1984, but this was rejected by Reagan.

Cuban-U.S. relations were at their lowest ebb in nearly a generation when Reagan left office in 1989 and remained so through the mid-1990s as the U.S. Congress tightened the trade embargo. Despite President Bill

Clinton's efforts to ease tensions just prior to leaving office, President George W. Bush quickly changed paths by tightening the trade embargo and expanding the list of requirements for Cuba to meet in order to normalize diplomatic relations.

In spring 2009, recently elected U.S. president Barack Obama made several public declarations supportive of a new stance in U.S. relations with Cuba. In April, he lifted the travel restrictions on Cuban-Americans visiting families in Cuba and the limitations of their remittances to the island. While the Cuban government did not respond with public gestures, reportedly Obama envoys traveled to Cuba on three occasions in July and August 2009 to explore further openings and reductions in tensions between the two nations.

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**Rastafarianism** Rastafarianism is a religious movement that emerged in JAMAICA during the Great Depression among the lower-class black population. The followers of the RELIGION contend that former Ethiopian emperor Haile Selassie I was the biblical messiah promised in the Old Testament of the Bible.

Rastafarianism developed as a spiritual system to boost morale and counteract the negative impact of political, economic, and social marginalization among economically and socially disadvantaged blacks during the 1930s. It came into being at roughly the same time that blacks in HAITI were emphasizing *noirisme* (Negritude) and blacks in the United States were participating in the Harlem Renaissance. As Haile Selassie was the only African monarch of an independent black African state during the 1930s, Jamaicans, cognizant that the Ethiopian emperor's lineage traced back to biblical characters King Solomon and the Queen of Sheba, came to view him as part of the Holy Trinity. The name of the religion is derived from the Ethiopian emperor's pre-coronation name, Ras Tafari Makonnen. Rastafarianism gradually spread throughout Jamaica and eventually the rest of the world. The popularity of Rastafarianism increased during the 1970s and 1980s through REGGAE, as many of the musicians were Rastafarians who incorporated the religion's themes into their lyrics. It is estimated that about 10 percent of the Jamaican population is Rastafarian and that there are more than 1 million Rastafarians around the world.

Emphasizing the importance of human dignity and self-worth, Rastafarians seek release from the psychological and physical legacy of slavery and Western imperialism. They extol the superiority of African culture and civilization in an effort to achieve freedom and self-respect. Since Rastafarianism is not a centralized religion, followers are encouraged to question authority

and societal norms in their individual quest for freedom. Developed at a time of intense racism and political domination of blacks, Rastafarians view society as corrupt and inherently unjust. In an attempt to counteract the negativity of society, Rastafarians seek to become one with nature. To accomplish this, they allow their hair to grow into dreadlocks; smoke marijuana, which they call ganja; and eat a restrictive (ital) diet based on the dietary laws found in Leviticus and Deuteronomy.

In 1966, Emperor Haile Selassie visited Jamaica and was greeted at the international airport in Kingston by 200,000 marijuana-smoking Rastafarians. In the crowd were reggae singer Bob Marley and his wife, Rita. After meeting the Ethiopian emperor, Rita Marley converted to Rastafarianism, claiming to have seen the stigmata on Haile Selassie's hands as he waved to the crowd of followers. Although the Ethiopian emperor died in 1975 under house arrest after being overthrown by a Marxist revolution, Rastafarians hold that he will call the day of judgment when righteous black people will return to Africa to live in peace and harmony. Haile Selassie, it should be noted, told his followers not to immigrate to Africa until they had first liberated the black people of Jamaica, a philosophy known as liberation before repatriation.

On April 23, 1978, at the height of political violence in Jamaica, reggae stars appeared at the One Love Peace Concert in Kingston. Peter Tosh demanded the legalization of marijuana. Bob Marley appeared on stage with politicians MICHAEL MANLEY and EDWARD SEAGA in an attempt to restore harmony in Jamaican society. The commercialization of reggae has helped to transform Rastafarianism from an outcast cult into a mainstream belief system.

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**reciprocity treaty, U.S.-Cuban** (1903) The U.S.-Cuban reciprocity treaty went into effect on December 16, 1903. It provided a 20 percent tariff reduction on Cuban goods entering the United States and reduced Cuban tariffs on imported U.S. goods from 40 to 20 percent. The United States had long been the primary market for Cuban sugar and tobacco, a fact that had wide ramifications for the Cuban economy and politics. During the U.S. Army's occupation of CUBA from 1898 to 1902, General Leonard Wood understood this relationship and thought the best way to encourage an economically independent Cuba was through a TRADE reciprocity agreement. Wood reasoned that continued economic prosperity would support the need for stable government on the island. He found a sympathetic ear in President William McKinley and his successor Theodore

Roosevelt. Congress appeared recalcitrant, owing to the influence of U.S. sugarcane and sugar beet growers. On the other hand, U.S. manufacturers and commercial interests strongly supported the bill.

Once implemented, Cuban sugar growers expanded production and refining capacities on the island and gained extensive profits through their privileged access to the U.S. market. The lowered tariffs on U.S. imports, largely manufactured items, however, effectively discriminated against the importation of similar goods from elsewhere. The global depression that began in 1929 and lasted through the 1930s increased political pressure from U.S. sugar beet and cane growers and resulted in U.S. legislation in 1937 that assigned quotas to foreign sugar-producing nations. Cuba received a 28.6 percent annual allotment of U.S. sugar imports, an amount temporarily suspended with the outbreak of World War II in 1939. The quotas were reestablished after World War II in legislation in 1948 and 1952, which also granted Cuba 98.64 percent of any deficiencies in the quotas assigned to other nations. Critics argued that over the long haul, Cuba's privileged access to the United States made the Cubans dependent on the United States and prevented its industrial development.

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**reggae** Reggae is a MUSIC style developed in JAMAICA during the 1960s and 1970s. RASTAFARIANISM has influenced many popular reggae artists who have incorporated the themes of faith, social injustice, poverty, and social conditions into their lyrics.

Although the term *reggae* is frequently used to describe all styles of Jamaican music, it refers primarily to a genre of music developed by poor blacks in Trenchtown, the largest ghetto in Kingston, Jamaica. Jamaican musicians, many of whom were influenced by Rastafarianism, blended traditional Jamaican folk music with American rhythm and blues during the 1960s. Reggae is characterized by a rhythmic style noted for regular chops on the off-beat, usually accented on the second and fourth note in each bar. The term *reggae* was first used by the Maytals, a Jamaican group that incorporated the word in their song "Do the Reggay" (1968), which was written by Frederick Nathaniel "Toots" Hibbert (b. 1945- ). Prior to 1968, the term *reggay* referred to a dance style in Jamaica, but the connection of the word with the music lent its name to the new music genre.

Reggae became popular internationally during the 1970s as artists such as Bob Marley (b. 1945-d. 1981), an advocate of Rastafarianism, incorporated themes

emphasizing social justice and oppression into his music. Marley, who is regarded by many as a prophet of Rastafarianism, is best known for his reggae songs, which include the hits “No Woman, No Cry,” “Could You Be Loved,” “Jamming,” “Redemption Song,” and “One Love.” Marley, who suffered racial prejudice in his youth, used his music to proclaim his social rights activism. Marley’s popularity facilitated the appeal of Rastafarianism worldwide.

Lyrics, melodies, and rhythms from reggae songs have been used to energize political campaigns in Jamaica. Both of Jamaica’s main POLITICAL PARTIES, the Jamaican Labour Party (JLP) and the People’s National Party (PNP), have used reggae themes in their political campaigns and the music genre for their own political goals to win voters. As a result, the two parties share relatively even percentages of the votes among Jamaica’s black population. Reggae, therefore, promotes political and social cohesiveness through religion. Whereas the majority of Jamaica’s people are not Rastafarian, the biblical messages of faith, salvation, and social justice are popular with Jamaica’s Christian population.

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**religion** Today, some 90 percent of Latin America’s population has been baptized Catholic, the highest percentage of any region in the world. Still, there are differences among the faithful. While some cling to the CATHOLIC CHURCH’s conservative traditions, others have accepted more modern values, as seen in the socioeconomic and political struggles that date to independence and in the conflict over the church’s role in the upheavals from the 1960s through the 1980s. During this generation, pressure for social change became violent. With few exceptions, such as EL SALVADOR’s archbishop Óscar Romero (b. 1915–d. 1980), the church’s hierarchy, older and more conservative, preferred to remain outside the conflict. Clergy more closely linked to the daily lives of their parishioners espoused liberation theology, a call for church activism in pressuring the state to address the needs of the poor.

Latin American Catholicism, furthermore, was influenced by the region’s indigenous peoples and by the African slaves brought to the New World. Although the Spanish and Portuguese forced these people to convert to Catholicism, their native rituals may be blended into Catholic religious services, particularly in the smaller and remote towns and villages in the Andes Mountains, CENTRAL AMERICA, and BRAZIL.

Although Protestantism arrived in the New World with missionaries in the 1840s and 1850s, it was not



A bust of Pope John Paul II commemorating his 1998 visit to Santiago de Cuba. Despite Protestant inroads, Catholicism remains the predominant religion in Latin America. (Thomas M. Leonard Collection)

until the late 19th and early 20th century that Protestant churches born in the Reformation were established. Anglicans, Lutherans, Methodists, and Presbyterians were among the new immigrants from Europe, particularly Germany, England, and Scotland. Throughout most of the 20th century, these groups tended to vote for liberal and radical POLITICAL PARTIES that opposed the Catholic Church. Similar to the Catholic Church, after WORLD WAR II, the membership of the Protestant Church split into two main groups, traditionalists and those who supported socioeconomic and political reform. Since the 1960s, Protestants who supported change drifted more toward centrist and left-of-center political parties, which resulted in more indigenous Latin Americans joining their churches.

Protestant churches benefited from the Second Vatican Council from 1962 to 1965, which focused on the need for socioeconomic reforms and led to liberation theology. Scholars also argue that other factors during the same period led many lower socioeconomic groups to the Protestant churches. These factors included increased violence in rural areas, which in turn led to urban MIGRATION; the breakdown of traditional peasant community life;

increased civil strife; and increased unemployment. Since the 1960s, evangelical faiths, particularly Pentecostals, have accounted for the most significant growth of Protestantism in Latin America. Countries that saw the greatest increase in the number of Protestants during the 1990s were ARGENTINA, BOLIVIA, CHILE, COSTA RICA, DOMINICAN REPUBLIC, El Salvador, HAITI, HONDURAS, NICARAGUA, PANAMA, PARAGUAY, PERU, and VENEZUELA.

While Latin America's Jewish population is relatively small, there are large communities in Argentina, Brazil, and MEXICO. Jewish migration can be traced to colonial Brazil, but the number of Jews increased markedly with their emigration from Europe between 1880 and 1920 and when fleeing persecution before and after World War II. Most Jews in Latin America are secularized and do not regularly participate in religious activities, except important holidays such as Rosh Hashanah and Yom Kippur.

Santería is the Spanish name given to the religious practices African slaves brought to Cuba in the late 18th and early 19th centuries. Variants are found in Haiti, the Dominican Republic, and the Lesser Antilles islands. Today, Westerners refer to these practices as Vodou. Vodou is a mixture of African traditions that references Catholic saints. Some Caribbean migrants to the United States have brought Santería with them.

See also RELIGION (Vols. I, II, III); SANTERÍA (Vol. III); SYNCRETISM (Vol. I); VODOU (Vol. III).

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**Remón Cantera, José Antonio** (b. 1908–d. 1955) *president of Panama* Born into a prominent Panamanian family, José Antonio Remón Cantera graduated third in his class from MEXICO's military academy in 1931. As the only Panamanian with formal MILITARY academy training, he returned home to be appointed captain of the National Police force. President Harmodio Arias (b. 1886–d. 1962) directed him to lead the police independent of U.S. supervision and to protect his presidency. Throughout the 1930s, Remón received technical advice from the U.S. Panama Canal Zone police but did not have to fear its interference owing to U.S. president Franklin D. Roosevelt's GOOD NEIGHBOR POLICY. After 1940, Remón imprinted his own style on the force by recruiting like-minded officers, establishing cavalry and motorized units, and implementing riot-control training. Although never numbering more than 2,000 men, by the mid-1940s, PANAMA's police force was poised to become the arbiter of national politics.

In the violence-marred 1948 presidential election, Remón's force prevented the National Assembly from ousting the sitting president Enrique Jiménez (b. 1886–d. 1970). President Daniel Chánis (b. 1890–d. 1961) was ousted by the police in July 1949 when he attempted to fire Remón, and in November 1949, the force permitted ARNULFO ARIAS MADRID to become president after promising not to interfere with the force. Following Arias's impeachment in May 1951, Remón permitted Alcibíades Arosemena (b. 1883–d. 1958) to assume the presidency, but Remón dictated appointments and government policy. Remón seized the moment in the political turmoil that followed. He resigned his police position to run for the presidency in the 1952 election as the candidate of the National Patriotic Coalition (Coalición Patriótica Nacional, or CPN). His promises to change the direction of national politics, along with the campaigning of his wife, Cecilia, overcame his reputation for torture, graft, and corruption to win office with 64 percent of the vote.

As president, Remón sought to please a broad spectrum of society. His policies favored agro-industrial enterprises at the expense of small farmers and sought to reduce Panama's economic dependence on the canal. A redefined tax code sought to cut the government's deficit and at the same time address the health care and educational needs of all Panamanians. Remón also prevented LABOR unions from striking, ordered the arrest of radicals and communists, and imposed "voluntary" censorship on the press. He converted the police into the National Guard and accepted increased U.S. military assistance for the guard. These changes led to charges that his regime bore similarities to that of Nicaraguan dictator ANASTASIO SOMOZA GARCÍA.

Remón addressed Panamanian nationalism with a revised canal treaty in 1955 that increased the annual annuity to \$1.9 million, further restricted the U.S. commissary operation in the zone, promised better job opportunities and equalized pay for Panamanians in the zone, and provided for the flying of the Panamanian flag in the zone (see PANAMA CANAL TREATIES). Other than the increased annuity and commissary restrictions, other treaty provisions were slow in coming and led to violent protests and demonstrations before the decade was out. Remón did not live to see any of this. He was assassinated on January 2, 1955. While the reasons behind the assassination have never been adequately explained, his death ended the CPN's stronghold on national politics.

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**Reyes, Rafael** (b. 1849–d. 1921) *president of Colombia* Rafael Reyes was a native of Boyacá, COLOMBIA. As a

young man, along with his brother, Reyes explored the Upper Amazon River and later the Putumayo River regions. Reyes earned a fortune during Colombia's quinine boom of the 1870s and a decade later became a leader in the Conservative Party, which led to his appointment as a general of the Colombian army. Reyes's opposition to extremist elements of the Conservative Party prompted him to leave the country during the War of the Thousand Days (1899–1902). He visited the United States in 1904 in a failed effort to gain redress for Colombia's loss of PANAMA. The adverse impact of the War of the Thousand Days and Panama's independence caused the Conservative and Liberal Parties to temporarily reconcile their differences. Reyes took the presidential sash on August 7, 1904, and set in motion a relatively peaceful 26-year period of political reconciliation, but not without intraparty squabbling.

Intolerant of criticism, Reyes strengthened executive power at the expense of the legislature. He dismissed Congress and replaced it with the National Assembly consisting of representatives appointed by governors he himself had appointed. He then ruled with an iron fist, which proved useful in the implementation of protectionist economic policies that were also in vogue elsewhere in Latin America at this time, and stood in conflict with traditional Conservative principles. Reyes encouraged industrial development, which in turn contributed to the growth of cities. He also expanded the agro-export coffee industry. Reyes is credited with stabilizing Colombia's monetary system. The nation returned to the international gold standard, and its international credit standing improved. At home, Reyes implemented an infrastructure development program that included the construction of roads, schools, and government buildings.

Traditional Conservatives were only one source of the political opposition to Reyes. He also drew the Liberals' ire because of their secondary role in his administration. The leadership of both parties opposed his plan to modernize the national army, which included the conscription of soldiers and linking promotion to ability rather than family connection. While Reyes considered that this reform would end the ruling elite's use of the institution to serve its own needs, some politicians charged that it would end civilian control of the MILITARY. Conservatives and Liberals also rejected Reyes's efforts to force the ratification of the 1909 THOMSON-URRUTIA TREATY, which provided for Colombia's recognition of and establishment of diplomatic relations with Panama. Colombian nationalism prevailed, and the treaty was rejected. Reyes recognized the tidal wave of opposition to him and resigned on July 27, 1909. He secretly boarded a ship bound for Europe.

See also CONSERVATIVE PARTY, COLOMBIA (Vol. III); LIBERAL PARTY, COLOMBIA (Vol. III); WAR OF THE THOUSAND DAYS (Vol. III).

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### Richards, Viv (Isaac Vivian Alexander Richards)

(b. 1952– ) *cricket player from Antigua and Barbuda* Born on March 7, 1952, in St. John's, Antigua, Isaac Vivian Alexander Richards, better known as Viv Richards, is called the “master blaster” by cricket enthusiasts. Richards made his test debut for the West Indies team against India in Bangalore in 1974. As a batsman, Richards was known for his attacking style, and his overall skill and personality made him the most popular cricketer in ANTIGUA AND BARBUDA. The West Indies team won the first Cricket World Cup, held in London in 1975. According to Richards, it was the most memorable moment in his career. The team went on to win the second Cricket World Cup in 1979. Richards was honored with the Man of the Match Award for his performance in the 1979 games. This award is given to the player deemed to have played the biggest part in his team's victory. Richards retired from the West Indies team in 1991 and was knighted in 1999.

Richards was named one of the five greatest cricketers of the 20th century by a panel of 100 expert judges appointed by the *Wisden Cricketers' Almanack* in 2000. This honor brought great pride to the people of Antigua and Barbuda and reinvigorated the sport of cricket in the Caribbean. In 2006, Antigua and Barbuda, with a \$60 million grant from China, began construction of the Sir Vivian Richards Stadium in North Sound, Antigua and Barbuda. Located about 20 minutes north of the capital of St. John's, the stadium was built for use in the 2007 Cricket World Cup hosted by the West Indies. Although designed to seat 10,000, temporary seats were added to double the seating capacity during that event.

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**Rio de Janeiro** Rio de Janeiro is the capital of the state of Rio de Janeiro. From 1763 to 1822, it served as the capital of the Portuguese colony and thereafter, until 1960, as the capital of independent BRAZIL. In 1960, the Brazilian capital was relocated to the city of Brasília, nearly 800 miles (1,287.5 km) inland, in a government effort to stem the tide of urban growth along the coast and develop the nation's interior.

During its colonial period, Brazil received minimal attention from Portugal because most of the empire's

wealth was drawn from Asia. Nevertheless, Rio was an important port in the colony and endured many raids from pirates, as well as a brief French occupation. Until the 20th century, the city remained confined to what is now the downtown business district. Today, it is divided into four districts, including the downtown and the north, south, and west zones. The downtown, or El Centro, remains the heart of Rio de Janeiro's business and commercial enterprises. It is also home to many former government buildings that date to the 19th century, the National Historical Museum and the National Art Museum, and the Municipal Theater. The south zone includes the famous Atlantic coast beaches, Sugarloaf Mountain, the Corcovado, and Tijuca Forest, the world's second-largest urban forest. The north zone includes the Maracanã Stadium, which can hold nearly 200,000 people. The sprawling west zone includes the city's industrial area.

Rio de Janeiro also serves as an important commercial and financial center and a shipping port. The range of industrial pursuits includes chemicals and petrochemicals, clothing and other textiles, metal products, petroleum products, pharmaceuticals, and processed foods. Despite a nearly \$11,000 per-capita annual income, Rio de Janeiro has some of Latin America's worst urban slums, or favelas, which are often without sewer and sanitary water systems and experience severe mudslides during heavy rains. An underground rail system is limited in its ability to move people around, and most residents rely on public buses for TRANSPORTATION.

In addition to its famous Atlantic beachfront, Rio de Janeiro is known for its annual CARNIVAL, which marks the beginning of the Catholic season of Lent, 40 days before Easter. Rio de Janeiro, particularly during Carnival, is known for lively MUSIC such as the samba (a music and dance form that dates to the 19th-century *choros* [poor black] communities and is based in Afro-Brazilian religious prayer music) and the currently popular funk carioca, a dance music whose lyrics depict the plight of the poor.

See also RIO DE JANEIRO (Vols. II, III).

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**Rio Pact (Inter-American Treaty of Reciprocal Assistance)** (1947) The Rio Pact, officially known as the Inter-American Treaty of Reciprocal Assistance, was agreed to at the 1947 Inter-American Conference held in RIO DE JANEIRO, BRAZIL, from August 15 to September 2. The Rio Pact clarified interpretative issues that had arisen from the 1945 ACT OF CHAPULTEPEC. The former provided for the peaceful settlement of hemispheric disputes before any appeal could be made to the United Nations (UN) Security Council, the first such pronouncement relating to Article 51 of the UN Charter, which allowed for the establishment of regional alliances.

More significantly, the Rio Pact declared that “an armed attack by any State against an American State” shall be considered as an attack against all the American states.” While a treaty safeguard provided that no individual state could be forced into action by others, the delegates could not agree on a definition of an “act of aggression” or exactly how the hemispheric nations would respond to any such act.

The treaty was a response to the growing tensions between the United States and the Soviet Union that had led to the onset of the cold war by 1947. At the time, the Soviets controlled Eastern Europe, Communists were advancing their cause in Greece and Turkey, and Mao Zedong's forces appeared on the verge of victory in China. From the U.S. perspective, the primary need was to contain communist expansion, potentially by MILITARY expansion. For the moment, the Rio Pact fulfilled that need in the Western Hemisphere.

For the United States, the Rio Pact meant the abandonment of its historic policy precepts not to become involved in permanent or entangling alliances. At the time, some analysts argued that the Rio treaty “multilateralized” the Monroe Doctrine by making it hemispheric policy. For the Latin Americans, the treaty deterred external aggression and served as a potential constraint on the United States because under it, a two-thirds majority was required to intervene collectively in another signatory state.

As pointed out by Nelson A. Rockefeller, State Department officials, and many Latin American political leaders, the United States had yet to address the socio-economic needs of Latin America that contributed to its becoming a breeding ground for the growth of communism (see COMMUNISM IN LATIN AMERICA). Those needs would be addressed later in the ALLIANCE FOR PROGRESS.

The Act of Chapultepec and the Rio Pact appeared to become empty promises in 1954, when the U.S. Central Intelligence Agency engineered the overthrow of Guatemalan president JACOBO GUZMÁN ARBENZ for his alleged communist policies (see GUATEMALA, U.S.-SPONSORS INVASION OF).

See also MONROE DOCTRINE (Vol. III).

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**Robinson, A. N. R.** (b. 1926– ) *prime minister and president of Trinidad and Tobago* Born on December 16, 1926, in Calder Hall, Tobago, Arthur Napoleon Raymond Robinson earned an M.A. in politics and economics from London University in 1955. After

returning to TRINIDAD AND TOBAGO, he was a founding member of the People's National Movement (PNM). Robinson served as the parliamentary representative for Tobago in the Parliament of the WEST INDIES FEDERATION from 1958 to 1962. Disagreeing with the political style of ERIC WILLIAMS, Robinson left the PNM in 1970. He established the Democratic Action Congress (DAC) in 1971, which was only successful in winning the two seats from Tobago in the 1976 and 1981 parliamentary elections. In 1981, Robinson joined forces with the United Labour Front (ULF), led by BASDEO PANDAY, and the Tapia House Movement (THM), led by Lloyd Best (b. 1934–d. 2007), to form the National Alliance, which subsequently joined the Organization for National Reconstruction (ONR) in 1983 to create a multiethnic party called the National Alliance for Reconstruction (NAR).

In 1986, the NAR defeated the PNM by winning 33 of the 36 seats in the assembly. Robinson became the third prime minister of Trinidad and Tobago. In 1987, the government, led by Robinson, selected NOOR HASSANALI to be the second president of Trinidad and Tobago. The multiethnic NAR, however, began to crumble in 1988 when the Indo-Trinidadian component, led by Panday, left to form the United National Congress (UNC). In 1990, during a coup attempt led by the Jamaat al Muslimeen, Robinson was shot in the leg, and most of his cabinet was held hostage for five days. In 1991, the PNM, led by PATRICK MANNING, one of the three PNM representatives to retain his seat in 1986, won the elections, and Manning became prime minister. In 1995, Manning called early elections. The PNM and UNC both won 17 seats, and the NAR won two seats. Robinson gave the two NAR seats to Panday, who became prime minister. Panday rewarded Robinson by selecting him to be the third president in 1997. Following the 2001 elections, in which the PNM and the UNC both won 18 seats, Robinson appointed Manning prime minister, despite the fact that Panday, the sitting prime minister, had appointed Robinson president. Manning's government selected George Maxwell Richards (b. 1931– ) to serve as Trinidad and Tobago's fourth president when Robinson's term expired in 2003.

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**Rojas Pinilla, Gustavo** (b. 1900–d. 1975) *president of Colombia* Born in Tunja in COLOMBIA's Boyacá Department, Gustavo Rojas Pinilla was educated in

local schools before attending the military academy in BOGOTÁ, from which he graduated in 1920. Shortly after being promoted to lieutenant in 1924, Rojas Pinilla made a career change. He spent three years studying civil engineering in the United States and after his return to Colombia in 1927 became involved in infrastructure construction projects, particularly road building.

Rojas Pinilla returned to the MILITARY in 1932, where his engineering skills were utilized. In 1943, the Colombian government sent him to the United States to secure military and construction materials under the terms of the lend-lease program. Upon his return to Colombia, Rojas Pinilla was appointed assistant director of the School of War in 1944, director of civil aeronautics in 1945, and promoted to the rank of colonel in 1946. For his role in suppressing the riots that followed the assassination of JORGE ELIÉCER GAITÁN on April 9, 1948, he was promoted to the rank of general. In 1952, Rojas Pinilla became commander of Colombia's armed forces. Despite his own conservative political leanings, on June 13, 1953, he engineered the removal of Conservative president General LAUREANO GÓMEZ in a bloodless coup d'état. Within a year of seizing power, Rojas Pinilla was faced with an economic downturn, which contributed both to increased violence and opposition to him. The military removed him from office on May 10, 1957, after which he remained a critic of the bipartisan National Front that alternated the presidency between Conservatives and Liberals. Subsequently, with his daughter María Eugenia Rojas de Morena (b. 1932– ), he organized the National Popular Alliance (Alianza Nacional Popular, or ANAPO). He stood as its candidate in the April 17, 1970, presidential election, which he lost to Misael Pastrana Borrero (b. 1923–d. 1997).

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**Romero Barceló, Carlos Antonio** (b. 1932– ) *governor of Puerto Rico and resident commissioner to the United States* The grandson of politician Antonio R. Barceló (b. 1868–d. 1938), Carlos Antonio Romero Barceló became an advocate of Puerto Rican statehood. A graduate of Yale University, he earned his law degree from the University of Puerto Rico in 1976 and began practicing law on the island a year later. He was linked to the 1978 murder of a young proindependence advocate at the hands of police. After several investigations, four police officers were found guilty of murder, and no links to Romero Barceló were found. Nevertheless, the incident became a continuing issue in his political career, which began in 1967 when he joined the New Progressive Party.

During his two terms as governor of Puerto Rico (1977–85), Romero Barceló emphasized the develop-

ment of tourism as an alternative to the nearly defunct sugar industry and stagnant industrialization process of OPERATION BOOTSTRAP. In 1986, Romero Barceló filled, by appointment, a vacant Senate seat, a position he held until elected resident commissioner in 1992. In Washington, D.C., he continually worked for a statehood referendum, even after its rejection by Puerto Rican

voters in 1993 and 1998. On returning to Puerto Rico from Washington in 2003, Romero Barceló retired from electoral politics.

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**Saint Christopher and Nevis (Saint Kitts and Nevis)** Part of the Leeward Islands, the Federation of Saint Christopher and Nevis, commonly referred to as St. Kitts (an old-fashioned abbreviation for Christopher) and Nevis, achieved independence from the United Kingdom in 1983.

The islands of St. Christopher and Nevis occupy 101 square miles (261.5 km<sup>2</sup>) of territory and are separated by a narrow strait about two miles (3 km) wide. Roughly 43,000 people currently live in St. Christopher and Nevis, most of whom are descended from African slaves. St. Christopher, the larger of the two islands and the location of the capital, Basseterre, is an oval-shaped island with a small peninsula at its southeastern end. Nevis, which lies to the south of St. Christopher, is cone shaped. St. Christopher and Nevis was a founding member of the ORGANIZATION OF EASTERN CARIBBEAN STATES. St. Christopher, named for Christopher Columbus, was the first English colony in the Caribbean. During the colonial period, to simplify administrative tasks, the British attached the somewhat distant Anguilla to the colony of St. Christopher and Nevis (see CARIBBEAN, BRITISH). In 1958, the three-island group of St. Christopher–Nevis–Anguilla entered the WEST INDIES FEDERATION, which was dismantled in 1962. In 1967, the British government granted St. Christopher–Nevis–Anguilla local autonomy. Anguilla immediately opted out of the association, eventually becoming part of the BRITISH OVERSEAS TERRITORIES. St. Christopher and Nevis became independent on September 19, 1983.

St. Christopher and Nevis is a parliamentary democracy based on the British model. The head of state, Queen Elizabeth II, is represented by a governor general, who is appointed by the British government. Since the governor

general's power is primarily advisory and ceremonial, real power is vested in the prime minister, who is usually the leader of the majority party in the National Assembly. The National Assembly is composed of directly elected representatives and senators appointed by the governor general. The uniqueness of the 1983 constitution derives from the provisions for the local autonomy of Nevis and the establishment of the separate Nevis Island Assembly. The island of Nevis, therefore, elects representatives both to the National Assembly and to its own Nevis Island Assembly. The Nevis Island Assembly may amend or revoke legislation passed by the National Assembly. At the time of independence, Nevis was also granted the right of secession. Secession from the nation requires a two-thirds vote in the Nevis Island Assembly and the approval of two-thirds of the voters in an island-wide referendum.

The Labour Party, organized by ROBERT BRADSHAW in 1940, dominated the political scene until 1979. By 1979, political opposition to the Labour Party had coalesced into two party groupings: the People's Action Movement (PAM) on St. Christopher, which supported economic diversification away from sugar and toward tourism, increased domestic food production, and increased autonomy for Nevis; and the Nevis Reformation Party (NRP) on Nevis. PAM and NRP, which had formed a coalition led by KENNEDY SIMMONDS, came to power in 1979. The PAM-NRP coalition cleared the way for the independence of St. Christopher and Nevis as a two-island federation. The Labour Party, led by DENZIL DOUGLAS, returned to power in 1995.

In the mid-1980s, the government envisioned the economic future of St. Christopher and Nevis as dependent on tourism, light manufacturing, and a scaled-

down sugar industry. To create a workforce to manage the country's tourist industry, the government invested heavily in the economic and social infrastructure of the nation. Although the potential seemed great, the economy did not keep pace with the rapidly expanding population. As a result, 20 percent of the population has been left in search of employment. Remittances to family members at home became a substantial portion of the national ECONOMY.

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**Saint Lucia** Located in the center of the Windward Islands, Saint Lucia lies between Martinique to the north and SAINT VINCENT AND THE GRENADINES to the south. Named in honor of St. Lucy, the patron saint of blindness, the island achieved independence from the United Kingdom in 1979.

The pear-shaped island of St. Lucia is 239 square miles (619 km<sup>2</sup>) of territory populated by 161,000 people, the majority of whom are descended from African slaves. The island is dominated by high peaks and rain forests in the interior and has a coastline of sandy beaches. St. Lucia is also known for its natural deepwater harbors. Castries, the capital and largest city, is located on the northwest coast and has an excellent natural harbor. St. Lucia was a founding member of the ORGANIZATION OF EASTERN CARIBBEAN STATES in 1983.

Because of the strategic value of the island's natural harbors, control of St. Lucia changed hands 14 times during the 18th and 19th centuries. The British eventually gained ultimate control in 1814. Although English is the official language and is spoken by 80 percent of the population, the cultural footprint of the early French presence on the island is still evident. Many St. Lucians, especially those in rural areas, speak a French patois. In addition, more than 90 percent of the people are Roman Catholics.

St. Lucia was a member of the WEST INDIES FEDERATION from 1958 to 1962. In 1967, the British government, which continued to control foreign affairs and national defense, granted St. Lucia local autonomy. St. Lucia became independent on February 22, 1979. St. Lucia is a parliamentary democracy based on the British model. The head of state, Queen Elizabeth II, is represented by a governor general who is appointed by the British government. Since the governor general's power

is primarily advisory and ceremonial, real power is vested in the prime minister, who is usually the leader of the majority party in the House of Assembly. The bicameral legislature in St. Lucia consists of the House of Assembly, whose 17 members are elected for five-year terms, and a Senate, whose 11 members are appointed by the governor after consultation with political, economic, and religious figures. Politics have been dominated by competition between the United Workers Party (UWP) and the St. Lucia Labor Party (SLP). JOHN COMPTON, leader of the UWP, was premier of St. Lucia from 1964 until independence in 1979, when he became prime minister. Shortly after independence, the SLP took control of the House of Assembly. Compton returned to power in 1982 and remained the prime minister until his resignation in 1996. He was succeeded by VAUGHAN LEWIS. The SLP won an overwhelming majority in the House of Assembly in 1997, and KENNY ANTHONY became the prime minister. Octogenarian Compton returned to power in 2006.

During the 1960s, the ECONOMY was transformed from a sugar-based one to one dedicated to banana production. This transformation initially improved the economic situation of small farmers because banana crops could be cultivated on small plots. During the 1990s, however, as the Europeans implemented more restrictive TRADE policies, St. Lucia, faced with declining revenues from banana exports, began to implement a long-term economic development program based on a diversified economy. Although AGRICULTURE is still an important component of the national economy, St. Lucia has made significant gains in developing the manufacturing sector and attracting a greater portion of the West Indies' tourist trade. St. Lucia's manufacturing sector is the most diverse in the eastern Caribbean.

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**Saint Vincent and the Grenadines** Part of the Windward Islands, Saint Vincent and the Grenadines achieved independence from the United Kingdom on October 27, 1979. A federation of 32 islands, St. Vincent and the Grenadines lies between SAINT LUCIA to the north and GRENADA to the south. St. Vincent occupies

the majority of the nation's 150 square miles (388.5 km<sup>2</sup>) of territory. The Grenadines, a collection of islands to the south of St. Vincent, make up the remaining territory. Kingston, the capital, is located on St. Vincent. The majority of the nation's 120,000 inhabitants are descended from African slaves.

Initially a French colony, the British acquired permanent control of islands in 1783. The British encouraged the immigration of Portuguese and East Indians during the 19th century. In 1958, the British placed St. Vincent and the Grenadines in the WEST INDIES FEDERATION, which was dissolved in 1962 after JAMAICA and TRINIDAD AND TOBAGO withdrew. In 1967, the British government granted St. Vincent and the Grenadines local autonomy but continued to control foreign affairs and national defense. St. Vincent and the Grenadines became independent on October 27, 1979, the last of the Windward Islands to gain independence from the United Kingdom.

St. Vincent and the Grenadines is a parliamentary democracy. The head of state, Queen Elizabeth II, is represented by a governor general who is appointed by the British government. The governor general's power, however, is primarily advisory and ceremonial. Real power is vested in the prime minister who is usually the leader of the majority party in the House of Assembly, which consists of directly elected representatives and senators appointed by the governor general. Until recently, politics have been dominated by the St. Vincent Labour Party (SVLP) and the New Democratic Party (NDP). SVLP prime minister R. MILTON CATO led the nation to independence and held power until 1984. Militant Rastafarians led by Lennox Charles seized Union Island (one of the Grenadines) in 1979. Cato requested military assistance from BARBADOS, which sent detachments of the Barbados Defense Force to capture the insurgents and restore order. NDP prime minister JAMES MITCHELL held power from 1984 until he voluntarily resigned in 2000. In 2001, a revised SVLP, now called the United Labour Party (ULP), defeated the NDP and took power under Ralph Gonsalves (b. 1945– ), who has joined Venezuelan president HUGO RAFAEL CHÁVEZ FRÍAS'S Bolivarian Alternative for the Americas.

The nation's ECONOMY is heavily dependent on AGRICULTURE. Bananas account for more than 50 percent of exports. In April 1979, the eruption of La Soufriere volcano caused extensive agricultural damage. Hurricanes have also devastated banana plantations. Dependence on a single-crop, export-led economy has also made the nation's economy vulnerable to external economic forces. Particularly ominous for the people of St. Vincent and the Grenadines is the European Union's plan to end preferential access to its markets by 2008. The government, therefore, encouraged the development of the tourist industry. During the 1990s, tourism replaced banana exports as the chief source of foreign exchange. The Grenadines have become especially popular with yachtsmen. New cruise ship berths helped increase the

number of tourists to more than 200,000 annually by 2000. Nevertheless, the negative impact of the events of September 11, 2001, on the tourist industry and a high birthrate have caused thousands of people to emigrate.

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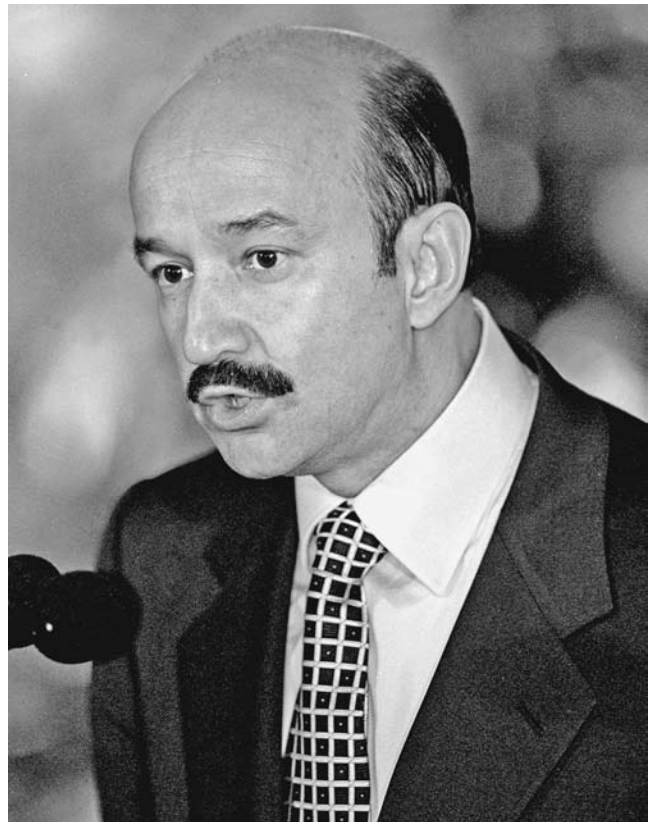
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**Salinas de Gortari, Carlos** (b. 1948– ) *president of Mexico* Carlos Salinas de Gortari was an economist and president of MEXICO in the late years of the 20th century. His presidential administration began with the promise of economic and social progress but was marred by corruption and economic crisis.

Salinas was born into a prominent family in MEXICO CITY on April 3, 1948. He was educated at the



A 1993 photo of Mexico's president Carlos Salinas (AP Photo/Jose Luis Magana)

Universidad Nacional Autónoma de México (UNAM) and earned a Ph.D. at Harvard University. Salinas served in the cabinet of President Miguel de la Madrid (b. 1934– ) during the disastrous recession of the 1980s and became the Institutional Revolutionary Party's (Partido Revolucionario Institucional, or PRI) presidential candidate in 1988. In that election, Salinas faced strong opposition from Cuauhtémoc Cárdenas (b. 1934– ), son of former president LÁZARO CÁRDENAS. His narrow victory elicited accusations of fraud among Cárdenas supporters, and later investigations uncovered a number of electoral irregularities.

As president, Salinas implemented an economic plan known as the Programa Nacional de Solidaridad, which encouraged local grassroots control of government aid programs. Arguing that the MEXICAN REVOLUTION had already succeeded, Salinas ended the agricultural protections granted to *ejido* communities under the CONSTITUTION OF 1917. The move provoked intense debate, but the president argued that revolutionary agrarian policies were no longer effective. Salinas also helped devise the NORTH AMERICAN FREE TRADE AGREEMENT with the United States and Canada. The treaty went into effect during his last year in office and incited a major rebellion by the Zapatista National Liberation Front, a revolutionary movement in the state of Chiapas (see EZLN).

While Salinas's policies created short-term economic growth for Mexico, he is remembered for the economic crisis that occurred after he left office. Irresponsible monetary and fiscal policies implemented throughout 1994 forced Salinas's successor, ERNESTO ZEDILLO, to devalue the nation's currency.

Salinas de Gortari fled the country after leaving the presidency. His brother, Raúl, was arrested on suspicion of fraud and conspiracy, and his brother Enrique was killed in 2004.

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**Sam, Vilbrun Guillaume** (b. 1859–d. 1915) *president of Haiti* Born on March 4, 1859, in Ouanaminthe, HAITI, Vilbrun Guillaume Sam was the son of former Haitian president Tirésias Augustin Simon Sam (b. 1835–d. 1916), who ruled Haiti from 1896 to 1902. Prior to 1915, Sam served as a congressional representative, a senator, a minister of defense, and a minister of finance. On March 4, 1915, Sam succeeded Joseph Davilmar Théodore (b. 1847–d. 1917), who had become

president in November 1914 after overthrowing Oreste Zamor (b. 1861–d. 1915) with the help of cacao farmers in the north. Théodore's inability to pay the cacao farmers (known as Cacos) led to the Cacos Rebellion, led by Rosalvo Bobo (b. 1873–d. 1929), and Théodore's resignation in favor of Sam.

Faced with rebellion, Sam, a black man who distrusted the mulatto elite and German investors, advocated closer economic and political ties with the United States. Bobo, a mulatto medical doctor, however, was critical of Sam's efforts to expand political and economic ties with the United States. On July 27, 1915, after Bobo's forces attacked the National Palace, Sam ordered the execution of 167 political prisoners, including Zamor. The result was a national uprising that sent Sam fleeing to the French embassy for safety. At 10:30 A.M. the next morning, an angry mob invaded the embassy and captured Sam, who was hiding in a bathroom. The mob publicly dismembered the president in front of the French embassy and scattered his remains throughout Port-au-Prince.

News of the gruesome events reached U.S. president Woodrow Wilson, who feared that the pro-German Bobo might become the next president. On July 28, 1915, Wilson ordered U.S. Marines to militarily occupy Haiti, who sent Bobo into exile in JAMAICA. Sam was succeeded by Philippe Sudré Dartiguenave (b. 1863–d. 1926), the first in a series of puppet presidents.

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**Sandiford, Erskine** (b. 1937– ) *prime minister of Barbados* Born on March 24, 1937, in BARBADOS, Erskine Sandiford earned a B.A. in English from the University of the West Indies and a master's degree in economics and social studies from the University of Manchester. A member of the Democratic Labour Party (DLP), Sandiford was appointed to the Senate in the Barbadian Parliament in 1967. He resigned his seat in 1971 to run for a seat in the House of Assembly. Prime Minister ERROL BARROW appointed Sandiford to serve first as minister of education and then as minister of health and welfare. In the 1976 parliamentary elections, although the DLP lost control of the House of Assembly, Sandiford managed to hold his seat by a margin of 12 votes. From 1976 to 1986, Sandiford served as a deputy parliamentary opposition leader.

After the DLP defeated the Barbados Labour Party (BLP) in 1986, Barrow, who once again was prime minister, appointed Sandiford deputy prime minister. After

Barrow died suddenly on June 1, 1987, Sandiford became prime minister. Sandiford led the DLP to victory in the 1991 parliamentary elections. His technocratic style, however, alienated many DLP members of Parliament. In 1994, after several members of the DLP opposed a motion proposed by Sandiford, the prime minister called for early elections. The BLP, led by OWEN ARTHUR, defeated the DLP, and Arthur became prime minister. David Thompson (b. 1961– ) succeeded Sandiford as leader of the DLP, but Sandiford remained in the House of Assembly until 1999, when he retired to teach economics at Barbados Community College.

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**Sandinista National Liberation Front (FSLN; Frente Sandinista de Liberación Nacional)** Founded by a group of Nicaraguan university students in 1961, the Sandinista National Liberation Front, or FSLN, dedicated itself to the overthrow of the Somoza dynasty and to the expulsion of U.S. influence in the country. The FSLN's philosophy drew on the nationalism of its namesake AUGUSTO CÉSAR SANDINO, as well as the Marxism-Leninism and Christian humanism embedded in liberation theology. Impressed by the success of FIDEL CASTRO RUZ in CUBA, the FSLN prosecuted a guerrilla conflict, albeit unsuccessful, against the Somoza government throughout the 1960s. In the early 1970s, on Castro's advice, the FSLN shifted its strategy to emphasize military strikes against isolated National Guard outposts. This strategy frustrated the Guard, whose response became increasingly brutal, which, in turn, only turned the population further against the Somoza regime. As the opposition to ANASTASIO SOMOZA DEBAYLE crystallized after the devastating 1972 earthquake that destroyed Managua, the FSLN was NICARAGUA's only armed group. Following the 1978 assassination of journalist PEDRO JOAQUÍN CHAMORRO CARDENAL, SOMOZA's support rapidly slipped away. He appeared totally isolated in June 1979, when the FSLN launched its final offensive.

Politically, the FSLN split into three factions in the early 1970s. One faction dated to 1967, when it adopted the "prolonged popular war" (*guerra popular prolongada*) as its strategy. It called for the building of a grassroots organization among the peasants in northern Nicaragua, while urban supporters would raise money to sustain the effort. Because Somoza's suppressive measures were directed at urban youth, rather than the rural villages, in 1975, Jaime Wheelock formed the "proletarian tendency," which changed the emphasis to urban guerrilla warfare. Shortly thereafter, a third faction, the "third way," or *terceristas*, surfaced within the FSLN. Led by DANIEL ORTEGA SAAVEDRA and his brother Humberto

(b. 1951– ), the *terceristas* reached out for alliances with other opposition groups, including the Nicaraguan elite. In October 1977, the *terceristas* formed an alliance with the "Group of Twelve," which represented Nicaragua's professional and business community. In San José, COSTA RICA, they formed a government in exile. The political strategy did not deter the *terceristas* from playing the lead role in either the 1978 summer offensive or the final offensive in June 1979 that forced Somoza to leave the country on July 19, 1979.

After Somoza's ouster, the FSLN set up a five-man junta that represented Nicaragua's different factions, but as the Sandinistas moved to consolidate their own power, the five resigned from the junta. VIOLETA BARRIOS DE CHAMORRO was the first. Many of the FSLN's actions reminded observers of Castro's efforts in Cuba 20 years previous: the organization of rural and urban workers into FSLN LABOR groups, defense committees in urban neighborhoods, and postponement of elections until 1984. Land distribution programs and the control of production in the private sector smacked of communism. The suspicions were confirmed by the FSLN leaders' visit to Moscow in 1981 and the presence of Cuban doctors, teachers, and agricultural and industrial advisers. As the U.S.-backed Contra War in Nicaragua intensified during the 1980s, so, too, did Cuban military assistance to the Sandinistas (see CENTRAL AMERICAN WARS).

While the FSLN's socioeconomic policies may have failed on their own merits, their rapid decline was brought about by the policies of U.S. president Ronald Reagan, who saw the Sandinistas as part of the Soviet Union's vision to communize the world (see SOVIET UNION AND LATIN AMERICA). Reagan refused to appropriate the \$8 billion reconstruction aid package initiated by his predecessor, Jimmy Carter, directed the INTER-AMERICAN DEVELOPMENT BANK not to extend credit to Nicaragua, and embargoed U.S. TRADE with the country. Most important, he ordered the prosecution of the Contra War to topple the FSLN government: The Central Intelligence Agency organized discontented Nicaraguans and trained them in HONDURAS to conduct warfare inside Nicaragua. The war took a heavy toll on Nicaragua's infrastructure and by 1985 caused the FSLN government to spend 67 percent of the national budget on defense against the Contras. Combined with the failure of the FSLN's economic policies, Nicaragua was an economic failure, which contributed to its acceptance of the 1989 Arias Peace Plan, which brought the war to an end.

The peace plan also paved the way for elections on February 25, 1990. FSLN candidate Daniel Ortega lost to Violeta Chamorro. He would lose again in 1997 and 2001 but finally captured the presidency in 2007. Over the same time span, the FSLN remained the largest single opposition party in the national legislature, and FSLN labor unions continued to pressure for improvement in the quality of life for the Nicaraguan poor, society's largest sector.

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**Sandino, Augusto César** (b. 1895–d. 1934) *guerrilla leader in Nicaragua* Augusto César Sandino was born in Niquinohomo, NICARAGUA, the illegitimate son of businessman Gregorio Sandino and coffee picker Margarita Calderón. Sandino went on to lead a guerrilla army against U.S. forces in Nicaragua from 1927 to 1933 and to become a national hero whom the revolutionary leaders of the 1980s named themselves after.

Sandino had a difficult childhood. He was forced to abandon formal schooling in 1910 to work in his father's general store. In 1916, he left Nicaragua for COSTA RICA, where he worked as a mechanic for three years before returning home to pursue his own grain business. After killing a man, Sandino again left Nicaragua. He first went to La Ceiba, HONDURAS, where he worked for the Vacarro Brothers Fruit Company and then on to Tampico, MEXICO, where he was employed by the Southern Pennsylvania Oil Company. During his stay in Tampico, Sandino was influenced by the social justice and anti-American aspects of the MEXICAN REVOLUTION. When Sandino answered his father's call to return to Niquinohomo in 1926, he brought with him a determination to correct the injustices that beset Nicaragua.

When Liberal general José María Moncada (b. 1894–d. 1946) accepted U.S. secretary of war Henry L. Stimson's mediated Treaty of Tipitapa on May 24, 1927, that ended his war against the ruling Conservatives, Sandino slipped off to San Rafael del Norte to take up his two-pronged cause: fighting against General Moncada, who represented the tradition of corrupt Nicaraguan politics, and driving the North Americans from his country. For six years, the war waxed and waned. U.S. Marines and Nicaraguan government troops chased the wily Sandino and his band of fighters, which never numbered more than 1,000 men. Sandino's forces wracked U.S.-owned commercial properties. In the eyes of U.S. Marines, Sandino shifted from being a "bandit" to a "guerrilla." Just as the war became unpopular in Nicaragua, the United States grew weary of its commitment. In the broader context, U.S. policy makers became frustrated with the failure of their interventionist policies in the Caribbean region since 1900 (see U.S. CARIBBEAN INTER-



Nicaraguan guerrilla leader Augusto César Sandino (center) with Mexican José Paredes (left) and Salvadoran Agustín F. Martínez (right), in El Salvador, June 1925 (*Records of the U.S. Marine Corps*)

VENTIONS, 1900–1943). By 1930, U.S. president Herbert Hoover faced vociferous opposition at home and abroad regarding the U.S. troops stationed in Nicaragua, as well as a stalemate on the battlefield. On February 13, 1931, Hoover announced that U.S. troops would be withdrawn after the November 1932 election; that withdrawal was completed on January 2, 1933. The withdrawal also led to a February 2, 1933, peace agreement between newly elected Liberal president Juan B. Sacasa (b. 1874–d. 1946) and Sandino. It provided for an immediate cease-fire, amnesty for Sandino's forces, and a tract of land in the Coco River region for a cooperative farm.

The end of the United States's "special relationship" with Nicaragua also opened the door for ANASTASIO SOMOZA GARCÍA to rise to power. Both Sacasa and Sandino had reason to fear Somoza. He brought the two together for meetings in the presidential palace on February 18 and 21, 1934, at which they agreed to disband the Somoza-led National Guard. Fearing for his own future, earlier in the day of February 21, Somoza and his officers had agreed to take joint responsibility for Sandino's death, which they plotted. That evening, as Sandino left the presidential residence, a group of National Guardsmen seized him and took him to an open field near Managua's airport, where he was executed by firing squad. At the time, Somoza was attending a poetry reading at the National Theater. Sandino's legacy reached new heights in the 1970s when the SANDINISTA NATIONAL LIBERATION FRONT declared that it was fighting to rid Nicaragua of the corrupt Somoza dynasty and U.S. support of it.

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**Sanguinetti, Julio María** (b. 1936– ) *president of Uruguay* Born in MONTEVIDEO, URUGUAY, into a middle-class family of Italian descent, Julio María Sanguinetti was educated in local schools before earning his law degree from the University of Montevideo in 1961. Two years later, he was elected to the national parliament on the Colorado Party ticket and was reelected in 1966 and 1971. Until his appointment by President Jorge Pacheco (b. 1920–d. 1978) as minister for industry and commerce, Sanguinetti served as a member of the Uruguayan delegation to the 1964 Geneva meeting of the United Nations Conference on Trade and Development (UNCTAD) and as President Pacheco's adviser on the affairs of the ORGANIZATION OF AMERICAN STATES (OAS). He was serving as minister of education and culture under President Juan María Bordaberry (b. 1928– ) in 1972, when he resigned in protest over the growing influence of the MILITARY in government. In 1976, the military government prohibited him from further political activity.

In 1983 and 1984, Sanguinetti served as general secretary of the Colorado Party during the negotiations of the Pact of the Naval Club, which paved the way for the November 25, 1984, elections in which Sanguinetti captured the presidency. Allegedly, the pact defined the military's parameters for permitting the country to return to its traditional democracy, requirements that included civilian promises not to punish the officer corps for HUMAN RIGHTS violations. Some observers contended that the pact also guaranteed Sanguinetti's electoral victory.

Sanguinetti inherited a country traumatized by 11 years of brutal military rule. He immediately released all political prisoners and reestablished full constitutional rights for all. But, the military's refusal to participate in any civilian trials for human rights abuses during the 1973–84 period eventually led to a 1989 government amnesty for all military officers. The law sharply divided the nation and cost Sanguinetti popular support. Through his foreign affairs minister, Enrique Iglesias (b. 1931– ), Sanguinetti pursued an activist TRADE policy that spurred the ECONOMY in 1986 and 1987, but thereafter, it slowed markedly until the end of his first presidential term in 1989.

Sanguinetti, who could not immediately succeed himself by constitutional provision, could seek a second term at a later date. This he did on November 27, 1994, when he won the presidential election with only 24.7 percent of the popular vote, which forced him to form a coalition government with several other political parties. Over extensive popular protest, Sanguinetti directed through the legislature a social security reform law that reduced

government subsidies to retirees. He also oversaw constitutional changes that strengthened the executive and reformed the election process to restrict one presidential candidate per party and a runoff election should no one candidate receive an overall majority of the vote in the initial election. Sanguinetti's administration benefited from expanded trade relations, particularly among its MERCOSUR partners and with the United States (see SOUTHERN CONE COMMON MARKET). Domestically, this resulted in job creation and higher wages and attracted direct foreign investment. Sanguinetti handed over the presidency to his colleague Jorge Batlle (b. 1947– ) on March 1, 2000, just before BRAZIL's currency devaluation and the Argentine economic collapse (see ARGENTINA, ECONOMIC COLLAPSE IN).

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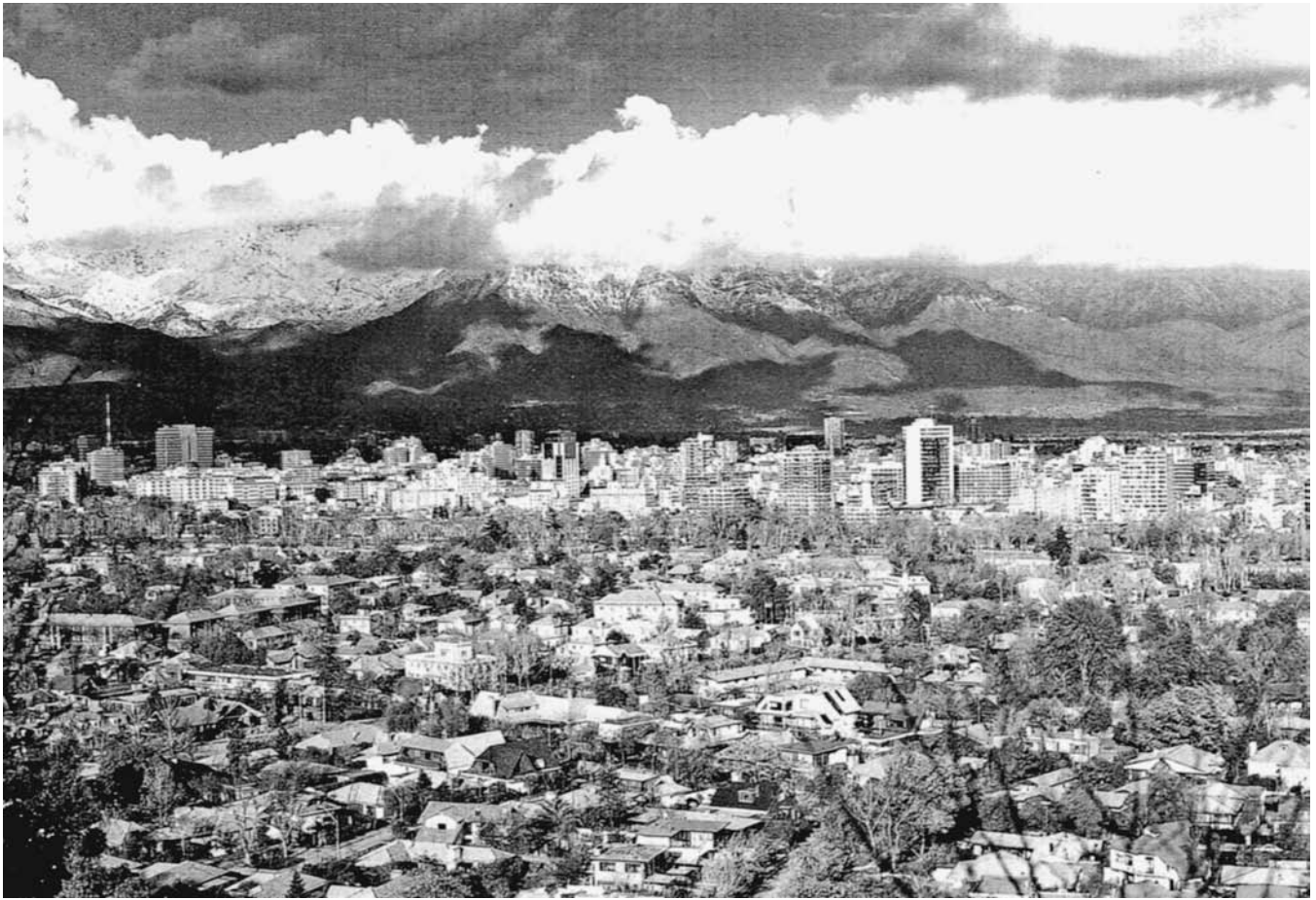
**Santiago de Chile** Santiago de Chile is located approximately at the midpoint of CHILE's 2,485-mile (4,000-km) length and 70 miles (113 km) inland from the Pacific Ocean port of Valparaiso. Metropolitan Santiago consists of 27 municipalities that are home to 5.6 million people, approximately one-third of Chile's total population. Santiago is the seat of the national government, although the legislature convenes in Valparaiso.

Founded on February 12, 1541, by Spanish conquistador Pedro de Valdivia, Santiago was the most distant city from Spain in its New World empire and remained an outpost after independence until the 1880s. The Church of San Francisco, completed in 1628, and the presidential offices at La Moneda, built in 1764, serve as reminders of Santiago's colonial past. The city took on new importance as a commercial and financial center with the development and expansion of the nitrate INDUSTRY and subsequently copper exports. In the period after World War II, Chile's industrial development centered in Santiago and the surrounding Central Valley, which led to further population growth in the city.

Chile moved away from its dependence on copper exports under the regime of General AUGUSTO PINOCHET UGARTE, from 1973 to 1988. Today its well-diversified ECONOMY includes many international firms, such as Billiton, Coca-Cola, Ford, Intel, JP Morgan, Nestlé, and Unilever. Santiago's industrial base accounts for 45 percent of the national gross domestic product.

Chile's Central Valley is a rich fertile plain that historically produced food for export that today, thanks to refrigeration and modern shipping, reaches the United States and China. Many food-processing plants are located in metropolitan Santiago.

Santiago also is a rich cultural center. Twenty-nine institutions of higher learning are located in the city,



Aerial view of Santiago de Chile, with the Andes in the background (Thomas M. Leonard Collection)

including the prestigious Catholic and national universities. In addition to La Moneda and the Church of San Francisco, 12 museums are located in the capital, including one of pre-Columbian art, archaeology, as well as the National Historical Museum.

See also SANTIAGO DE CHILE (Vols. II, III); VALDIVIA, PEDRO DE (Vol. I).

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**Santo Domingo** Santo Domingo, capital city of the DOMINICAN REPUBLIC, is the oldest continuously inhabited European settlement in the Americas. Officially founded on August 4, 1496, by Bartholomew Columbus, brother of Christopher Columbus, Santo Domingo is located on the Caribbean Sea at the mouth of the Ozama River. Today, an estimated 2.7 million people live in Santo Domingo's metropolitan area, which includes the National District, the seat of the national government.

Santo Domingo served as Spain's first New World capital and was the launching area for Spanish con-

quistadores such as Vasco Núñez Balboa and Hernando Cortés. Many of its historic buildings are found today in the city's colonial district, including Santa María la Menor, the New World's first Catholic cathedral; Ozama Fortress, the oldest fort in the Americas; the Royal Palace; and the New World's first monastery and convent. Santo Domingo entered a state of decline after English privateer Francis Drake invaded the city in 1586. By a series of treaties in 1665, the city came under French control. From 1801 until 1844, the French, Haitians, and Spanish took turns administering the city. Finally, in 1844, the Dominican Republic gained its independence from HAITI.

In the 20th century, Santo Domingo was the epicenter of the country's political domination by U.S. Marines from 1916 to 1924, the dictatorship of RAFAEL TRUJILLO from 1930 to 1961, and JOAQUÍN BALAGUER's 22-year rule between 1960 and 1996. Trujillo oversaw the city's reconstruction following the 1930 earthquake and renamed it Ciudad Trujillo, a name that lasted until his death in 1961.

Today, Santo Domingo is a city of broad avenues and modern buildings and is home to many international businesses. Outside the city center, campuslike environments house nearly 500 U.S. "807" assembly plants in textiles, clothing, electronics, footwear, and leather goods



for reshipment to the United States. In addition to its port, which connects the Dominican Republic with the Caribbean and the rest of the world, the international airport at Santo Domingo brings businesspeople and tourists from Europe, Asia, and Africa. Three main highways and a domestic air service link the capital with the remainder of the country. Though the city has an excellent international telecommunications system, an inadequate electric system is a major drawback to commercial development.

In addition to the old Spanish sector, Santo Domingo has many museums and historic sites, including the Christopher Columbus Lighthouse, built in 1992 to house the assumed remains of the explorer. Eighteen institutions of higher education are located throughout the city. Santo Domingo has many wealthy neighborhoods with plush arcades and modern shopping centers. In contrast, the residents of the city's northernmost reaches are among the poorest in Santo Domingo.

See also COLUMBUS, CHRISTOPHER (Vol. I); SANTO DOMINGO (Vols. II, III).

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**São Paulo** São Paulo, BRAZIL, is situated some 30 miles (48 km) west of the port city of Santos on a high plateau that is part of the Brazilian Highlands. Founded by a group of Jesuit priests in 1554, São Paulo remained an impoverished outpost during the Portuguese colonial period. In the 19th century, São Paulo experienced rapid growth first through the expansion of the tea industry and by the end of the century through coffee production for export to international markets. With a decline in the demand for coffee and the impact of the two world wars, São Paulo's elite invested their wealth in industrial development into the late 20th century, at which time financial and ancillary services emerged as the primary economic activity.

São Paulo's economic development saw a concomitant rise in population. The city grew from a rural town of a few thousand people during the Portuguese colonial period to 25,000 in the mid-19th century. Twentieth-century industrialization brought with it a large influx of Europeans, particularly Italians, as well as Middle Easterners and Japanese, who found employment in the city's 11,500 industrial plants. By the middle of the 20th century, São Paulo had nearly 2 million residents. The rapid growth continued thereafter so that in 2007, the 588-square-mile (1,523-km<sup>2</sup>) city had some 10.9 million inhabitants, or 19.9 million including the 3,108-square-mile (8,050-km<sup>2</sup>) metropolitan area. At present, São Paulo is the most populous city in Brazil, South America, and the Southern Hemisphere.

Industrial growth also spawned a middle class, but the *paulista* elites remained in political and financial control of the city. Beginning in the 1920s, LABOR organized into unions, which became a potent political force after World War II.

São Paulo has a diverse cultural makeup that finds expression in restaurants, LITERATURE, MUSIC, and the arts. Many cultural historians trace Brazil's first theater to São Paulo, and today, the tradition is found in several theatrical venues. The city has its own Drama Art School. Its Historic Museum has rare book and original document collections that cover the colonial period. The city is also home to eight universities.

See also SÃO PAULO (Vols. II, III).

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**Seaga, Edward** (b. 1930– ) *prime minister of Jamaica* Born on May 28, 1930, in Boston, Massachusetts, to Jamaican parents of Scottish and Lebanese descent, Edward Seaga and his family returned to JAMAICA when he was still an infant. Seaga attended primary and secondary school in Kingston and graduated from Harvard University with a B.A. in social sciences in 1952. A member of the Jamaica Labour Party (JLP), he won election to Parliament in 1962 representing Western Kingston, a seat which he held for more than 40 years. Seaga served as minister of development and welfare for ALEXANDER BUSTAMANTE and minister of finance for Hugh Shearer (b. 1923–d. 2004) until the JLP lost power in the 1972 elections. In 1974, he became the leader of the JLP. Seaga's party lost the 1976 elections, which were plagued by political violence, to the People's National Party (PNP), led by MICHAEL MANLEY.

In 1980, campaigning on a platform of reestablishing close relations with the United States, Seaga's party won 51 of the 60 seats in the House of Representatives. Seaga established an amicable relationship with U.S. president Ronald Reagan. He supported Reagan's CARIBBEAN BASIN INITIATIVE and OPERATION URGENT FURY, the U.S.-led invasion of GRENADA designed to overthrow the New Jewel Movement. Seaga broke diplomatic relations with CUBA and lowered the taxes on U.S. mineral companies operating in Jamaica. The Jamaican ECONOMY, however, did not improve during the 1980s, and Seaga lost support at home. Manley won the 1980 elections and returned to power. Seaga continued to lead the political opposition until 2005, when he retired from politics to accept a position as senior research fellow at the University of the West Indies. His retirement marked the end of Jamaica's first generation of political leaders. Seaga was succeeded as leader of the JLP by Bruce Golding (b. 1947– ), who became prime minister in 2007.

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**Shining Path (Sendero Luminoso)** The Shining Path was founded by Abimael Guzmán Reynoso (b. 1934– ) in 1968 at the San Cristóbal de Huamanga National University in Ayacucho as a splinter group of PERU's Communist Party. Many of its disciples were students of Guzmán in San Cristóbal's College of Education and returned to their native villages to further espouse Guzmán's philosophy. Throughout the 1960s and 1970s, the Shining Path remained within the Ayacucho District, one of Peru's most poverty-stricken regions.

The Shining Path's stated objective is to destroy traditional Peru and replace it with a "people's republic" based on an alliance between the workers and peasants. Its ideology—"Gonzalo Thought"—draws from the doctrines of Mao Zedong and Peruvian Marxist JOSÉ CARLOS MARIÁTEGUI. From Mao, the Shining Path advocates a protracted "people's war," initially to gain control of the countryside, then moving into the cities. From Mariátegui, it accepts the idea that only a revolution can destroy Peru's semifeudal society.

On the eve of Peru's first democratic election on May 17, 1980, the Shining Path began its armed struggle for revolution with an attack on an obscure polling place in Ayacucho. Thereafter, the movement spread throughout the Upper Huellaga Valley and into LIMA. In the process, its members brutally tortured and executed local political officials, as well as supervisors of community farms and opposition spokesmen, real or imagined. Torture and rape became common tactics to force peasants into compliance. Political representatives, community organizers, and social workers in Lima's "young towns" (slums) became the target of the Shining Path's wrath. In addition, Lima's infrastructure came under attack, particularly electric relay stations. The Peruvian government's first reaction was to arm the peasants so they could resist encroachments but in 1985 gave the army carte blanche to suppress the movement. The army proved to be as brutal as the Shining Path. In all, an estimated 69,000 people died or disappeared as a result of the terrorist and MILITARY violence.

With the capture of Guzmán on September 12, 1992, and his subsequent call for an end to the armed struggle, the 1995 arrests of other Shining Path leaders, and President ALBERTO KENYA FUJIMORI's amnesty plan that netted an estimated 6,000 Shining Path members, the movement seemed to wither away. However, from 2001 to 2006, several isolated attacks on government buildings, roads, and infrastructure projects, along with some kidnappings, indicate that the Shining Path remains active.

In the meantime, legal maneuvering delayed Guzmán's trial until 2006. On October 13 of that year, a Peruvian court convicted him of terrorism and sentenced him to life in prison.

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**Silva, Luiz Inácio Lula da** See LULA DA SILVA, LUIZ INÁCIO.

**Simmonds, Kennedy** (b. 1936– ) *prime minister of St. Christopher and Nevis* Born on April 12, 1936, in Basseterre, the capital of SAINT CHRISTOPHER AND NEVIS, Kennedy Simmonds earned a medical degree at the University of the West Indies in 1962. After his internship in JAMAICA, he set up private practice in Anguilla. In 1965, he was one of the founding members of the People's Action Movement (PAM), which was formed as an opposition party to the Labour Party led by ROBERT BRADSHAW. From 1966 to 1969, he pursued postgraduate studies, first in the BAHAMAS and then in Pittsburgh, Pennsylvania. In 1969, he returned to St. Christopher and Nevis to resume his practice. Simmonds was elected leader of PAM in 1976.

In a special bi-election in January 1979, Simmonds won the seat made vacant by Bradshaw's death in 1978. He was the first person in decades to be elected to a political position in St. Christopher and Nevis and not a member of the Labour Party. Taking advantage of confusion in the leadership of the Labour Party following Bradshaw's death, Simmonds allied PAM with the Nevis Reformation Party (NRP) and won the 1980 elections. The change in government reduced the drive for secession in Nevis. Simmonds served as premier from 1980 to 1983, when the United Kingdom granted St. Christopher and Nevis independence.

One of Simmonds's first acts as prime minister was to support the October 1983 U.S. intervention in GRENADA. St. Christopher and Nevis dispatched a small force of police to participate in the pacification of Grenada. The growth of the offshore finance industry during the 1980s, although economically beneficial for the nation, increased money laundering and led to rampant allegations of corruption in the government (see OFFSHORE BANKING). Allegations that government officials were involved in drug smuggling led to the Labour Party's victory in 1995.

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**Sinarquistas** Sinarquistas were members of the National Synarchist Union (Unión Nacional Sinarquista, or UNS), which formed in MEXICO in 1937 as an ultranationalist, pro-Catholic, and anticommunist organization. Sinarquista founder José Antonio Urquiza (b. 1904–d. 1938) criticized the social policies of President LÁZARO CÁRDENAS as leftist and anticlerical.

Urquiza and his followers advocated the tenets of Christian democracy espoused in Pope Leo XIII's *Rerum Novarum* encyclical. For that reason, Sinarquistas were condemned by the Mexican government and U.S. intelligence agents as fascists. One high-ranking member of the Sinarquistas, Hellmuth Oskar Schreiter, was found to be a Nazi agent. The Sinarquistas sympathized with many of the political philosophies championed by Francisco Franco's Falange in Spain. They also denounced PAN-AMERICANISM as a U.S. attempt to dominate the other countries of the Americas. The Sinarquistas were most active in the states of Guanajuato and Sinaloa but aimed to spread the movement across Mexico. The organization published a weekly newspaper called *El Sinarquista* to promote its nationalist agenda. The movement eventually expanded into the U.S. Southwest as anti-Mexican racism in the 1940s created a receptive audience for Sinarquistas's pro-Mexico message.

In the early years of WORLD WAR II, nongovernmental leftist groups in Mexico led the charge in trying to discredit the Sinarquistas. By 1942, however, Mexico had formally joined the war and more organized government action helped silence the Sinarquistas. In the last half of the 20th century, Sinarquistas have made several attempts to establish a political party but have failed to obtain official recognition.

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**Soccer War** (1969) The Soccer War was a four-day conflict from July 14 to 18, 1969, between EL SALVADOR and HONDURAS. The immediate cause of the war was the riots that erupted at the Tegucigalpa soccer stadium where the two national teams were to compete for a place in the international soccer tournament the World Cup. The historic origins of the conflict date to the 1920s, however, when Salvadoran peasants migrated to Honduras because

land was not available to them in El Salvador. The new immigrants settled along the countries' common border. With time's passage, their numbers increased through continued MIGRATION and procreation of those already living in Honduras. The new groups moved to the unoccupied Honduran interior. The Salvadorans remained on these lands, in some cases for two generations, and made no attempt to obtain clear title to the land or apply for Honduran citizenship. Two factors in the 1960s exacerbated the problem. Honduras, already the region's poorest and most underdeveloped country, received little, if any, benefit from the CENTRAL AMERICAN COMMON MARKET (CACM) that was established in 1960. In fact, Honduras found itself with an ever-increasing TRADE deficit to the more industrious El Salvador.

Nationalism on both sides intensified in 1969 when Honduran president Oswaldo López Arellano's (b. 1921– ) land distribution program conflicted with the holdings of the Salvadoran migrants and their descendants, who were being forced to return home. The Salvadoran elite resisted their forced return because they would increase the pressure on already scarce lands in El Salvador.

The rioting in Tegucigalpa prompted the Salvadoran government to send troops into Honduras, ostensibly to end the outflow of people. The troops rapidly advanced to Nueva Ocotepeque and Santa Rosa de Copán, leaving the impression that they intended to attack the capital, Tegucigalpa. Caught off guard by the ground assault, the Hondurans used their superior airpower to rout the Salvadorans. The ORGANIZATION OF AMERICAN STATES negotiated a cease-fire that went into effect on July 20, 1969, but it was not until October 30, 1980, that U.S. president Jimmy Carter orchestrated an agreement that sent the dispute to the International Court of Justice at The Hague. In 1992, the court awarded the disputed territory to Honduras, but not until 1999 did El Salvador accept the decision.

The cost of the war was high. An estimated 2,000 people, most of them Hondurans, were killed. Estimates range from 60,000 to 130,000 peasants who returned to El Salvador, where their presence complicated an already tenuous land tenure system that contributed to Salvadoran civil war a decade later (see CENTRAL AMERICAN WARS). The CACM fell into disarray, only to be revived with the changing global ECONOMY in the 1990s.

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**Société Haïtienne–Américaine pour le Développement Agricole (SHADA; Haitian–American Society for Agricultural Development)** The Société Haïtienne–Américaine pour le Développement Agricole

(SHADA) was an American corporation dedicated to the production of rubber in HAITI during World War II. It was created on August 15, 1941, to encourage the production of raw materials in Haiti, especially those materials considered vital to the MILITARY that could conceivably be denied to the United States if the Japanese militarily conquered European and U.S. colonies in Southeast Asia. Most troublesome to U.S. government officials was the potential loss of access to natural rubber supplies in British Malaysia and Dutch Indonesia, which represented more than 95 percent of the world's natural rubber production. Notwithstanding American efforts to develop synthetic rubber, the U.S. government energetically sought to develop alternative rubber sources in more than a dozen Latin American nations (see WORLD WAR II AND LATIN AMERICA).

Haitian president ÉLIE LESCOT who supported the United States during World War II, encouraged SHADA activities in Haiti. Technically, the Haitian government was the owner of SHADA, which was funded with a \$5-million loan from the Export-Import Bank. To secure the loan, however, the company's stock was turned over to the Export-Import Bank as collateral. The manager and all principal officers of SHADA were Americans. More than 40,000 Haitian peasants had their farms expropriated to provide the needed land for rubber and sisal plantations. By 1943, more than 90,000 Haitians were employed by SHADA. Synthetic materials to produce rope, however, eventually negated the need for Haitian sisal. Over 32,000 acres of land in Haiti were planted with *Cryptostegia* vines and *Hevea* trees imported from the Philippines. Harvesting latex from the *Cryptostegia* vines, however, proved difficult and unproductive. In addition, the displacement of peasants from their farms caused food shortages in Haiti. In 1944, the U.S. government, citing the success of the synthetic rubber program in the United States and the dismal performance of the *Cryptostegia* rubber plantations in Haiti, canceled SHADA's *Cryptostegia* rubber program. In 1945, the U.S. government also canceled the contract for rubber from the *Hevea* trees. Lescot's association with the failed economic venture contributed to his overthrow in 1946. The government of Dumarsais Estimé (b. 1900–d. 1953) nationalized SHADA's holdings and began the process of returning land to peasants and encouraging them to plant coffee.

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**soldaderas** *Soldaderas* were WOMEN soldiers and camp followers in MEXICO during the revolution of

1910. The armies of nearly all factions of the MEXICAN REVOLUTION had female participants, but the number of women and the types of duties they performed varied.

*Soldaderas* were often the wives, sisters, and other female relatives of male soldiers, and they accompanied their men for a variety of reasons. Many *soldaderas* had lost their homes and main income providers as local villages were destroyed and the men went off to fight. Others followed their men into battle to provide basic services that were not supplied by rebel militias or by the national army. Women cooked and cleaned for the soldiers and provided basic nursing care to the wounded. *Soldaderas* were also female companions to the soldiers, and often entire families accompanied revolutionary armies. Women gave birth and raised small children in the camps. When a male companion died in battle, the *soldadera* often attached herself to another. In some armies, *soldaderas* even fought alongside the men. Some women held officer ranks, and there are numerous accounts of *soldaderas* performing brave feats and leading armies to victory on the battlefield. Although life in the camps was difficult, many *soldaderas* found their new roles to be liberating and welcomed the opportunity to contribute to the revolution.

After the fighting subsided, many women were forced to return to their former lifestyle, their services on the battlefield having produced few immediate changes in gender roles. Nevertheless, the emerging feminist movement in Mexico frequently pointed to the contributions made by *soldaderas* to argue for women's rights and equality.

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**Somoza Debayle, Anastasio (Tachito)** (b. 1925–d. 1980) *dictator of Nicaragua* Anastasio “Tachito” Somoza Debayle rose to power through the MILITARY to serve as president and dictator of NICARAGUA. The second son of ANASTASIO SOMOZA GARCÍA and Salvadora Debayle, the younger Anastasio was educated at St. Leo's Preparatory School in Florida and La Salle Military Academy on Long Island prior to his graduation from West Point in 1946. After returning home, President Somoza appointed his son head of the National Guard, the regime's military prop. Until his father's death in 1956, the younger Somoza directed the Guard in the suppression of the numerous minor rebellions against the elder Somoza.

Following the assassination of the elder Somoza in 1956, Tachito's brother Luis Somoza Debayle



Nicaraguan president Anastasio Somoza Debayle (*center*) with his wife, Hope Portocarrer, and Nelson A. Rockefeller during a reception at the U.S. Embassy Residence in Managua, Nicaragua, on May 16, 1964 (*Courtesy of the Rockefeller Archive Center*)

(b. 1922–d. 1967) served as Nicaragua’s president until 1963. During that time, the brothers were at loggerheads. Luis was a reformer, who lifted the existing state of siege and wanted free and unfettered elections as a step toward a more democratic nation. Tachito wanted to retain the family’s political dominance. Despite their conflict, the Somoza brothers continued to appoint family and friends to key government posts. On February 8, 1967, two months before Luis’s fatal heart attack, Anastasio won the presidential election. His four-year term was characterized by further graft, corruption, and nepotism, which further intensified the opposition. In addition to the traditional Conservative and Liberal Parties that opposed the Somoza dynasty, factions within Somoza’s ruling Independent Liberal Party (Partido Liberal Independiente, or PLI) sought his resignation. Outside the political circles, CATHOLIC CHURCH officials and the fledgling middle class also sought social and political change. The nascent Marxist-leaning SANDINISTA NATIONAL LIBERATION FRONT (FSLN) conducted guerrilla attacks on National Guard outposts in the countryside. The weight of opposition against him prompted Somoza to manipulate an agreement in 1971 that required him to step down from the presidency in favor of a three-man ruling junta until the 1974 presidential elections, when he would again stand as a candidate.

Nicaragua’s political dynamic significantly changed following an earthquake on December 23, 1972, that devastated Managua and killed an estimated 10,000 people. Somoza, his colleagues, and the National Guard allegedly took for their own purposes much of the international relief aid that poured into Nicaragua. Indeed, the poorer sections of Managua were never rebuilt. The opposition stiffened its resistance. The traditional elite

rallied behind the owner of *La Prensa*, PEDRO JOAQUÍN CHAMORRO CARDENAL. Small businesspeople formed the Nicaraguan Democratic Movement (Movimiento Democrático Nicaragüense, or MDN), while individual and more disparate middle-sector groups operated alone. All clamored for Somoza’s resignation. In the countryside, the FSLN continued its assault on government, and particularly National Guard, outposts. The opposition intensified following Chamorro’s assassination on January 10, 1978; it was widely assumed that Somoza had engineered the shooting. Chamorro’s death also brought together the Broad Opposition Front (Frente Amplio Opositor, or FAO), which represented the various opposition groups and the United People’s Movement (Movimiento Pueblo Unido, or MPU), an organization that included students, as well as communist and socialist elements. Somoza, however, refused to seriously negotiate with these groups in the spring and summer of 1978.

Somoza’s weakness, however, was registered on August 22, 1978, when members of an FSLN faction, led by Edén Pastora (b. 1937– ), seized the National Palace and 2,000 of its occupants. Somoza eventually caved into their demands for the release of 60 FSLN prisoners and their safe conduct out of Nicaragua to PANAMA and VENEZUELA. Somoza agreed to have his government disseminate an FSLN declaration of charges against the dictator and pay a \$500,000 ransom. Despite this embarrassment and continued FSLN victories in the countryside, Somoza refused U.S.- and UN-initiated mediation efforts in the fall of 1978. Somoza’s recalcitrance and continued HUMAN RIGHTS violations prompted President Jimmy Carter to terminate all U.S. military assistance to the Nicaraguan dictator. Although he would continue to purchase arms on the world market, particularly from Israel, Somoza otherwise stood completely isolated when the FSLN began its offensive in June 1979. New U.S. ambassador to Nicaragua, Lawrence Pezzulo, made one last mediation attempt, but this time, the FSLN, with victory in sight, determined that peace negotiations were useless. Somoza finally succumbed on July 17 and two days later flew out of the country for Miami, Florida, leaving behind an economically devastated country.

Because an extradition treaty existed between the United States and Nicaragua, arrangements were made for Somoza to go to PARAGUAY, where he lived under the protective shield of dictator ALFREDO STROESSNER. Despite tightly controlled borders and society, two assassins made their way into the country to kill Somoza on September 17, 1980, while he was driving his car in Asunción. Responsibility for the killing remains elusive. Initially, an Argentine guerrilla group claimed responsibility for Somoza’s killing, but subsequently, the FSLN made a similar claim, and finally, a former U.S. Central Intelligence Agency operative asserted that FIDEL CASTRO Ruz designed the plot.

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**Somoza García, Anastasio (Tacho)** (b. 1896–d. 1956) *dictator of Nicaragua* Technically the 35th and 39th president of NICARAGUA, Anastasio “Tacho” Somoza García ruled over the nation as a dictator for 20 years. The son of a successful San Marcos Province coffee grower, Somoza was educated in local schools before earning his degree from the Pierce School of Business Administration in Philadelphia, Pennsylvania, an experience that enabled him to become fluent in English. In Philadelphia, Somoza met his future wife, Salvadora Debayle (b. 1925–d. 1980), who provided him entry into Nicaragua’s prominent social circles. They had two sons, Luis and ANASTASIO SOMOZA DEBAYLE.

Somoza did not distinguish himself until 1926, when he joined the Liberal rebellion in support of Juan Bautista Sacasa’s (b. 1874–d. 1946) claim to the presidency. Sacasa was his wife’s uncle. Somoza’s English-language skills, rather than his military prowess, saw him serve as interpreter for U.S. secretary of war Henry L. Stimson, who brokered an end to the dispute leading to the presidency of the Liberal Party leader José María Moncada (b. 1870–d. 1945) from 1929 to 1933. Somoza held several positions in the Moncada administration, including governor of León and foreign minister. He also accepted an appointment to the U.S.-created National Guard, where his English-language skills again served him well between the supervising U.S. Marines and the Spanish-speaking Nicaraguan troops. By the time of the U.S. military withdrawal from Nicaragua in 1933, Somoza had become the Guard’s commander.

Following the withdrawal of U.S. troops, Somoza set out to gain political control of Nicaragua. He first eliminated guerrilla leader, AUGUSTO CÉSAR SANDINO, who was popular among the poor. On the evening of February 21, 1934, at Somoza’s instruction, a group from the National Guard seized Sandino as he left the presidential residence and took him to an isolated spot, where he was assassinated. Next, Somoza confronted President Sacasa (1933–36) at every opportunity until the latter’s resignation on June 6, 1936. Somoza went on to win the December 6, 1936, presidential election by a 107,201 to 108 popular vote count, according to Nicaraguan officials. Owing to its GOOD NEIGHBOR POLICY, the United States rejected the political opposition’s calls for intervention. Somoza then consolidated his hold on the country. FAMILY and close friends received high-level government appointments. The National Liberal Party (Partido Liberal Nacional, or PLN) was revived to become his personal political

tool and the dominant party in the unicameral legislature through rigged elections. Somoza used constitutional manipulation to extend his presidency to 1947, but by the end of World War II, the opposition groups pressured sufficiently for change. Spurred on by the pro-U.S. propaganda that circulated during the war, the opposition forced Somoza to renounce his 1947 presidential bid. Still, Somoza retained enough power to place two relatives in the presidency. The elderly Leonardo Argüello (b. 1875–d. 1947) took office on May 1, 1947. When he sought to gain control over the National Guard, Somoza replaced him in May 26, with Víctor Ramón Reyes y Reyes (b. 1873–d. 1950), who retained the office for three years. In 1950, Somoza returned to the presidential palace through rigged elections, but not before reaching an agreement with the Conservative Party that it receive one-third of the National Assembly and an equal amount of cabinet appointments.

During Somoza’s dictatorship, he and his family gained control of the national ECONOMY. At first they used government revenues to purchase commercial outlets, then capitalized on the nationalization of German-owned properties during WORLD WAR II to expand their holdings. Their control spread across banking, railroads, the national airline, ports, warehouses, construction, and the



Nicaraguan president Anastasio Somoza García (*bottom, center*) with his army officers in 1945 (*U.S. Army Signals Corps*)

media. To ensure the National Guard's continued support, Somoza permitted it to share in some of these operations, along with gambling activities, prostitution, and the sale of liquor. At the time of Somoza's death in 1956, the family's wealth was estimated to be \$140–\$160 million.

Somoza also cultivated friendship with the United States. He supported U.S. policies during World War II and the anticommunist fight during the cold war. Such deliberate cultivation, along with the U.S. failure to distance itself from Somoza, led many to assert that the United States approved of the dictatorship. Others point out that because Nicaragua lay on the extreme fringe of World War II and the cold war, Washington policy makers had other priorities.

On the evening of September 21, 1956, Somoza was in León to accept his party's nomination for another presidential term when a young poet, Rigoberto López Pérez (b. 1935–d. 1956), assassinated him. U.S. ambassador Thomas E. Whelan, with President Dwight D. Eisenhower's approval, had Somoza flown to a U.S. military hospital in the Panama Canal Zone, where he died September 29.

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**Southern Cone Common Market (MERCOSUR; Mercado Común del Sur)** The Southern Cone Common Market was established by the Treaty of Asunción on March 26, 1991. It pledged the countries of ARGENTINA, BRAZIL, PARAGUAY, and URUGUAY to eliminate tariffs among themselves by December 31, 1995, establish a common external tariff (CET) for third parties outside MERCOSUR, and adopt harmonious economic policies in relation to LABOR, intellectual property rights, TRADE policies, and technical matters. The member states did not meet the 1995 treaty deadline, but discussions continue to present.

Should MERCOSUR fully integrate, it would become the largest trading bloc in Latin America, with nearly 270 million residents who account for 55 percent of Latin America's gross domestic product (GDP), 55 percent of its industrial trade, and 35 percent of all trade. By 2008, BOLIVIA, CHILE, COLOMBIA, ECUADOR, and PERU, had become associate members of MERCOSUR.

From the start, MERCOSUR was beset with differences between the parties. The treaty did not resolve the long-standing nationalistic rivalries between Argentina and Brazil, with each claiming leadership in Southern

Cone affairs. Both countries had implemented the neoliberal economic model, which had led to more engagement in the global market than with neighbors Paraguay and Uruguay. Paraguay, the weakest and the poorest of the MERCOSUR nations, hoped to cut a niche within the market and in trade with neighboring countries. Uruguay faced the greatest challenge in privatizing its state and para-statal (semiprivate) operations. Progress has been slow in reaching the goals of the Asunción treaty, except for establishment of a CET. The harmonization of labor laws exemplifies the problem. Argentine workers are paid comparatively well, and Argentine workers historically have enjoyed greater job security. In contrast, workers in Paraguay are among the most poorly paid in the hemisphere. Argentine workers fear that harmonization of labor laws will lead to lower wages, while Paraguayan workers aspire to the Argentine level. Additionally, intellectual property rights are poorly protected within MERCOSUR, and this, in turn, contributes to problems in negotiations with external groups, particularly the United States and the European Union (EU).

The implementation of the U.S.-Mexico-Canada NORTH AMERICAN FREE TRADE AGREEMENT on January 1, 1994, was seen by most analysts as the first step toward the FREE TRADE AREA OF THE AMERICAS (FTAA), a hemisphere-wide trade partnership, although most Latin Americans view the FTAA as another tool of U.S. hegemony. Of the MERCOSUR partners, Brazil spoke out most loudly against it and vowed to organize all Latin American nations into an economic bloc before dealing with the United States in relation to an FTAA. Simultaneously, the EU was casting about for trading partners. MERCOSUR served that purpose and also provided an opportunity for the EU to strengthen its economic relations with the United States. Discussions began in 1998 but became ensnared over the EU's agricultural policies and MERCOSUR's protection of Latin American textile industries (see EUROPEAN UNION AND LATIN AMERICA).

Other factors contributed to a slowdown of the intra-MERCOSUR discussions toward common economic policies and Latin America's relationship with the EU. The administration of George W. Bush brought a change in U.S. policy regarding an FTAA. Instead of a hemispheric trade partnership, the Bush administration sought regional or individual free trade agreements, such as the 2005 DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT and the 2006 treaty with Colombia that the U.S. Congress has yet to consider. The expansion of the EU into eastern and central Europe contributed to its temporary loss of interest in pursuing trade relations with the MERCOSUR countries. These voids sent those countries to seek trade partnerships outside the hemisphere. China and South Korea have been the most receptive (see CHINA AND LATIN AMERICA, PEOPLE'S REPUBLIC OF). Events within the Southern Hemisphere also affected MERCOSUR. The devaluation of the Brazilian real on January 13, 1999,



Columbia University in Asunción, Paraguay, hosts a conference on the 10-year benefits and detriments of the Southern Cone trading bloc MERCOSUR. (Thomas M. Leonard Collection)

and the 2000–01 Argentine financial crisis adversely affected intra-MERCOSUR trade. Political changes in Bolivia and VENEZUELA that brought left-leaning men to power were also significant. On May 1, 2007, Bolivian president JUAN EVO MORALES AYMA announced that the MERCOSUR countries would no longer receive privileged pricing for the purchase of natural gas. Despite the myriad of issues, MERCOSUR discussions regarding trade, tariff, and labor issues continue. In 2008, the EU rekindled its interest in a trading relationship with MERCOSUR.

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**Soviet Union and Cuba** Soviet foreign policy regarding the spread of COMMUNISM IN LATIN AMERICA had been predicated on the U.S.-proclaimed Monroe

Doctrine, which stated that the Western Hemisphere was off limits to foreign penetration. The Soviets, therefore, gave vocal and strategic support to local Communist Parties throughout Latin America but did not support violent revolutions, including that of FIDEL CASTRO RUZ during his march to power in CUBA from 1956 to 1959. Once Castro took office in 1959, the Soviets remained hesitant to support Castro and provide him with economic assistance, unsure of Castro's intentions or of the U.S. response to him.

The first Soviet effort at assistance came on February 4, 1960, during a visit by Soviet first deputy premier Anastas Mikoyan to HAVANA, ostensibly to open a Soviet TRADE fair in the city. While Mikoyan performed the public function, he also signed a trade agreement that provided Cuba with a 12-year \$100 million credit line at 2.5 percent interest to purchase Soviet commodities and technical assistance for the construction of plants and factories and ensured the Soviet Union 5 million tons of Cuban sugar for the next five years. The Dwight D. Eisenhower administration did nothing more than assert that the treaty violated the Monroe Doctrine, a protest that fell on deaf ears in Havana and Moscow.



Nevertheless, throughout spring and into early summer 1960, the rhetoric from Havana and Washington intensified. When U.S. president Eisenhower directed U.S. companies not to refine Soviet crude oil on June 29, 1960, Castro responded by nationalizing those companies and went on to threaten the nationalization of other U.S. companies should Congress pass and Eisenhower implement legislation to place an embargo on the importation of Cuban sugar. Congress approved the measure, and Eisenhower implemented the embargo on July 6, 1960 (see CUBA, U.S. TRADE EMBARGO OF). Two days later, Soviet premier Nikita Khrushchev announced that the Soviet Union would purchase the remainder of the 1960 quota of Cuban sugar. Khrushchev also declared that the Soviets would defend Cuba against outside aggressors. An emboldened Castro completed the nationalization of U.S. properties by October 31, 1960, an act that contributed to the severance of diplomatic relations with the United States on January 3, 1961, just before Eisenhower left office.

Eisenhower's failure to respond to Castro's aggressiveness and President John F. Kennedy's failure to openly support the BAY OF PIGS INVASION in April 1961 were among the factors that convinced Khrushchev to persuade the Soviet MILITARY leadership to place medium-range intercontinental missiles in Cuba. Khrushchev's decision was not for Cuban defense but to counter the presence of U.S. missiles in Western Europe aimed at the Soviet Union. Khrushchev and Kennedy settled the crisis without consulting Castro (see CUBAN MISSILE CRISIS). An embarrassed Castro became infuriated during his state visit to Moscow in April 1963 and was advised by the Soviets to return the Cuban ECONOMY to its reliance on sugar, something Castro had come to power determined to end. While the Soviets retreated from Cuban affairs for the remainder of the decade, Castro attempted to diversify the economy. He failed to do so and again turned to the Soviet Union. As a prerequisite for Soviet assistance in 1970, Castro pledged to implement Soviet-designed five-year economic plans and otherwise accept Soviet economic advice.

The Vietnam War had a broad impact on U.S. policy toward Castro and opened the door to renewed Soviet interest in Cuba. In August 1970, U.S. intelligence reported that the Soviets were constructing a submarine base in Cienfuegos, Cuba. While President Richard M. Nixon wanted to solve the problem quietly, his national security advisor, Henry Kissinger, did not. The latter wished to chastise the Soviets and went on to act independently of the president to demand that they tear down the base. In the diplomatic exchanges between Kissinger and the Kremlin, the Soviets capitalized on Kissinger's statement that the United States would not bring down the Castro regime by military force, a much broader statement than in the 1962 "Kennedy-Khrushchev understanding," which declared that the United States would not invade Cuba.

Kissinger's statement became part of the Soviet's final statement on October 22, 1970, that brought the crisis to an end. Despite continued U.S. protests, the Soviets completed the base, and over the next four years, some 12 Soviet submarines visited it.

The 1962 Kennedy-Khrushchev understanding was revisited eight years later, when another U.S. president had been weakened by events beyond his control, enabling the Soviets to again probe U.S. interests in Cuba. President Jimmy Carter confronted inflation at home, rising anti-Americanism in Latin America, an insolvable Middle East crisis, and Muslim fundamentalism in Iran. The Soviets tested U.S. resolve in the summer of 1978, when U.S. intelligence indicated that the Soviets had provided the Cuban Air Force with a squadron of MIG-23 jet fighter planes. Although the Soviets had long assisted in the modernization of the Cuban military, not until the reported presence of the MIGs did any of that aid violate the 1962 Kennedy-Khrushchev accord, which prohibited the introduction of offensive weapons to Cuba. The MIGs were capable of carrying nuclear weapons. Following a series of meetings in Moscow and Washington, D.C., the crisis was settled with a Soviet pledge that there were no MIG-23s in Cuba. Carter appeared satisfied.

The Kennedy-Khrushchev understanding made no mention of stationing military troops in Cuba; nevertheless, the Soviet troop presence increased precipitously, to about 5,000 men, in July 1979. When Senator Frank Church threatened to scuttle the Senate's consideration of the Strategic Arms Limitation Talks (SALT II) agreement, President Carter quietly went about settling the crisis. In October 1979, Carter secured a Soviet pledge not to use any of its troops stationed in Cuba against the United States.

Cuba and the Soviet Union, which had never been close, began to drift further apart in the mid-1980s when Soviet premier Mikhail Gorbachev informed Castro that the Soviet Union could no longer prop up the Cuban economy. The Cubans would now be expected to pay for the goods and services they received from the Soviet Union. With the collapse of the Soviet Union in 1991, Cuban economic ties with the Soviet Union and the Eastern European states came to a near standstill, as the Cuban government lacked the hard currency to pay for imports. As a result, Castro declared a "special period" in which the Cubans endured greater economic hardship while he cast about for new trading partners.

See also MONROE DOCTRINE (Vol. III).

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**Soviet Union and Latin America** Although relations between the Soviet Union and Latin America were a dominant feature of the cold war (1960–90), contact between the two regions can be traced to famous writers from czarist Russia who visited BRAZIL. By the end of the 19th century, only ARGENTINA (1885), URUGUAY (1887), and MEXICO (1890) had established official diplomatic relations with the Russian government. While Russian immigrants had scattered to many parts of Latin America, they had taken up residence mainly in Argentina and Brazil. Marxist thought was widespread in the early 20th century, particularly among LABOR leaders. Mexican Communist labor leader Vicente Lombardo Toledano (b. 1894–d. 1968), for example, was instrumental in the writing of the Mexican socialist-leaning CONSTITUTION OF 1917. Communism's ultimate objective, as expressed in the goals of the Communist International (COMINTERN), directly contradicted the capitalist model. The COMINTERN was a Soviet-sponsored international organization established at a Moscow meeting from March 2 to 6, 1919, to replace the world's bourgeoisie with a Soviet-style system. In Latin America, this opposition to capitalism led to the violent suppression of alleged communist labor unions and the deportation of their leaders, as seen in Argentina, Brazil, and Chile in 1919 and 1920 (see COMMUNISM IN LATIN AMERICA).

After WORLD WAR I and throughout the 1920s and early 1930s, only Mexico and Uruguay had appointed diplomats to the newly formed Union of Soviet Socialist Republics. Communist groups were elsewhere looked upon with disdain, as evidenced by the criticism of Mexico's 1917 constitution and the U.S. hunt for AUGUSTO CÉSAR SANDINO in NICARAGUA and AGUSTÍN FARABUNDO MARTÍ in EL SALVADOR. Despite government opposition, however, by the end of the 1920s, Communist-led LABOR unions and POLITICAL PARTIES could be found in almost every Latin American country. In 1929, these groups formed the Latin American Trade Union Confederation (Confederación Sindical Latinoamericana, CSLA). In their campaigns against capitalism, Communist labor unions pursued themes such as foreign domination of the local economies and the exploitation of workers by the ruling classes. While these concepts were put forward in COMINTERN's propaganda, they also reflected some of Latin America's socioeconomic and political realities.

Communist groups met varied fates during the 1930s. In some cases, such as in Brazil and El Salvador, communist political parties were driven underground, while in COSTA RICA, MANUEL MORA VALVERDE's Communist Party continued to grow and became an influential player

in the country's 1940 and 1944 presidential elections. CHILE's Communist Party also became significant, particularly after allying itself with the Radical and Socialist Parties to form the Popular Front, which had become a significant political player by 1946. During World War II, the Cuban labor movement benefited from its leader Blas Roca's (b. 1898–d. 1937) support of President FULGENCIO BATISTA Y ZALDÍVAR. During the war, Latin America's Communist Parties mirrored Soviet foreign policy: They supported Soviet neutrality at the outbreak of World War II on September 1, 1939, until the German invasion of the Soviet Union on June 22, 1941. From that point until the Allied cross-channel invasion on June 6, 1944, they portrayed the Soviet Army as the lone effective force in combating Nazism; and after that date, they fully supported the Allied cause against the Axis partnership (see WORLD WAR II AND LATIN AMERICA). In deference to the Allied cause, Stalin disbanded COMINTERN on May 15, 1943, and encouraged the Communist Parties henceforth to capitalize on local issues and cooperate with other political groups to gain popular support for election to political positions in order to legitimize their government roles.

As the cold war confrontation between the United States and the Soviet Union began to simmer following World War II, the debate around nationalism and communism in Latin America sharpened. As the war drew to a close in 1945, calls for corrections in Latin America's political system and its socioeconomic disparities found various expressions. For example, Argentina's JUAN DOMINGO PERÓN asserted in 1946 that his prolabor programs had prevented Communists from controlling the country's largest voting bloc, but this fell on deaf ears among Argentina's traditional elite and U.S. policy makers. That same year, U.S. ambassador to GUATEMALA Edwin Kyle fell out of step with local landowners when he favorably compared President JUAN JOSÉ ARÉVALO's social security, rent control, and minimum wage laws to President Franklin D. Roosevelt's New Deal programs. In 1948, the U.S. ambassador to Costa Rica did not see any significant difference between the policies of political rivals JOSÉ FIGUERES FERRER of the National Liberation Party and Communist Mora. On the eve of the 1954 U.S.-sponsored invasion of Guatemala, Assistant Secretary of State Henry Holland cautioned policy makers to distinguish between communism and legitimate nationalist movements to correct historic socioeconomic and political ills that plagued Latin American countries. Holland's advice was ignored, and the U.S. invasion restored Guatemala's old order (see GUATEMALA, U.S.-SPONSORED INVASION OF). While there was very little to connect the Soviet Union to any of these movements, the postwar experiences of U.S. foreign service officers colored their perception of events. The 1947 State Department reforms included rotation in assignments so that Europeanists and Asianists would serve a term in Latin America or on the department's

Latin American desk. To these officers, Latin American welfare programs, social security, wage laws, and land distribution paralleled similar programs in Communist Eastern Europe and China and only confirmed a U.S. National Security Council conclusion in September 1950 that the Soviets were seeking to control the world.

The CUBAN REVOLUTION of 1956–61 best illustrates the nationalist-communist argument. Because he railed against CUBA'S socioeconomic ills and its corrupt political system, FIDEL CASTRO RUZ drew broad support from the lower and middle socioeconomic sectors in his successful drive to oust Batista from power on December 31, 1958. Over the next two years, Castro moved quickly to consolidate power in his own hands, and his confrontation with the United States resulted in the nationalization of U.S.-owned industries in Cuba and, subsequently, a U.S. economic embargo (see CUBA, U.S. TRADE EMBARGO OF). Throughout the period, Cuban elites and former *batistianos* labeled Castro a communist, but U.S. policy makers remained unsure, with some describing him rather as a dictatorial nationalist. Nevertheless, as Cuba and the Soviet Union drew closer together economically in 1961 and the Soviets placed intermediate range ballistic missiles on the island in the summer of 1962, U.S. analysts placed Castro within the Soviet orbit (see SOVIET UNION AND CUBA). This was an incorrect assessment, as Castro, frustrated by Soviet policy during the October 1962 CUBAN MISSILE CRISIS, attempted to maintain his independence from the superpowers. Only after the collapse of the Cuban ECONOMY in 1970 did Castro accept, as a precondition for Soviet assistance, to implement the Soviet economic model and political system in Cuba. From then until the late 1980s, the Soviets spent an average of \$2 billion annually to sustain the Cuban economy for geopolitical reasons regarding its relations with the United States. The governments in Havana and Moscow actually mistrusted each other.

Castro's Cuba prompted the MILITARY in other Latin American countries to suppress Communist and other leftist organizations over the next generation and the United States to increase its military assistance to meet the same objective. The United States also intervened when it anticipated a communist victory. For example, on April 14, 1965, President Lyndon B. Johnson sent 42,000 troops into the DOMINICAN REPUBLIC to prevent an alleged communist, JUAN BOSCH, from taking political power, and on October 25, 1983, President Ronald R. Reagan sent 7,000 troops to GRENADA to prevent a "communist takeover" of that island. In the first instance, there was no Soviet presence, and in the second, Eastern European and Cuban military personnel were present to assist with the construction of a modern air facility. Reagan also oversaw the Contra War in Nicaragua and supported the established order in El Salvador in the 1980s to prevent a communist takeover of those

countries (see CENTRAL AMERICAN WARS). Although the Soviets supplied the Nicaraguan SANDINISTA NATIONAL LIBERATION FRONT with token military support, Moscow made it clear that it could not afford to support another "Cuba" in the Western Hemisphere. In addition to military action, the United States used economic measures to isolate the legally elected Chilean government of Marxist SALVADOR ALLENDE GOSSENS from 1970 until his overthrow on September 11, 1973. U.S. policies forced Allende to seek and gain assistance from Soviet bloc countries and China, actions that in turn produced allegations of increased Communist influence in the Western Hemisphere.

In the 1990s, Latin America moved away from military governments toward a more free and open society that provided a greater opportunity for Communist Parties to reemerge. However, until the end of the 20th century, their impact was minimal, owing to the disintegration of the Eastern European bloc and the collapse of the Soviet Union itself. With the failure of the neoliberal economic model to improve the quality of life for the Latin American poor, in the early 21st century, voters turned "left" to bring leaders such as HUGO RAFAEL CHÁVEZ FRÍAS to the presidency in VENEZUELA, JUAN EVO MORALES AYMA in Bolivia, and DANIEL ORTEGA SAAVEDRA in Nicaragua. Some U.S. analysts viewed these elections as a resurgence of communism in Latin America rather than as local nationalist cries for improved socioeconomic conditions.

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**Spencer, Baldwin** (b. 1948– ) *prime minister of Antigua and Barbuda* Born on October 8, 1948, in Green Bay, ANTIGUA AND BARBUDA, to working-class parents, Baldwin Spencer is a TRADE unionist by profession. As the leader of the United National Democratic Party (UNDP), he won and continues to hold a seat representing St. John's Rural West in the 1989 parliamentary elections. In 1992, he formed the United Progressive Party (UPP), a coalition party made up of the UNDP, the Progressive Labour Movement (PLM), and the Antigua Caribbean Liberation Movement (ACLM), to challenge the Antigua Labour Party (ALP) led by VERE CORNWALL BIRD.

In the 2004 parliamentary elections, the UPP captured 12 of the 17 seats in the House of Representatives, thus ending the Bird family's control of politics in Antigua and Barbuda. Since his election, Spencer has tried to expand the economic infrastructure of the nation, especially the tourism industry. American billionaire Allen Stanford, the largest landholder and employer in Antigua and Barbuda, has invested millions of dollars in the nation. In 2006, Stanford created and funded the Stanford 20/20 cricket tournament in Antigua. Both Spencer and Stanford are avid cricket aficionados, and cricket is the most popular sport in Antigua and Barbuda (see SPORTS AND RECREATION). In early 2007, however, Spencer and Stanford began a verbal war in local newspapers. Spencer was angered that Stanford continued to consult ALP politicians about development strategies, and Stanford was miffed at the criticism.

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**sports and recreation** Sports in Latin America are as diverse as its people and geography. By the 20th century, the ball games and other sports of the indigenous peoples had disappeared from popular view. The equestrian sports played on the Argentine Pampas harked back to the colonial period but were engaged in mainly by the elite. Instead, in the late 19th and early 20th centuries, the games of the North Atlantic world were taking root as businessmen, skilled laborers and managers, missionaries, teachers, and military personnel traveled and settled across Latin America. While soccer, or *fútbol*, is of European origin, the game bears some resemblance to the ball games of the Mesoamerican indigenous population. Soccer is the most popular sport in Latin America today. Latin American countries have won nine World Cup titles, as well as many hemisphere-wide contests.

North American sports are also played in Latin America. Baseball arrived in CUBA with merchants and seamen in the late 19th century. From there, it spread throughout the circum-Caribbean region, becoming very popular also in PUERTO RICO, the DOMINICAN REPUBLIC, COLOMBIA, VENEZUELA, NICARAGUA, and MEXICO. After Jackie Robinson's debut with the Brooklyn Dodgers tore down the color barrier in U.S. professional baseball in 1947, players from Latin America began to grace the U.S. Major League Baseball rosters; they now count among the game's most successful players. Boxing also captured the imagination of many Latin Americans, particularly in countries with large minority populations. Auto racing attracted many of South America's elite. More recently, basketball has enjoyed widespread appeal in Latin America, with



Registration call for little league soccer, in Montevideo, Uruguay. Fútbol is Latin America's most popular sport. (Thomas M. Leonard Collection)

teams having successfully challenged the United States in the Pan-American Games, the Olympics, and other international contests.

Amateur athletics quickly gave way to club and factory sports teams and leagues, which helped break down Latin America's color and ethnic barriers. By the 1920s, industrial leagues had brought together the best players in any given plant no matter their origin, as seen in PERU. Skilled Yucatecan Mayan Indians still dominate local baseball rosters. These professional players are better paid and perform less-taxing tasks on the job, at least for the duration of their playing careers. The same is true of Latin American club sports, where players are subsidized by various private-sector businesses. The International Olympic Committee had recognized this reality by 1992, when it allowed professional athletes to participate in the Olympic games as part of national teams.

As had occurred in the former Soviet Union and Eastern European countries during the cold war, Cuba has established government-supported training facilities, with children attending from a young age to train for international competition. That model was followed by other Western Hemisphere nations, including the United States, but through a combination of public- and public-private-sector funding.

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**Stroessner, Alfredo** (b. 1912–d. 2006) *dictator of Paraguay* The son of a German immigrant and Paraguayan woman, Alfredo Stroessner grew up in a well-to-do family in Encarnación, PARAGUAY. In 1929, at the age of 17, Stroessner entered the Paraguayan MILITARY academy. His studies were interrupted in 1932 upon the outbreak of the CHACO WAR with BOLIVIA. Recognized for his bravery in the 1932 battle of Boquerón, Stroessner rose to the rank of first lieutenant and had control of an artillery unit by the war's end in 1935. Stroessner was among a group of younger officers sent to BRAZIL in 1940 for additional military training, after which he continued to rise in the military. For remaining loyal to President HIGINIO MORÍNIGO during the 1943 abortive coup d'état, Stroessner was sent to the Superior War School. After graduation in 1946, he was assigned to the army's General Staff Headquarters. On Morínigo's instructions, Stroessner directed his artillery to destroy Asunción's shipyards in order to thwart an attempted coup by naval officers in 1947. Stroessner emerged from the conflict as one of a handful of officers in the reorganized and purged Paraguayan army and by 1951 was its commander in chief. From that position on May 15, 1954, he directed the ouster of President Federico Chávez (b. 1882–d. 1978) and assumed the presidency himself three months later. Subsequently, Stroessner was reelected president in eight consecutive rigged contests (1958, 1963, 1968, 1973, 1978, 1983, and 1988).

Initially, Stroessner's political power rested on his military reputation gained during the Chaco War. To strengthen his position as president, he purged dissident officers from the military and Colorado politicians from government and the party. Stroessner also tightened his control over the Colorado Party by letting its many conflicting factions battle one another. Stroessner controlled the party through appointed officials and spies. Through an intricate network of ancillary organizations, he manipulated control over businesspeople, professionals, students, workers, WOMEN, and peasants. Opponents of the regime, real and imagined, were jailed and tortured, assassinated, or exiled. A detailed record of these atrocities was uncovered with the discovery of the "Archive of Terror" in 1992.

Stroessner's economic policies favored the elite, particularly in AGRICULTURE, and foreign investors. Loyal Colorado Party members and other loyalists benefited from road construction and other public works projects, many of which were financed by U.S. foreign aid programs during the 1960s and 1970s. Some 10,000 soldiers received 50 acres (20 ha) of land each on leaving the military, a program that helped expand agricultural production. Stroessner's greatest economic triumph was the completion of the Itaipú Hydroelectric Dam in 1982, which provided his cronies the opportunity to profit from its construction and subsequently from the sale of electricity to neighboring countries, particularly Brazil.

Stroessner's strong anticommunist stand at the height of the cold war brought him U.S. friendship and economic assistance. That changed during the presidencies of Richard Nixon and Jimmy Carter, especially with Carter's emphasis on HUMAN RIGHTS. The changed global situation caused deep cuts in U.S. assistance to Paraguay, which continued during the 1980s under President Ronald Reagan, who called for democracy in Paraguay. Changes in U.S. assistance programs coincided in the 1980s with a slowing in the Paraguayan ECONOMY, as well as rising inflation and unemployment, the increasingly restive middle and upper classes anxious for participation in politics, and a split in the military over who should succeed Stroessner. The restlessness climaxed on the evening of February 2, 1989, when General Andrés Rodríguez (b. 1929–d. 1997) forced Stroessner to relinquish power. Stroessner and his son Gustavo (b. 1945– ) fled to Brazil, thus ending a 35-year dictatorship. Only FIDEL CASTRO RUZ's hold over CUBA has lasted longer. Both Stroessners refrained from future political action, splitting time between their homes in Brasília and a ranch outside Belo Horizonte. Despite an extradition treaty between Brazil and Paraguay, no effort was made to return Stroessner to Paraguay to stand trial for his crimes against the Paraguayan people. He died of heart failure on August 16, 2006.

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**student movement in Mexico** In the 1960s, a resistance movement led by students and other young people began to grow in MEXICO. University and preparatory school students—many of them from the middle and upper classes—began to challenge the government on issues relating to democracy and social justice. The student movement gained momentum in the summer of 1968 when the government sent in the Granaderos—a special mounted riot-police force—to break up demonstrations. Clashes between the Granaderos and students became more frequent, and the movement grew as more young people joined in protest.

Just weeks before MEXICO CITY was set to host the summer Olympic games, students called for a massive strike and took to the streets in peaceful demonstrations. Mexico was the first Latin American nation and the first developing country to host the Olympics, and the government insisted that the games would take place in a peaceful and efficient manner. Negotiations failed

to bring an end to the student strike, and the number of marchers grew into the thousands. On the evening of October 2, 1968, following a day of speeches and peaceful protests, student demonstrators gathered in the Plaza of Three Cultures in the middle-class Tlatelolco neighborhood. By nightfall, the plaza had been surrounded by paramilitary units and other security forces. In the ensuing chaos, police opened fire and killed hundreds of unarmed protesters, although official government accounts claimed only a few dozen casualties.

In the aftermath of the confrontation at Tlatelolco, government forces arrested hundreds of suspected student leaders and blamed communist agitators for the confrontation. The Olympic games proceeded uninterrupted, but in the coming weeks, many middle-class families began to see the true authoritarian nature of the government as young people were arrested and many disappeared altogether. It also became clear that the government had engaged in a coverup, and many citizens lost confidence in the Institutional Revolutionary Party (Partido Revolucionario Institucional, or PRI). Decades later, the administration of President VICENTE FOX (2000–06) declassified government documents related to the Tlatelolco incident, and the Mexican judicial system attempted to bring charges against the government leaders suspected of ordering the attack. Among those investigated was former president LUIS ECHEVERRÍA, who was serving as minister of the interior in 1968.

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**Suriname** Formerly known as Netherlands Guiana or Dutch Guiana, Suriname achieved independence from the Netherlands on November 25, 1975. Suriname is the smallest sovereign state in South America. Occupying 63,251 square miles (163,819 km<sup>2</sup>) of territory, it lies between French Guiana to the east and GUYANA to the west. Its northern border is the Atlantic Ocean, and its southern border is shared with BRAZIL. The southernmost part of its border with French Guiana is still disputed. Almost 90 percent of Suriname's 450,000 people live along the 230-mile-long (370-km) coastline, with the great majority living in Paramaribo, the nation's capital. Almost 350,000 Surinamese people live in the Netherlands. Suriname's population is made up of several distinct ethnic groups. East Indians, descendants of 19th-century contract workers from India, constitute 38 percent of the population. Creoles—mulatto and black descendants of African slaves—account for 32 percent of the population. Javanese, descendants of 20th-century contract workers from the Dutch East Indies, make up about 15 percent of the population,

while Maroons, descendants of escaped African slaves, are about 10 percent of the total. This ethnic diversity is replicated in Suriname's linguistic and religious composition. Although Dutch is the official language, Sranan Tongo, a creole language with English, Dutch, Spanish, Portuguese, and African components, is the lingua franca. Sarnami Hindustani is spoken by the descendants of British contract workers. Christianity is dominant among Creoles and Maroons, while most of the Sarnami Hindustani speakers are Hindu. The Javanese are primarily Muslim.

In 1667, the Dutch received Suriname from England in exchange for their colony of New Netherland (present-day mid-Atlantic U.S. states). Dutch farmers initiated a land reclamation policy that entailed draining swamps and lagoons, as well as building dikes and canals, which made the land habitable and suitable for AGRICULTURE. After the Napoleonic Wars, the entire region of Guiana (Guayana, in Spanish), as it was then called, was divided into English, Dutch, and French zones. Following the emancipation of slaves in Suriname in 1863, the Dutch people brought Indonesian workers to the colony. In 1954, Dutch Guiana became a self-governing component of the Netherlands responsible for its own internal affairs. The Dutch, however, continued to control foreign policy and national defense. In 1975, the Dutch granted independence to Suriname. Johan Ferrier (b. 1910– ), Suriname's governor since 1968, became the nation's first president. HENCK ARRON, the leader of the Suriname National Party (SNP), was the nation's first prime minister. When Suriname became independent, its large Asian population feared that it would lose political and economic privileges to the even larger African population. As a result, about 140,000 people immediately left to the Netherlands. At the time of independence, the Dutch government guaranteed the new Surinamese government \$100 million per year for 10 years to help the new nation develop its ECONOMY. As aluminum production declined during the first decade of independence, the Dutch annual stipend became the basis of economic stability in Suriname. Regardless, virtually none of the Dutch aid was used to develop the nation's infrastructure.

On August 13, 1980, DÉSI BOUTERSE led a MILITARY coup that overthrew the civilian government. The general population welcomed the coup, hoping that the military would end government corruption and improve the standard of living. Bouterse, however, banned opposition parties and brutally suppressed dissent. In 1982, following a series of grizzly political murders, the Dutch and U.S. governments suspended all economic aid to Suriname. Bouterse responded by greatly expanding the size of the military and experimented with the idea of forming an alliance with CUBA. Realizing the risks involved in this plan, especially in the aftermath of the 1983 U.S.-sponsored invasion of GRENADA, Bouterse quickly disengaged from his foreign policy initiatives with Cuba. In an attempt to regain the desperately needed Dutch

economic aid, Bouterse tried to construct a veneer of democracy. He lifted the ban on opposition POLITICAL PARTIES and began work on revising the constitution. In 1986, Ronnie Brunswijk (b. 1962– ), representing 50,000 Maroons living in the interior who were angered by Bouterse's attempts to resettle them in urban areas, launched a civil war. U.S. and Dutch government officials condemned Bouterse's harsh tactics to combat the rebels but stopped short of imposing further sanctions.

Although the civil war continued, Bouterse allowed elections to be held in 1987. An anti-Bouterse coalition called the Front for Democracy and Development won 40 of the 51 seats in the National Assembly. The Netherlands and the United States resumed economic aid the following year. President Ramsewak Shankar's (b. 1937– ) initiative to end the civil war by pardoning the revolutionaries angered Bouterse, who overthrew the civilian government on December 24, 1990. Following the so-called telephone coup, Bouterse installed a military-backed government led by Johann Kraag (b. 1913–d. 1996). In 1990, after large quantities of cocaine began to arrive in the Netherlands, an investigation revealed that Bouterse was involved in the export of Colombian cocaine (see DRUGS). Once again, the Dutch suspended their massive aid infusions, which precipitated another economic crisis and increased the internal opposition to Bouterse, who resigned from office on December 24, 1990. Democratic elections held on May 25, 1991, were won by RONALD VENETIAAN's New Front coalition. Although Venetiaan was able to end diplomatically the civil war in 1992, the economy deteriorated due to a slump in international aluminum prices. Venetiaan won the 1996 elections by a slight majority but did not have the necessary two-thirds vote required to be president. Jules Wijdenbosch (b. 1941– ), a member of Bouterse's National Democratic Party (NDP), was able to form a coalition government and be elected president. Wijdenbosch created the new position of councillor of state for Bouterse. In late 1997, Bouterse was tried in absentia in a Dutch court for drug smuggling and was found guilty. Regardless, Surinamese law prohibits Bouterse's extradition because he is a former head of state.

By the end of the 1990s, the Dutch had again resumed aid payments, albeit at the diminished amount of \$65 million per year. Widespread strikes over economic difficulties broke out in 1999, forcing Wijdenbosch to call for early elections. Wijdenbosch's coalition collapsed, and Venetiaan returned to power in 2000. Venetiaan initiated an austerity program, raised taxes, and attempted to limit government spending. Regardless, Suriname remains dependent on aluminum exports, which provide more than 90 percent of the government's tax revenues.

Notwithstanding the nationalistic rhetoric employed by all politicians since independence, the bauxite INDUSTRY is still controlled by a subsidiary of the Australian company Alcoa. Rice remains the chief agricultural crop and food staple. Venetiaan was reelected to office in 2005. His austerity programs, supported by low-interest loans from the United States and the Netherlands, have improved the national economy.

See also SURINAME (Vols. II, III).

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**Symonette, Roland** (b. 1898–d. 1980) *premier of the Bahamas* Born on December 16, 1898, in the small town of Current on the island of Eleuthera in the BAHAMAS, Roland Symonette was the son of a Methodist minister. Although he only had six years of formal education, Symonette was a major figure in Bahamian politics for more than 50 years. During the 1920s, when Prohibition was in effect in the United States, Symonette accumulated wealth smuggling rum to the Florida coast. He invested his money in real estate and became a billionaire. He won a seat representing Shirlea in the House of Assembly in 1924 and held the seat until his retirement in 1967.

In 1958, Symonette helped establish the United Bahamian Party (UBP). He served as chief minister from 1955 to 1964. Symonette was knighted by Queen Elizabeth II in 1959. When the Bahamas achieved internal self-government in 1964, he became premier. Symonette resigned his seat in Parliament shortly before the 1967 elections, which were won by LYNDEN PINDLING's Progressive Liberal Party (PLP). He died at his home in Nassau on March 13, 1980. Symonette has been honored by having his portrait depicted on the Bahamian \$50 bill. His son Brent (b. 1954– ), a member of the Free National Movement (FNM) and one of the few white members of Parliament, has been foreign minister since 2007.

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**Taiwan relations with Latin America** On July 23, 2008, Taiwan president Ma Ying Jeou announced his intention to visit PARAGUAY and the DOMINICAN REPUBLIC after visiting the United States. The trip had nothing to do with economics or the vital interests of the approximately 10,000 descendants of Chinese who reside in Paraguay or the 50,000 in the Dominican Republic. Rather, it was designed to shore up diplomatic relations between the governments in ASUNCIÓN and SANTO DOMINGO and in Taipei. Paraguay, the Dominican Republic, and the Central American states (COSTA RICA, EL SALVADOR, GUATEMALA, HONDURAS, NICARAGUA, and PANAMA) have a solid regional commitment to Taiwan's status as a state separate from the People's Republic of China.

For several years following the establishment of the People's Republic of China in 1949, Latin American states followed the U.S. lead in recognizing the Kuomintang government in Taipei as the legitimate government of all China. That began to change in October 1971 after the United Nations (UN) recognized the government in Beijing as the legitimate Chinese government and China replaced Taiwan on the UN Security Council and in the UN General Assembly. Taiwan's position was further weakened after U.S. president Richard M. Nixon visited Beijing in 1973. MEXICO quickly altered its position, and other South American nations soon followed. In 1980, COLOMBIA was the last Latin American nation to drop its recognition of the Kuomintang government as the legitimate Chinese government. At present, 12 Latin American nations recognize the legitimacy of the Taipei government: BELIZE, the Dominican Republic, El Salvador, Guatemala, HAITI, Honduras, Nicaragua, Panama, Paraguay, SAINT CHRISTOPHER

AND NEVIS, SAINT LUCIA, and SAINT VINCENT AND THE GRENADINES.

From the 1970s until the end of the 20th century, Taiwan paid for this support through generous aid programs, particularly those that brought technical and medical assistance after natural disasters in CENTRAL AMERICA. In return for its assistance, the seven Central American states support Taiwanese views in the international community, and Taipei does the same for Central America. Panama is unique in its Taiwanese relations, as it permits the Hong Kong-based Hutchinson Whampoa Company to operate its Pacific coast port and entry to the Panama Canal and on August 21, 2003, completed a free TRADE agreement with Taiwan.

Since 2001, the increasing democratization of Taiwan has led to questions about its commitment to Central America, the Dominican Republic, and Paraguay. Additionally, more transparent accountability in Taipei has resulted in decreased financial assistance to these countries over the past eight years. These trends in Taiwan, along with China's aggressive economic policies in Latin America since 2000, prompted the Dominican Republic, Paraguay, and Central American republics to rethink their relations with Taiwan and contributed to their completing the 2005 DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT with the United States (see CHINA AND LATIN AMERICA, PEOPLE'S REPUBLIC OF).

Taiwan is not anxious to lose the recognition and support of these Latin American nations, however, since they account for one-fourth of the total of countries that extend recognition to it. Its status is made more tenuous by cuts in its foreign aid program and by China's rising interest in Latin America.



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**Terra, Gabriel** (b. 1872–d. 1942) *president of Uruguay*

Born into a wealthy MONTEVIDEO family, Gabriel Terra earned his degree from the University of Uruguay in 1895 in law and jurisprudence, with a specialization in fiscal and financial matters. Shortly afterward, Terra entered politics as a member of the Colorado Party and soon became a self-professed disciple of its leader, JOSÉ BATLLE Y ORDÓÑEZ. Elected to the Chamber of Deputies in 1905, Terra served there until 1925. During that same period, Terra served as URUGUAY's representative to the 1916 Pan-American Commercial and Financial Conference in Washington, D.C., and in 1918, he headed the Uruguayan delegation to the International Financial High Commission in Paris.

In 1925, Terra was elected to a six-year term on the National Council of Administration, the collegial executive created by the 1918 constitution. This nine-member body shared the executive power with the president of the republic, who was elected for a four-year term. In 1930, Terra resigned from the council to run for the presidency. His bid was successful, and he took office on March 1, 1931. By this time, Terra had moved ideologically to the right; he had become frustrated with the collegial administrative structure that made it difficult for the government to deal with the adverse impact of the global depression, which severely damaged Uruguay's export-based ECONOMY. Terra joined forces with Nationalist (Blanco) Party leader Luis Alberto de Herrera (b. 1873–d. 1959) to engineer a nonviolent coup d'état on March 13, 1933. Terra presided over the new regime, which drafted a new constitution effective in 1934. Under the terms of this document, Terra was elected to a four-year term, from 1934 to 1938. The Congress remained in the hands of procoup supporters from both the Colorado and Blanco Parties, while Terra used his newfound executive powers to banish from politics independent *blancos* and the *batllistas* of the Colorado Party.

As president, however, Terra could do nothing to correct the impact of the depression. No government policy could regain the lost global markets, particularly in Europe, for Uruguayan beef and grain. The tariff-protected manufacturing sector continued to operate, albeit at a slower rate, but it could not grow owing to a loss in consumers' purchasing power. At the same time, the government wage rolls continued to grow. The outbreak of World War II on September 1, 1939, paved the way for Uruguayan economic recovery. In 1938, Terra turned over the reins of government to president-elect and brother-in-law Alberto Baldomir (b. 1884–d. 1948).

Until his death in 1942, Terra spent his time quietly in Montevideo, writing books on economics.

See also BLANCO PARTY (Vol. III); COLORADO PARTY, URUGUAY (Vol. III).

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**Thomson-Urrutia Treaty** (1914) On April 6, 1914, the U.S. ambassador to COLOMBIA, Thaddeus A. Thomson, and Colombia's foreign minister, Francisco José Urrutia (b. 1870–d. 1950), signed a treaty bearing their names that provided Colombia with \$25 million, free use of the Panama Canal, and a U.S. apology for its role in the "separation" of PANAMA from Colombia in 1903.

The treaty had its origins in Panama's independence in 1903 and the United States's support of the Panamanian rebels and speedy recognition of the new government. An effort to soothe Colombian feelings was found in the 1909 proposed Root-Cortés Agreement, but Colombia's lingering anti-U.S. sentiment prevented its congress from approving the agreement.

President Woodrow Wilson and his first secretary of state, William Jennings Bryan, were more sympathetic to the Colombian discontent and for this reason instructed Thomson to negotiate an agreement. The outbreak of WORLD WAR I on August 1, 1914, forced delays in the process, however, as the canal's defense, security of Caribbean oil fields, and concern about the Germans residing in countries throughout the circum-Caribbean region took precedence (see WORLD WAR I AND LATIN AMERICA). Following the German surrender on November 11, 1919, President Wilson asked the Senate to ratify the Thomson-Urrutia Treaty. The Senate refused to do so, largely because supporters of former president Theodore R. Roosevelt saw the treaty as a criticism of Roosevelt and his policies.

Relations improved between Colombia and the United States in the years immediately following World War I. Colombia welcomed U.S. private investment and its own expanded access to the U.S. market. U.S. global policy also changed, particularly toward Latin America, with which the United States sought more friendly relations. The memory of Roosevelt also waned. The U.S. Senate ratified the treaty on October 20, 1921, and the Colombian Senate gave its approval on December 22, 1921.

See also PANAMANIAN INDEPENDENCE (Vol. III).

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**Tonton Macoutes (Milice de Volontaires de la Sécurité Nationale; MVSN; National Security Volunteer Militia)** The *Milice de Volontaires de la Sécurité Nationale* was a militia created by FRANÇOIS DUVALIER in 1959 to impose compliance with the Haitian dictator's demands. Its members were commonly referred to as "Tonton Macoutes," a reference to a character from Haitian folklore. At Christmas, good children who obeyed their parents were visited by Tonton Noël (Uncle Christmas) and received gifts and treats. Bad children who disobeyed their parents were kidnapped by Tonton Macoute (Uncle Knapsack), who placed them in a large burlap sack and took them away to an undisclosed location. Since Haitian parents frequently used intimidation, threats, and physical punishment to control their children, the specter of the Tonton Macoute—essentially the equivalent of a bogeyman in American culture—was a source of physical and psychological terror.

Duvalier, who came to power as a populist in HAITI's 1957 presidential elections, created the Tonton Macoutes after a 1958 military coup attempt. Recruited from the poorest, most uneducated rural black families, the Tonton Macoutes, who eventually numbered more than 25,000, were a powerful tool of physical and psychological intimidation. The brutal measures taken by the Tonton Macoutes to enforce loyalty to Duvalier were overlooked by the government. Led by Luckner Cambronne (b. 1929–d. 2006) until 1972, the Tonton Macoutes dressed in paramilitary garb reminiscent of the Blackshirts, another voluntary militia, organized by Italian dictator Benito Mussolini in 1919. The Tonton Macoutes were famous for wearing dark sunglasses, even at night. Although the Tonton Macoutes carried pistols, they preferred to use machetes to inflict bodily harm, which was reminiscent of the terror unleashed on Haitian peasants in the DOMINICAN REPUBLIC in 1937.

The Tonton Macoutes, who committed thousands of atrocities during the Duvalier dictatorship, cultivated an image of being Vodou demons. Victims were publicly displayed as a warning to other Haitians that noncompliance with Duvalier's wishes would not be tolerated. The power of the Tonton Macoutes eventually rivaled that of the Haitian National Guard and served as a countervailing force to protect the Duvalier FAMILY from the threat of a military coup for three decades. By 1986, the violence and corruption of the Duvalier regime led to a massive uprising that ended the Duvalier dictatorship. The MILITARY government disbanded the Tonton Macoutes, many members of which fled Haiti to escape reprisals from an angered population. In the aftermath of the Duvalier dictatorship, more than 100 Tonton Macoutes were placed inside tires coated with gasoline and set on fire. This act—known as *Père Lebrun* (a popular tire retailer in Port-au-Prince) in Haiti—is commonly referred to as *necklacing* in English.

See also VODOU (Vol. III).

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**Toro Ruilova, David** (b. 1898–d. 1977) *president of Bolivia* A native of Sucre, BOLIVIA, David Ruilova Toro pursued a military career from an early age and during the CHACO WAR (1932–35) became army chief of staff. The war resulted in the loss of Bolivian territory to PARAGUAY and contributed to the emergence of a group of middle-sector professionals who became known as the "Chaco generation." They questioned the elite political leadership that had ruled Bolivia since its independence in 1825, as well as the military officer corps for its failed wartime policies and practices. The Chaco generation also appealed for an improved quality of life for Bolivia's NATIVE AMERICANS.

To ward off a civilian political attack on the military, Toro and his military colleague Germán Busch (b. 1904–d. 1938) led a group of younger officers to oust President José Luis Tejada (b. 1882–d. 1938) on May 17, 1936. Influenced by European fascist concepts, Toro set out to establish a corporate state in which the government controlled a society organized according to socioeconomic functions. Under his "military socialism," Toro also attempted to provide economic and social reforms for Bolivia's long-neglected indigenous groups. Toro directed the nationalization of Standard Oil Company operations without compensation. This not only satisfied Bolivians' desire to control their own natural resources but was seen as revenge for the company having sold oil to Paraguay via ARGENTINA during the Chaco War. Toro appealed to the Bolivian populace by establishing a LABOR ministry and labor unions, or syndicates, which everyone was encouraged to join. He called for a constitutional convention that would prepare a new framework of state that legalized new political parties and guaranteed social equality.

Because Toro made no effort to strip the country's tin MINING triumvirate of its wealth or political influence, Busch led another group of officers against Toro, who was unseated on July 13, 1937. For the next two years, Toro remained moderately active in Bolivian politics before retiring to SANTIAGO DE CHILE, where he died on July 25, 1977. Toro's legacy to Bolivia was the initiation of a social consciousness that reached its high-water mark in the 1952 revolution.

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**Torrijos Herrera, Omar Efraín** (b. 1929–d. 1981) *de facto leader of Panama* Born in Veraguas Province,

PANAMA, Omar Efraín Torrijos Herrera was educated first at local schools and later at EL SALVADOR'S Military Academy, at which he was commissioned as a second lieutenant. He later studied at the U.S. Army's School of the Americas in the Panama Canal Zone. Torrijos joined the Panamanian army in 1952 and reached the rank of second lieutenant in 1966.

Torrijos joined Major Boris Martínez to oust President ARNULFO ARIAS MADRID on October 11, 1968. A year later, Torrijos won a power struggle with Martínez and promoted himself to brigadier general. Torrijos immediately set out to consolidate his power, persecuting political opposition and student and LABOR leaders. After a controlled legislative election in 1972 that was devoid of opposition candidates, Torrijos directed the writing of a new constitution that made him absolute head of government for a six-year term. He also restructured the Panamanian army into the National Guard and eventually approved all officer assignments, including that of Lieutenant Colonel MANUEL ANTONIO NORIEGA MORENO as head of the guard's G-2 intelligence unit. Understanding that instituting social programs was a means to political security, Torrijos established the National School for Political Training (ESCANAP) to educate National Guard officers in a wide range of political and social issues, after which they also participated in government policy making.

Immediately after coming to power in 1969, Torrijos reached out to the urban and rural lower classes. He established the National Confederation of Panamanian Workers (Confederación Nacional de Trabajador Panameños, or CNTP), which brought into the political arena those groups traditionally associated with the canal zone and with rural agro-export-oriented industries. For rural peasants, he established cooperatives (*asentamientos*) whereby the government purchased and then sold to them the properties of tax delinquents. With the redistribution of approximately 1.235 million acres (500,000 ha) of land by 1977, some 12,532 families benefited from the program. After 1974, the Panamanian ECONOMY slowed, prompting a new MIGRATION of the rural poor to the canal's terminal cities, Colón and Panama City. Torrijos attempted to meet their needs through public housing programs and by providing basic services such as electricity and potable water. Nevertheless, he failed to reduce the disparity in wealth. In 1977, the wealthiest 10 percent of Panamanians received 45 percent of the national income, while the poorest 20 percent received just 2.3 percent.

Torrijos's most important accomplishments were the 1977 PANAMA CANAL TREATIES, which provided for the transfer of the canal's ownership from the United States to Panama by December 31, 1999. Two-thirds of Panamanians approved of the treaties in a yes or no plebiscite in October 1977, with only West Indian laborers voting in mass against them. The West Indians stood to lose their only protection against Panamanian racially

motivated discrimination if the United States withdrew from Panama. The acceptance of the Panama Canal treaties also deprived Panamanians of the opportunity to blame the United States for all their ills and brought into focus Torrijos's continued repression, dictatorial government, and inability to improve a stagnant economy.

Torrijos's popularity had dramatically declined by the mid-1970s, prompting him to announce in October 1978 that he would relinquish his role as "Maximum Leader" and "return to the barracks." He appointed Aristides Royo (b. 1940– ), a young reformist, as president, and conservative banker Ricardo del la Espriella (b. 1934– ) as vice president. At the same time, Torrijos announced that the country would return to democracy with elections for the National Assembly in 1980 and general elections in 1984.

After Torrijos stepped down in 1978, he became increasingly dispirited and withdrawn, distancing himself from both government and National Guard affairs. Whatever his intentions, they came to an abrupt end on July 31, 1981, when his plane crashed into a mountain in western Panama. While the crash may really have been an accident, every Panamanian seemed to have a theory. They attributed Torrijos's death to Noriega, the communists, the conservative elite, and even the U.S. Central Intelligence Agency.

Torrijos changed the face of Panamanian politics. His socioeconomic and political programs reached out to those who had been abused by the oligarchs, the canal laborers and workers of the agro-export industry. His social programs made the government the nation's largest employer but depended on government borrowing. By 1977, Panama had the highest per-capita debt in the Western Hemisphere. Torrijos also turned the National Guard into a social institution that carried out civic action and service delivery programs and gave it a stake in the political arena. But, an undetermined number of its officer corps became involved in illegal activities, including arms and DRUG smuggling, prostitution, liquor distribution, and money laundering. In the end, Torrijos intensified the competition among Panama's political actors: the elite, the middle sector, the poor, and the National Guard.

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**trade** Patterns of trade in Latin America have paralyzed the region's industrial development. European and U.S. industrialization created demand for Latin America's primary products, which fueled its export-

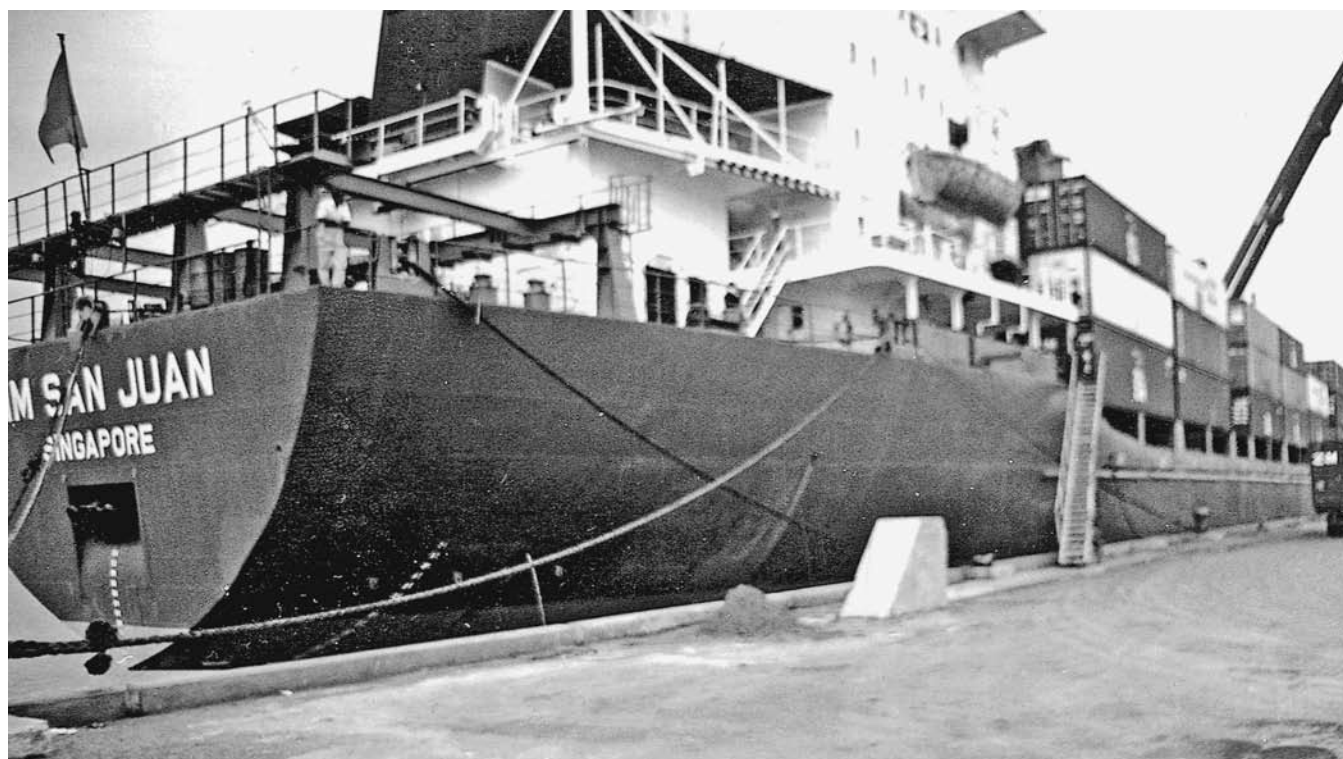
based economies in the late 19th and early 20th centuries. Hemispheric trade patterns fell into place: Primary products were exported from Latin America to the Northern Hemisphere, and manufactured goods were imported from it.

ARGENTINA and URUGUAY exported mainly beef, wool, and grains; BRAZIL, rubber and sugar; CHILE, nitrates and copper; PERU, guano and metal ores; CUBA, sugar; CENTRAL AMERICA, bananas and coffee; and MEXICO, agricultural and MINING products. In turn, these countries imported European and U.S. manufactured goods, including textiles, electronic devices, furniture, machinery, and pharmaceuticals. As manufactured goods always cost more than raw materials, Latin America was in debt to the United States and western European nations on the eve of the Great Depression in 1929. Latin American political leaders failed to recognize that U.S. and European protective tariffs not only made Latin American nations dependent on their manufactured goods but mitigated against the diversification of Latin American economies. Exports of beef, wool, hides, and other agricultural products to the United States were further restricted by U.S. tariffs.

Contrary to popular perception, the United States, not Great Britain, was Latin America's major trading partner on the eve of the depression. The United States imported 29 percent of Latin American exports by 1929, while Britain imported 20 percent; Germany, 12 percent; and France, 8 percent. Additionally, the

United States was the main importer of primary goods from 13 countries: BRAZIL, COLOMBIA, COSTA RICA, CUBA, DOMINICAN REPUBLIC, ECUADOR, EL SALVADOR, GUATEMALA, HONDURAS, MEXICO, NICARAGUA, PANAMA, VENEZUELA, and the U.S. territory of PUERTO RICO. Great Britain served as the primary market for goods from Argentina, BOLIVIA, Chile, and Peru. HAITI's primary market was France. Britain was the chief supplier of goods to seven countries, but the total value of its exports matched that of the United States.

The Great Depression stymied international trade, with each country pursuing its own trade policies. The United States sought trade reciprocity treaties with individual countries. Only the newly minted dictators in the circum-Caribbean region signed on, with the intent more of legalizing their governments than gaining trade benefits. For the next two generations, the larger Latin American nations turned to import-substitution policies as a means of diversifying and industrializing their economies (see ECONOMY). Under this model, they produced mainly for their domestic markets. Brazil and Mexico capitalized on U.S. WORLD WAR II economic assistance to initiate industrialization. To do so, they had to borrow foreign capital to purchase machinery and technical know-how; they also instituted tariffs to protect their fledgling industries against foreign competition. By the late 1970s, however, import substitution began to crumble. The small domestic markets had stagnated, while other regions had begun to export competing



With the process of globalization that began in the 1980s, Latin America's Southern Cone nations have expanded commerce with Asia. (Thomas M. Leonard Collection)

primary products. Africa and Asia exported tropical fruits and food products, for example, and Australian and Canadian beef and wheat cut into traditional Latin American markets in Europe. Additionally, U.S. tariffs and quota systems militated against its importation of Latin American manufactures and agricultural produce. Latin American trade suffered further after 1971 with the collapse of the 1947 Bretton Woods system, which meant that the United States could no longer support the convertibility of dollars into gold at a fixed price. As a result, the major industrialized nations began to float their currencies, which made it difficult for Latin American nations to sustain trade-weighted exchange rates. Furthermore, in 1973 and 1978, the Organization of Petroleum Exporting Countries (OPEC) restricted oil production, which reduced the global supply and quadrupled the price of petroleum. Except for Bolivia, Colombia, Ecuador, Mexico, and Venezuela, the other Latin American nations lacked oil self-sufficiency, a factor that contributed to higher domestic energy costs and an increase in trade deficits as the cost of imported oil rose. Finally, while Latin America's post-World War II military dictators kept workers' wages down, these remained a much larger part of the total cost of production than they did in Southeast Asian nations. By 1980, the Latin American share of the global market had declined markedly. The problem was magnified by the region's trade imbalance with the industrial world and its sizable debts to the international banking community.

Not all Latin American economies suffered, however. PARAGUAY's primary export, yerba maté, enjoyed a special place in the Argentine market, and otherwise, that country's underdeveloped economy meant it did not fully participate in the global economy. Uruguay's socialized economy depended more on trade with its neighbors Argentina and Brazil than elsewhere, thus it, too, was somewhat insulated from global economic conditions. Cuba, historically dependent on the export of sugar, refused U.S. assistance to diversify its economy after World War II and saw its share of the global sugar market dwindle as other traditional sources of the product, such as Southeast Asia, returned to the market. Central American and Caribbean nations that depended on the export of bananas and coffee likewise suffered. Those countries with petroleum reserves fared better; Ecuador, Mexico, and Venezuela, in particular, benefited from rising petroleum prices due to OPEC's policies.

In 1976, the United States implemented the Generalized System of Preferences (GSP) already in place in Western Europe. GSP's promise for duty-free access to industrialized markets for nontraditional exports brought little progress to Latin America until the United States modified its tariff code to permit the importation of goods. Originally designed to aid U.S. multinational corporations, it gave rise to Mexico's MAQUILADORA industries along the U.S. border and the so-called 807 industries in the Dominican Republic and

Central America that assembled U.S.-made goods for return to the United States.

The failure of various trade policies to generate employment and improve national economies significantly contributed to the LATIN AMERICAN DEBT CRISIS OF THE 1980s. The world was moving toward the neoliberal economic model, of which trade liberalization was a fundamental tenet, and Latin American nations joined the march. From the 1980s, the region's governments eliminated protective tariffs and other trade restrictions and opened their doors to foreign investment. Additionally, the Western Hemisphere followed the European example in moving toward free trade agreements. First, the 1994 NORTH AMERICAN FREE TRADE AGREEMENT aimed for an open market between the United States, Mexico, and Canada by 2005. Although that goal was not achieved, much has been done to integrate the three markets. Next, U.S. president George H. W. Bush pursued a FREE TRADE AREA OF THE AMERICAS (FTAA) that would combine the hemispheric nations into an economic union, as originally envisioned in 1889 by Secretary of State James G. Blaine. While President William J. Clinton pursued the same objective, in 2004, President George W. Bush abandoned it. He was motivated in part by Latin American resistance, led by Brazil, to an FTAA that would serve primarily U.S. interests. Thereafter, until 2008, Bush completed free trade agreements with Chile in 2003, the DOMINICAN REPUBLIC and CENTRAL AMERICA in 2005 (DR-CAFTA), and Colombia, Panama, and Peru in 2007 (see DOMINICAN REPUBLIC-CENTRAL AMERICA FREE TRADE AGREEMENT). However, the U.S. Congress has only approved the Chilean, Peruvian, and DR-CAFTA agreements; it has yet to consider the Colombian and Panamanian agreements. Latin American governments also have acted independently. Discussions for a trade agreement between the European Union and MERCOSUR that began in 1999, restarted in 2007, following a three-year hiatus. The Central American countries reached a trade agreement with Mexico in 2006 that permits the duty-free transit of Central American goods across Mexico to the U.S. market. Potentially more significant was China's arrival in the Western Hemisphere beginning in 2001 (see CHINA AND LATIN AMERICA, PEOPLE'S REPUBLIC OF). China has concluded trade agreements with Argentina, Brazil, Chile, and Peru and has concessions from Ecuador and Venezuela to access their remote oil fields.

See also TRADE (Vols. I, II, III).

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**transportation** While footpaths connected much of the Aztec, Maya, and Inca Empires and the Spanish and Portuguese constructed coastal port facilities to serve their commercial purposes, highways and railroads connecting the interior towns of Latin American countries, along with modern port and aviation facilities, are a phenomenon of the late 19th and early 20th centuries.

The construction of highways, railroads, and port facilities is associated with the development of export-based economies, which required bringing products from a country's interior to oceanic ports for their shipment to Europe and the United States. Because Latin American governments lacked the funds to undertake such projects themselves, foreigners did much of this work. British firms, for example, constructed railroads and port facilities for the transportation of Argentine beef, grains, and wool to the world market. French companies did most of the work associated with the exportation of Brazilian sugar. U.S. entrepreneurs such as Henry Meiggs, Minor Cooper Keith, and James J. Hill and the United Fruit Company built railroad networks in BOLIVIA, CHILE, MEXICO, PERU, CENTRAL AMERICA, and CUBA. Railroads and port facilities were constructed at Arica, Valparaíso, Tampico, Callao, Puntarenas, Puerto Barrios, and HAVANA. American, British, and French businessmen often pursued their projects with monies borrowed by Latin American governments from European bankers. Because those governments then needed to repay these loans, they realized little profit from the new infrastructure. In one of the worst examples, by 1910, the Honduran government was approximately \$100 million in debt to British financiers but had yet to see a mile of railroad track. Foreign-owned railroads became the targets of nationalistic governments in the mid-20th century, such as in ARGENTINA under JUAN DOMINGO PERÓN and in Cuba under FIDEL CASTRO RUZ. A lack of funding for the development and maintenance of efficient highway systems contributed to a dramatic decline in railroad traffic after World War II. Some railroads, such as the San José–Limón line in COSTA RICA and the BUENOS AIRES–Patagonia service in Argentina, are no longer fully usable.

In the 1920s, Mexico became the first Latin American country to construct a planned system of highways. Some 14,000 miles (22,531 km) of roadway were completed by 1950 and 115,000 miles (185,075 km) by 1975. Tolls partly pay for the maintenance of the roads, which reach into all regions of the country. The pursuit of the import-substitution industrialization (ISI) economic model, particularly after World War II, prompted Latin American governments to construct highways into the outlying suburbs of major cities and then into the interior to harvest raw materials and market products (see

ECONOMY). The relocation of manufacturing plants inland was an effort to relieve the strain of population growth on coastal urban centers. At the local level, workers were moved by public busing systems from home to work. This is best illustrated today in the industrial campuses that house the “807” industries in SANTO DOMINGO, the DOMINICAN REPUBLIC, and near Puerto Cabezas, HONDURAS. The relocation efforts did not prevent urban sprawl or congestion in Latin America's large cities, however. Like their North American counterparts, Latin Americans fell in love with the automobile, thus today's urban centers are congested with traffic.

While the vision of an intercontinental highway connecting the Northern and Southern Hemispheres in the Americas was first envisioned in 1925, progress on the road itself did not come about until World War II (see WORLD WAR II AND LATIN AMERICA). The threat of the German U-boats operating in the Caribbean Sea prompted the need for an alternative supply route to the Panama Canal Zone. The United States largely financed the wartime construction of the PAN-AMERICAN HIGHWAY from the U.S.-Mexican border to the Panama Canal Zone. The project employed thousands of Mexican and Central American workers who were displaced by the loss of their traditional jobs in the agricultural sectors. After, the threat of German U-boats ended in early 1943 and the wartime Allies focused their efforts first upon the European and then the Asian war theaters, work on the Pan-American Highway slowed and in some cases stopped altogether. Plans for the highway's completion altered after World War II. Rather than a unitary highway, by 1955, the Pan-American Highway reached into Chile as a collection of interconnecting national roads.

In the early 20th century, aviation was the sport of Latin America's wealthy elite. Then, in 1911, Mexican president Porfirio Díaz hired two French pilots to fly reconnaissance missions over revolutionary strongholds. Starting in the 1920s, Latin American governments developed military air forces for self-protection, and from Argentina to Honduras governments purchased antiquated U.S. and European planes for training pilots, flying reconnaissance trips, and mapping missions. During World War II, Central American air forces contributed to the fight against German U-boats in the Caribbean. During the cold war, Latin American pilots received U.S. training, but the availability of military aircraft was subject to the mood of the U.S. Congress. In the 1970s, for example, congressional and presidential concerns over HUMAN RIGHTS violations in Latin America made the acquisition of U.S. aircraft difficult. In these circumstances, the Latin Americans turned to Western Europe, particularly France, to purchase military planes. Since 1970, the Cuban Air Force has consisted of Soviet-built aircraft.

Latin American commercial airlines developed in the 1920s and 1930s. National airlines such as COLOMBIA'S Sociedad Colombo-Alemana de Transporte Aéreo



The former Honduran national airline TAN, now part of the TACA Group, typifies the common means of intra-regional transportation in Latin America. (Thomas M. Leonard Collection)

(SCADTA) connected not only with other capital cities but with the nation's interior. EL SALVADOR's Transportes Aéreos Centroamericanos (TACA) performed a similar function in Central America.

Beginning in 1927, Pan American World Airways, with extensive government support, monopolized U.S.–Latin American air routes until the end of World War II, when new companies entered the market. After World War II, Latin American government-controlled airlines became commonplace and enabled the airlines to fly further afield, to Europe and the United States.

At the beginning of the 21st century Latin America has an adequate transportation system connecting internal regions with the national capitals, as well as the global marketplace.

See also DÍAZ, PORFIRIO (Vol. III); KEITH, MINOR COOPER (Vol. III); TRANSPORTATION (Vols. I, II, III).

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**Trinidad and Tobago** The most industrialized of the former British colonies in the Caribbean, Trinidad and Tobago achieved independence from the United Kingdom on August 31, 1962 (see CARIBBEAN, BRITISH).

Outside the hurricane belt, Trinidad and Tobago, which encompasses 1,979 square miles (5,125.5 km<sup>2</sup>) of territory, consists of two main islands, Trinidad and Tobago, and 21 small islets. The nation's capital and third-largest city, Port of Spain, is located on Trinidad, which accounts for about 95 percent of the country's territory and population. Trinidad and Tobago is located northeast of VENEZUELA, southwest of BARBADOS, and south of GRENADA. Indo-Trinidadians and Afro-Trinidadians, each representing about 40 percent of the nation's 1.3 million people, are the two largest ethnic groups in Trinidad and Tobago. Whereas English is currently the nation's official language, place-names on Trinidad are equally of Amerindian, Spanish, and English origin, reflecting the nation's colonial experience. On Tobago, most place-names have their origin in English.

Christopher Columbus first encountered Trinidad and Tobago in 1492. Trinidad is named for the Holy Trinity, and Tobago is named after tobacco. Initially the islands were Spanish colonies, but the British consolidated their control over Trinidad and Tobago during the Napoleonic Wars at the beginning of the 19th century. During the 1830s, following the abolition of slavery, the British began massive importation of Indian laborers. The United Kingdom combined the two islands and several small islands into a single colony during the 1880s. The British ruled Trinidad and Tobago as a CROWN COLONY without any local representation until 1925, when the British established a legislative council for the islanders. Voting rights, however, were severely limited by income and property requirements. It was not until 1946 that the British implemented universal adult suffrage.

Whereas sugar dominated the ECONOMY from the 16th to the 19th century, by the end of the 19th century, cacao was the principal agricultural crop. During the 1930s, the Great Depression and crop diseases contributed to the displacement of cacao production. Since the 1930s, the petroleum INDUSTRY has dominated the economy of Trinidad and Tobago, which has had a strong impact on the nation's political stability. In 1937, LABOR riots in the oil fields led by Tubal Uriah "Buzz" Butler (b. 1897–d. 1977) caused political and economic pandemonium in Trinidad and Tobago. Butler, who left the Trinidad Labour Party in 1936 to establish the British Empire Citizens' and Workers' Home Rule Party, was imprisoned until early 1939. Fearful of losing access to Trinidadian petroleum, however, the British reimprisoned Butler at the outbreak of World War II. Concurrently, the British also leased the naval base at Chaguaramas to the United States, which the United States occupied until 1963.

Following his release from prison after the war, Butler reorganized his Home Rule Party. The party won three of the nine available parliamentary seats in the 1946 elections. It also won seven of the 18 available seats in the 1950 elections. British officials, however, fearful of Butler's radicalism, asked ALBERT GOMES to form a coalition government. Gomes, the founder of the Party of Political Progress Groups, which eventually merged with the People's Democratic Party and the Trinidad Labour Party to form the Democratic Labour Party (DLP), the main opposition party between 1957 and 1971, became the first chief minister. In 1956, the People's National Movement (PNM), led by ERIC WILLIAMS, won the parliamentary elections, and Williams became chief minister and subsequently premier in 1959, when the United Kingdom granted Trinidad and Tobago greater self-autonomy. Trinidad and Tobago joined the short-lived WEST INDIES FEDERATION in 1958. Initially, West Indian leaders selected Chaguaramas as the site of the new federation's capital. By 1962, however, JAMAICA began to view the West Indies Federation as an inhibitor to independence. After Jamaica withdrew from the federa-

tion in 1962, Trinidad and Tobago, unwilling to support the financial burden that membership entailed, also left, which signaled the end of the federation. Within weeks, the British granted Trinidad and Tobago independence, on August 31, 1962. Williams became the nation's first prime minister and held office until his death in 1981.

Following independence, Queen Elizabeth II was the titular head of state, while the leader of the majority party was the prime minister. In 1976, however, Trinidad and Tobago became a republic, and Ellis Clarke (b. 1917– ), the last governor general, was elected president, largely a symbolic position, by the Parliament. Williams supported greater economic integration in the Caribbean. In 1967, Trinidad and Tobago became the first commonwealth nation to join the ORGANIZATION OF AMERICAN STATES (OAS). In 1973, several Caribbean nations signed the Treaty of Chaguaramas in Trinidad and Tobago, establishing the CARIBBEAN COMMUNITY AND COMMON MARKET. Whereas Williams maintained diplomatic relations with CUBA, he consistently pointed out the superiority of the capitalist system over the socialist one. During the 1970s, the international oil crisis benefited the nation's economy. After Williams died in office in 1981, the PNM, led by George Chambers (b. 1928–d. 1997), continued to rule until 1986 when the National Alliance for Reconstruction (NAR), a multiethnic coalition party, won 33 of the 36 seats in the assembly.

A. N. R. ROBINSON was prime minister from 1986 to 1991. In 1987, the Parliament selected NOOR HASSANALI to be the second president of Trinidad and Tobago. The first Indo-Trinidadian to be president of the nation, Hassanali was also the first Muslim head of state in the Americas. The multiethnic NAR, however, began to crumble in 1988 when the Indo-Trinidadian component, led by BASDEO PANDAY, left to form the United National Congress (UNC). In 1991, the PNM, led by PATRICK MANNING, one of the three PNM representatives to retain his seat in 1986, won the elections, and Manning became prime minister. In November 1995, Manning called early elections. The PNM and UNC both won 17 seats, and the NAR won two seats. The NAR allied with the UNC, which allowed Panday to become the first Indo-Trinidadian prime minister. In 1997, the Parliament chose Robinson as the third president.

In the 2001 elections, the PNM and the UNC both won 18 seats. Robinson, serving as president, appointed Manning prime minister, despite the fact that Panday was the sitting prime minister and the UNC had won the popular vote. In 2003, the Parliament selected George Maxwell Richards (b. 1931– ) to serve as Trinidad and Tobago's fourth president. Richards is the first head of state of Amerindian ethnicity in the English Caribbean. Regardless of which party holds the majority in Parliament, both the PNM and the UNC support free market economic policies and increased foreign investment. Virtually all state-owned industries and corporations have been privatized. The main difference between



the two principal political parties is the ethnic affiliation of their members. Nevertheless, the economy, especially the petrochemical industry, remains strong and provides a high standard of living for the people of Trinidad and Tobago.

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### Trujillo, Rafael (Rafael Leónidas Trujillo Molina)

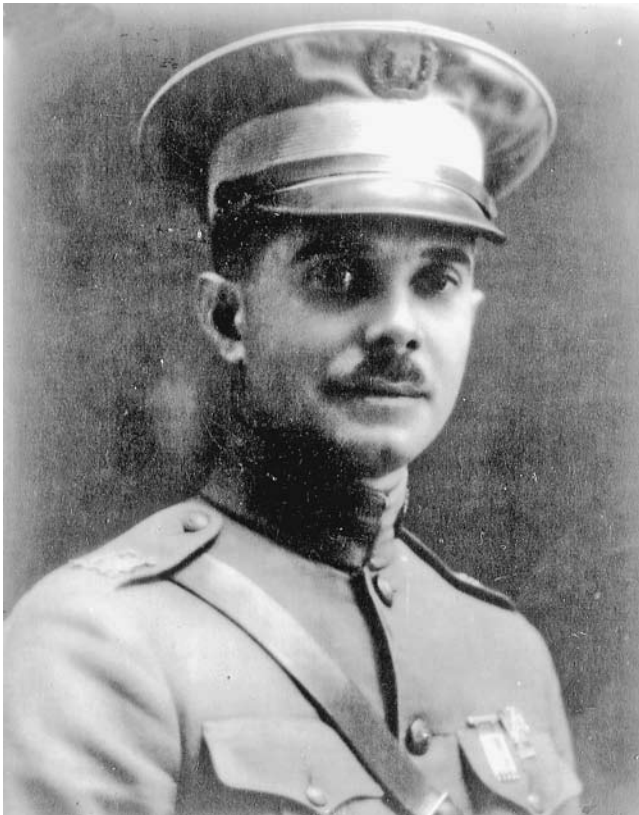
(b. 1891–d. 1961) *dictator of the Dominican Republic* Born on October 24, 1891, to José Trujillo Valdez and Julia Molina Chevalier in San Cristóbal, DOMINICAN REPUBLIC, Rafael Trujillo, a light-skinned mulatto, had a relatively uneventful childhood. His nine siblings—Rosa María Julieta, Virgilio, José “Petán” Arismendy, Amable “Pipi” Romero, Aníbal Julio, Nieves Luisa, Pedro Vetilio, Ofelia Japonesa, and Héctor “Negro” Bienvenido—would all eventually benefit from the Trujillo dictatorship. Trujillo was employed as a guard at the American-owned Boca Chica sugar mill at the beginning of the first U.S. intervention of the Dominican Republic (1916–24). In an attempt to restore order and stability, the United States disarmed the Dominican population and ordered the creation of a supposedly apolitical National Guard in 1917. While many of his fellow countrymen were protesting against the U.S. occupation, Trujillo, armed with a letter of recommendation from his American boss at the Boca Chica sugar mill, applied for a position in the new National Guard. His request was accepted in December 1918, and he was made a second lieutenant in the Guard in January 1919. Because of his friendly attitude toward U.S. MILITARY personnel and his ability to speak English, Trujillo rapidly rose in rank, being promoted to captain in 1922. Trujillo was promoted to major immediately prior to the withdrawal of U.S. troops in 1924. Dominican president Horacio Vásquez (b. 1860–d. 1936) placed Trujillo in charge of the National Guard and promoted him to brigadier general in 1927.

By early 1930, Vásquez’s hold on power had been weakened by personal illness, the debilitating impact of the Great Depression, and his unconstitutional

attempt to remain in power for a second term. With the approval of U.S. officials in SANTO DOMINGO, a civilian-military movement led by Rafael Estrella (b. 1889–d. 1935) and Trujillo overthrew Vásquez’s government in February 1930. Although he initially stated that he had no desire to assume the presidency, Trujillo became president in May 1930. All political opposition was eliminated through bribes, intimidation, torture, and murder. Trujillo established vast intelligence networks throughout the country that spied on the Dominican people as well as each other. One of his most brutal and efficient agencies was the Military Intelligence Service (Servicio de Inteligencia Militar, or SIM). SIM employed a particularly brutal form of torture, known as the “pulpo” (octopus), involving electrodes connecting sensitive body parts to a leather skull cap. Trujillo’s hold on power was reinforced when Hurricane Zenon hit Santo Domingo on September 3, 1930. He was able to claim that he had protected his people from a natural disaster by rebuilding the city.

Trujillo quickly established a cult of personality in the Dominican Republic. He surrounded himself with intellectuals such as JOAQUÍN BALAGUER to give his regime legitimacy and appeal. Scholars wrote books glorifying Trujillo’s rule. Thousands of monuments were erected in Trujillo’s honor to fuel his megalomania. In 1936, the name of the capital city was changed from Santo Domingo to Ciudad Trujillo. Dominican citizens who did not display images of Trujillo in their home were brutalized. The CATHOLIC CHURCH, one of Trujillo’s staunchest allies, ordered that homage be paid to the dictator during mass. To solidify his relationship with the United States, Trujillo proclaimed himself a staunch anti-Nazi and protector of U.S. economic investment in the Dominican Republic. In 1941, he paid off the Dominican foreign debt. His friends and FAMILY members were rewarded with lucrative economic concessions. Trujillo came to personally own half of the Dominican ECONOMY, including almost 70 percent of the sugar industry. Although he was only officially president from 1930 to 1938 and again from 1942 to 1952, he exercised absolute power during the interim periods by appointing puppet presidents.

Trujillo was preoccupied with eliminating the African footprint in his nation and reinforcing the Hispanic cultural identity. Fearful of the influence of neighboring HAITI, a nation with strong African cultural roots, Trujillo encouraged the immigration of white people to the Dominican Republic. As a result, DOMINICAN-HAITIAN RELATIONS were acrimonious. During the 1930s, Trujillo facilitated the immigration of European Jewish refugees and displaced people from the Spanish civil war. The Jewish settlers became the base of a Jewish community in Sosúa. In 1937, using the excuse that they were criminals, Trujillo orchestrated the death of more than 15,000 Haitians living in the Dominican Republic. The butchering of Haitians with machetes is vividly recounted in Edwidge Danticat’s fictional *The Farming*



In 1930, at age 39, Rafael Trujillo was general commander of the Dominican Republic's National Guard. (*Records of the U.S. Marine Corps*)

of *Bones*. Regardless, the U.S. government continued to support Trujillo.

Trujillo's hold on power began to unravel during the second half of the 1950s. He hosted an international fair in 1955 at the cost of more than \$30 million, which placed a serious strain on the Dominican economy. In 1956, Trujillo ordered the death of his outspoken critic Jesús Galíndez (b. 1915–d. 1956), a refugee from the Spanish Civil War. SIM agents kidnapped Galíndez, who had recently completed a dissertation at Columbia University outlining the atrocities of the Trujillo dictatorship, from the streets of New York City and flew him to the Dominican Republic, where he was tortured and killed. Gerald Lester Murphy, the American pilot who flew the doomed Galíndez to Ciudad Trujillo, became vocal about Trujillo's activities, and he, too, was eliminated. To quell U.S. accusations that he had a part in Murphy's death, Trujillo developed an elaborate ruse that claimed that a Dominican pilot killed Murphy because of an illicit homosexual love affair. U.S. policy makers, Murphy's girlfriend, and the Dominican pilot's wife were unconvinced. In the aftermath of FIDEL CASTRO RUZ's CUBAN REVOLUTION of 1956–61, U.S. policy makers believed that authoritarian dictators such as Trujillo threatened U.S. hegemony in the Caribbean. The U.S. government found it difficult to convince democratically

elected Latin American presidents to support a plan of action against a Cuban dictator while the United States supported an authoritarian dictator in the Dominican Republic. On June 24, 1960, Trujillo authorized an assassination attempt on Venezuelan president RÓMULO ERNESTO BETANCOURT BELLO, also an outspoken critic of the Trujillo regime. Although unsuccessful, the event led the ORGANIZATION OF AMERICAN STATES (OAS) to impose diplomatic and economic sanctions on the Dominican Republic. Significantly, the United States blocked Trujillo's access to the profits from the lucrative U.S. sugar quota. On November 25, 1960, Trujillo orchestrated the death of Minerva, María Teresa, and Patria Mirabal, three sisters of the elite who had also criticized his regime. The sisters, who became known as "the Butterflies" (their code name among the opposition was "Las Mariposas") became a symbol of opposition to the Trujillo regime.

On the evening of May 30, 1961, Trujillo, on the way to visit one of his mistresses, was assassinated by a group of members of the Dominican elite made up of former accomplices and victims of his dictatorship. Although the United States had no active role in the assassination, it did provide the weapons used to kill Trujillo and give its approval. Following the dictator's death, his son RAMFIS TRUJILLO unsuccessfully attempted to continue the Trujillo dictatorship. Ramfis and the rest of the Trujillo family fled into exile in November 1961. Following the exodus of the Trujillo family, Trujillo's remains were sent to Paris, only to be transferred to Madrid in 1970. Notwithstanding Trujillo's brutal and corrupt regime, thousands of Dominicans still pine for the order and stability of his dictatorship.

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#### Trujillo, Ramfis (Rafael Leónidas Trujillo Martínez)

(b. 1929–d. 1969) ruler of the Dominican Republic Born on June 5, 1929, to RAFAEL TRUJILLO and his mistress María Martínez, Ramfis Trujillo was the dictator's eldest son. Although Ramfis's paternity was called into question, Trujillo acknowledged Ramfis as his legitimate son. Rumors assert that the disappearance of Martínez's husband, who denied paternity of Ramfis, was orchestrated

by Trujillo. The bond between Trujillo and Ramfis, nicknamed after a character in Verdi's opera *Aida*, was strengthened when Trujillo made Martínez his third wife in 1936. Indulged by his father, Ramfis had a pampered childhood. He played with real pistols and was made a colonel in the Dominican army at the age of four. In the early 1950s, Ramfis married his first wife, Octavia Ricart, who bore him six children: María Altagracia, Aida, Mercedes, María Angélica, Ramses, and Rafaelito.

In 1957, his father sent him to study at the U.S. Army's Command and General Staff College at Fort Leavenworth, Kansas. Trujillo was a poor student and spent most of his time with his friend Porfirio Rubirosa (b. 1909–d. 1965) in Hollywood carousing with starlets such as Kim Novak, Zsa Zsa Gabor, and Joan Collins. Trujillo gave his actress girlfriends lavish gifts. In early 1958, the U.S. Army denied Trujillo a diploma, which humiliated and angered his father. In November 1958, Trujillo returned to the DOMINICAN REPUBLIC to continue his debauched lifestyle. He divorced his wife, participated in the rape of Dominican women, and ordered the murders of several enemies and critics. Becoming an embarrassment to his father, who hoped to groom Trujillo to succeed him in power, in 1959, the dictator sent Trujillo to a sanatorium in Belgium. After spending several months in the sanatorium, Trujillo established residence in a mansion in Paris and married Lita Milán.

On May 31, 1961, Trujillo learned that his father had been assassinated the previous night. Trujillo, his younger brother Radhamés, and Rubirosa immediately returned to the Dominican Republic aboard a chartered Air France plane. Trujillo immediately took control of the Dominican army and set about searching for his father's assassins. JOAQUÍN BALAGUER, who was attempting to distance himself from the atrocities of the Trujillo dictatorship and move the nation along the path toward democracy, continued to handle the day-to-day operations of the Dominican government. Internal and external opposition to the continuation of the Trujillo regime was intense. In November 1961, Trujillo, after executing all but two of the surviving assassins of his father, fled the country and settled in France before moving to Spain in 1962, where he was welcomed by Spanish dictator Francisco Franco. While living in Spain, Trujillo continued his playboy lifestyle. On December 17, 1969, while on the way to the airport in Madrid in a Jaguar driven by the duchess of Albuquerque, the car crashed into a tree. On December 28, 1969, he died in a Madrid hospital of pneumonia. Trujillo was buried in Madrid.

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**Tugwell, Rexford G.** See MUÑOZ MARÍN, LUIS; OPERATION BOOTSTRAP; PUERTO RICO.

#### Túpac Amaru Revolutionary Movement (Movimiento Revolucionario Túpac Amaru; MRTA)

The Túpac Amaru Revolutionary Movement (MRTA) was a communist guerrilla movement in PERU between 1980 and 1997. Founded in 1980, it was led by Víctor Polay Campos (b. 1951– ) and Néstor Cerpa Cartolini (b. 1953–d. 1997), known as Comrades Rolando and Evaristo, respectively. The MRTA took its name from Túpac Amaru II, an 18th-century rebel leader who claimed Inca ancestry. Its goal was to establish a communist state and eliminate all imperialistic elements in the country, including the Peruvian elite and U.S. business interests.

At the height of its strength in the mid-1980s, it counted close to 1,000 members. Unlike Peru's other noted guerrilla organization, the SHINING PATH, the MRTA did not focus on the killing of civilians. Rather, it attempted to demonstrate its strength through kidnappings for ransom and the destruction of infrastructure facilities. The MRTA drew U.S. attention following the November 30, 1995, arrest of MIT student Lori Berenson (b. 1969– ) for collaborating with the MRTA. Originally sentenced to life imprisonment, Berenson's sentence was reduced to 20 years' incarceration. Among the MRTA's most noted acts was the seizure of the Japanese ambassador's residence in LIMA in December 1996 and holding 72 hostages there for four months. The crisis ended on April 22, 1997, when President ALBERTO KENYA FUJIMORI ordered a military assault on the residence, during which all but one hostage was freed and all 14 MRTA militants were killed.

Infighting among MRTA's leadership continually weakened the organization. The Fujimori government's efforts resulted in Polay's capture and imprisonment in 1992 and Cerpa's death in 1997. The MRTA subsequently self-destructed, although a few of its members remained active into the 21st century.

See also TÚPAC AMARU II (Vol. II).

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**Tupamaros** See NATIONAL LIBERATION MOVEMENT.

# U

**Ubico y Castañeda, Jorge** (b. 1878–d. 1946) *president of Guatemala* Born in GUATEMALA CITY, GUATEMALA, Jorge Ubico y Castañeda was the son of Marta Lainfiesta de Ubico and Arturo Ubico Urrucla, a wealthy landowner and prominent politician in the administration of Justo Rufino Barrios (b. 1835–d. 1885), Jorge’s godfather. After finishing his schooling in the United States, Ubico entered the Guatemalan Military Academy in 1894. He joined the Guatemalan army in 1897 and enjoyed a distinguished career, which included outstanding service in a war with EL SALVADOR in 1907, promotion to colonel at the age of 28, the governorship of two states, serving as minister of war from 1921 to 1923, and promotion to division general, the highest rank in the Guatemalan army, in 1922.

In the political turmoil brought about by the impact of the Great Depression on Guatemala in 1930 and 1931, Ubico emerged as the sole candidate in the February 14, 1931, presidential elections. He quickly consolidated his power by appointing loyal military officers to government positions; silencing political opposition through intimidation, incarceration, and exile; and censoring the press. The National Legislature rubber-stamped his programs and proposals and approved his manipulation of the constitution to extend his presidency. Despite the government’s limited income during the depression, Ubico maintained fiscal control through tight budgets. He improved global market access for Guatemala’s primary export, coffee, and refused to incur debt through foreign loans.

Ubico undertook the modernization of Guatemala City, directing the construction of a presidential palace, the national legislative building, post and telegraph offices, a sports stadium and park facilities, water and

sewerage systems, and the paving of streets. The process was extended into rural towns and villages. A network of mostly gravel roads reached into Guatemala’s most



Jorge Ubico y Castañeda, Guatemalan president and general of the army from 1931 to 1944 (Courtesy of the American States Library)

remote areas. Ubico accomplished this modernization through the exploitation of LABOR.

The outbreak of the European war on September 1, 1939, caused the loss of European and subsequently U.S. markets for Guatemalan coffee and bananas. Despite the 1940 International Coffee Agreement, U.S. wartime subsidies, and programs in quinine and rubber production, Guatemala's ECONOMY worsened. Throughout World War II, Ubico enthusiastically supported the Allied cause, readily implemented U.S. directives to deport both suspected and real Nazis, and placed restrictions on those German nationals and descendants who remained in the country. At the United States's request, Ubico placed German-owned properties, businesses, and financial accounts under government control. Guatemalans, already chafing under Ubico's dictatorship, now blamed him, not the loss of global markets, for the country's adverse economic conditions and railed also against his embracing of U.S. directives against German residents (see WORLD WAR II AND LATIN AMERICA).

Public opposition to Ubico surfaced in 1942, as the emerging "generation of rising expectations," consisting mainly of middle-class people, protested what they saw as an illegal extension of his presidency. In the spring of 1944, discussion of another extension prompted a greater public outcry. Ubico's removal of the dean of the medical school brought University of San Marcos students and faculty into the streets in protest. They were soon joined by shopkeepers, journalists, lawyers, and medical professionals. Younger and lower-ranking officers within the military who had little opportunity for promotion used the occasion to direct a coup d'état and ousted Ubico from power on July 1, 1944. He fled first to El Salvador and then to New Orleans, where he died on June 14, 1946.

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**United Nations Convention on the Law of the Sea (1982)** The United Nations Convention on the Law of the Sea was completed on December 10, 1982, after nine years of negotiations. It went into force on November 16, 1994, when GUYANA became the final signatory to the treaty. The treaty contains a wide set of guidelines for the use of internal waters: It establishes rules for archipelagic states to define their waterways, sets territorial water limits at 12 miles (19 km), and per-

mits coastal states to set laws on the use of their waters, ranging from mineral exploitation to fishing rights and scientific research. The convention extends the boundary for another 12 miles for the control of illegal TRADE, smuggling, and immigration by the coastal state and allows that state another 200 miles (322 km) as its exclusive economic zone, in which it can mine nonliving material in the subsoil of the continental shelf.

A crisis over Latin American territorial waters can be traced to the 1950s when CHILE, ECUADOR, and PERU each claimed legal control over territorial waters extending some 200 miles into the Pacific Ocean. There were also conflicting claims among a number of Caribbean states, whose coastal waters often overlapped. These situations resulted in a compromise on the 12-mile territorial limits, with a 200-mile extension of exclusive economic zones.

By February 2009, 155 nations had signed the Law of the Sea Convention, including all but six Latin American nations (COLOMBIA, DOMINICAN REPUBLIC, Ecuador, EL SALVADOR, Peru, and VENEZUELA).

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**United States Agency for International Development (USAID)** The United States Agency for International Development (USAID) was established in 1962 as an independent federal agency directed by the secretary of state to administer the U.S. government's bilateral aid programs. USAID shapes its programs in accordance with the foreign policy of each presidential administration.

Regarding Latin America, for the first 10 years of its existence, USAID administered the ALLIANCE FOR PROGRESS \$20-billion program to strengthen capitalism, provide for economic development and an improved quality of life, and expand the institution of democracy. Presidents Lyndon B. Johnson and Richard M. Nixon lost interest in the program because of their different philosophies in the battle against communism and their focus on the Vietnam War. That war made the U.S. Congress more assertive in terms of foreign affairs, however. In 1973, it mandated that foreign assistance focus more on the basic needs of the world's poorest people than on economic development, and in 1979, it created the position of agency director to supervise USAID, in place of the secretary of state.

The influence of the Christian Right on USAID policy became evident in 1973 when North Carolina Republican senator Jesse R. Helms engineered an amendment to the agency's funding bill that denied the use of U.S. funds for abortions. In 1984, President Ronald R. Reagan expanded the edict by banning all U.S. assistance to international agencies that provided abortion counseling or advocated

or provided abortions. The ban on USAID family-planning assistance adversely impacted governments and agencies across Latin America that endeavored to limit population growth among the poor. Although President William J. Clinton rescinded the ban in 1993, President George W. Bush reinstated it in 2001.

In response to the wave of democratization in the 1980s, President George H. W. Bush emphasized funding projects to enhance civil society, including EDUCATION programs, preventing voter fraud, expanding voting rights, and reforming judicial and criminal justice systems. Presidents Clinton and the younger Bush vigorously pursued these programs, and Latin American countries have benefited accordingly. The total amount of U.S. development assistance to Latin America since USAID's founding has decreased drastically, however, dropping from \$5.1 billion in 1962 to approximately \$2 billion in 2005.

In 2008, Congress approved \$400 million for military assistance to Mexico and \$65 million for Central America, but disbursement of the funds to Mexico has been held up owing to Congressional objections to charges of human rights violations. On September 29, 2009, the State Department issued its human rights report that indicated a lessening of government human rights abuses in Mexico. However, engaged in fierce debate over health care reform legislation, Congress has yet to consider lifting the block on aid disbursement.

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**United States Virgin Islands** The United States Virgin Islands are located in the Caribbean Sea, approximately 1,100 miles (1,770 km) southeast of Florida and approximately 50 miles (80.5 km) east of PUERTO RICO. Some 100 islands and islets make up the U.S. Virgin Islands, but only four are of significance: Saint Croix, St. Thomas, St. John, and Water Island. An estimated 112,000 people reside in this organized and unincorporated territory administered by the U.S. Department of the Interior's Office of Insular Affairs. The islands' combined area is approximately 133 square miles (344.5 km<sup>2</sup>), about twice the size of Washington, D.C.

On his second voyage to the Western Hemisphere, in 1493, Christopher Columbus discovered and named the islands, but over time, they were occupied by several European powers, including Spain, Britain, the

Netherlands, France, and Denmark. The Danish West India Company settled on St. Thomas in 1672 and on St. John in 1694 and in 1733 purchased St. Croix from France. They became royal Danish colonies in 1754. African slave labor sustained the sugar-based ECONOMY until its demise in the early 19th century, which helped lead to the abolition of slavery in 1848.

Twice in the late 19th century, the Danes attempted but failed to sell the islands to the United States. At the time, the U.S. Congress was not in an expansionary mood, but that changed in 1914 with World War I and the opening of the Panama Canal (see WORLD WAR I AND LATIN AMERICA). The islands became strategically important to the United States because of their location along the Anegada Passage, one of three main connectors between the Atlantic Ocean and the Caribbean Sea. The governments in Washington, D.C., and Copenhagen understood that should Germany occupy Denmark during the war, the islands would fall under German jurisdiction and potentially serve as a submarine base to threaten U.S. interests in the Caribbean region. A deal was struck. For \$25 million, the United States purchased all but Water Island, which it did in 1944 for \$10,000.

Although Virgin Islanders are citizens of the United States, the U.S. Constitution prevents them from participating in U.S. presidential elections. The islanders elect their own governor to a four-year term, and he or she is eligible for immediate one-term reelection. John de Jongh (b. 1957– ) won the November 2006 contest and took office on January 1, 2007. The 15-seat Senate constitutes the unicameral legislature. Its laws are subject to approval by the U.S. Congress. The governor appoints judges for 10-year terms to the islands' Supreme Court, but its decisions can be reviewed by the U.S. District Court of the Virgin Islands. The islanders also elect a representative to the U.S. Congress; he or she can sit on committees but cannot vote on legislative matters. The islanders show little interest in altering their current relationship with the United States.

Despite the constant threat of storms, tourism is the islands' major INDUSTRY, accounting for 80 percent of the gross domestic product and employment. Approximately 2.6 million visitors arrive each year, mostly by cruise ship at the main port of Charlotte Amalie on St. Thomas. HOVENSA, a joint venture between Amerada Hess and Petróleos de Venezuela, operates a modern oil-refining plant on St. Croix that processes 495,000 barrels of crude oil a day. With only 5.71 percent of its land arable, AGRICULTURE is limited, and foodstuffs must be imported. Financial and businesses services make up a small component of the ECONOMY.

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**Uribe Vélez, Álvaro** (1962– ) *president of Colombia* A professional politician from Medellín, COLOMBIA, who earned a law degree from the University of Antioquia in 1977 and completed postgraduate studies in administration and management at Harvard University, Álvaro Uribe Vélez served as mayor of Medellín and senator from and governor of Antioquia state before winning the presidential election on August 7, 2002, with 52 percent of the popular vote. Uribe was reelected for a second term on May 26, 2006, with 67 percent of the popular vote. On January 13, 2009, President George W. Bush presented Uribe with the Medal of Freedom, the highest U.S. award for civilians.

As president, Uribe's greatest challenge was to confront the twin issues of drug trafficking and guerrilla insurgency. The United States provided the Colombian government with more than \$3 billion in military assistance to arrest both elements. By middle of his second presidential term, the Colombian government claimed substantial progress on both counts; all crime was down by 50 percent since Uribe began his presidency in 2002. Despite the dramatic rescue on July 3, 2008, of former presidential candidate Ingrid Betancourt and three Americans held captive by the Revolutionary Armed Forces of Colombia (FARC) for six years that highlighted the war on Colombian terror, critics assert that Uribe has been less successful and that both the narco-traffickers and guerrillas receive support from Venezuelan President Hugo Chávez as part of his anti-U.S. stance.

An advocate of the neo-liberal economic model, Uribe pursued a privatization and tax program that netted the government nearly \$800 million, which he used for housing, medical, and educational programs for poor urban dwellers. Uribe also signed commercial agreements with Argentina and Bolivia, but the free-trade agreement signed with the United States on November 22, 2006, still languishes in Congress.

Uribe's second term endured allegations of corruption against him and his supporters and charges that Uribe's past is tarnished by links to the Medellín drug cartel.

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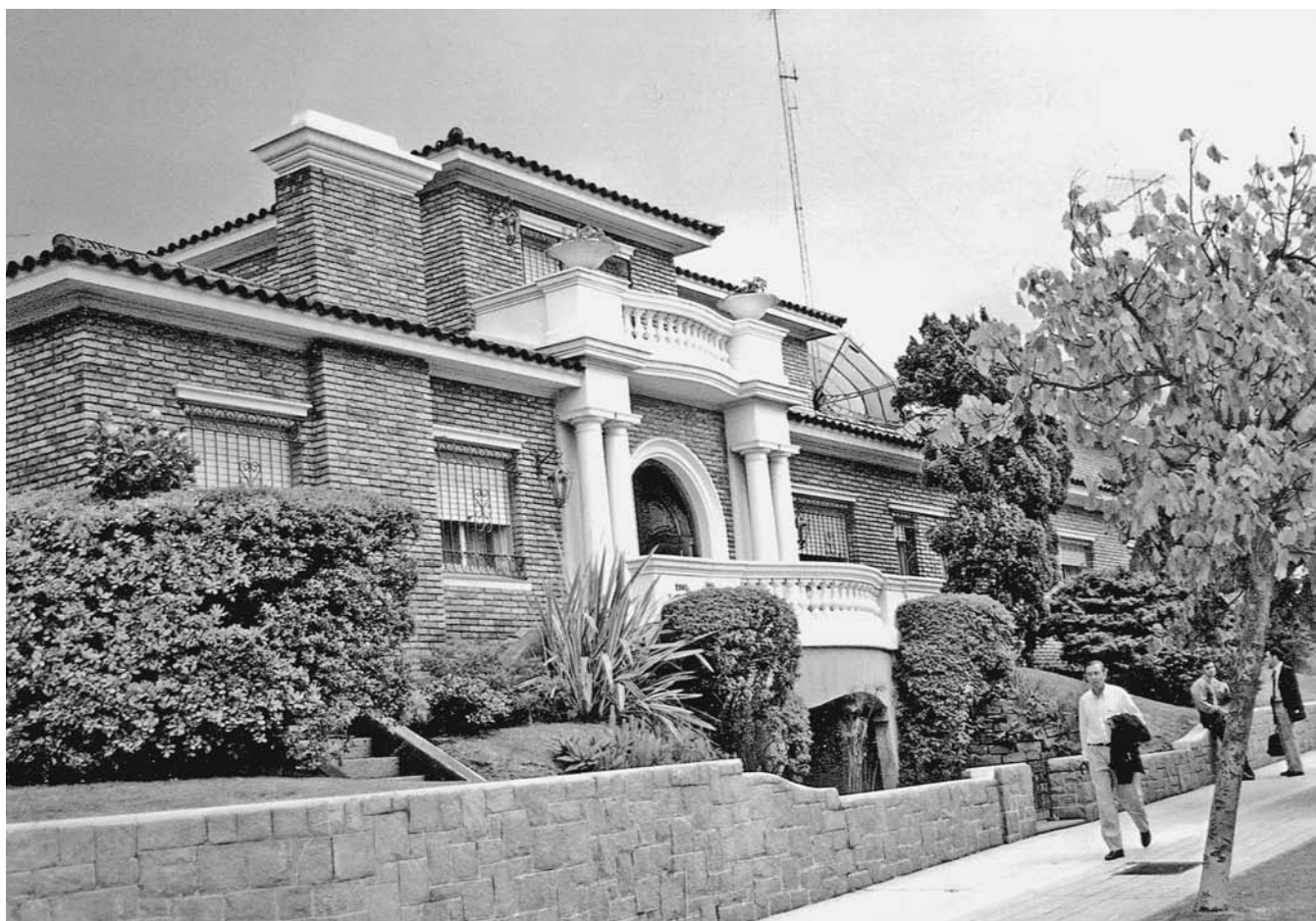
**Uruguay** After SURINAME, Uruguay is the second smallest nation in South America. Totalling approximately 68,000 square miles (176,119 km<sup>2</sup>), Uruguay is slightly smaller than the state of Oklahoma. Uruguay is bordered on the northeast by BRAZIL, the southwest by ARGENTINA, and on the southeast by the Atlantic

Ocean. Its capital, Montevideo, is home to 1.4 million people, nearly half of the country's population. The rolling hills that characterize the countryside are similar to Argentina's Pampas and prompted the development of cattle and sheep farming, as well as the cultivation of grains, in the 19th century. Industrialization came in the mid-20th century and is largely confined to Montevideo and its environs.

Founded by the Spanish in 1726, Montevideo first served as a strategic outpost of its empire. By the time of Latin America's independence movements in the early 19th century, the city had developed into a major seaport. Originally claimed by Argentina, Uruguay was annexed by Brazil in 1821, only to declare its independence in 1825, which was secured by a British-sponsored treaty in 1828. Agricultural pursuits quickly took root, but given the nation's space limitations, by the late 19th century, the countryside could no longer support the growing population. Montevideo became the safety valve for the excess rural populace. Two political parties emerged, the liberal Colorado Party and the conservative Blanco Party. They both represented the nation's rural elite and, as elsewhere in Latin America at the time, mirrored the liberal-conservative ideological conflict.

In the early 20th century, President JOSÉ BATLLE Y ORDÓÑEZ benefited from the profits of the export-based ECONOMY to introduce political structural changes, social welfare programs, and state-sponsored economic enterprises. Uruguay's 1919 constitution contained the framework of these programs. The global depression that began in 1929, however, adversely affected Uruguay's economy, and this, in turn, contributed to a new constitution in 1934 and the 1933–38 dictatorship of GABRIEL TERRA. Batlle's social welfare system, nonetheless, remained intact. During World War II and the immediate postwar period, the global demand for Uruguay's primary agricultural products was rekindled and stimulated government-supported import-substitution industrialization, as well as the government's purchase of British-owned railroads and public utilities that dated to the 19th century. In the process, the government bureaucracy and social welfare system expanded. In the mid-1950s, the global demand for Uruguay's agricultural products dropped precipitously as Europe recovered from the war and new sources (notably Australia and Canada) of beef and grain entered the marketplace. At the same time, the limited domestic market contributed to the stagnation of ISI, a situation exacerbated by LABOR's demands for lofty pay increases to keep pace with inflation. A new constitution in 1951 replaced the president with a nine-member ruling National Council, which crippled political decision making. Bailouts by the International Monetary Fund (IMF) in 1967 and 1973 momentarily brought fiscal relief to the government, but the IMF's concomitant austerity measures adversely affected the quality of life of Uruguayan people.

Given the country's political situation, left-wing parties could register no more than 9 percent of the vote



A typical upper-class home in an affluent section of Montevideo, Uruguay (Thomas M. Leonard Collection)

in national elections, but the debate outside the political arena came to the forefront in 1964 with the unification of industrial workers into the National Assembly of Workers (Confederación Nacional de Trabajadores, or CNT). While the CNT prompted the traditional political parties—the *blancos* and *colorados*—to compete for labor's support, a new movement surfaced. A challenge to the nation came from the NATIONAL LIBERATION MOVEMENT (MLN-T), or Tupamaros, an urban guerrilla group founded in 1963. It burst onto the national scene in the early 1970s. Shortly after President Juan María Bordaberry's (b. 1926– ) inauguration on March 1, 1972, the MLN-T launched a wave of terrorist attacks on the government in hopes of stirring a popular uprising that would lead to the establishment of a Marxist state. The uprising did not occur. In fact, the MLN-T practice of kidnapping for ransom and maiming of individuals and its lack of a coherent philosophy militated against their garnering popular support. By 1979, the guerrilla threat to Uruguayan society markedly declined, but the MILITARY did not relinquish power until 1984, when it permitted the presidential election of *colorado* JULIO MARÍA SANGUINETTI on November 25. Sanguinetti served two presidential terms: 1985–90 and 1995–2000.

He and President Luis Alberto Lacalle (b. 1944– ), who served from 1991 to 1995, implemented neoliberal economic reforms such as lowering tariffs, encouraging foreign direct investment, controlling deficit spending, reducing inflation, and cutting the size of the government workforce. Nevertheless, the government continued to play a prominent role in the economy by continuing its role in water, electric and telephone services, insurance, banking, petroleum refining, airlines, and railways.

In 1992, Uruguay joined with Argentina, Brazil, and PARAGUAY to establish the SOUTHERN CONE COMMON MARKET (MERCOSUR) and in 1996 became home to its secretariat. The increased TRADE with its MERCOSUR partners contributed to Uruguay's 5 percent annual growth rate through the late 1990s. Still, the United States remained Uruguay's major trading partner. Argentina's financial crisis in 2001–02 slowed that commerce and prompted the Argentinean withdrawal of U.S. dollars deposited in Uruguayan banks (see ARGENTINA, ECONOMIC COLLAPSE IN). The international demand for Uruguay's agricultural goods prompted an economic recovery that led to 5 percent annual growth rates during the last two years of the decade.



By the end of the 20th century, the Blancos and Colorados gave way in popularity to the Frente Amplio, a coalition of left-of-center parties that can be traced to 1971. Although the party long governed Montevideo, it did not move into national prominence until the October 1, 2004, presidential elections, when its candidate Tabaré Vázquez (b. 1940– ) easily captured the presidency with 50.5 percent of the popular vote. Frente Amplio also gained control of the national legislature. Vázquez immediately made good on campaign promises to reopen investigations of HUMAN RIGHTS violations by the military during the 1970s and early 1980s. Vázquez also finds himself engaged in a dispute with Argentina over Uruguay's construction of a wood pulp mill on the Uruguay River, which it shares with Argentina. The latter is seeking to terminate the project because of the potential adverse affect of the mill on the environments of both countries.

At his administration's midpoint, Vázquez benefited from an annual economic growth rate of 7 percent and a per-capita gross domestic product (GDP) of more than \$5,800. Sixty percent of Uruguay's GDP is generated by the service industries; the industrial sector accounts for 22 percent; and AGRICULTURE, only 9 percent, a drastic change from the agro-export economy at the start of the 20th century.

See also BANDA ORIENTAL (Vols. II, III); BLANCO PARTY (Vol. III); COLORADO PARTY, URUGUAY (Vol. III); URUGUAY (Vols. I, III).

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## U.S. Caribbean interventions, 1900–1934

During the first three decades of the 20th century, the United States intervened in the internal affairs of circum-Caribbean nations on 17 occasions. U.S. policy makers were motivated mainly by the need to secure the Panama Canal from foreign threats and the belief that the region's inhabitants were not yet able to administer their nations wisely, owing to the legacies of Spanish colonial rule. U.S. policies in the Caribbean contributed to Latin Americans' charge of "Yankee imperialism."

In 1898, as the United States moved toward war with Spain over CUBA, the crescendo for a U.S.-owned and -operated transisthmian canal intensified, and each influenced the other regarding U.S. Caribbean policy. Policy makers in Washington and U.S. diplomats in the circum-

Caribbean region considered that regional political leaders were inept when it came to administering government and managing financial affairs, with both factors causing political instability and inviting foreign interventions. These points were driven home by the British-German-Italian blockade of the Venezuelan coast in 1902–03. Those nations succeeded in their effort to force President Cipriano Castro to renegotiate his government debt to European banks. To keep European gunboats out of the Caribbean, the United States took preemptive action. For example, to secure Cuba from foreign intervention, it insisted on the attachment of the PLATT AMENDMENT to the 1902 Cuban constitution as a precondition for the withdrawal of U.S. Marines from the island and granting Cuba its independence. The Platt Amendment prevented the Cuban government from granting any foreign government territorial rights on the island and from undertaking excessive foreign debt and allowed the United States to intervene on the island to maintain political stability. Similar provisions were found in the 1903 Hay–Bunau Varilla Treaty, which granted Panama its independence. U.S. president Theodore Roosevelt provided for a broader policy application on December 4, 1904, when he announced that any "chronic wrongdoing" in the Western Hemisphere gave the United States the right to intervene in a nation's internal affairs.

The Roosevelt Corollary to the Monroe Doctrine was first applied to the DOMINICAN REPUBLIC, when in 1905, it could not meet its debt obligations to European bankers. An agreement, finally ratified by the U.S. Senate in 1907, provided for U.S. Marines to supervise the Dominican customhouses, distributing 45 percent of import duties for local government operations and 55 percent to meet the country's international debt repayments (see U.S. CUSTOMS RECEIVERSHIP). President William Howard Taft and his secretary of state, Philander C. Knox, pursued a similar policy, known as "dollar diplomacy," whereby private U.S. banks paid off a nation's debts to foreign and domestic investors and U.S. Marines occupied that nation's customhouses to distribute operating funds to the local government and ensure repayment to U.S. banks. This was the essence of the Knox–Castillo Convention with NICARAGUA and the Knox–Paredes Agreement with HONDURAS, both signed in 1911. Two years later, the United States stood by as the British threatened gunboat diplomacy to force Guatemalan strongman MANUEL ESTRADA CABRERA to resume international debt repayments.

Roosevelt also used the Platt Amendment to dispatch marines and ENOCH CROWDER to Cuba to prevent President Tomás Estrada Palma (b. 1884–d. 1960) from remaining in office in 1906. Crowder remained until 1909 to write new electoral laws for Cuba. While these were deemed the most progressive in Latin America at the time, they did not bring the conflict between political conservatives and liberals to an end. In 1911 and 1916, U.S. troops again returned to the island to ensure

political order and did not leave until 1933. President Woodrow Wilson sent troops into HAITI in 1914 and to the Dominican Republic in 1916, where they remained until 1934 in an effort to ensure political stability. The United States attempted to foster democracy in the Central American republics (COSTA RICA, EL SALVADOR, GUATEMALA, Honduras, and Nicaragua) through treaty agreements in 1907 and 1923. Each was an attempt to define a revolutionary government and deny it the rights accorded a legitimate government, including recognition. The agreements did not prevent internal turmoil, however, as seen in the Honduran civil conflicts during the 1920s, and the emergence of revolutionaries such as Nicaragua's AUGUSTO CÉSAR SANDINO.

To further secure the circum-Caribbean region from international threats, in 1916, the United States completed the Bryan-Chamorro Treaty with Nicaragua, which gave it the right to construct a transisthmian canal route through that country and to purchase the Danish West Indies to secure the Anegada Passage, which connects the Caribbean Sea with the Atlantic Ocean.

Following World War I, several factors converged that resulted in President Franklin D. Roosevelt's 1933 pronouncement of the GOOD NEIGHBOR POLICY, which momentarily marked an end to U.S. intervention in the internal affairs of circum-Caribbean nations. First, the European threat to the Panama Canal dissipated after the war. Furthermore, State Department officials had lost interest in bringing democracy to the region. For example, Central American desk officer Stokeley W. Morgan argued that because revolutions were a way of life throughout the Caribbean, the United States could not alter the region's political culture. Undersecretary of State J. Reuben Clark concluded in his 1928 study of the Monroe Doctrine that the Roosevelt Corollary was an inappropriate extension of the doctrine itself. As secretary of commerce from 1921 to 1928, Herbert Hoover offered an economic reason for policy change. He argued that the Latin American charge of Yankee imperialism contributed to the larger and richer countries in South America not purchasing U.S. goods. These factors converged in 1933, so that President-elect Roosevelt announced in his inaugural address on March 4 that the United States would henceforth follow a good neighbor policy. It became official U.S. policy when Secretary of State Cordell Hull announced it at the Seventh Pan-American Conference meeting in Montevideo, URUGUAY, from December 3 to 26, 1933.

See also CASTRO, CIPRIANO (Vol. III); CONSERVATISM (Vol. III); LIBERALISM (Vol. III); MONROE DOCTRINE (Vol. III); PANAMANIAN INDEPENDENCE (Vol. III); TRANSISTHMIAN INTERESTS (Vol. III); WAR OF 1898 (Vol. III).

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**U.S. Customs receivership (1905–1940)** In an effort to protect U.S. economic interests and preclude the possibility of European intervention to collect debts, the U.S. government took control of the DOMINICAN REPUBLIC's finances in 1905. Dominican and American government officials entered into a customs receivership whereby U.S. officials would collect customs revenue, regulate Dominican finances, provide funds to the Dominican government, and service Dominican foreign debt.

During the last quarter of the 19th century, President Ulises Heureaux contracted extensive foreign loans to develop the economy and infrastructure of the Dominican Republic. The financial chaos and political turmoil following Heureaux's 1899 assassination coincided with a period in which the United States began to exert greater influence in the Caribbean region (see U.S. CARIBBEAN INTERVENTIONS, 1900–1934). On January 5, 1905, as the Dominican Republic plunged into deeper financial and political chaos, U.S. secretary of state John Hay, fearful that European creditors would intervene in the Dominican Republic to collect unpaid claims, announced that the newly unveiled Roosevelt Corollary to the Monroe Doctrine would be applied to the Dominican Republic. The Dominican government accepted a U.S.-implemented customs receivership that took control of Dominican customhouses and collected Dominican export and import taxes. In April 1905, the *modus vivendi*, whereby the United States allocated 55 percent of the collected revenue to pay Dominican foreign debt and 45 percent to the Dominican government, went into effect. At the same time, the United States attempted to persuade the Dominican government to carry out various fiscal and political reforms. Dominican elites wantonly facilitated the extension of U.S. hegemony for their own self-interest.

After the arrangement was ratified by the U.S. Congress on June 22, 1907, the United States proclaimed the U.S.-Dominican Convention of 1907. With the approval of the Dominican government, the United States reduced and consolidated the Dominican foreign debt with the collaboration of the Guarantee Trust Company of New York. The plan included a \$20-million loan by the bank to pay legitimate claims against the Dominican government, thus making the United States the Dominican Republic's only foreign creditor. In August 1916, after Dominican president Francisco Henríquez y Carvajal (b.

1859–d. 1935) refused to grant the United States greater control over the Dominican economy, the U.S. government suspended the Dominican government's access to funds collected by the customs receivership. The result was economic and political pandemonium. Citing the inability of the Dominicans to control their nation, the United States militarily intervened in November 1916. A U.S. military government attempted to implement fundamental changes in the nation's political, economic, and social life in the hope of creating a stable neighbor that would safeguard U.S. strategic and economic interests. The marines disarmed the Dominican population and created the theoretically apolitical National Guard, which eventually became the power base of dictator RAFAEL TRUJILLO.

In 1922, U.S. secretary of state Charles Evans Hughes and former Dominican minister of finance Francisco J. Peynado (b. 1867–d. 1933) announced the Hughes-Peynado Plan, which paved the way for presidential elections in the Dominican Republic and the withdrawal of U.S. Marines. In 1924, after the Dominicans ratified the Dominican-American Agreement, which guaranteed U.S. Customs receivership until the foreign debt was paid to American banks, the marines left. In 1931, as the Great Depression ravaged the Dominican economy, Trujillo, who had come to power in 1930, secured U.S. permission to suspend the payment of the principal on the Dominican foreign debt, although he continued to make interest payments. Because of the new international environment brought about by World War II, Trujillo was able to negotiate the 1940 U.S.-Dominican Convention, which abolished the customs receivership. U.S. financial officials would remain in the Dominican Republic but only in an advisory capacity. In 1947, Trujillo paid off the remaining Dominican foreign debt. For Trujillo, this was a historic event because it constituted U.S. recognition of Dominican financial independence.

See also HEUREAUX, ULISES (Vol. III); MONROE DOCTRINE (Vol. III).

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**U.S. direct investment in Latin America** At the beginning of the 20th century, Europeans—led by British, German, and French entrepreneurs, shipping magnates, bankers, and commercial houses—dominated the foreign investment sector in Latin American economies. Nevertheless, European businesspeople on the ground in Latin America cautioned their home offices

and governments that their U.S. counterparts were making rapid inroads into the market. While U.S. trade with Latin America can be traced to the colonial period, little materialized after Latin America completed its independence in 1826 until the late 19th century, when two developments enabled the United States to advance its commercial interests in the region.

In the 1880s, Liberals occupied Latin America's presidential palaces. Determined to accelerate their respective nation's involvement in the global market, they implemented the free trade ideology of the time, which enabled foreigners to invest in local economies with relative ease. During the same period, the industrial revolution took hold in the United States, and U.S. entrepreneurs began to look abroad for raw materials and new markets and places to invest. The vision of Latin American Liberals and U.S. entrepreneurs melded. Under these conditions, the Kennecott, Braden, and Anaconda Companies came to control copper mining in Chile; Sinclair and Standard Oil of California dominated the oil industries in Mexico and Venezuela; the United Fruit Company controlled the banana and transportation businesses in Central American countries and elsewhere in the circum-Caribbean region; and the Guggenheim, Hearst, and Morgan interests dominated Mexico's mining, cattle, and banking industries, respectively. There was much truth to the observation "Poor Mexico; so far from God, so close to the United States." Equally poignant was Leland Jencks's 1928 book title, *Our Cuban Colony*. By the mid-1920s, Cuba stood as the most obvious example of U.S. direct foreign investment. U.S. investments in the country rose from \$50 million in 1895 to \$205 million in 1928 and encompassed most aspects of the Cuban economy: agriculture, land development, banking, shipping, railroads, and public utilities.

The Great Depression that began in 1929 set in motion a decade of global economic stagnation, during which direct foreign investment in Latin America was virtually nonexistent. Industrial nations took to solving their own economic woes rather than seek cooperative solutions to the problem. For example, the U.S. trade reciprocity agreements of the 1930s were designed to spur U.S. industries, not those of Latin America. Nevertheless, because of the reduction in Latin America's imports at the time, the treaties were of little benefit to the United States.

World War II brought mixed economic returns to Latin America (see WORLD WAR II AND LATIN AMERICA). Argentina sustained its exports of beef and wheat to the Allies, as the war choked off European food sources. Chile and particularly the U.S. copper companies there earned enormous profits because copper was used in the manufacture of shell casings. Cuba became the Allies' primary source of raw sugar, and hence, U.S.-owned refineries, transportation companies, and ancillary businesses benefited. U.S. oil companies operating in Ecuador and Venezuela profited from the wartime demand for

petroleum. On the opposite end of the scale, the coffee and bananas produced by U.S. companies in Central American and Caribbean countries virtually ceased operations. In the middle of these extremes, BRAZIL and Mexico were able to begin their industrial development due to the largesse of the U.S. government.

Owing to growing concern about communism in Europe and Asia immediately after World War II, U.S. investments in Latin America grew slowly until the 1960s, when the threat of communism in Western Hemisphere brought a new and heightened interest in that region (see COMMUNISM IN LATIN AMERICA). Initially, capital-intensive rather than labor-intensive industries developed in Latin America, where governments were still operating under the rules of the import-substitution industrialization (ISI) economic model.

As Latin American governments moved away from the ISI model in the late 1970s and in the 1980s accepted the neoliberal concept of free markets, U.S. business attitudes also changed. Corporate leaders now saw Latin America as a vast consumer market waiting to be tapped. U.S. firms opened operations across Latin America, and in effect, Latin American workers produced “American” goods for local consumption; the increased local consumption of these goods led to increased job security. For example, the “Big Three” U.S. automakers—Chrysler, Ford, and General Motors—built plants in Argentina and Brazil, as did Motorola, the electronics maker. Significant attention was given to the “927” industries in PUERTO RICO, the “807” industries elsewhere in the Caribbean and Central America, and Mexico’s MAQUILADORAS, which permitted the manufacture of clothing, electronics, pharmaceuticals, and other products by U.S.-based companies for resale in the United States. But, given less attention was the fact that these products could be shipped elsewhere in Latin America. U.S. retailers soon followed. Sears Roebuck long operated its department stores in major Latin American cities, but as the cities modernized in the 1980s, which included the construction of U.S.-style malls, specialty retailers entered the consumer market. The “Big Boxes”—for example, Wal-Mart and Home Depot—soon followed.

In the late 1980s and early 1990s, new factors affected U.S. investment in Latin America. Mexican economic growth slowed dramatically owing to a provision in the CONSTITUTION OF 1917 that limited direct investment in any single business to 49 percent of the operation. This was a response to the legacy of Spanish colonialism and to President Porfirio Díaz’s Liberal economic policies from the 1880s to 1911, which permitted 100 percent foreign ownership of any singular economic pursuit in agriculture, manufacturing, mining, finance, transportation, and communications. However, in the 1980s neither wealthy Mexicans nor the national government had sufficient funds to invest the required 51 percent in any company. President CARLOS SALINAS DE GORTARI therefore persuaded the Mexican legislature

### Total U.S. Direct Investment in Latin America

YEAR	DOLLARS (MILLIONS)
1897	0.3
1914	1.2
1960	8.3
1970	14.7
1980	38.8
1990	70.7
2000	233.1
2006	322.2

Source: U.S. Department of Commerce, Economics and Statistics Administration, Bureau of Economic Analysis, U.S. Direct Investments Abroad (Washington, D.C.: Government Printing Office, 2007), p. 27.

to abolish the requirement, which contributed to the growth of maquiladoras along the U.S. border. Salinas also saw the need for a more open market with the United States. This led to the NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA), which went into effect in 1994. U.S. direct investment quickly followed, as did an uprising in the south of Mexico (see EZLN).

The U.S. vision to expand NAFTA into the FREE TRADE AREA OF THE AMERICAS (FTAA) fizzled at the beginning of the 21st century. Latin Americans became increasingly concerned about U.S. dominance of such an arrangement, prompting individual governments to reach out to European and Asian nations, including China, instead (see CHINA AND LATIN AMERICA, PEOPLE’S REPUBLIC OF). U.S. businesses now faced increased global investment competition in Latin America. Additionally, at the beginning of the new century, the structural reforms demanded by the neoliberal economic model (see ECONOMY) had been implemented, but the benefits of free trade had not reached the wider populace. The frustration at this found expression in the contemporary leftward drift of Latin American politics. The impact of this political change on direct foreign investment in Latin America remains to be seen.

See also DÍAZ PORFIRIO (Vol. III).

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**U.S.-Mexican relations** U.S.-Mexican relations in the 20th century shifted from concerns over U.S. intervention during and after the MEXICAN REVOLUTION to issues of commerce, the DRUG TRADE IN MEXICO, and IMMIGRATION FROM MEXICO TO THE UNITED STATES. AS the diplomatic debates have evolved, the geographic proximity of the United States and MEXICO has produced both resentment and the need for cooperation.

When the Mexican Revolution broke out in 1910, U.S. leaders watched with alarm and concern. American economic interests had grown substantially in Mexico during the Porfiriato, and revolutionary violence threatened landholdings and businesses owned by U.S. citizens. Furthermore, instability in Mexico became a security concern as World War I erupted in Europe (see WORLD WAR I AND LATIN AMERICA). U.S. diplomats attempted to influence the course of the revolution by acting as mediators and by urging Washington to become involved. One of most controversial examples came in 1913, when U.S. ambassador Henry Lane Wilson helped to broker a deal that led to the overthrow of FRANCISCO MADERO and the rise of dictator VICTORIANO HUERTA. AS the revolution dragged on, the United States became more interventionist. In 1914, U.S. president Woodrow Wilson authorized a blockade of the port of Veracruz after a minor altercation between U.S. and Mexican soldiers. Two years later, he appointed General John J. Pershing to lead a punitive expedition against FRANCISCO VILLA after the revolutionary leader led a raid on Columbus, New Mexico. In both instances, the presence of U.S. troops on Mexican soil created strong nationalist feelings and resentment toward the United States.

Revolutionary reform in Mexico in the coming decades continued to concern U.S. economists. In the 1920s, issues of land ownership, debt, and oil rights were initially addressed in the Bucareli Agreement, but economic nationalism continued to grow in Mexico. In 1938, President LÁZARO CÁRDENAS nationalized the petroleum INDUSTRY, setting the stage for government-sponsored import-substitution industrialization policies in later decades. Mexican leaders secured government ownership of important economic sectors and imposed TRADE barriers to protect national industries. Government involvement in the ECONOMY combined with aggressive spending in social programs to create a financial crisis in the 1970s that was addressed in the short term by foreign borrowing. Since the 1980s, Mexico has experienced several debt and currency crises, often involving U.S. banks and investors. The most recent, in 1994, coincided with the passage of the NORTH AMERICAN FREE TRADE AGREEMENT between Mexico, the United States, and Canada, and a U.S.-funded bailout package helped the Mexican economy recover.

Since 1990, other diplomatic issues have dominated the relationship between the two countries. As the U.S. government waged its war on DRUGS in South America in the 1980s, the production of illicit substances shifted

to Mexico. Drug-related violence and corruption have become increasing prevalent throughout the country, especially in border regions. Illegal immigration from Mexico to the United States has also dominated the foreign relations of the two countries in recent decades. It is estimated that as many as 10 to 20 million undocumented Mexican immigrants reside in the United States, working mainly in low-wage service, manufacturing, and agricultural jobs. Changing immigration policy has become a topic of intense political debate in the United States and often dominates diplomatic discussions between the two countries.

See also PORFIRIATO (Vol. III).

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**U.S. military assistance programs** Twentieth-century U.S. interest in Latin American MILITARY affairs began shortly after World War I. It paralleled the U.S. effort at global disarmament, as seen in Secretary of Commerce Herbert Hoover's various formulas to determine the size of national armies based on national needs. Hoover's proposals did not find a receptive global audience, even at the 1922–23 Central American conference held in Washington, D.C. (see CENTRAL AMERICAN CONFERENCES OF 1907 AND 1923). While the five Central American republics (COSTA RICA, EL SALVADOR, GUATEMALA, HONDURAS, and NICARAGUA) accepted the U.S. plan to limit the size of their land armies, they did nothing to implement the agreements. Two circum-Caribbean countries, Nicaragua and the DOMINICAN REPUBLIC, accepted the U.S. recommendations to create a national constabulary, or national guard. The goal was to create a force that would serve the nation's interest, not those of its dictator. This did not occur, however. The National Guardsmen supported ANASTASIO SOMOZA GARCÍA and his son ANASTASIO SOMOZA DEBAYLE in Nicaragua and RAFAEL TRUJILLO in the Dominican Republic, just as armies supported military dictators elsewhere in the Caribbean.

During the 1920s, the U.S. proposal to limit the total tonnage of capital ships also had little impact in Latin America. Where navies existed, they were small, and their equipment was antiquated. Thus, ARGENTINA, BRAZIL, and CHILE accepted the U.S. offer of naval ships after World War I. The purchases enhanced those country's hemispheric and global prestige.

During the interwar generation, from 1920 to 1939, the U.S. Congress continually cut back on appropriations. As a result, the U.S. military was underfunded, and the State Department did not approve all sales of U.S. military equipment to foreign powers. As in the case of Nicaragua and the Dominican Republic, U.S. officers could not train foreign troops unless they first resigned from the U.S. military service. That rarely occurred. U.S. policy meant that the Latin Americans remained dependent on European equipment and training officers. In effect, Latin American militaries possessed a variety of outdated European equipment that was often in need of repair, while field training varied according to the practices of the contracted countries, usually French, German, Italian, or Spanish. This fact became apparent to U.S. military planners from August to October 1940, during their assessment visits to Latin America countries. Latin America was not in a position to offer military assistance in World War II (see *WORLD WAR II AND LATIN AMERICA*).

That war did not appreciably alter the situation. Neutral nations Argentina and Chile did not accept U.S. military missions. Some political leaders, such as those in Central America, did not want their officers coming into close contact with their U.S. counterparts out of fear that they might become self-serving. Brazil and MEXICO stood as exceptions among Latin American nations, sending troops to the Asian and Pacific battlefronts. Latin American governments also were disappointed with the U.S. wartime lend-lease program. Each presented the U.S. government with vast shopping lists to modernize their militaries. The Joint Army-Navy Board lowered the final allocations and indicated that shipments could not begin until 1943 because of demands in the European and Asian theaters.

After World War II, the U.S. military planned to unify the hemispheric command structure, training methods, and equipment. The plan fell on deaf ears in the State Department and U.S. Congress, each of which argued that such assistance would do little more than sustain Latin American dictators. That changed in 1952, by which time the cold war had become a global contest. U.S. military assistance now began to flow to Latin America, initially to help secure ports and other *TRANSPORTATION* facilities. The *CUBAN REVOLUTION* of 1956–61 prompted new U.S. policies. President John F. Kennedy introduced the *ALLIANCE FOR PROGRESS* to help resolve the socioeconomic conditions that could result in revolutions. To prevent the growth of guerrilla movements, the military turned to counterinsurgency, including training local military in combating and interrogating guerrillas. The methodology became brutal, resulting in heavy criticism of the program and the United States, but this did not prevent President Lyndon B. Johnson from increasing military assistance to Latin America in the hope of suppressing the guerrilla movements. President Richard M. Nixon, who had little interest in Latin America, continued the high levels of military sales.

Two new trends that converged in the 1970s affected U.S. military sales abroad. The U.S. Congress completed legislation that granted the president authority to cut military assistance to governments in violation of civil and *HUMAN RIGHTS*. Jimmy Carter came to the presidency in 1977 with a commitment to human rights and used that legislation to terminate military sales to Argentina, Brazil, Chile, and Guatemala. In February 1979, he added Nicaragua to the list, which contributed significantly to the downfall of Nicaraguan strongman Somoza Debayle in July 1979. Ronald Reagan reversed course on assuming the presidency in 1981. U.S. arms became available to all Latin American nations provided they maintained internal order against potential “communist” threats (see *CENTRAL AMERICAN WARS*). At the same time, the Guatemalan military government resisted overt U.S. assistance, instead taking arms purportedly to fight against drug trafficking in the country. Providing military assistance to Latin American nations became a hallmark of the Reagan and George H. W. Bush presidencies. U.S. funds and equipment, such as helicopters, were used in the U.S. war on drugs and the effort to eliminate them at the source.

In the 1990s, several factors contributed to another change in military sales to Latin America. The 1991 collapse of the Soviet Union marked the end of the cold war, which in turn led to a reduction in U.S. military assistance programs. Latin America’s return to democratic governments reduced the military’s presence in politics and helped lower the demand for foreign military hardware and training. Additionally, President William J. Clinton emphasized solving the U.S. drug problems at home rather than abroad and sought to limit the entry of *DRUGS* into the country by tightening border control. Clinton’s plan had failed to curtail U.S. drug use by the end of his administration. Indeed, drug use had increased, which prompted Clinton to push through Congress in 2000 a \$1.3-billion assistance package to battle drugs in *COLOMBIA*, *ECUADOR*, *Aruba*, and *Curaçao*. The preponderance of the package was for military assistance, including airport construction and improvement in Ecuador, Aruba, and Curaçao. Sixty-five percent of the funding went to Colombia, where guerrilla groups worked with drug-growing peasants and narcotraffickers. The U.S. drug war left indelible marks on Latin America. By 2000, the pursuit of drug growers, processors, and traffickers had enhanced the power of the military, which expanded its influence in government, particularly in *BOLIVIA*, *Colombia*, and *PERU*.

Upon taking office in January 2001, President George W. Bush continued the emphasis on combating narcotraffickers and guerrilla groups, particularly in Colombia. U.S. assistance to Latin American governments combating internal drug traffickers continued through May 2008, when Bush asked Congress for \$500 million in military assistance to aid Mexico in its battle against drug trafficking. Bush traveled down a new path

on October 2, 2005, when he lifted a three-year ban on 21 Latin American countries from receiving U.S. military aid and training to nations that refused to exempt U.S. soldiers from war crimes trials. The ban had little impact on the Latin Americans' purchase of military supplies in the international market, including arms. Just how the policy change impacted on U.S. military sales is difficult to determine because precise figures for military hardware sales to Latin America after 2003 under the Foreign Military Sales (FMS) and Direct Commercial Sales (DCS) programs are difficult to ascertain, but from 2005 to 2008, an estimated 3,321 Latin American soldiers received training in the United States in a wide range of antiguerrilla tactics, including counterintelligence and helicopter repair. This aid has been directed at the military in countries with large indigenous movements that publicly oppose economic neoliberalism, including Brazil, Colombia, Ecuador, El Salvador, Nicaragua, and PARAGUAY. While most Latin American analysts see these movements as a response to local economic conditions, Bush did not. Critics also note that these activities have increased the Pentagon's influence in foreign policy decision making.

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**U.S. trade reciprocity agreements (1930s)** In the 1930s, a series of bilateral TRADE agreements between the United States and Latin American countries were signed. By the time Franklin D. Roosevelt took the presidential oath of office on March 4, 1933, U.S. trade with Latin America had declined drastically; since 1929, exports had fallen by 78 percent in value and imports by 68 percent. The 1930 Smoot-Hawley Tariff exacerbated the problem by raising the tariffs on imports. Other governments were equally nationalistic during

the Great Depression, initiating currency restrictions, import quotas, barter agreements, and higher tariffs. In 1934, U.S. secretary of state Cordell Hull gained support from Assistant Secretary of State Adolf A. Berle and Secretary of Commerce Henry A. Wallace to seek trade reciprocity agreements with Latin American nations with the aim of boosting the post-depression ECONOMY in the United States. At the Seventh International Meeting of American States from December 3 to 26, 1933, in Montevideo, Uruguay, Hull secured a resolution calling for trade liberalization policies, including the negotiation of reciprocal trade agreements. At home, in June 1934, Congress granted the State Department authority to negotiate such treaties, while the president could raise or lower tariff duties by 50 percent and move goods onto and off the duty-free list.

Latin America fitted neatly into the plan because it did not have a competitive industrial sector, nor did its major exports (flaxseed, cane sugar, cacao, castor beans, bananas, crude rubber, manganese, bauxite, and platinum) compete with U.S. commodities. In addition, the majority of Latin American exports to the United States were already admitted under the terms of the most-favored-nation status. By comparison, the United States could be the chief supplier of manufactured goods to Latin America. In sum, the former had the dominant negotiating position. Latin America's larger countries, such as ARGENTINA, BRAZIL, and CHILE, whose economies were more oriented toward Europe, shied away from negotiating trade reciprocity agreements with the United States. At the other extreme were the circum-Caribbean countries, whose primary exports of bananas, cane sugar, tobacco, and tropical fruits had already entered the United States under most-favored-nation status and whose underdeveloped economies did not generate sufficient wealth to purchase significant quantities of U.S. manufactures.

One indirect result of the treaties was to legitimize the status of regional dictators, including GUATEMALA'S JORGE UBICO Y CASTAÑEDA, NICARAGUA'S ANASTASIO SOMOZA GARCÍA, and COLOMBIA'S LAUREANO GÓMEZ. Thus, while the reciprocal trade treaties did not contribute very much to the revitalization of U.S. INDUSTRY, they did serve the personal purposes of Latin American dictators.

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**Vargas, Getúlio Dornelles** (b. 1882–d. 1954) *president and dictator of Brazil* Born into a prominent family with good political connections, in São Borja in the southern border state of Rio Grande do Sul, Getúlio Dornelles Vargas became one of BRAZIL's most influential politicians. On completing his education in local schools, he followed in his father's footsteps and joined the MILITARY but resigned in 1907 to study law in Pôrto Alegre. Three years after his graduation, in 1911, he was elected to the state's legislature, which was under the complete control of Governor Borges de Medeiros (b. 1863–d. 1961). As Vargas learned in 1912, not even the slightest criticism was tolerated. For so doing, he was barred from reelection for five years and would be readmitted only after he had demonstrated sincere contrition and sworn allegiance to the state's political boss. Vargas gained national prominence during the 1920s as a congressman and head of the delegation from Rio Grande do Sul. In 1926, President Washington Luís Pereira de Sousa (b. 1869–d. 1957) appointed him finance minister. Two years later, Vargas bested incumbent Medeiros in Rio Grande do Sul's gubernatorial election.

Vargas sought the presidency in 1930 as the candidate for the Liberal Alliance, a coalition that the Republican Party and other dissidents had formed to oppose to the traditional elite. Vargas also gained support from the *tenentes* (army lieutenants) and their civilian followers, who clamored for political and social change. Vargas's support base lay in the urban areas but was ultimately insufficient to outmaneuver the rural elite. Júlio Prestes (b. 1882–d. 1946) won the election on March 1, 1930. Although Vargas appeared to accept his fate, he quietly authorized his supporters to plan a revolution. It came

on October 3, 1930, and within three weeks, the rebels controlled most of the coastal states. Outgoing president Luís capitulated, and on November 3, Vargas became head of a provisional government for an unspecified time and without limitation on his authority.

Vargas moved quickly to consolidate his power by suspending the 1891 constitution, dismissing the judiciary and the National Congress, and replacing elected state governors with intervenors answerable only to him. A new military command structure ensured that officers remained loyal to the defense and navy ministers appointed by Vargas. To garner popular support, Vargas created the Ministries of Education and Labor, though in reality the government lacked the financial resources to address educational and LABOR-related issues. In effect, Vargas emerged as Brazil's undisputed dictator.

Vargas attempted to address the devastating impact of the Great Depression on Brazil's agro-export-based ECONOMY by cutting domestic taxes and import duties and lowering import quotas. Even so, as an economic nationalist, he favored protective tariffs to secure home-grown industries.

Vargas's political high-handedness and the continuing depression caused opposition to him to emerge, which found expression in a three-month-period of protest known as the Constitutional Revolution of 1932. As it fizzled, Vargas took steps to ensure his own position. On July 16, 1934, a new constitution was promulgated, and on July 17, 1934, Vargas was selected by the constituent assembly to be the first president under the new document. Constitutionally ineligible to seek reelection in 1938, Vargas and his colleagues manufactured a communist threat that led to the pronouncement of yet another constitution on November 10, 1937.



Known as ESTADO NOVO (New State), the government under the new constitution was a dictatorship. Congress and the judiciary were disbanded, civil rights were suspended, the state took control of the media, and the military was authorized to suppress all subversion. Rather than stand aside in the scheduled 1943 presidential election as promised, Vargas used World War II to justify his declaration of a state of siege and thus remain in power. As the war drew to an end in 1945, the public, stirred on by the Allies' democratic ideals, demanded that Vargas leave office. Concerned that Vargas might be quietly maneuvering to stay on, in October 1945, a group of army officers recently returned from the Italian battlefront deposed Vargas and installed a provisional government. Vargas, however, did not disappear. He was elected to the Senate in the December 1945 elections.

Despite his dictatorial rule and the fascist ideology of Estado Novo, Vargas was decidedly pro-Allies during World War II (see WORLD WAR II AND LATIN AMERICA). Brazil entered the war on August 22, 1942, and in 1944, a Brazilian expeditionary force fought with the Allies in the Italian campaign. Vargas also benefited from U.S. wartime assistance, using U.S. funds to construct the nation's first steel plant, a base for future industrialization. He also laid the foundations of a corporate state by establishing national control over the automotive and hydroelectric power industries. The 1943 labor code permitted the establishment of unions under government auspices.

Vargas returned to the presidency on January 31, 1951, following a successful campaign as the candidate of the Brazilian Worker's Party (Partido Trabalhista Brasileiro, or PTB). However, he inherited a more democratic Brazil, as illustrated by the divided Congress. He also inherited an economy ravaged by inflation. From the start of his administration, Brazil's traditional rural elite and conservative military officer corps distrusted him. To satisfy his labor support base, Vargas declared a 100 percent pay increase for blue-collar workers on May 1, 1954. This set opposition to him in motion, and he was eventually charged with graft, corruption, and undefined criminal activities. Under these circumstances, the military demanded his resignation. Vargas answered by committing suicide on August 24, 1954, leaving a legacy that included initiating Brazil's industrialization and rights for urban labor.

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**Velasco Ibarra, José María** (b. 1893–d. 1979) *president of Ecuador* Born into a middle-class family in Quito, ECUADOR, José María Velasco Ibarra received his early education in the capital city, then undertook postdoctoral studies at the Sorbonne in Paris, France. He held several jobs after his return home in 1920, including as the editorial writer Labriolle for Quito's leading newspaper. He used his column to attack Ecuador's elitist government and corrupt politicians and called for the implementation of democracy. Velasco Ibarra was elected to the National Congress in 1932 and a year later became president of the Chamber of Deputies. After Congress voted to depose Liberal Party president Juan de Dios Martínez Mera (b. 1875–d. 1955) for participating in alleged electoral fraud, Velasco Ibarra became Ecuador's president on September 1, 1934. His term lasted only 11 months. When the Conservative Party blocked his legislative program, Velasco Ibarra attempted to rule as a dictator, and the MILITARY removed him from office on August 21, 1935. Political turmoil characterized Ecuadorean politics for the remainder of the decade.

Liberal Carlos Alberto Arroyo (b. 1893–d. 1969) won the fraudulent 1940 presidential elections but became increasingly unpopular because of government repression and the ceding of land to PERU in the 1942 border dispute settlement. A bloody revolt on May 28, 1944, forced his resignation and three days later led to Velasco Ibarra's appointment as president. Initially, Velasco Ibarra drew support from a number of political parties, save his own Liberals. His most important accomplishment was the convening of a constitutional convention in 1946, which ratified Velasco Ibarra's tenure in office until 1950. He did not complete his term, however. A military coup on August 23, 1947, ousted Velasco Ibarra, who again left the country. Velasco Ibarra returned to win the presidency in 1952 and, this time, he completed his full term.

Constitutionally ineligible to succeed himself in 1956, Velasco Ibarra waited until the May 20, 1960, presidential election to seek another term in office. When he began to show signs of support for FIDEL CASTRO RUZ'S CUBAN REVOLUTION and at the same time proposed tax increases on the elite, the traditional Conservative and Liberal Parties turned to the military to oust Velasco Ibarra on November 7, 1961. Velasco Ibarra was again inaugurated president on September 1, 1968, for the fifth and final time. After he disbanded Congress on July 22, 1970, and replaced the 1967 constitution with that of 1946, he engaged in a power struggle with the military that resulted in his ouster from office on February 15, 1972.

Velasco Ibarra's charismatic style and effectiveness as an orator captured the imagination of Ecuador's poor, whose problems he appeared to understand. Nevertheless, he lacked the support of key political actors, who were needed to sustain his presidencies. After his final removal from office, Velasco Ibarra moved to ARGENTINA, where

he resided until March 1979, when he returned to Quito to bury his wife. Two weeks later on March 30, 1979, at age 86, he died of pulmonary disease.

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**Venetiaan, Ronald** (b. 1936– ) *president of Suriname* Born on June 18, 1936, in Paramaribo, SURINAME, Ronald Venetiaan earned a doctorate in mathematics from the University of Leiden, in the Netherlands, in 1964. He returned to Suriname after graduation and taught mathematics at the University Preparatory and Teacher Training College. In 1973, Prime Minister HENCK ARRON appointed Venetiaan minister of education. Venetiaan returned to teaching following the 1980 MILITARY coup led by DÉSI BOUTERSE that overthrew the civilian government. In 1987, he was elected chairman of the advisory board of the Suriname National Party (NPS). Following the return to civilian government in 1988, Venetiaan was renamed minister of education. Notwithstanding the 1990 military coup, Venetiaan remained minister of education until 1991.

Venetiaan, the leader of the New Front coalition (which included the NPS), won the democratic elections held on May 25, 1991. He promptly replaced Bouterse, who had become the commander in chief of the armed forces. Venetiaan also ended six years of civil war that had been unleashed by disgruntled Maroons in 1986. Although Venetiaan won the 1996 elections by a slight majority, he did not have the necessary two-thirds vote required to be president. Jules Wijdenbosch (b. 1941– ), representing Bouterse's National Democratic Party (NDP), was able to form a coalition government and be elected. Widespread strikes over economic difficulties broke out in 1999, forcing Wijdenbosch to call for early elections. Wijdenbosch's coalition collapsed, and Venetiaan returned to power in 2000. Venetiaan's fiscal austerity and currency reform programs have restored economic stability.

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**Venezuela** Venezuela is located on the northeastern coast of South America bordered by the Caribbean Sea and the North Atlantic Ocean; to its west lies COLOMBIA, and to its south, GUYANA and BRAZIL. Venezuela totals 352,143 square miles (912,046 km<sup>2</sup>), including 11 federally controlled island groups with a total of 72 individual islands. Venezuela's terrain is marked by the Andean highlands and Maracaibo lowlands in the northwest, the Guiana Highlands in the southeast, and the central plains. Venezuela is approximately twice the size of California and with slightly more than 26 million inhabitants is the sixth most populous country in Latin America. Eighty-five percent of the people reside in urban areas in Venezuela's northern sector. The population is a combination of European, indigenous, and African heritage. While the country is noted as one of the world's major oil producers, it is also rich in natural gas, coal, iron ore, bauxite, and other minerals and produces hydroelectric power.

On August 1, 1498, during his third voyage to the New World, Christopher Columbus became the first European to set foot on South American territory, near the mouth of the Orinoco River. Because it did not appear to possess mineral ores or the large Amerindian civilizations that attracted the Spanish to other parts of the New World, much of what is Venezuela today remained unexplored by Spanish conquistadores. Over time, CARACAS became a center of the cacao TRADE, but little more. Only in 1777 did Venezuela become a captaincy general, and in 1786 it was named an *audiencia* within the Viceroyalty of New Granada. As elsewhere in Latin America, Venezuela gained its independence from Spain only slowly. The process began on April 19, 1810, when the *cabildo* (town council) at Caracas refused to recognize Joseph Bonaparte as ruler of the Spanish Empire, then declared independence from Spain on July 5, 1811, and was completed at the Battle of Carabobo on June 24, 1821. For the next nine years, Venezuela was part of the Gran Colombian nation that also included Colombia and ECUADOR. A rebellion led by José Antonio Páez resulted in Venezuela's leaving the confederation on January 13, 1830, with Páez serving as the first president of the new nation for 16 years, after which the Liberal-Conservative struggle that characterized all Latin American countries in the 19th century resulted in a series of caudillo (political strongman) administrators.

As the 20th century began, General Cipriano Castro occupied the presidential palace. His nine years of despotic and brutal rule are best known for provoking foreign interventions. By 1902, Venezuela had accumulated significant debt with European banks, particularly in Britain and Germany. Castro refused to arbitrate the dispute, and the United States acquiesced, hence in December 1902, the two European powers dispatched gunboats to blockade the Venezuelan coast for two months before Castro capitulated and agreed to arbitration. The International Court at the Hague arbitrated a final settlement in 1904.

### THE GÓMEZ YEARS, 1908–1935

On December 19, 1908, General JUAN VICENTE GÓMEZ ousted Castro when he was in Europe for medical treatment. Gómez, often described as Venezuela's last caudillo, governed the country for 27 years until his overthrow in 1935. The MILITARY was his major support, while a compliant legislature wrote six new constitutions to extend his tenure. If political opponents did not go into exile, they found themselves incarcerated under intolerable conditions and subject to brutal torture that often resulted in death. Gómez's methods earned him the title "Tyrant of the Andes."

Because Gómez viewed Venezuelans as a primitive mixed-raced people, as opposed to "pure" people, he believed that the country's economic development could be completed only by foreigners with their superior technological and management skills, who needed a stable political environment in which to work. Initially, Gómez benefited from the high global demand for coffee, but beginning in 1918, increased oil production provided the state with unprecedented wealth that enabled Gómez to pay off Venezuela's foreign debt and institute a public works program. Because the oil INDUSTRY is capital intensive, rather than labor intensive, it did little for the Venezuelan LABOR movement but did contribute to the nation's urbanization and to the growth of the middle class. Through corruption and skimming from its income, Gómez and his closest advisers benefited most from the oil industry. In the 1920s, agricultural productivity declined and, coupled with the influx of oil money, led to high inflation, which adversely affected middle- and lower-income groups. Real wages and purchasing power declined.

Public protests against Gómez began in 1928 and continued until his death seven years later. The most significant demonstrations occurred on April 11–15, 1928, when university students took to the streets in Caracas, only to be repressed by the military. Student leaders such as future presidents RÓMULO ERNESTO BETANCOURT BELLO, Raúl Leoni (b. 1905–d. 1972), and Rafael Caldera Rodríguez (b. 1916– ) escaped into exile, while hundreds of others were arrested and jailed, and countless were killed and injured. Gómez's dictatorship finally came to an end with his death on December 17, 1935. Although Venezuela would again experience dictatorial rule, most analysts agree that Gómez's death marked the end to *caudillismo* and the beginning of Venezuela's slow transition to democratic rule.

Gómez's two immediate successors, Generals Eleazar López Contreras (b. 1883–d. 1973) and Isaías Medina Angarita (b. 1897–d. 1953), governed through a tumultuous decade. As might be expected after a long period of dictatorial rule, several new POLITICAL PARTIES emerged, mostly on the left, such as the National Democratic Party (Partido Democrático Nacional, or PDN) and the Democratic Action (Acción Democrática, or AD) party. Greater freedom of expression resulted in labor

demands for wage increases and the establishment of the Federation of Chambers of Commerce and Industry, which exerted influence over government economic development policies.

With regards to potential oil wealth, President Medina adopted the "50/50" principle, meaning that oil company profits could not exceed the amount of monies going to the state. This principle found expression in the 1943 Hydrocarbons Act, which placed a tax on the income the oil companies earned from their downstream operations, such as gasoline refining, fertilizer production, printing ink, and, subsequently, plastics. In return, the oil companies received full concession rights to extract all oil possible for a 40-year period. The act was the first step in the process of nationalizing Venezuela's oil industry.

Sources of discontent existed. Within the military, a group of younger officers dissatisfied with the lack of professionalism and the cronyism among the upper ranks formed a secret lodge, the Patriotic Military Union (Unión Patriótica Militar, or UPM) that, in turn, formed an alliance with the AD to oust Medina from the presidency on October 18, 1946, and pave the way for the presidency of AD leader Betancourt Bello. Still, democracy had not been secured. Beginning with Betancourt, over the next 14 years, Venezuela had seven presidents, including the brutal dictator MARCOS PÉREZ JIMÉNEZ, who held power from December 2, 1952, to January 25, 1958. Benefiting from ever-increasing petroleum monies, Pérez Jiménez undertook large construction projects that mostly stood as monuments to himself, such as luxurious hotels and an imitation of New York City's Rockefeller Center, while government expenditures on EDUCATION and health care stagnated. Government corruption was so rampant that when Pérez Jiménez left office in 1958, he reportedly took with him an estimated \$250 million. Two caretaker governments followed, until elections were held on December 2, 1958, and Betancourt was returned to the presidency.

### DEMOCRATIC VENEZUELA, 1958–1998

In retrospect, historians mark the Betancourt administration as Venezuela's turning point from military-elite leadership to a more representative democratic government with a peaceful transfer of power between elected civilian presidents. Nevertheless, the facade of democracy did not cover over the plight of the larger Venezuelan population.

Under Betancourt's tutelage the AD factions agreed to cooperate rather than fight with each other as they had in the past, and to be more flexible in their approach to politics. AD reached out to the Social Christian Party (COPEI) in signing the Pact of Punta Fijo on October 31, 1958, under which the two parties agreed to share cabinet positions and the control of state institutions regardless of who won the elections, an agreement that effectively shut other parties out of Venezuela's political

arena. Benefiting from oil profits, the two parties satisfied the needs of their major constituencies at the expense of the poor and marginalized communities represented by smaller political parties. Over time, the system became corrupt as AD and COPEI attempted to hold on to power.

The military was the first beneficiary of the new system. Most important at the time was the amnesty granted to all military personnel who could be charged with crimes committed during the many years of previous military dictatorship. The military also received immediate pay increases, better housing, and modern equipment, benefits that continued over time and that kept the military from intervening in political affairs. The CATHOLIC CHURCH, which had vehemently opposed the Pérez dictatorship, was able to expand its influence during the Betancourt and succeeding administrations.

AD and COPEI also agreed to an economic development plan. Private property rights were protected, and compensation would be provided for any expropriated for agrarian reform purposes. Local industries received tax benefits to protect themselves from foreign competition and financial assistance through the newly created state agency, the Venezuelan Development Corporation. Labor unions gained the right to collectively bargain for wage increases and other benefits. Again, owing to its oil wealth, the state invested heavily in food programs, housing, and health care. Finally, a new constitution in 1961 enhanced presidential powers at the expense of the national legislature. Clearly, Betancourt had set out to institutionalize Venezuela's newfound democracy, or as one analyst put it, "to institutionalize a prolonged truce." Until 1989, Betancourt's successors continued and expanded the reform programs.

Venezuela's economic growth and social programs were predicated upon profits from petroleum exports. In 1960, the Venezuelan Petroleum Corporation (CVP) was established to oversee that industry. That same year, Venezuela became a founding member of the Organization of Petroleum Exporting Countries (OPEC), a nascent cartel that would dominate the global oil market and greatly influence the price for crude oil during the 1970s and 1980s. The Arab-Israeli war of 1971 and OPEC's manipulation of production and price increases triggered a steep increase in Venezuela's oil profits, which enabled the government to continue its development and social programs.

On December 9, 1973, CARLOS ANDRÉS PÉREZ won the presidential election with 48.8 percent of the popular vote. Together, AD and COPEI gained control of the national legislature. With this mandate, Pérez set course on an aggressive economic policy that enabled the Venezuelan government to nationalize, with compensation, U.S. firms mining iron ore in the Guiana Highlands and 14 foreign-owned oil operations. In 1976, the oil industry became the province of the Venezuelan Petroleum Corporation (PDVSA), a government agency.

The increased wealth enabled Pérez to expand the country's industrialization process. Wage increases were decreed for labor, and the public employment rolls doubled during the Pérez administration. Subsidized price controls encouraged the excessive purchase of foreign-made consumer goods, ranging from televisions to automobiles, from clothing to foodstuffs. In the process of economic expansion, government corruption became more prevalent. The economic downside of the spending spree was increased inflation and government debt and an unfavorable balance of TRADE. For Venezuela, the oil boom of the 1970s became the oil crisis of the 1980s as the global price for oil collapsed. Three successive presidents, including Pérez, who returned to office on February 2, 1989, failed to improve the situation.

### THE HUGO CHÁVEZ ERA

Opposition to the AD-COPEI 1958 Pact of Punta Fijo arose immediately after its signing. Protest groups and fringe political parties played on the plight of the poor. Most notable during the 1960s and 1970s were guerrilla organizations that received support from FIDEL CASTRO Ruz in CUBA. In addition to the government's aggressive military policy against guerrillas, ERNESTO "CHE" GUEVARA's death in 1967 contributed to Castro's reassessment of his support for revolutionary movements in Latin America. Whatever the reasons, Venezuela's guerrilla movements subsided after 1967. In their place, new leftist political groups and parties emerged in the 1970s, such as the Movement Toward Socialism (Movimiento al Socialismo, or MAS), Movement of the Revolutionary Left (Movimiento de la Izquierda Revolucionaria, or MIR), and the People's Electoral Movement (Movimiento Electoral del Pueblo, or MEP), which drew their support from the poor and marginalized sectors that did not benefit from the oil prosperity.

When Pérez returned to the presidency at the beginning of 1989, he initiated a neoliberal economic austerity program that included a reduction in government-subsidy programs for basic goods and services; it had the largest impact on the poor. The military suppressed the demonstrations that followed, a move that only further infuriated the populace. Pérez survived two coup attempts in 1992, including one by an unknown military officer, HUGO RAFAEL CHÁVEZ FRÍAS, who received a two-year prison sentence for his action. Pérez, however, did not survive the pressure that stemmed from the corruption charges against him. He resigned the presidency on May 21, 1993. Two interim presidents followed until the general election of December 9, 1993, that sent Caldera back into the president's office, but he was unable to cope with the magnitude of the problem. By 1998, nearly 75 percent of Venezuelan people lived in poverty.

As the candidate of the newly founded Fifth Republic Movement (Movimiento V [Quinta] República, or MVR), Chávez was elected Venezuelan president on December 9, 1998, with promises to break with the past through a new

constitution, which Venezuelans approved on December 8, 1999. The new document promised agrarian reform, health care, education, housing, and a social security program for all. It also provided for the direct election of a president by a plurality of vote, with all people having suffrage. Chávez won the presidential election on July 30, 2000, with MVR and MAS support. The two parties also gained control of the unicameral legislature.

Opposition to Chávez was immediate and intensified until April 11–13, 2002, when mass demonstrations in Caracas led to a coup attempt and his temporary resignation until a group of loyal military officers put down the rebellion and restored him to the presidency. The persistent opposition resulted in a national work stoppage from December 2, 2002, until February 17, 2003. The political turmoil continued with a national petition calling for a referendum on Chávez's recall; it was held on August 15, 2004. Again, Chávez survived and went on to win a second presidential election on December 3, 2006. His effort to tighten his grip over government by amending the 1999 constitution to provide for greater executive authority at the expense of the legislature and the courts failed in a national referendum on November 29, 2007.

The reasons for Chávez's unpopularity are many. The traditional elite and middle sector scoff at his power grab, at the expense of democracy as Venezuelans know it. His promises to reach out to the poor have gone largely unmet. Venezuela remains a country of significant wealth disparity, with nearly 70 percent of the population unemployed or underemployed. Chávez has squandered the nation's oil wealth on modern military equipment and foreign policy gifts for other underdeveloped countries in the hemisphere, such as Cuba and BOLIVIA. And his debunking of the United States and effort to thwart U.S. presence in Latin America has met with mixed reactions at best.

See also CASTRO, CIPRIANO (Vol. III); CAUDILLO (Vol. III); CONSERVATISM (Vol. III); GRAN COLOMBIA (Vol. III); LIBERALISM (Vol. III); NEW GRANADA, VICEROYALTY OF (Vol. II); PÁEZ, JOSÉ ANTONIO (Vol. III); VENEZUELA (Vols. I, II, III).

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**Vieques Island** Vieques Island is a 63-square-mile (163-km<sup>2</sup>) island municipality that lies 10 miles (16 km) northwest of PUERTO RICO in the Caribbean Sea. It gained international notoriety in the early 21st century as a bomb-training site for the U.S. Navy. This sparsely populated island was home to ancient NATIVE AMERICANS between 3000 B.C.E. and 2000 B.C.E. and had an estimated population of 9,000 in 2000. Christopher Columbus claimed the island for the Spanish, but Vieques remained a lawless outpost, home to pirates and outlaws throughout most of its colonial history. The island was formally annexed to Puerto Rico in 1854. In the latter part of the 19th century, black Caribs, mostly from St. Thomas, Nevis, St. Christopher, and St. Croix, migrated to the island, and today, their descendants play an important role in the island's ECONOMY and society.

The United States acquired the island, along with Puerto Rico, in the 1898 Treaty of Paris, which ended the Spanish-American War. During World War II, the U.S. Navy purchased about two-thirds of Vieques as an extension of Roosevelt Roads Naval Station on Puerto Rico (see WORLD WAR II AND LATIN AMERICA). After the war, the U.S. Navy continually used its portion of the island for military exercises and a firing range for bombs, missiles, and other weapons. With the approach of the 21st century, Puerto Rican protests intensified against the continued use of the island as a bombing range, but not until the killing of Vieques native David Sanes (b. 1954–d. 1999) on April 19, 1999, did the protests draw international attention and that of U.S. politicians. The navy withdrew from Vieques in 2003 and from Roosevelt Roads a year later. Both closings contributed to unemployment on the main island and on Vieques. Today, the former naval property is administered by the U.S. Fish and Wildlife Service.

See also VIEQUES ISLAND (Vol. III); WAR OF 1898.

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**Villa, Francisco (Pancho Villa; José Doroteo Arango Arámula)** (b. 1878–d. 1923) *Mexican revolutionary leader* Francisco (Pancho) Villa was one of the most colorful and disputed personalities of the MEXICAN REVOLUTION. Considered by many to be nothing more than a bandit, to others he was a heroic defender of the poor and exploited.

Villa was born José Doroteo Arango Arámula on an hacienda in the state of Durango in 1878. Stories

say that as a teenager he attacked a landlord who had raped his sister. He fled the hacienda, changed his name to Francisco Villa (*Pancho* is the diminutive of *Francisco*), and lived as a bandit for more than a decade. In 1910, he joined the revolutionary movement initiated by FRANCISCO MADERO and played a prominent role in the Battle of Ciudad Juárez, which ultimately forced the dictator Porfirio Díaz into exile.

Villa remained a loyal supporter of Madero, who was elected president in 1911. After Madero was removed from office and executed by VICTORIANO HUERTA, Villa joined the Constitutionalist alliance with VENUSTIANO CARRANZA and helped lead a nationwide uprising against the Huerta dictatorship from 1913 to 1914. During that time, Villa used the U.S. media to gain recognition and support in the United States. The Mutual Film Corporation sent a camera crew to film footage of Villa's revolution and produced the feature-length film *The Life of General Villa*. After deposing Huerta, a rift developed between Villa and Carranza, and the two fought each other in a bloody

civil war for several years. In 1916, Villa led a raid into Columbus, New Mexico, killing dozens of U.S. citizens. In retaliation, the U.S. government sent General John J. Pershing on an expedition to capture Villa. Pershing's expedition was unsuccessful, Villa's forces were already faltering. The battle-worn leader went into retirement on a large hacienda in Chihuahua in 1920.

Even in retirement, Villa was considered a threat to the national leadership. The revolutionary leader was assassinated in Parral, Chihuahua, on July 23, 1923.

See also DÍAZ, PORFIRIO (Vol. III).

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**Violencia, La** See COLOMBIA.



**Wasmosy, Juan Carlos** (b. 1938– ) *president of Paraguay* Born and educated in Asunción, PARAGUAY, Juan Carlos Wasmosy was trained as a civil engineer. While serving as the head of the Paraguayan consortium that built the Itaipú Hydroelectric Dam between 1973 and 1984, Wasmosy amassed significant wealth. As the handpicked successor to Colorado president Andrés Rodríguez, Wasmosy won the May 9, 1992, presidential election. Wasmosy's popularity quickly dwindled when he appointed to government posts longtime supporters of dictator ALFREDO STROESSNER and did not continue the Rodríguez reform programs. Wasmosy survived an attempted military coup d'état in 1996, directed by General Lino Oviedo (b. 1943– ), thanks to the diplomatic maneuvering of U.S. president William J. Clinton. Four years after leaving office in 2002, Wasmosy was convicted of defrauding the Paraguayan government and sentenced to a four-year jail term.

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**West Indies Federation (WIF)** (1958–1962) The West Indies Federation (WIF) was a short-lived alliance of several British colonies into a single political unit that would eventually become independent of Great Britain. Britain's Colonial Office had a long history of proposing various schemes to unify some or all of the Caribbean islands into a collective unit, but these all ran afoul of local opposition (see CARIBBEAN, BRITISH). Established on January 3, 1958, the WIF brought together 14 major

Caribbean islands, plus 220 uninhabited minor islands, islets, and cays. Spread out over 7,800 square miles (20,202 km<sup>2</sup>) the major islands included ANTIGUA AND BARBUDA, the BAHAMAS, BARBADOS, Cayman Islands, DOMINICA, GRENADA, JAMAICA, Montserrat, SAINT CHRISTOPHER AND NEVIS, SAINT LUCIA, SAINT VINCENT AND THE GRENADINES, TRINIDAD AND TOBAGO, and the Turks and Caicos Islands.

A governor general was appointed to represent Queen Elizabeth II, and a government was set up at Port of Spain, Trinidad and Tobago, under a prime minister, the first being Grantley H. Adams (b. 1898–d. 1971) of Barbados. In consultation with the state governors, the governor general appointed a 19-member Senate, while the House of Representatives had 45 elected members.

From the start, the federation was beset with dissension. Despite the Caribbean-wide call for independence, not all member states approved the WIF charter, including the two most populous states, Jamaica and Trinidad and Tobago. The central government could not function smoothly, given the insular interests of its membership. Antifederation movements in Jamaica and Trinidad and Tobago doomed the enterprise to failure. As these two larger and more prosperous members moved toward their independence from Britain, the West Indies Federation disintegrated and officially dissolved with the British Parliament's passage of the West Indies Act on May 31, 1962. The experience left the Caribbean leaders with the recognition that economic unity was a necessary first step to political unity (see CARIBBEAN COMMUNITY AND COMMON MARKET; CARIBBEAN FREE TRADE ASSOCIATION).

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**West Indian labor force** See PANAMA; PANAMA CANAL, CONSTRUCTION OF.

**Williams, Eric** (b. 1911–d. 1981) *prime minister of Trinidad and Tobago* Born on September 25, 1911, in Port of Spain, Trinidad, Eric Williams was the son of a Trinidadian postal employee. He earned a Ph.D. in history from Oxford University in 1938 after completing his doctoral dissertation, “The Economic Aspect of the West Indian Slave Trade and Slavery.” Williams accepted a tenure-track position at Howard University in 1939, becoming a full professor in 1947. He worked for the Anglo-American Caribbean Commission, an organization created to examine political and economic developments in the postwar Caribbean, in Washington, D.C., from 1948 to 1955. Williams returned to TRINIDAD AND TOBAGO to establish his own political party, the People’s National Movement (PNM), in 1956. His party served as the political vehicle for Afro-Trinidadians, who had previously lacked significant political organization.

In 1956, the PNM won the parliamentary elections, and Williams became chief minister and subsequently premier in 1959 when the United Kingdom granted Trinidad and Tobago greater self-autonomy. Trinidad and Tobago joined the short-lived WEST INDIES FEDERATION in 1958. The two largest entities in the 10-nation federation of English-speaking territories in the Caribbean were JAMAICA and Trinidad and Tobago. Williams and his Jamaican counterpart, however, had vastly different ideas about how the federation should function. Williams wanted a strong federal government with representation based on financial contribution to the federation. Jamaica, however, preferred a weak federal government and representation based on population. In September 1961, Jamaica left the federation. Williams, unwilling to remain in the federation and become financially responsible for the eight small, poor islands that made up the rest of the federation’s membership, and convinced that the federation would delay independence, subsequently removed Trinidad and Tobago from the federation. In the December 1961 parliamentary elections, the PNM won 57 percent of the popular vote and 20 of the 30 seats in the Legislative Assembly.

The United Kingdom granted Trinidad and Tobago independence on August 31, 1962, and Williams became the nation’s first prime minister. Following independence, Queen Elizabeth II was the titular head of state, while the leader of the majority party was the prime minister. In

1976, however, Trinidad and Tobago became a republic, and Ellis Clarke (b. 1917– ), the last governor general, was elected president, largely a symbolic position, by the parliament. Williams supported greater economic integration in the Caribbean. In 1967, Trinidad and Tobago became the first commonwealth nation to join the ORGANIZATION OF AMERICAN STATES (OAS). Although Williams maintained diplomatic relations with CUBA, he consistently pointed out the superiority of the capitalist system over the socialist one. During the 1970s, the international oil crisis benefited the nation’s ECONOMY. After Williams died in office on March 29, 1981, the PNM, led by George Chambers (b. 1928–d. 1997), continued to rule until 1986. Williams, a prolific writer and scholar, published dozens of books, articles, and essays during his lifetime.

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**women** At the dawn of the 21st century, the majority of Latin American women reside in urban, not rural, areas. On average, they have two to three more years of schooling than men do. Their lives have become more secular thanks to global communications and greater autonomy and mobility. Still, the cultural stereotype persists of a devout Catholic, subject to male dominance and tied to home, FAMILY, and menial tasks. Reality belies that stereotype.

In the 19th century, elite women such as Peruvian Clorinda Matto de Turner and Argentine Mariquita Sánchez (b. 1786–d. 1868) engaged in literary discussion and became the center of the *bellas artes* (fine arts). Their efforts set the stage for early 20th-century writers, such as Brazilian Patrícia Galvão (Pagu) (b. 1910–d. 1962), who defied acceptable norms and spoke out in defense of workers’ rights. Women gradually entered the public arena. Until World War II, they had won the right to vote in only five countries—BRAZIL, CUBA, ECUADOR, EL SALVADOR, and URUGUAY—and this tended to be for political reasons rather than a desire for gender equality. In the post–World War II period, MARÍA EVA DUARTE DE PERÓN symbolized both the triumph and the hope of women everywhere. She rose from an obscure background to become the first lady of ARGENTINA, with her own political ambitions, before her death at age 33. Starting in 1942, women’s right to vote spread across



Latin America until 1961, when PARAGUAY became the last state to institute woman suffrage. Since then, women have entered the local, regional, and national political arenas. In 1986, Rose Marie Karpinsky became the first female president of COSTA RICA's legislative assembly. In the early 21st century, Michelle Bachelet (b. 1951– ) and Cristina Fernández de Kirchner (b. 1953– ) serve as the presidents of CHILE and Argentina, respectively. Other women received notoriety for supporting revolutionary agendas, such as Peruvian Magda Portal (b. 1901–d. 1989), a founder of the AMERICAN POPULAR REVOLUTIONARY ALLIANCE, and Cecilia Sánchez (b. 1920–d. 1980), confidante of Cuba's revolutionary leader, FIDEL CASTRO RUZ. Women also came to the forefront in mass urban protests over food shortages, inflation, and civil and HUMAN RIGHTS violations. For example, in Argentina women pressed for government accountability for the more than 10,000 estimated “disappeared ones” during the DIRTY WAR. In contrast, in countries with large indigenous populations, such as GUATEMALA, ECUADOR, and BOLIVIA, women's roles and lifestyles remain closer to the traditional image, although there are prominent exceptions, such as RIGOBERTA MENCHÚ TUM, who received the Nobel Peace Prize in recognition for her work in rights for NATIVE AMERICANS.

Until the Liberal movement gripped Latin America in the late 19th century, women's EDUCATION remained the domain of CATHOLIC CHURCH institutions. The Liberals' implementation of public education broadened and strengthened the movement to educate both men and women from all social sectors. Educational reforms were most successful in societies with more homogenous populations, such as Argentina, Chile, and Uruguay, and least successful in mixed or nonwhite societies, such as Bolivia, Brazil, Cuba, Ecuador, Guatemala, and MEXICO. Not until after World War II, and particularly after the CUBAN REVOLUTION of 1956–61 and the ALLIANCE FOR PROGRESS, did the desire for female education take hold in Latin America. While literacy campaigns for the poor received the most public attention, the door opened for women to train in professions including architecture, computer science, engineering, medicine, and business management. Despite educational advances, Latin American women continue to earn less and advance more slowly in the workplace than men do, and the globalization of the ECONOMY has made these differences more apparent. Women dominate employment in the various low-wage assembly industries along the Mexico-U.S. border and in the DOMINICAN REPUBLIC, BELIZE, COSTA RICA, Guatemala, and HONDURAS (see MAQUILADORA). The fast-growing tourist INDUSTRY employs women as hotel clerks, tourist guides, cooks, maids, and waitresses. Women also work in cash-paying LABOR such as picking and packaging agricultural products for shipping abroad. Public awareness of these discrepancies, along with the plight of the poor, are the focal points of contemporary women's movements in Latin America.

See also MATTO DE TURNER, CLORINDA (Vol. III); WOMEN (Vols. I, II, III).

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**World Trade Organization (WTO)** The 124 governments represented at the final session of the Uruguay Round of international TRADE discussions in Marrakesh, Morocco, on April 15, 1994, agreed to establish the World Trade Organization (WTO) by the year's end. The WTO came into existence on January 1, 1995, with the power to establish permanent trading commitments and rules of trade and to settle disputes among its members. The organization dates to the General Agreement on Trade and Tariffs (GATT) established on January 1, 1948, as a stopgap measure en route to the establishment of an international trade organization. Fifty countries had agreed to the charter of the International Trade Organization by 1950, but the U.S. Congress refused to ratify the agreement. The world's economic order had changed significantly by the 1980s. Europe and Japan had recovered from World War II and were now major players in international commerce. Former colonies in Africa and Asia had become independent and sources of natural resources and cheap labor. Latin American economies were no longer controlled by the state, and governments there were more democratic. The nations of the world also accepted the neoliberal economic model that called for the tearing down of trade and commercial barriers. The WTO set out to level the playing field for international trade, and to tackle other issues that affected commerce, such as agricultural subsidies, environmental controls, LABOR costs, and intellectual property rights.

Initially, the Latin American nations, like the European Union (EU), saw the WTO in part as a tool to limit U.S. dominance of Western Hemispheric trade through the proposed FREE TRADE AREA OF THE AMERICAS (FTAA). By 2000, however, the WTO had failed to force a reduction in U.S. subsidies for the U.S. agricultural sector and protective tariffs for selected industries that would make Latin American food stuffs and manufactures more competitive in the United States. Negotiations are further complicated by the fact that the Latin American governments have minimal interest in protecting intellectual property rights and the harmonization of labor wages, fringe benefits, and laws that protect workers. These issues became apparent at the 1999 WTO meeting

in Seattle, Washington, from November 29 to December 3, 1999, and the FTAA conclave in Miami, Florida, on November 20–21, 2003. Beginning in March 2005, the United States abandoned its hopes for an FTAA agreement and set about signing free trade agreements with CENTRAL AMERICA and the DOMINICAN REPUBLIC (DOMINICAN REPUBLIC–CENTRAL AMERICA FREE TRADE AGREEMENT, or DR-CAFTA), the Andean Pact member nations (ANDEAN COMMUNITY OF NATIONS) COLOMBIA and PERU. By 2008, only the DR-CAFTA was in operation, while the impact that it and the other hemispheric free trade agreements will have on the WTO and FTAA remains uncertain.

Latin American governments have turned to the WTO in relation to individual commodities. For example, on June 26, 2008, the WTO ruled against the EU's discriminatory tariff on bananas from nine Latin American nations: BRAZIL, Colombia, COSTA RICA, ECUADOR, GUATEMALA, HONDURAS, NICARAGUA, PANAMA, and VENEZUELA. In January 2005, the EU imposed a quota system on the importation of bananas that favored former European colonies in Africa, the Caribbean, and Latin America. In January 2008, the EU replaced the quota system with a tariff (230 euros per ton) on such imports, which the nine Latin American countries felt was discriminatory. The WTO has yet to rule on a protest from Brazil, Thailand, and Australia against a February 2005 EU decision to increase tariffs on sugar imports.

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**World War I and Latin America** Europe's plunge into war in August 1914 at first had little impact on Latin America, where the conflict was viewed as a non-American affair. For the next two and a half years, until April 1917, Latin American nations discussed proposals to ensure their neutrality and to resolve economic problems created by the war but failed to implement any program. They also did nothing to prepare for their possible entry into the war or toward hemispheric defense of the continent.

The German declaration to continue unrestricted submarine warfare on February 1, 1917, did little to promote hemispheric solidarity, despite government professions to the contrary. Following the U.S. declaration of war against Germany on April 4, 1917, eight Latin American republics eventually did the same; these were BRAZIL, CUBA, COSTA RICA, GUATEMALA, HAITI, HONDURAS, NICARAGUA, and PANAMA. With the exception of Brazil, these countries were in the strategic circum-

Caribbean region and had been victims of U.S. occupations and/or political and financial pressures. Two—Cuba and Panama—owed their independence to the United States. Guatemala, Honduras, and Nicaragua unsuccessfully appealed to Washington for greater economic assistance due to loss of the European market share. Because of political turmoil, the United States had occupied Haiti since 1915, but Secretary of State Robert Lansing concerned himself more with the German presence in the country, which had links to the Haitian elite. Costa Rica acted on March 23, 1919, to be eligible for entry into the League of Nations, but the declaration did not end the U.S. nonrecognition of the Federico Tinoco (b. 1868–d. 1931) government.

BOLIVIA, the DOMINICAN REPUBLIC, ECUADOR, PERU, and URUGUAY severed diplomatic relations with the Central Powers, but their declarations of “friendly neutrality” toward the United States incurred risks equal to those assumed by the nonactive belligerents. EL SALVADOR declared itself neutral in the conflict, but “friendly neutral” toward the United States. In both instances, “friendly neutrality” meant that U.S. naval and merchant ships could frequent, without harm or limitation, Ecuadorean and Salvadoran ports. Other neutral countries included ARGENTINA, CHILE, COLOMBIA, MEXICO, PARAGUAY, and VENEZUELA.

In 1917, Argentine president Hipólito Yrigoyen (b. 1852–d. 1933) issued two calls for a conference on continental solidarity, but without a U.S. presence. The conference never materialized, thus the Argentine effort to assume hemispheric leadership failed.

The economic impact of the war varied from country to country. The Central American nations whose primary coffee market was Germany suffered from the Allied blockade of the German coast. But, those with primary products that the Allies could readily consume did well: Argentina, with wheat and beef; Chile with copper and nitrates; and Cuba with sugar. None of the Latin American countries militarily participated in the conflict, although Brazil helped guard the Latin American Atlantic coast from German submarine attacks.

In November 1920, when the League of Nations convened in Geneva, Switzerland, all the Latin American republics were present except the Dominican Republic, Mexico, and Ecuador. At the time, the Dominican Republic was still occupied by U.S. Marines, meaning that its independence was “suspended.” Mexican absence was due to the U.S. refusal to extend recognition to the new “revolutionary” Mexican government. Ecuador's government failed to ratify the league covenant until 1934, at which time it joined the League of Nations. The Latin Americans were motivated by their idealism and the international prestige that league membership brought with it. They also saw the league as a vehicle to prevent what was termed “external aggression.” This could refer to border conflicts, foreign attacks, and U.S. intervention in the region's internal affairs (see U.S.

CARIBBEAN INTERVENTIONS, 1900–1934). The United States did not join the League of Nations, however, which led the Latin Americans to lose interest. Their participation in the League of Nations was almost nonexistent by 1925.

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**World War II and Latin America** The Japanese attack on Pearl Harbor on December 7, 1941, sent the world into war. By January 1942, eight Latin American nations had joined the United States in declaring war on Germany, Italy, and Japan. These were COSTA RICA, CUBA, DOMINICAN REPUBLIC, EL SALVADOR, GUATEMALA, HAITI, HONDURAS, and PANAMA. The remainder, save ARGENTINA and CHILE, severed relations with the Axis Powers. MEXICO and BRAZIL declared war in May and August 1942, respectively, followed by BOLIVIA and COLOMBIA in 1943. Chile, concerned about the defense of its coastline, severed relations in 1943, followed by Argentina a year later, when outcome of the war seemed clear. Chile and Argentina declared war on the Axis Powers in 1945, likely more concerned with meeting admission requirements to the newly formed United Nations (UN) than in support of the Allies.

Following the 1933 U.S. announcement of the GOOD NEIGHBOR POLICY, Latin Americans were more concerned with U.S. reaffirmation of that policy than with the war clouds forming in Europe. This was evident at the Inter-American Conference for the Maintenance of Peace meeting in BUENOS AIRES, Argentina, on December 1–23, 1936, and the Eighth International Conference American States that convened in LIMA, PERU, on December 9–27, 1938. Only after the German invasion of Poland on September 1, 1939, and the capitulation of France and the Low Countries to the Germans in early summer 1940 were the Latin Americans stirred to action, and in both instances, they accepted U.S. leadership. In response to the German invasion of Poland, the hemisphere's foreign ministers convened in Panama from September 3 to October 3, 1939, where they declared a safety belt around the Americas south of Canada, extending some 300 to 1,000 miles (483–1,609 km) into the Atlantic Ocean, and warned the belligerents to refrain from warlike action in the region. At HAVANA in July 1940, the foreign ministers asserted that British, Dutch, and French possessions would be administered by the American republics to prevent them from falling into “unfriendly hands,” a clear reference to Germany.

This was a bankrupt declaration, however, because of the American republics' inability to enforce it militarily.

Beginning in 1936, the U.S. War and Navy Departments had begun to plan for hemispheric defense in the event of a European war. This planning included meetings with MILITARY staff from each Latin American republic in 1940. U.S. generals and commanders concluded that their neighbors' militaries and navies could offer little, if any, assistance. Thus, in “Rainbow 5,” the U.S. plan for hemispheric defense, a line was drawn from the hump of Brazil on the Atlantic Ocean coast northwest to ECUADOR's southern border to protect the Panama Canal and Venezuelan oil supplies. From the Galapagos Islands in the Pacific, across the northern coasts of Colombia and VENEZUELA, throughout CENTRAL AMERICA, and on several Caribbean islands north to CUBA, a vast network of airfields was built to secure the canal, its shipping lanes, and the oil. The army's air effort, coupled with the navy's antisubmarine activities, had eliminated the German U-boat threat in the Caribbean by the end of 1942.

Associated with the military defense of the canal and oil was the U.S. concern with Axis, and particularly German, espionage, intelligence gathering, and propaganda capabilities throughout the hemisphere. The United States instituted a wide-ranging plan to rid



Members of the Brazilian Expeditionary Force prepare to embark for combat in Italy during World War II. (U.S. Army Signal Corps)

the hemisphere of Axis influence and, with the exception of Argentina and Chile, Latin American governments cooperated. Residents of German, Japanese, and Italian extraction who were considered dangerous were deported to their homelands or sent to the United States for internment. Others were placed under house arrest, while their mail was censored, monetary transactions controlled, and movements restricted. Approximately 8,500 Axis nationals and their descendants had been deported by the time the program was halted in October 1943. Many lost their homes and businesses. The United States conducted a mass propaganda program throughout the hemisphere through the OFFICE OF THE COORDINATOR FOR INTER-AMERICAN AFFAIRS (OIAA). OIAA employed Walt Disney Studios to make films specifically for Latin American audiences. These films touted the superiority of democracy and capitalism over fascism and militarism. They also espoused the war's goals of democracy, civil rights, and freedom from hunger, all of which hit a nerve in Latin America. Indeed, recent studies have suggested that the U.S. propaganda helped lead to the popular challenge to Latin America's elitist and military rule at the end of the war.

The outbreak of the European war in 1939 disrupted Latin America's historic ties to the European marketplace. The United States undertook several programs to help alleviate the problem, but not all countries benefited, and among those that did, the assistance was not equal. For example, because the Allies had lost access to sugar from Southeast Asia and eastern Europe, the United States purchased the entire Cuban sugar crop each year during the war. The loss of access to natural rubber latex from Southeast Asia benefited Brazil in the same way. Likewise, the Allied need for copper for shell casings brought added income to Chile. Argentina continued to sell its beef to Great Britain. At the war's end in 1945, all these Latin American countries had favorable TRADE balances, particularly with the United States. But, the primary products of Central American and Caribbean countries—coffee, tobacco, bananas, and tropical fruits—were not wartime necessities. The economies of those countries therefore slipped backward. Brazil and Mexico benefited from U.S. largesse. Both became manufacturers of U.S. wartime needs, from uniforms to jeeps. Each also used the U.S. assistance to further their industrial development.

Conventional wisdom holds that the United States has long sustained Latin American militaries. With the exception of the National Guards established in the Dominican Republic and NICARAGUA, this assertion was not correct through 1952. On the eve of World War II, the United States found the Latin American militaries to be woefully inadequate and laden with antiquated and broken European equipment. U.S. wartime military missions to Latin America faced difficult challenges. Dictators were mistrusting, believing that the U.S. training of their militaries might lead those militaries to seek political power for themselves rather than support the regime. Costa Rica's democratic governments directed the U.S. military personnel not to wear their uniforms in public. Although the Latin American governments presented the United States with massive shopping lists under the lend-lease program, U.S. Army and Navy administrators scaled these back significantly. Under the program, Latin America received just \$480 million, or 10 percent of the budgeted amount, in military supplies, and delivery did not begin in earnest until 1943. In the meantime, the Caribbean was secured from German U-boats, and the needs for the planned 1944 cross-channel invasion took precedence, as did preparations for the invasion of Japan. Although the U.S. Army put in place plans for postwar hemisphere defense in 1945, its request for the supplies to do this was rejected by the State Department and Congress. Not until 1952 did U.S. military assistance begin to flow to Latin America.

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**WTO** See WORLD TRADE ORGANIZATION.



**Yáñez Decree** See CHILE.

**Zapata, Emiliano** (b. 1879–d. 1919) *Mexican revolutionary leader* Emiliano Zapata was an agrarian worker who became the leader of the rebel army from Morelos and surrounding southern states during the MEXICAN REVOLUTION. He fought for agrarian reform and became a symbol of peasants' rights in MEXICO.

Zapata was born on August 8, 1879, in Anenecuilco in the state of Morelos. He held many jobs, including working as a muleteer, horse trainer, and a part-time sharecropper on a local hacienda. He also owned some land. He was elected to represent other peasants on the village council and began to speak out against the injustices, including land policies, of the Porfiriato. As neighboring haciendas expropriated *ejido* (communal) lands from indigenous communities, Zapata led local protests and minor uprisings in defense of the peasantry. When FRANCISCO MADERO issued his call to arms in 1910 to bring down the dictatorship of Porfirio Díaz, Zapata organized a local fighting force and joined the insurrection. Rebellions erupted throughout the country, forcing Díaz into exile in May 1911.

Zapata initially supported Madero as the latter became president with the promise of democratic and social reforms. Zapata hoped Madero would address peasant demands for a return of expropriated *ejido* lands but quickly withdrew his support when he became convinced that this would never happen under Madero. Zapata instead, once again, called his army to revolt under the Plan de Ayala, which set out his goals, agrarian reform being the most prominent. In subsequent years, Zapata's army rebelled against the dictatorship of

VICTORIANO HUERTA and against the Constitutionalist Army of VENUSTIANO CARRANZA during a protracted civil war. Throughout the revolution, Zapata continued his struggle in defense of peasants' rights and agrarian reform.

The CONSTITUTION OF 1917 finally addressed many of the land tenure issues that the Zapatistas had been demanding, but President Carranza refused to implement the most aggressive reforms, and Zapata continued to defy the central government. On April 19, 1919, Zapata was assassinated in an ambush orchestrated by one of Carranza's generals. The Zapatista Army of National Liberation that formed in Chiapas in 1994 to oppose agrarian and other injustices that were part of the NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA) took its name from Emiliano Zapata (see EZLN).

See also DÍAZ, PORFIRIO (Vol. III); *EJIDO* (Vol. III); PORFIRIATO (Vol. III).

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**Zapatista Army of National Liberation** See EZLN.

**Zedillo, Ernesto** (b. 1951– ) *president of Mexico* Ernesto Zedillo was an economist and president of MEXICO in the 1990s. He inherited a major economic

crisis from his predecessor, CARLOS SALINAS DE GORTARI, and devoted his six-year administration to putting the nation on a path toward recovery. He is credited with overseeing sweeping political reforms that opened the electoral process and allowed an opposition party to win the presidency for the first time in 2000.

Zedillo was born on December 27, 1951. He studied economics and earned a Ph.D. from Yale University. He held several advisory positions in the government in the 1980s and became the Institutional Revolutionary Party's (Partido Revolucionario Institucional, or PRI) presidential candidate in 1994 after the assassination of candidate Luis Donaldo Colosio (b. 1950–d. 1994). In the weeks following his inauguration in December, Zedillo was forced to devalue the Mexican peso as a result of poor fiscal and monetary policies implemented over the previous year. The economic fallout caused by the devaluation combined with accusations of corruption against the previous administration and created widespread dissatisfaction in the country. Zedillo's administration oversaw investigations of the Salinas family and conducted negotiations with the Zapatista Army of National Liberation, a rebel group Ejército in Chiapas (see EZLN).

Zedillo effected a major transformation in Mexico's democratic process by reforming the Federal Election Institute (Instituto Federal Electoral, or IFE). He also ended the "*dedazo*"—the practice of an outgoing president naming the next PRI candidate (and de facto successor)—by instituting a system of primary elections. Zedillo's political reforms allowed opposition POLITICAL PARTIES to challenge the PRI, and the party that had dominated the Mexican presidency since 1929 was voted out of office for the first time in 2000. Since leaving the presidency, Zedillo has held numerous posts at the United Nations. He also teaches economics at Yale University.

#### Further reading:

Julia Preston. *Opening Mexico: The Making of a Democracy* (New York: Farrar, Straus & Giroux, 2004).

Susan Kaufman Purcell. *Mexico under Zedillo* (Boulder, Colo.: Lynne Rienner Publisher, 1998).

**Zelaya, José Santos** (b. 1853–d. 1915) *president of Nicaragua* The son of a wealthy Managua planter, José Santos Zelaya was educated at the Instituto de Oriente in Granada, NICARAGUA, and then, at age 16, sent to France for further studies. There, he became imbued with the positivist philosophers Auguste Comte and Herbert Spencer. Zelaya returned home in 1872, at age 19, and immediately became involved in politics. He vaulted to the Nicaraguan presidency in 1893 following a series of Liberal-instigated revolts.

Zelaya brought liberal philosophy to the presidency. He directed the writing of Nicaragua's 1893 constitution, which provided for the separation of church and

state, prohibited convents and monasteries, decentralized government by giving greater powers to municipal governments, mandated state-directed EDUCATION, and abolished the death penalty. Still, Zelaya ruled as a dictator. At times, he censored the press and imprisoned his political opponents. He succeeded himself through rigged elections.

Like other Latin American Liberals of the time, Zelaya promoted the development of the agro-export industries: bananas, coffee, cotton, timber, and gold. He also supported and used government monies to finance infrastructure development but did not permit foreigners to dominate the construction and ownership thereof. He also granted special privileges to outsiders who built commercial houses that supported the development, including hardware stores, food-processing businesses, and the like (see ECONOMY).

Zelaya gained notoriety in foreign affairs by forcing the British to accept the 1860 Treaty of Managua, which gave Nicaragua control over the Mosquito Coast and by settling Nicaragua's boundary disputes with HONDURAS and COSTA RICA. He supported the unsuccessful effort to bring about a union of Nicaragua, EL SALVADOR, and Honduras in 1895. His dream of reuniting CENTRAL AMERICA under his leadership during the first decade of the 20th century contributed to his downfall.

The San Juan River that borders Nicaragua and Costa Rica long had been the preferred site for the construction of a transisthmian canal, and during the first two years of the 20th century, the United States attempted to persuade Zelaya to make the appropriate concessions. Zelaya refused because it meant granting the United States sovereignty over Nicaraguan territory. He also wanted greater compensation for the use of Nicaraguan territory for the canal. His recalcitrance was among the factors that led the United States to PANAMA in 1903.

After 1903, the United States viewed Zelaya's profession of Central American leadership with a jaundiced eye, an attitude that only emboldened Zelaya. At the same time, internal discontent with the Zelaya dictatorship intensified, leading to a rebellion in Bluefields in 1909. The assassination of two U.S. mercenaries that same year by members of Zelaya's army gave the United States reason to intervene. Zelaya fled the country, and the United States installed a Liberal, Dr. José Madriz (b. 1867–d. 1911), as president. The U.S. intervention did not stop the Liberals and Conservatives from continuing their battles, which in turn caused the United States to maintain its presence in Nicaragua until 1933.

See also CONSERVATISM (Vol. III); LIBERALISM (Vol. III); MOSQUITO COAST (Vol. III); POSITIVISM (Vol. III); TRANSISTHMIAN INTERESTS (Vol. III).

#### Further reading:

Charles Stansifer. "José Santos Zelaya: A New Look at Nicaragua's Liberal Dictator." *Review/Revista Interamericana* 7, no. 3 (October 1977): 468–485.

# APPENDIX

## PRIMARY SOURCE DOCUMENTS

Several themes permeate Latin America's 20th-century historical experience. These are grouped below into four sections addressing some of the key elements of Latin America's path to the present. The documents found in the first section, "The Search for Political and Financial Stability," represent the U.S. effort to bring political modernity to the circum-Caribbean region. The documents under "Latin America Limits U.S. Imperialism" elucidate the Latin American response to U.S. interference in the region's internal affairs. After World War II, there emerged across Latin America efforts to correct the economic, social, and political injustices that had long marred the region. While these movements could be described as legitimate nationalist efforts to correct Latin America's historical record, in the larger cold war context, they were often considered to be communist. The documents under "Nationalism or Communism?" illustrate that intellectual conflict. Under "Latin America's New Political Paradigm" are documents that address the impact of a generation of political and economic change as Latin America enters the 21st century.

### The Search for Political and Financial Stability

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*During the first generation of the 20th century, U.S. policy towards Latin America focused on the Caribbean, in large part due to the political instability and financial mismanagement that characterized the history of each nation in the region, and which potentially invited*

*European intervention. Because any political instability might spill over into Panama and a European presence in the Caribbean might present a threat to the operations of the Panama Canal, the U.S. State Department initiated policies designed to bring political and financial stability to the region, and hence deter European intrusions, which were viewed in Washington, D.C., as violations of the 1823 Monroe Doctrine under which the United States declared itself the protector of the Western Hemisphere.*

#### Dana G. Munro, Intervention and Dollar Diplomacy in the Caribbean, 1900–1921 (Excerpt)

*Dana G. Munro (b. 1892–d. 1990) spent two years in Central America before joining the State Department in 1920, where he assisted with the formulation of policy toward the region. His view of the Caribbean people was similar to that of others responsible for U.S. policy in Latin America at the time.*

*Munro's description is based on his view of the region's political immaturity, economic underdevelopment, and social stagnation. The elite families assumed the right to govern at the expense of the impoverished and largely illiterate masses. Yet, this elite lacked the skills to administrate fairly or wisely. As a result, there was no effective civil society, nor was there government fiscal responsibility. Political conflict was one consequence of this system, and the threat of violence crossing national borders and into Panama threatened the U.S. operation of the Panama Canal. Thus, the U.S. pursuance of democratic government and fiscal responsibility was not only a crusade to improve quality of life for the people of the circum-Caribbean region but also to secure the Panama Canal.*

*To understand the problems that faced President Theodore Roosevelt and his successors, one must know something about conditions in the Caribbean states in the first years of the cen-*

ture. In 1900, few of the Central American and West Indian republics had achieved the relative stability and economic prosperity that many of their South American neighbors were beginning to enjoy. They were small countries with scanty resources. Estimates of their populations are unreliable, but Guatemala, the most populous, was thought to have somewhat less than 1.6 million inhabitants in 1900. Cuba had about the same number. None of the others, except perhaps Haiti, had so many as 1 million, and Nicaragua, Honduras, Costa Rica, and Panama had considerably less than half a million. There had been some material progress in the quarter century before 1900, when foreigners had begun to invest in a small way in railroads and mines and plantations, but in general, the Caribbean area was one of the most backward parts of the Western Hemisphere.



The chief cause of backwardness was the continual internal strife that had discouraged economic activities of all sorts. Inherited political traditions, combined with the poverty and ignorance of the masses of the people, made it difficult to attain stable government under the republican constitutions adopted at the time of independence. In colonial times, the inhabitants had been ruled autocratically by officials sent from Europe and had had no opportunity to participate in governmental affairs. After independence, it had been difficult for them to operate unfamiliar institutions borrowed from people who had had centuries of experience in self government.

In most of the Caribbean republics, political affairs were dominated by a relatively few families who owned most of the large farms and cattle ranches. The members of this upper class, with their servants and dependents, lived a rather simple life in the towns and larger villages, without many of the amenities that their descendants enjoy today. Usually they left the actual management of their properties to overseers. Since their estates rarely produced large incomes, even in years when crops and cattle were not destroyed by revolutionary armies, few of them were wealthy. Many of the men practiced law or medicine, but these professions were overcrowded and usually unremunerative.

The upper class was avidly interested in politics because government employment did offer opportunities for profit as well as the prestige of holding office. As the only educated people in the community, and the only group that understood something of the complexities of public affairs, the members of the principal families held most of the positions in the government even when military leaders from other social groups occupied the presidency. In such a community, personal and family ties and private enmities played an important role in political life. Where the number of educated people was so small, a native leader or an unusually able foreign diplomat, or a small group that knew what it wanted, could have an extraordinary influence.

There was practically no middle class between the aristocracy and the illiterate and poverty-stricken masses. The great majority of the people were peasants, of Indian or Negro

descent in some countries and of mixed blood in others. Most of these lived in small villages where the only contact with the outside world was in many cases by a journey of several days on foot or horseback over bad trails, and where, more likely than not, there was neither a school nor a priest. Their houses were dirt-floored, one- or two-room shacks, with little or no furniture. Some of them worked for a few cents a day on the farms and ranches of the upper class; others planted *milpas*—small clearings in the forest where a patch of corn could be grown for a few years before the land was exhausted. In Guatemala and a few other sections of Central America, the majority of the peasants were full-blooded Indians, who were practically slaves under a peonage system. Elsewhere the peasants were frequently oppressed and exploited by landowners and officials. The Indians and the Negro peasants in Haiti, showed no interest in politics, but this was less true of the people of mixed blood in such countries as Nicaragua, Honduras, and Santo Domingo. There, the country people were often enthusiastic adherents of one of the parties that contended for power, and the monotony and poverty of their daily lives made them the more responsive to appeals to take up arms when the leaders appealed to them.

The political parties, though they might call themselves “conservatives” and “liberals,” rarely represented any great differences over questions of policy. The Church, except perhaps in Guatemala, never had the wealth and power that made its relation to the government an issue in several of the larger Latin American countries, and there was rarely any clear-cut cleavage on other political or social problems. The groups that contended for control of the government were usually factions that supported a popular leader and they were often called by the leader’s name. A politician’s importance depended on the number of adherents who were ready if necessary to take up arms to support him, and this was true whether he was a white aristocrat, popular among his fellow townsmen or among the people of the region where he had his estates, or an illiterate soldier who had attained an ascendancy over his equally ignorant companions. When the leader’s influence was particularly strong in one city or province it was reinforced by the traditional local rivalries that were one of the chief causes of civil strife.

Conflicts between rival leaders were normally settled by the use of force. Constitutional forms were preserved by holding elections at the end of each presidential term or after a successful revolution, but the party in power always won. The inexperience of the voters and the lack of any tradition of self-government made it easy for the group in power to control the electoral process, and leaders who seized power by force could see no reason to permit their opposition to oust them simply by obtaining a majority of the voters. Often the opposition party did not even contest the election, and, when it did, intimidation and fraud assured its defeat.

A political group could keep control of the administration only so long as it could prevent the opposition from waging a successful civil war, or from inducing a part of the army to stage a *golpe de cuartel*, or military mutiny. Sometimes, to maintain an appearance of constitutional government, the presidency was passed from hand to hand among a group of leaders. More



often, perhaps, the principal chief of the dominant group had himself reelected from term to term, or kept control by giving the presidency to a henchman who was little more than a figurehead. In either case, the man who controlled the army ruled the country, deciding who was to sit in Congress and giving orders to the courts in any case where political considerations were involved. If a leader were sufficiently ambitious and ruthless, he could maintain a despotic control over the country and its people for a long period.

If the president was a ruler of the more brutal type, he had his chief opponents shot or driven into exile, and he systematically persecuted their followers. Even if he wished to rule in a more civilized way he could not usually afford to permit any overt political activity or any freedom of the press. He knew that political opposition could only have revolution as its goal, and that toleration of public criticism would be regarded as a sign of weakness which could cost him support of politicians and army officers who wanted above all to be on the winning side.

At the first sign of overt resistance, the principal members of the opposition party would be imprisoned or exiled. Even when there was no immediate threat of civil war, the lot of the opposition leaders was not a happy one. Lawyers who belonged to the wrong party found it difficult to get fair decisions from the courts, and planters were likely to have their workers seized for service in the army. The result was that the party out of power had to revolt in order to escape an intolerable situation, and it too often resorted to savage reprisals when it came into power. The cruelties practiced on political enemies engendered factional hatreds which were passed on from father to son and which helped to keep the revolutionary spirit alive.

Starting a revolution was a simple matter. In such small countries, a few hundred men were a formidable force. If the leaders did not have rifles that had been hidden since the last civil war, they could usually obtain them from foreign merchants willing to gamble on their success, or from the government of a neighboring country. Both in Central America and in *Española* [Hispaniola], the governments continually interfered in one another's affairs in this way, partly because each ruler felt that he himself would be safer if a president indebted to him was in power in a nearby state. Frequently local commanders within the country could be induced by bribery or promises of preferment to join the revolutionary movement. An uprising might achieve important successes before the government could interfere because there were no roads for the rapid transport of troops. It was not necessary for the insurgents to be well trained or well equipped because the government had no well trained or equipped troops with which to oppose it.

The standing armies, made up of barefooted soldiers, recruited usually against their will from the most ignorant strata of the population and officered by men who had little or no professional training, were rarely formidable forces. Nevertheless, with revolution an ever-present possibility, the military establishment was the most important branch of the government. There were garrisons through-out the country, in

each important town and village, and in the rural districts the *comandante* [commander], though he might command only six or eight soldiers, was a petty despot, charged with police as well as military duties. In larger political subdivisions, civil and military jurisdiction was also combined in one official, so that the whole country was in fact under military rule. The army almost always consumed by far the largest part of the public revenue. All officers, from the Minister of War to the local *comandante*, expected to supplement their salaries by graft in the buying of supplies or by collecting money for the pay of non-existent soldiers, and important generals often demanded and received outright grants from the treasury as the price of continued loyalty. Even the most powerful dictators had to submit to this sort of blackmail because they could not hope to remain in office without military support.

Heavy military expenditures, and the graft that pervaded all other departments of the administration, usually kept the governments poor, even at times when internal disorders did not curtail their revenues. It was not unusual for civilian employees to go unpaid for months at a time, and frequently there was not even money to pay the soldiers. Very rarely were funds available for schools or road building. Much of the money which the governments should have received was lost through smuggling and corruption in the customhouses, which were the principal source of revenue.

*Source:* Dana G. Munro. *Intervention and Dollar Diplomacy in the Caribbean, 1900–1921*, 7–12 (Princeton, N.J.: Princeton University Press, 1964).

### Platt Amendment, 1901 (Excerpts)

*Events in Cuba that followed the signing of the Treaty of Paris on December 10, 1898, illustrated the worst of the prevalent views among U.S. foreign policy makers at the time that the circum-Caribbean region was politically immature, economically underdeveloped, and socially stagnant. Spanish administrators departed the island leaving behind the Cuban creole elite to govern, but the Spanish colonial structure deprived them of any meaningful experience. Below the elite was a mass of mostly illiterate Afro-Cubans who had been tied to the sugar and tobacco industries and who also lacked any political or fiscal experience. In addition, Spain left Cuba with \$400 million in international debt obligations and an empty treasury. The seeds for political upheaval and foreign intervention had been planted.*

*U.S. policy makers faced few choices thanks to the Teller Amendment to the Joint Congressional Resolution on April 19, 1898, which was equivalent to a declaration of war on Spain to free Cuba. The Teller Amendment prevented the United States from annexing Cuba. Policy makers confronted a serious dilemma: Cuba was potentially volatile, but the United States was unable to annex or to permanently occupy the island.*

*Senator Orville Platt (b. 1827–d. 1905), a Republican from Connecticut, resolved this dilemma with his proposal attached to the 1901 Army Appropriations Bill. Approved by*

*Congress on March 4, 1901, the Platt Amendment, as it became known, granted the United States intervention rights in case of Cuban political chaos or fiscal irresponsibility. As a precondition for the termination of U.S. military occupation and for Cuba's independence, the Cubans reluctantly amended their constitution in 1902 to include the Platt Amendment. Between 1906 and 1921, the United States used the Platt Amendment to intervene in Cuba's internal affairs on four occasions.*



I. That the government of Cuba shall never enter into any treaty or other compact with an foreign power or powers which will impair or tend to impair the independence of Cuba, nor in any manner authorized or permit any foreign power or powers to obtain by colonization or for military or naval purposes or otherwise, lodgment in or control over any portion of [Cuba].

II. . . . [Cuba] shall not assume or contract any public debt, the pay the interest upon which, and to make reasonable sinking fund provision for the ultimate discharge of which, the ordinary revenues of the island, after defraying the current expenses of government is inadequate.

III. . . . [Cuba] consents that the United States may exercise the right to intervene for the preservation of Cuban independence, the maintenance of a government adequate for the protection of life, property, and individual liberty, and for discharging the obligations with respect to Cuba imposed by the treaty of Paris on the United States, now to be assumed and undertaken by the government of Cuba.

IV. . . . That all Acts of the United States in Cuba during its military occupancy thereof are ratified and validated, and all lawful rights acquire there under shall be maintained and protected. . . .

VII. . . . To enable the United States to maintain the independence of Cuba, and to protect the people thereof, as well as for its own defense, the government of Cuba will sell or lease to the United States lands necessary for coaling or naval stations at certain specified points to be agreed upon with the President of the United States.

*Source:* C. I. Bevans, comp. *Treaties and Other International Agreements of the United States of America, 1776–1949*, Vol. 8, 1,116–1,117 (Washington, D.C.: Government Printing Office, 1971).

### Isthmian Canal Convention (Hay–Bunau Varilla Treaty), November 18, 1903 (Excerpts)

*Philippe Bunau-Varilla (b. 1859–d. 1940), a French citizen who represented French canal interests, played a unique role in the independence of Panama in 1903. Just prior to the war, he*

*labored in the United States to raise money and troops for the independence movement and reportedly persuaded President Theodore Roosevelt to prevent Colombian troops from suppressing the movement. Following Panama's independence on November 3, 1903, Bunau-Varilla became the republic's representative to the United States, and on November 18, 1903, in New York City's Waldorf Astoria Hotel, he signed the Isthmian Canal Convention, better known as the Hay–Bunau Varilla Treaty, granting Panama its independence and the United States the rights to construct and defend the canal. Drafted by U.S. secretary of state John Hay, the treaty was presented to the Panamanian commissioners when they arrived in New York on November 24.*

*In addition to granting rights to the United States “as if it were sovereign” within the zone, the Hay–Bunau Varilla Treaty, like the Platt Amendment with Cuba, restricted Panama's foreign policy and international debt liability and also granted the United States the right to intervene in Panama's internal affairs should it threaten to disrupt the canal's operation. At first, the Panamanian elite sought only to chip away at U.S. rights within the zone, but after World War II, the rising tide of Panamanian nationalism called for the termination of the 1903 treaty, which was finally accomplished with the Carter–Torrijos Treaties, signed in 1977.*



. . . Article I. The United States guarantees and will maintain the independence of the Republic of Panama.

Article II. . . . Panama grants to the United States in perpetuity the use, occupation and control of a zone of land and land under water for the construction, maintenance, operation, sanitation, and protection of . . . [a] canal . . .

Article III. . . . Panama grants to the United States all the rights, power and authority within the zone . . . and auxiliary lands and waters described in said Article II which the United States would possess and exercise if it were the sovereign of the territory within which said lands and waters are located to the entire exclusion of the exercise by . . . Panama of any sovereign rights, power or authority. . . .

Article VII. . . . The same right and authority are granted to the United States for the maintenance of public order in the cities of Panama and Colon and the territories and harbors adjacent there to in case the Republic of Panama should not be, in the judgment of the United States, able to maintain such order. . . .

Article X. . . . Panama agrees that there shall not be imposed any taxes, national, municipal, departmental, or of any other class, upon the canal, the railways and auxiliary works, tugs or other vessels employed in the service of the canal, storehouses, workshops, offices, quarters for laborers, factories of all kinds, warehouses, wharves, machinery and other works, property and effects appertaining to the canal or railroad and auxiliary

works, or their officers or employees, situated within the cities of Panama and Colon, and that there shall not be imposed contributions or charges of a personal character of any kind upon officers, employees, laborers, and other individuals in the service of the canal and railroad and auxiliary works. . . .

Article XIII. The United States may import at any time into the [canal] zone and auxiliary lands, free of custom duties, imposts, taxes or other charges, and without any restrictions any and all vessels, dredges, engines, cars, machinery, tools, explosives, materials, supplies and other articles necessary and convenient in the construction, maintenance, operation, sanitation, and protection of the canal and auxiliary works, and all provisions, medicines, clothing supplies and other things necessary and convenient for the officers, employees, workmen and laborers in the service and employ of the United States and for their families. . . .

Article XXIII. If it should become necessary at any time to employ armed forces for the safety and protection of the canal, or the ships that make use of the same, or the railways and auxiliary works, the United States shall have the right, at all times and in its discretion, to use its police and its land and naval forces or to establish fortifications for these purposes. . . .

Source: Treaty Series, no. 431 (Washington, D.C.: Government Printing Office, 1938).

### Theodore Roosevelt, Roosevelt Corollary to the Monroe Doctrine, December 6, 1904 (Excerpt)

*In addition to Cuba and Panama, political and, particularly, fiscal irresponsibility throughout the Caribbean invited European gunboats to force loan payments. The 1902–03 Anglo-German-Italian blockade of Venezuelan ports illustrates the point. Although the International Court at The Hague settled the debt problem in 1904, the lingering German naval ships alarmed U.S. policy makers when, in that same year, political chaos in the Dominican Republic made it impossible for the government to meet its international debt obligations.*

*Building upon policy precedents found in the 1901 Platt Amendment and the 1903 Hay–Bunau Varilla Treaty, President Theodore Roosevelt (b. 1858–d. 1919) proclaimed during his annual message to Congress a “Corollary to the Monroe Doctrine” as the justification statement for U.S. interventions throughout the circum-Caribbean region. According to Roosevelt’s declaration, the United States could execute preemptive interventions in order to keep European gunboats from encroaching upon the Caribbean and potentially threatening the Panama Canal. During the next generation, analysts pointed to the “Roosevelt Corollary” to justify U.S. intervention in several circum-Caribbean republics.*



. . . It is not true that the United States feels any land hunger or entertains any projects as regards to other nations of the Western Hemisphere save such as are for their welfare. All that this country desires is to see the neighboring countries stable, orderly and prosperous. Any country whose people conduct themselves well can count upon our hearty friendship. If a nation shows that it knows how to act with reasonable efficiency and decency in social and political matters, if it keeps order and pays its obligations, it need fear no interference from the United States. Chronic wrongdoing, or an impotence which results in a general loosening of the ties of civilized society, may in America, as elsewhere, ultimately require intervention by some civilized nation, and in the Western Hemisphere the adherence of the United States to the Monroe Doctrine may force the United States, however reluctantly, in flagrant cases of such wrongdoing or impotence, to the exercise of an international police power. If every country washed by the Caribbean would show the progress in just and able civilization which with the aid of the Platt amendment Cuba has shown since our troops left the island, and which so many of the republics in both Americas are constantly and brilliantly showing, all question of interference by this Nation with their affairs would be at an end. Our interests and those of our southern neighbors are in reality identical. They have great natural riches, and if within their borders the reign of law and justice obtains, prosperity is sure to come to them. While they thus obey the primary laws of civilized society they may rest assured that they will be treated by us in a spirit of cordial and helpful sympathy. We would interfere with them only in the last resort, and then only if it became evident that their inability or willingness to do justice at home and abroad had violated the rights of the United States or had invited foreign aggression to the detriment of the entire body of American nations. It is a mere truism to say that every nation, whether in America or anywhere else, which desires to maintain its freedom, its independence, must ultimately realize that the right of such independence cannot be separated from the responsibility of making good use of it. . . .

Source: James R. Richardson. *Compilation of Messages and Papers of the Presidents*, Vol. 16, 6,293–6,294 (New York: Bureau of National Literature, 1917).

### Treaty Respecting Finance, Economic Development and Tranquility of Haiti, September 16, 1915 (Excerpts)

*Since its independence from France in 1791, Haiti continuously experienced violent political instability and fiscal mismanagement. More presidents fell victim to the bullet than the ballot box. The situation reached a high-water mark in 1915 when President Jean Vilbrun Guillaume Sam (b. ?–d. 1915) was dragged from his hiding place in the French legation by a mob that literally tore him limb from limb for having directed the execution of 160 political prisoners. French and German*

*troops were already in the country to defend their citizens, but now, the United States feared that these nation's presence would somehow effect operations of the Panama Canal. In July 1915, U.S. Marines were dispatched to the island to ensure tranquillity and to force the Haitian regime to accept a treaty that granted more interventionist rights to the United States than the Platt Amendment did in Cuba and the Hay–Bunau Varilla Treaty did in Panama. Additionally, the 1915 treaty with Haiti is similar to the financial agreements signed with the Dominican Republic in 1905 and Honduras in 1910 and, as in these instances, only served to heighten criticism of the United States.*



Article I. . . . The United States will . . . aid the Haitian Government in the proper and efficient development of its agricultural, mineral and commercial resources and in the establishment of the finances of Haiti on a firm and solid basis.

Article II. . . . The President of Haiti shall appoint, upon nomination of the President of the United States, a General Receiver and such aides and employees as may be necessary, who shall collect receive and apply all customs duties on imports, and exports accruing at the several custom houses and ports of entry in the Republic of Haiti.

The President of Haiti shall appoint, upon nomination of the President of the United States a Financial Advisor . . . attached to the Ministry of Finance . . . to devise an adequate system of public accounting, aid in increasing the revenues and adjusting them to the expenses, inquire into the validity of the debts of the Republic, enlighten both Governments with reference to all eventual debts, recommend improved methods of collecting and applying the revenues and make such other recommendations to the Minister of Finance as may be deemed necessary for the welfare and prosperity of Haiti. . . .

Article V. All sums collected and received by the General Receiver shall be applied first, to the payment of the General Receiver, his assistants and employees and expenses of the Receivership . . . second, to the interest and sinking fund of the public debt of the Republic of Haiti; and third to the maintenance of the constabulary referred to in Article X, and then the remainder to the Haitian Government for the purposes of current expenses. . . .

Article VIII. . . . Haiti shall not increase its public debt except by previous agreement with the President of the United States, and shall not contract any debt or assume any financial obligations unless the ordinary revenues of the Republic [are] available for such purposes. . . .

Article IX. . . . Haiti will not without previous agreement with the President of the United States modify the customs duties in a manner to reduce the revenues there from . . .

Article X. . . . Haiti obligates itself, for the preservation of domestic peace, the security of individual rights, and full observance of the provisions of this treaty, to create . . . an efficient constabulary, urban and rural, composed of native Haitians . . . and organized and officered by Americans. . . .

Article XI. . . . Haiti agrees not to surrender any of [its] territory . . . by sale, lease or otherwise, or jurisdiction of such territory to a foreign power, nor enter into a treaty or contract with a foreign power or powers that will impair or tend to impart the independence of Haiti.

Source: William M. Malloy, comp. *Treaties, Conventions, International Acts, Protocols and Agreements between the United States and Other Powers*, Vol. 3, 2,673–2,678 (New York: Greenwood Press, 1968).

### General Treaty of Peace and Amity February 7, 1923 (Excerpts)

*With the exception of Costa Rica, political turmoil characterized the Central American republics of El Salvador, Guatemala, Honduras, and Nicaragua after their independence from Spain in 1823. In these nations, the political arena remained closed to all but the landed elite while the military served to ensure their continuance in power. Rivalries between political parties that often erupted into so-called revolutions were more a rivalry among the elitist families. On many occasions, political rivals or those ousted from power would assemble across their national border to organize and implement another “revolution.” With Panama’s independence and the construction of the transisthmian canal, U.S. policy makers feared that the Central American political turmoil would spill over into Panama and thereby threaten the canal’s operation and security.*

*In an effort to bring political tranquillity to Central America, the United States hosted a conference from December 10, 1922, until February 7, 1923. At it, the Central American representatives agreed to the nonrecognition of governments that came to power illegally and to limit the size of their military to that needed only for national defense, not to serve the interests of the ruling clique. The treaty proved ineffective, as the United States quickly found itself involved in Honduran and Nicaraguan politics. The Central Americans, except those in power in 1923, gave only lip service to the treaty. By consensus, the signatories, including the United States, voided the agreement in 1935.*



### GENERAL TREATY OF PEACE AND AMITY FEBRUARY 7, 1923

Article II. . . . to contribute to strengthening their stability . . . [the Republics of Central America] . . . declare that every act, disposition or measure which alters the constitutional

organization in any of them is to be deemed a menace to the peace of said republics, whether it proceed from any public power or from the private citizens.

Consequently, the governments of the contracting parties will not recognize any other government which may come into power in any of the five republics through a coup d'etat or a revolution against a recognized government, so long as the freely elected representatives of the people thereof have not constitutionally reorganized the country. And even in such a case they obligate themselves not to acknowledge the recognition if any of the persons elected as President, Vice-President or Chief of State designate should fall under any of the following heads:

- (1) If he should be the leader or one of the leaders of a coup d'etat or revolution, or through blood relationship or marriage, be an ascendant or descendant or brother of such leader or leaders.
- (2) If he should have been a Secretary of State or should have held some high military command during the accomplishment of the coup d'etat, the revolution or while the election was being carried on, or if he should have held this office or command within the six months preceding the coup d'etat, revolution or the election.

Furthermore, in no case shall recognition be accorded to a government which arises from election to power of a citizen expressly and unquestionably disqualified by the Constitution of his country as eligible. To election as President, Vice-President or Chief of State designate . . .

Article IV. In case of a civil war no government of Central America shall intervene in favor of or against the government of the country where the conflict takes place.

Article V. The contracting parties obligate themselves to maintain in their respective Constitutions the principle of non-reelection to the office of President and Vice-President of the Republic; and those of the contracting parties whose Constitutions permit such reelection, obligate themselves to introduce a constitutional reform to this effect in their next legislative session after the ratification of the present treaty.

### ARMS LIMITATION CONVENTION FEBRUARY 7, 1923

Article I. . . . Having taken into consideration their population, area, extent of frontiers and various other factors of military importance, agree that for five years that . . . shall not maintain an army and national guard in excess of the number hereinafter provided, except in case of war or an impending invasion by another state.

Guatemala	5,200
El Salvador	4,200
Costa Rica	2,500
El Salvador	2,500
Nicaragua	2,500

General officers of a lower rank of the standing army, who are necessary in accordance with the regulation of each country, are

not included in this article, nor are those of the national guard. The police force is also not included.

Article II. . . . The first duty of the Central American armies is to preserve the public order, each of the contracting countries agrees to establish a national guard to cooperate with the army to maintain order in the various districts of the country and frontiers, and shall immediately consider the best means for establishing it. With this end in view, the Central American states shall take into consideration the use of instructors, in order to take advantage of in this manner, of experience acquired in other countries in organizing such corps.

In no case shall the combined force of the army and the national guard exceed the maximum number in the preceding article. . . .

Article III. The contracting parties agree not to export or permit the exportation of arms or munitions or any other kind of military stores from one Central American country to another.

*Source:* United States National Archives, College Park, Maryland, Record Group 59, Records of the Department of State, Conference on Central American Affairs, Washington, D.C., Appendix, Treaties and Conventions, 284–288.

## Latin America Limits U.S. Imperialism

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*Given Latin America's historical experience, a deep distrust of foreigners permeated its society. The colonial experience was replete with Spanish exploitation. During the immediate postindependence period, internal political debate about opening the continent to foreign trade was rooted in the colonial experience. By the 1860s, however, the debate changed from one about whether to have foreign connections to one about how to control them. When the North Americans arrived in Latin America during the late 19th and early 20th centuries, they did not leave a good impression, as explained by John T. Reid.*

*The Latin Americans also sought legal recourse to control the intervenor beginning with the work of Carlos Calvo in 1866, followed by efforts by people such as Luis M. Drago in 1902 and Manuel E. Gondra in 1923. Although their efforts failed to curb foreign intervention, they serve as examples of the rising tide of Latin American nationalism against U.S. interventions in the circum-Caribbean region during the early 20th century.*

*In the post-World War I period, U.S. policy also underwent change, culminating in the good neighbor policy in 1933, by which the United States pledged itself not to intervene in the internal affairs of the Latin American nations.*

### John T. Reid, Spanish American Images of the United States, 1790–1960 (Excerpt)

*Early 20th-century Latin American writers were highly critical of U.S. efforts to impose its political and financial institutions on their nations, as demonstrated in University of Florida professor John T. Reid's The View from the South (1977). Imperialism, not moral crusading, characterized these efforts: Private U.S. entrepreneurs, corporations, and officials at the highest levels of government were guilty of exploiting their weaker and less sophisticated Latin American neighbors. U.S. capitalists sought only profit at the expense of the Latin American people. U.S. government officials imposed their will at inter-American conferences. Although some Latin American intellectuals in the late 1930s separated the American people from government policies, the seeds of distrust had been planted, the fruits of which carried over into the post-World War II period.*



The dominant attitude of many if not most Spanish American intellectuals toward the United States as a nation for a good part of this century has been that of an alarmed and resentful opponent of what was universally called imperialism. In the first years political imperialism was the primary target. The fear that the Colossus of the North was plotting to absorb the weaker Spanish speaking republics into its expanding empire became a conviction among a number of very articulate critics of the United States, filtering down in the form of slogans from them to sizeable segments of the population. Later, economic and cultural domination became the dreaded spectres.

[T]he anxiety about North American expansionism dates back to the Independence period and that it grew in intensity during the nineteenth century. The Spanish American War ignited a conflagration, fueled by the acquisition by the United States of Spanish-speaking territory and growing psychological tensions within Spanish America. While the fear of political absorption has diminished, some form of opposition to northern imperialism has been a fairly constant note to this day in opinion about the United States.

There is no need to recount here the details of the events that aroused widespread and vehement opposition to America's foreign policy with regard to Latin America since it has been told often by competent authorities.<sup>1</sup> [Just] recall the occupation of Puerto Rico and the Philippines, the Platt Amendment to Cuba's constitution, the American role in the birth of the Republic of Panama, interference in the events of the Mexican Revolution, and the frequent interventions, armed and otherwise, in the affairs of several Caribbean republics, we have the basic framework on which was built the movement of opposition to political imperialism.

[No attempt will be made here] to present a comprehensive listing of the dozens of books and articles that appeared in the early years of the century attacking the actions and policy

of the United States. An exhaustive accumulation of examples would not be especially illuminating except as an illustration of the scope of the campaign, since, for the most part, they were cut from a single pattern.<sup>2</sup>

The broadsides aimed at *yanqui* imperialism by Jose Vargas Vila and Rufino Blanco-Fombona are probably the most devastating of the collection, and a brief survey of their invective will give a useful idea of the extremes of the campaign. Vargas Vila, a Colombian novelist, compressed most of his *anti-yanqui* venom into an impassioned prose-poem called *Ante 105 bárbaros*. Its pages are studded with epithets of opprobrium: North Americans were "the barbarians of the North," "the drunken mobs," "a voracious, unfriendly, disdainful race," "a band of adventurers." Their policy toward Latin America was "the doctrine of plundering, robbery, and conquest." American conduct in the Philippines was "a wave of fire and blood," and the Panama affair was nothing but "insolent, tricky piracy." In summary, wrote Vargas Vila, "A great nation becomes a burly bandit, cutting the throats of weak nations. Washington's ghost becomes a pirate. And the banner of liberty becomes an immense shroud cast over the heads of those peoples." While British imperialism, he declared, was at least a civilizing force, the North American brand was simply brutalizing and destructive, "the sport of savages . . . the madness of prosperity."<sup>3</sup>

Rufino Blanco-Fombona, a Venezuelan litterateur of substantial and continental reputation, was equally outspoken in numerous publications. When he heard that President McKinley had been assassinated, he felt that justice had been done. The dead leader, he wrote, had fostered North American imperialistic ambitions, and "his hangman's fingers" had marked out Hispanic America for northern greed. "May his wounded flesh taste lead" was his requiem, "may the man who unleashed tragedy in the Philippines, in Cuba, and on the sea know what tragedy means."<sup>4</sup>

Manuel Ugarte, an Argentine essayist and perhaps the most persistent and dedicated of the literary foes of imperialism, devoted a good part of his life to proclaiming the dangers which threatened on the northern horizon. More temperate in his expression than Vargas Vila or Blanco-Fombona, he was probably the most influential of the anti-imperialist guild in spreading indignation against the expansionist course of the United States. He propagated the idea, which became almost a cliché, that there was a North American master plan for dominating its southern neighbors, a skillfully coordinated conspiracy involving Wall Street and the Department of State, plotted with diabolical shrewdness.<sup>5</sup>

Other writers, such as Carlos Pereyra and Jose Vasconcelos of Mexico, were especially brilliant among anti-imperialistic luminaries; in fact almost everybody who pretended to literary prominence from 1900 to 1925 felt the urge or the obligation to condemn and warn against the expansionist designs of the Colossus of the North.<sup>6</sup> Even poets from time to time forsook their fine-spun theories and Parisian bohémias to lend their talents to the verbal offensive against *yanqui* imperialism.

The poem "A Roosevelt," by Ruben Darío, the best known representative of the new *modernista* movement in poetry, was a particularly memorable poetic reflection of concern in the face

of the northern menace. University students are said to have learned it by heart. Published in 1904, this poem expressed in vivid terms the common fear not only of political engulfment by the United States, but also and more pointedly of the annihilation of the cultural personality and even the language of Spanish America.

Addressing Theodore Roosevelt as the personification of American imperialism, Darío said, “You are the United States—you are the future invader—of that ingenuous America which has Indian blood—which still prays to Christ and still speaks Spanish.” Describing Roosevelt as haughty, able, energetic and self-confident, the poet glorified his own America, which “lives on light, fire, perfume, love” and prophesied that the “free cubs of the Spanish lion” will never be conquered.<sup>7</sup> Although Darío also occasionally criticized the United States in his journalistic articles,<sup>8</sup> he was neither a consistent nor a convinced anti-imperialist. In fact, shortly after the publication of “A Roosevelt,” he composed “Salutación al Aguila,” which was a somewhat banal hymn to Pan American friendship and cooperation. Darío had gone to Rio de Janeiro as Nicaraguan delegate to the Third Pan American Conference, and there, possibly under the influence of Elihu Root’s personal charm and the cheery brotherhood of champagne, he wrote this rather friendly tribute to the United States, a poem that angered Blanco Fombona, a less fickle opponent of the imperial eagle.<sup>9</sup> Darío’s last important poem, “Pax,” was a plea for the union of all American republics—“The Star-Spangled banner with the [Argentine] blue and white.”<sup>10</sup>

José Santos Chocano, a Peruvian poet often described as a literary Yankee-phobe, also held a somewhat ambiguous attitude toward North American power. In his “La epopeya del Pacifico” he wrote lines that became well known in Spanish America: “The United States, like a bronze pillory, tortures the foot of America against a nail. . . . Let us distrust the man with the blue eyes when he tries to snatch us from the warmth of our hearth—and beguiles us with a gift of buffalo skins-nailed down with disks of sounding metal.” But then the poet granted that hard work is the only way to enjoy a lost Eden, implying that Spanish America should imitate the industrious virtues of the blond-haired Saxons. While the Panama Canal will be built by Negro labor, not by white northerners, it will surely be a boon to Spanish America, Chocano concluded.<sup>11</sup> There is evidence that Chocano’s ideal was the harmonization of the exuberant Latin imagination with the persevering energy of the North.<sup>12</sup>

The defeat of Spain in 1898, considered by many as a blow aimed at the Latin or Hispanic “race,” and the landing of marines in Central America and the Caribbean republics stirred up a swarm of protests in verse which were more significant as polemic than as poetry.<sup>13</sup> Poems written later by the Cuban Nicolas Guillen and the Chilean Pablo Neruda, in which the United States came under heavy fire, were in an entirely different category. Because of the universally recognized poetic genius of the authors (Neruda is regarded by some as Latin America’s greatest bard), their denunciations of American imperialism, following the Communist line pretty closely, have in all probability carried a good deal of weight. Neruda’s series

of intricate poetic criticisms of Anaconda Copper, Standard Oil, and United Fruit is impressive verse, even though its basic theme is well within the established pattern; the poems have likely had influence, particularly among Chilean and other Spanish American young people.<sup>14</sup>

One of the most remarkable literary manifestations of the fear and detestation of *yanqui* imperialism was a series of novels attacking North American economic and political penetration. The first of these, *El problema*, by the Guatemalan Máximo Soto-Hall, was published in 1899, and they have continued to appear steadily ever since.

With a few exceptions, such as César Vallejo’s *Tungsteno* and one or two novels of Miguel Angel Asturias, this fictional offensive is of slight literary quality. The plots are melodramatic and the characters are usually caricatures. Like our western novels and like folk-tales, they are compounded of a group of familiar motifs or elements that occur with remarkable regularity. A few of the earlier novels, such as those of Soto-Hall and the Costa Rican Carlos Gagini, deal with the dreaded possibility of political and cultural absorption by the United States. Most, however, are concerned with the penetration of North American companies into Spanish America for oil, mining, or fruit. It is not unexpected that a large number of works are the product of Central American pens and that the villain is the United Fruit Company. Some of the recurring elements in most of these stories are the cold, heartless *yanqui* businessman or manager, often disdainfully conscious of race, the hateful, servile native overseer or foreman, the seduction of a native maiden by these lustful bullies, the collusion with national politicians to steal the nation’s economic birthright, the “cultural” invasion by the *yanquis* with their whiskey, aspirin, victrolas, strange language, and immorality, and, above all, the cruel and pitiless exploitation of the national worker.

The authors of some of these novels were Communists (e.g., Carlos Luis Fallas) and they naturally used the party’s stereotypes as their building blocks. Nearly all of them, party members or not, followed a generally uniform pattern; a number of these novels, in addition to their main anti-imperialist theme, included plentiful material illustrative of local folklore and customs, particularly those of Miguel Angel Asturias. The tendency may be one facet of the intense nationalism which inspired these novels.<sup>15</sup>

Historians and other North Americans concerned with inter-American relations are often so astonished, shocked, or conscience stricken when they realize the extent and effectiveness of the anti-imperialist sentiment embodied in the writers we have discussed that they fail to heed several very noteworthy although secondary aspects of this literature. It will be worthwhile to review briefly these aspects.

Almost without exception, in the tirades against *yanqui* imperialism, the attack was directed not particularly at the people of the United States, but rather against the government of the Colossus of the North in unholy alliance with the greedy interests of Wall Street. In their broadsides some of the more rabid crusaders, such as Vargas Vila, pilloried our whole civiliza-

tion and its people, but a good many of the critics specifically absolved the ordinary North American citizen of responsibility.

Carlos Pereyra, a Mexican historian and one of the most implacable foes of imperialism, explained that the American people have been deceived by politicians with regard to the true and dastardly intent of the Monroe Doctrine.<sup>16</sup> In one of the most explicit anti-imperialist novels of Central America, Máximo Soto Hall's *La sombra de la Casa Blanca*, the White House and Wall Street are as usual bracketed as vicious flaws in North American life. But, the novelist continued, "as for the people, I am never weary of repeating that they are fine. The clean seed brought by the 'Mayflower' has been borne by the four winds throughout this vast continent and has flowered and borne fruit. When the scalpel cuts out the flaws, this will really be a marvelous nation."<sup>17</sup>

The Argentine poet Leopoldo Lugones wrote in 1938, "In the United States there is a breed of ignorant, brutal politicians and they are the proponents of the famous 'big stick.' But there is another more numerous and better kind of individual for whom inter-American harmony is no vain clap-trap." Benjamin Subercaseaux, a Chilean writer, believed that the people of the United States are the best intentioned in the world, but that their rulers do wrong to Latin America.<sup>18</sup> A contemporary Argentine castigator of imperialism denounced American bankers, politicians, and monopolies in the old-fashioned way, but declared that imperialistic ventures find no favor or support among the common people of the United States and arouse active opposition from a distinguished academic group.<sup>19</sup>

Related to this belief that the villains of imperialism are the politicians and bankers, and not the man-in-the-street, is the curious fact that many of the most ardent opponents of *yanqui* highhandedness in the Caribbean draw a clear line of demarcation between the alleged imperialism of the United States and the civilization and national characteristics of that country. A few, like Blanco-Fombona, simply damned our whole culture with all its ways and works. But more frequently one finds unqualified censure of imperialism alongside frank admiration for certain aspects of the *yanqui* character and its culture. Darío, while making Theodore Roosevelt the symbol of the dangers of North American expansionism, also expressed a scarcely veiled esteem for his energy, culture, pride, and capability—all presumably representative qualities of his country.<sup>20</sup> Ugarte, the arch-enemy of the United States' Latin American policy, did not equivocate in expressing his high regard for the virtues and cultural advance of the United States. Francisco García Calderón (Peru), after making the customary charge against North American perfidy in dealing with Latin America, proceeded to describe North American society with equanimity, giving full credit to its praiseworthy aspects.<sup>21</sup>

A particularly clear example of the tendency to separate the government from the American people is provided by Colombian attitudes following the Panamanian revolt and Theodore Roosevelt's arbitrary action with regard to the canal. Colombian opinion at the time and subsequently showed continued respect for United States contributions to republican progress and generally placed the blame for Colombia's grievances on Theodore Roosevelt and his cohorts. Their treachery,

many maintained, did not represent the desires of the American people.<sup>22</sup>

Some of the *apristas*, passionately defiant of economic imperialism, found much excellence in the North American way of life. For example, in Luis Alberto Sánchez' voluminous survey of the United States as he knew it, there is a chapter which could pass as a typical pamphlet attacking Manifest Destiny and Dollar Diplomacy. But the bulk of this Peruvian *aprista's* book contains a fairly objective and mostly favorable account of life and culture in the United States.<sup>23</sup> A most striking illustration is the lengthy book about the United States by Colombian educator Jesús Arango. It is divided into two parts. The first 115 pages are a sober examination of American civilization, with clear emphasis on its laudable features. The remainder is a forthright condemnation of the imperialistic monster.

A third important aspect of the clamor about North American imperialism is the fact that attacks on the iniquity of the United States have almost invariably been accompanied by severe castigation of their fellow citizens and especially of their rulers by the Spanish American writers themselves. In the writings of men like Ugarte, the blame for intervention in the political life of Latin American countries by the United States is assigned as much to the governing classes in the south as to the northern meddler. According to Ugarte's thesis, to disparage and hate the United States leads nowhere; the Spanish Americans' energy must be directed to united and patriotic efforts to make their own countries strong. In the midst of his diatribes against the "modern Carthaginians" (North Americans), Vargas Vila in like manner took time out to excoriate Spanish American politicians as blind, lazy, and submissive.<sup>24</sup>

Gabriela Mistral, a Chilean poetess of continental fame, expressed in vigorous terms a typical attitude: "Hatred of the *yanqui*? He is conquering us, overwhelming us, through our own fault, because of our torrid languor, our Indian fatalism. . . . Let us hate that in ourselves which renders us vulnerable to his spike of steel and gold, his will and his wealth."<sup>25</sup>

In fact, part of the reaction against *yanqui* misbehavior was really a distressing re-examination on the part of Spanish American *pensadores* of their own human condition, a search for their true roots and for a definition of their national identities. The anti-imperialist campaign was only one phase of a broader attempt to find their correct way through the labyrinth of modern values.

To a certain extent, the fear of the *yanqui* peril was related to that widespread tempest, primarily European in origin, in which racial superiority or inferiority were earnestly debated as if they were realities. The ideas of Gobineau, Chamberlain, et al. were, as we have seen, not unknown to certain Spanish American intellectuals who sometimes associated their quarrel with the Colossus of the North with the facile, deterministic theories of the racists. Thus the quarrel became a battle in a hypothetical and transcendental war between the Anglo-Saxon or Nordic race and the Latin race (whatever those terms may mean). A few were pessimistic about the outcome, but others, sounded the clarion call for Latin unity against the racial enemy, sometimes dreaming of an ideal coalition of France,



Spain and Latin America; more frequently, as has been noted, they advocated a union of the Latin American republics. Both Vargas Vila and Blanco-Fombona though they discerned collusion among Great Britain, the United States, and Germany to subdue the Latin race.<sup>26</sup> Vasconcelos was also at time obsessed with the now antiquated social ideology of race struggle and customarily located his early *anti-yanqui* oratory in that context. In view of the complexity of racial mixture in Latin America, conversion of the anti-imperialist crusade into a clear cut confrontation of Nordics and Latins naturally caused some confusion in the minds of the more realistic crusaders.

## NOTES

- Samuel Flagg Bemis, *The Latin American Policy of the United States*, presents the essential facts, although his tendency to justify the actions of the United States is obvious.
- Yankeephobia of the anti-imperialist kind is thoroughly examined in Rippy, "Literary Yankeephobia in Hispanic America," and in his "Pan Hispanic Propaganda in Hispanic America." See also Mary Chapman, "Yankeephobia."
- Vargas Vila, *Bárbaros*, pp. 149, 159, and passim.
- Blanco-Fombona, *La lámpara de Aladino*, p. 402; see also his *La evolución política y social de Hispanoamérica*, and his essay on Sarmiento in *Grandes escritores de América* (Madrid, 1917).
- Ugarte, "La nueva Roma," in Englekirk et al., *Anthology of Spanish American Literature*, pp. 656–57. Four books by Ugarte are important landmarks in the anti-imperialist campaign: *El porvenir de la América latina* (1910); *Mi campaña hispanoamericana* (1922); *El destino de un continente* (1923); and *La patria grande* (1924).
- For a fairly complete bibliography of anti-imperialist writings, see Rippy's introduction to Ugarte's *Destiny of a Continent*, pp. 293–96. Particularly significant works were Pereyra, *El mito de Monroe* (1914), Arturo Capdevila, *América: nuestras naciones ante los Estados Unidos* (1926), Alfredo Palacios, *Nuestra América y el imperialismo yanqui* (1915), and Vasconcelos, *Bolivarismo y Monroísmo* (1935).
- Darío, in Englekirk et al., pp. 426–27. Fear of cultural imperialism has been a frequent theme in other commentators; see, for example, Ernesto Mario Barreda, poet and novelist, *Nosotros*, 2a época, 1:52–57.
- E.g., *La caravana pasa*, pp. 240–49, and "Edgar Allan Poe," in *Los raros*, in *Obras completas*.
- See Fred P. Ellison, "Ruben Darío and Brazil"; Luis Alberto Sánchez said that Darío's opposition to imperialism was purely "decorative" and that he lacked "social sensitivity" (*Balance y liquidación del 900*, p. 49).
- Darío, *Poesía: libros poéticos completos*, pp. 479–84.
- Chocano, in Englekirk et al., pp. 468–69.
- See Chocano's poem "El canto del porvenir" and Estuardo Nuñez, "El poeta Chocano en Nueva York."
- See selections by Calix to Oyuela (Argentina), Luis Andrés Zuñiga (Honduras), and Santiago Argüello (Nicaragua) in Alberto Cabrales, *Política de Estados Unidos y poesía de Hispanoamérica*.
- Neruda, *Obras completas* (Buenos Aires, 1956), pp. 423–27; Guillén, *West Indies, Ltd.* (Havana, 1934).
- See Eneida Avila, "Las compañías bananeras en la novelística centroamericana." This comprehensive study attempts to collate conditions as described in the novels with present-day realities as revealed in a large number of field interviews with personnel of the United Fruit Company. The results indicate little correspondence between the fictional presentations and the actual situations. For a brief survey of *anti-yanqui* fiction, see Luis Alberto Sánchez, *Proceso y contenido de la novela hispanoamericana* (Madrid, 1953), pp. 531–34; Harold Urist, "Portrait of the Yanqui"; and Ansón C. Piper, "El yanqui en las novelas de Rómulo Gallegos." (Gallegos, a distinguished novelist and statesman, portrayed admirable *yanquis* as well as villains.)
- Pereyra, p. 22.
- Quoted in Avila, "Las compañías," no. 57, p. 118.
- Lugones, "La América Latina," p. 67; Subercaseaux, *Retorno de U.S.A.*, p. 180. Future references to Subercaseaux are in the text.
- Ramón Oliveres, *El imperialismo yanqui en América*, p. 50. Other commentators of the caliber of Alfonso Reyes and Luis Alberto Sánchez exempt the American people from imperialistic guilt. See Beals and Humphrey, *No Frontiers*, p. 94, for the belief of Mexican students in the innocence of the common man.
- Darío, "A Roosevelt," in Englekirk et al., pp. 426–27. Darío later admired Roosevelt even more fully when he learned that the president honored poets (*ibid.*, p. 427). See José Balseiro, "Ruben Darío and the United States," p. 76.
- Ugarte, *The Destiny of a Continent*, pp. 169, 285; García Calderón, *Latin America: Its Rise and Progress*, pp. 298–306.
- Joseph L. Arbena, "The Image of an American Imperialist: Colombian Views of Theodore Roosevelt."
- Sánchez, *Un sudamericano en Norteamérica*, chap. 2 and passim.
- Ugarte, in Englekirk et al., p. 661; Vargas Vila, passim; see also Enrique José Varona, "imperialismo yankee en Cuba."
- Mistral, in *Inter-America* (1922), 6:21.
- Vargas Vila, p. 99; Blanco-Fombona, *La americanización del mundo*, p. 24.

Source: John T. Reid. *Spanish American Images of the United States, 1790–1960*, 153–162 (Gainesville: University of Florida Press, 1977). Reprinted with permission of the University Press of Florida.

## Carlos Calvo, Calvo Doctrine (Initial Draft), 1868

*The 1860s represented a turning point in Latin America's global relationships. Thanks to the replacement of sailing vessels with steam engines, European businesses came in search of markets and raw materials, and in 1862, the French led a combined military mission to Mexico to force the collection of debts. Only the U.S. Civil War caused momentary pause in American expansionary interests.*

*Argentine scholar Carlos Calvo (b. 1824–d. 1906) viewed these events, and particularly the French intervention in Mexico, as precursors to the future. He wanted to devise a legal means that would prevent foreign corporations from persuading their home governments to interfere in Latin America's internal affairs over unpaid debts and other legal matters. As a result, the Calvo Clause, written into contracts of foreign businesses operating in Latin America, required the foreigners to accept the jurisdiction of local courts and to surrender the right to appeal for diplomatic protection from their home government. The Calvo Doctrine, which contained similar limitations, was to be written into economic agreements between governments, such as the United States and Mexico, but the United States resisted such efforts. The Latin Americans con-*

*tinued to push for limitations on diplomatic protection (in other words, interventions) well into the 20th century.*



According to strict international law, the recovery of debts and pursuit of private claims does not justify *de plano* intervention of governments, and since European states invariably follow the rule in their reciprocal relations, there is no reason why they should not also impose it upon themselves in their relations of other nations of the new world.

It is certain that aliens who establish themselves in a country have the same right to protection as nationals, but they ought lay claim to a protection more extended. If they suffer any wrong, they ought to count on the government of the country prosecuting the delinquents, and not claim from the state to which the authors of the violence belong any pecuniary indemnity.

The rule that in one case it has been adopted to impose on American states is that foreigners merit more regard and privilege, more marked and extended than those accorded even to the nations of the country where they reside.

*Source:* Edwin M. Borchard. *The Diplomatic Protection of Citizens Abroad*, 793 (New York: Banks Law Publishing, 1915).

### Luis M. Drago, Drago Doctrine, December 29, 1902 (Excerpts)

*In 1902, the alarmed Argentine foreign minister Luis M. Drago (b. 1859–d. 1921) appealed to U.S. secretary of state John Hay to use the Monroe Doctrine as a tool to prevent the use of European gunboats to force debt collection in Latin America. At the time, British and German ships had blockaded the Venezuelan coast for such purposes. Drago argued that the use of force violated a nation's sovereignty and that sovereignty was a fundamental concept of international law. Furthermore, Drago proclaimed that the Monroe Doctrine declared against European occupation of Latin American territory, and accordingly, the British-German presence in Venezuela violated the doctrine. Drago sought U.S. support for his position.*

*Although Hay failed to support Drago and President Theodore Roosevelt arranged for the settlement of the European-Venezuelan debt dispute, the Drago Doctrine became widely recognized as the first protest against the use of force by an industrialized nation to collect debts in a developing and weaker nation.*



... [T]he origin of the (British-Venezuelan) disagreement is, in part, the damages suffered by subjects of the claimant (Britain) during revolutions and wars that have recently occurred within the borders of [Venezuela] ... and in part also the fact that certain payments on the external debt of the nation have not been met at the proper time. ...

Among the fundamental principles of public international law ... is that all states, whatever be the force at their disposal, are entities in law, perfectly equal one to another, and mutually entitled by virtue thereof to the same consideration and respect.

... [T]he payment of (debt) in its entirety can and must be made by the nation without diminution of its inherent rights as a sovereign entity, but the summary and immediate collection at a given moment, by means of force, would occasion nothing less than the ruin of the weakest nations, and the absorption of their governments, together with all the functions inherent in them. ...

This is in no wise a defense for bad faith, disorder, and deliberate and voluntary insolvency. It is intended merely to preserve the dignity of the public international entity which may not thus be dragged into war. ... The fact that collection cannot be accomplished by means of violence does not ... render valueless the acknowledgment of the public debt, the definite obligation of paying it. The Argentineans acknowledge that Venezuela's failure to pay its international obligations resulted in the capture of its fleet, the bombardment of one of its ports, and the establishment of a rigorous blockade along its shores. If such proceedings were to be definitely adopted they would establish a precedent dangerous to the security and the peace of the nations of this part of America. The collection of loans by military means implies territorial occupation to make them effective, and territorial occupation signifies the suppression or subordination of the governments of the countries on which it is imposed. ...

Such a situation seems obviously at variance with the principles many times proclaimed by the nations of America, and particularly with the Monroe Doctrine, sustained and defended with so much zeal on all occasions by the United States, a doctrine to which the Argentine Republic has heretofore solemnly adhered. ...

The only principle which the Argentine Republic maintains and which it would, with great satisfaction, see adopted ... by a nation that enjoys such great authority and prestige as does the United States, is the principle ... that there can be no territorial expansion in America on the part of Europe, nor any oppression of the peoples of this continent, because an unfortunate financial situation may compel some one of them to the fulfillment of its promises. In a word ... public debt can not occasion armed intervention nor even the actual occupation of the territory of American nations by a European power.

*Source:* U.S. Department of State. *Papers Relating to the Foreign Relations of the United States, 1903*, 1–5 (Washington, D.C.: Government Printing Office, 1904).

### Treaty to Avoid or Prevent Conflicts between the American States (Gondra Treaty), May 3, 1923 (Excerpts)

*The agenda of the Fifth International Conference of American States held in Santiago, Chile, in 1923 illustrated Latin America's discontent with U.S. interventions in their internal*

*affairs. Although the U.S. delegation sidestepped most discussions about political issues, it could not ignore the proposal of former Paraguayan president and head of the Paraguayan conference delegation Manuel E. Gondra (b. 1871–d. 1927). He proposed a continental treaty to establish commissions of inquiry that would examine disputes between nations. In effect, the Treaty to Avoid or Prevent Conflicts provided for these commissions to conduct a year-long examination of an interstate problem, and while so doing, neither disputant would prepare for war. Hopefully, this “cooling-off” period would pave the way for a diplomatic solution to interstate problems. The Treaty to Avoid or Prevent Conflicts proved ineffective, but its concept eventually became a basic tenet of the inter-American security system in limiting external influences in Latin America.*



Article I. All controversies which for any cause whatsoever may arise between two or more of the High Contracting Parties and which it has been impossible to settle through diplomatic channels, or to submit to arbitration in accordance with existing treaties, shall be submitted for investigation and report to a Commission to a Commission to be established. . . . [The parties] undertake, in case of disputes, not to begin mobilization or concentration of troops on the frontier of the other Party, nor to engage in any hostile acts or preparations for hostilities, from the time steps are taken to convene the Commission until the said Commission has rendered its report or until the expiration of the time provided for. . . .

Article II. The controversies referred to in Article I shall be submitted to the Commission of inquiry whenever it has been impossible to settle them through diplomatic negotiations or procedure or by submission to arbitration, or in cases in which the circumstances of fact render all negotiation impossible and there is imminent danger of an armed conflict between the Parties. Any one of the Governments directly interested in the investigation of the facts giving rise to the controversy may apply for the convocation of the Commission of Inquiry and to this end shall be necessary only to communicate officially this decision to the other party and to one of the Permanent Commissions. . . .

Article V. . . . The Commission shall furnish the render its report within one year from the date of its inauguration . . . [and] it may be extended six months beyond the period established, provided the Parties to the controversy are in agreement. . . .

Article VII. Once the report is in possession of the Governments parties to the dispute, six months time will be available for renewed negotiations in order to bring about a settlement of the difficulty in view of the findings of [the] report; and if during this new term they should be unable to reach a friendly arrangement, the Parties in dispute shall recover entire liberty

of action to proceed as their interests may dictate in the question dealt with in the investigation. . . .

Source: U.S. Department of State. *Papers Relating to the Foreign Relations of the United States, 1923*, Vol. 1, 30–34 (Washington, D.C.: Government Printing Office, 1938).

### J. Reuben Clark, Clark Memorandum on the Monroe Doctrine, December 17, 1928 (Excerpts)

*As the Latin American protest against U.S. intervention in its internal affairs intensified during the 1920s, U.S. policy also slowly changed. The threat of European intervention greatly diminished after World War I, the State Department’s Latin American Division recognized its inability to impose democracy upon the circum-Caribbean states, the U.S. business community asserted that the interventionist policy negated economic opportunities, and, in the late 1920s, body bags carrying marines home from the chase after Nicaragua’s rebel leader Augusto César Sandino caused increasing public protest against intervention.*

*Shortly after assuming the presidency in March 1929, Herbert Hoover directed Undersecretary of State J. Reuben Clark (b. 1871–d. 1961) to undertake a study of the Monroe Doctrine and the accompanying “Roosevelt Corollary” that provided the cover for U.S. interventions in the circum-Caribbean region after 1904. As indicated in the excerpt below, Clark concluded that the corollary had no relationship to the original intention of the 1823 Monroe Doctrine.*



. . . It is of first importance to have in mind that Monroe’s declaration in its terms, relates solely to the relationships between European states, . . . the Western Hemisphere, and the Latin American Governments, which on December 2, 1823 declared and maintained their independence which we had acknowledged. . . .

[T]he declaration does not apply to purely inter-American relations. Nor does the declaration purport to lay down any principles that are to govern the interrelationship of the states of the Western Hemisphere as among themselves. The (Monroe) Doctrine states a case of United States *vs.* Europe, not of the United States *vs.* Latin America.

Such arrangements as the United States has made, for example, with Cuba, Santo Domingo, Haiti, and Nicaragua, are not within the Doctrine as announced by Monroe. They may be accounted for as an expression of national policy, which like the Doctrine itself, originates in the necessities of in the necessities of security or self preservation of national policy . . . and outlined in what is known as the ‘Roosevelt Corollary’ to the Monroe Doctrine (1904) in connection with the Dominican debt protocol of 1904; but such arrangements are not covered by the terms of the Monroe Doctrine.

Should it become necessary to apply a sanction for a violation of the Doctrine as declared by Monroe, that sanction would run against the European power offending the policy, and not against the Latin American country which was the object of the European aggression, unless a conspiracy existed between the European and American states involved.

In the normal case, the Latin American state against which aggression was aimed by a European power, would be the beneficiary of the Doctrine not its victim. This has been the history of its application. The Doctrine makes the United States a guarantor, in effect, of the independence of Latin American states, though without the obligations of a guarantor of those states, for the United States itself determines by its sovereign will when, where, and concerning what aggression it will invoke the Doctrine, and by what measures, if any, it will apply a sanction. In none of these things has any other state any voice whatever.

... [T]he Monroe Doctrine . . . has no relation in its terms to an aggression by any other state than a European state, yet the principle 'self preservation' which underlies the doctrine . . . would apply to any non-American state in whatever quarter of the globe it lay, or even to an American state, if the aggression of such state against other Latin American states were "dangerous to our peace and safety," or were a "manifestation of an unfriendly disposition towards the United States," or were "endangering our peace and happiness;" that is, if such aggressions challenged our existence.

Source: J. Reuben Clark. *Memorandum on the Monroe Doctrine*, December 17, 1928, xix–xx (Washington, D.C.: Government Printing Office, 1930).

**Cordell Hull, Statement by the U.S.  
Secretary of State, Seventh International  
Conference of American States,  
December 15, 1933 (Excerpt)**

*In his inaugural address on March 4, 1933, President-elect Franklin D. Roosevelt (b. 1882–d. 1945) promised to be a "good neighbor" in world affairs. Nine months later, in December, at the opening session of the Seventh International Conference of American States in Montevideo, Uruguay, Secretary of State Cordell Hull (b. 1871–d. 1956) extended Roosevelt's proclamation by promising that his country would no longer interfere in the internal affairs of Latin American nations. It was the culmination of Latin American demands for U.S. policy changes during the 1920s and the U.S. self-examination of its policy that culminated in J. Reuben Clark's Memorandum on the Monroe Doctrine. The United States committed itself to the good neighbor policy in the Convention on the Rights and Duties of States and the Protocol to Non-Intervention, signed at the conference's conclusion on December 23, 1933.*

*Ironically, shortly before the conference, Roosevelt's special envoy to Cuba, Sumner Welles (b. 1892–d. 1961), encouraged Cuban army sergeant Fulgencio Batista y Zaldívar (b. 1901–d. 1973) to overthrow the government of President Ramón Grau San Martín (b. 1889–d. 1969), a proposal reiterated in January 1934 by his replacement, Jefferson Caffrey (b. 1896–d. 1974). Batista acted on January 14, 1934. Elsewhere in the circum-Caribbean region during the 1930s, the United States did not interfere in the rise to power or the political maneuverings to remain in power of dictators Jorge Ubico y Castañeda (b. 1878–d. 1946) in Guatemala, Maximiliano Hernández Martínez (b. 1882–d. 1946) in El Salvador, Tiburcio Carías Andino (b. 1876–d. 1969) in Honduras, Anastasio Somoza García (b. 1896–d. 1956) in Nicaragua, and Rafael Trujillo (b. 1891–d. 1961) in the Dominican Republic.*



The United States comes to the Montevideo Conference "because we share in common the things that are vital to the entire material, moral and spiritual welfare of the people of this hemisphere and because the satisfactory development of civilization itself In this Western World depends on cooperative efforts by all the Americas . . . we stand ready to carry on in the spirit of that application of the Golden Rule by which we mean the true good will of the true good neighbor. . . . We have a belt of sanity on this part of the globe. We are as one as to the objective we seek. We agree that it is a forward-looking enterprise which brings us here, and we must make it a forward-moving enterprise. . . .

In its own forward-looking policy the administration in Washington has pledged itself . . . to the policy of the good neighbor. As President Roosevelt has defined the good neighbor, he 'resolutely respects himself and, because he does so, respects the rights of others.' We must think, we must speak, we must act this part."

I am safe in the statement that each of the American nations whole-heartedly supports this doctrine—that every nation alike earnestly favors the absolute independence, the unimpaired sovereignty, the perfect equality of each nation, large or small, as they similarly oppose aggression in every sense of the word.

... [M]y country is steadily carrying [this new policy] into effect . . . the extent and nature of which should be familiar to each of the nations here represented. My Government is doing its utmost, with due regard to commitments made in the past, to end with all possible speed engagement which have been set up by previous circumstances. . . . The people of my country strongly feel that the so-called right of conquest must forever be banished from this hemisphere, and most of all they shun and reject that so-called right for themselves.

Source: U.S. Department of State. *Papers Relating to the Foreign Relations of the United States—Peace and War: United States Foreign Policy, 1931–1941*, 196–198 (Washington, D.C.: Government Printing Office, 1943).

## Convention on Rights and Duties of States, December 26, 1933 (Excerpts) Additional Protocol Relating to Non-Intervention, December 23, 1936 (Excerpts)

*This convention and protocol formed the legal basis of the good neighbor policy as articulated by Secretary of State Cordell Hull. The principles of national sovereignty and equality were reaffirmed and the right of intervention in the internal affairs, of each state, denied. At the next two inter-American conferences—in Buenos Aires in 1936 and in Lima in 1936—the Latin American delegations were more interested in the reaffirmation of the nonintervention principle than any discussion of the rising European and Asia war clouds. Only with the outbreak of the European war in September 1939 and the fall of France in June 1940 did the Latin Americans turn to a discussion of hemispheric security.*



### Convention on Rights and Duties of States

Article III. The political existence of the state is independent of recognition by the other states. Even before recognition the state has the right to defend its integrity and independence, to provide for its conservation and prosperity, and consequently to organize itself as it sees fit, to legislate upon its interests, administer its services, and to define the jurisdiction and competence of its courts.

Article IV. States are juridically equal, enjoy the same rights, and have equal capacity in their exercise. The rights of each one do not depend upon the power which it possesses to assure its exercise, but upon the simple fact of its existence as a person under international law. . . .

Article VI. The recognition of a state merely signifies that the state which recognizes it accepts the personality of the other with all the rights and duties determined by international law. Recognition is unconditional and irrevocable. . . .

Article VIII. No state has the right to intervene in the internal or external affairs of another.

Article IX. The jurisdiction of states within the limits of national territory applies to all its inhabitants. Nationals and foreigners are under the same protection of the law and the national authorities and the foreigners may not claim rights other or more extensive than those of the nationals. . . .

Article XI. The signatories agree not to recognize territorial acquisitions or special advantages which have been obtained by force whether this consists in the employment of arms, in threatening diplomatic representations, or in any other effective coercive measure. The territory of a state is inviolable and may not be the object of military occupation nor of other mea-

asures of force imposed by another state directly or indirectly or for any motive whatever even temporarily.

### Additional Protocol Relating to Non-Intervention

. . . Article I. The . . . parties declare inadmissible the intervention of any one of them, directly or indirectly, and for whatever reason, in the internal affairs of any other of the parties.

The violation of the provision of this Article shall give rise to mutual consultation, with the object of exchanging views and seeking methods of peaceful adjustment.

Article II. It is agreed that every question of concerning the interpretation of the . . . [protocol] which . . . has not been possible to settle through diplomatic channels, shall be submitted to the procedure of conciliation provided for in the agreements in force, or to arbitration or to judicial settlement.

*Source:* C. I. Bevans, ed. *Treaties and Other International Agreements of the United States, 1776–1949*, Vol. 3, 338–342, 343–346 (Washington, D.C.: Government Printing Office, 1949).

## Nationalism or Communism?

*Long-standing socioeconomic problems emerged as the most important issue in post-World War II Latin American history. As explained by Peruvian writer and philosopher José Carlos Mariátegui (b. 1894–d. 1930), poor farmworkers—usually Amerindians, mestizos, and their dependents—had been long exploited by the landowners. Arduous workdays under miserable conditions for nearly subsistence wages and without legal protection in turn contributed to poor housing, education, and health care for the rural workers. Urban workers fared no better. Since the beginning of the 20th century, these workers had been at the mercy of producers, unprotected by law. Governments regularly repressed labor strikes and demonstrations and charged the strike leaders with being anarchists, socialists, and communists. Argentine populist and president Juan D. Perón (b. 1855–d. 1974) drew support from urban workers, popularly known as descamisados (shirtless ones). Below, Perón spells out what he believes to be legitimate workers' rights.*

*Mexico was the first Latin American nation to address both issues. Its 1917 constitution detailed the rights of urban labor, which many analysts assert reflect the ideas of Mexican Marxist labor leader Vicente Toledano (b. 1894–d. 1968). The same document granted the Mexican federal government control over all land and natural resources, including the redistribution of property and exploitation of natural resources. Collectively, these three documents illustrate the growing assault on Latin America's traditional socioeconomic order in*

which the elites, including foreigners, profited at labor's expense. From this perspective, Mariátegui, Perón, and the Mexican Constitution of 1917 are expressions of Peruvian, Argentine, and Mexican nationalism, respectively.

As the cold war took root in the years immediately after World War II, these legitimate nationalist demands became ensnarled in the free world's struggle against communism. This conflict of ideas played out in Guatemala from 1945 to 1954, where Presidents Juan José Arévalo (b. 1904–d. 1990) and Jacobo Arbenz (b. 1913–d. 1971) initiated reforms that increasingly attacked the elite's privileged position. The uncertainty regarding Arévalo's and Arbenz's philosophy is discussed in this section. The same confusion is found in regard to Fidel Castro (b. 1926– ). In pleading his own defense case at his trial for the July 26, 1953, attack on the Moncada Barracks, Castro calls for the need to correct the inequities of Cuba's past. In his 1959 meeting with Castro, U.S. vice president Richard M. Nixon (b. 1913–d. 1994) could not determine if the Cuban leader was a communist or not. Eighteen years later, during a television interview with British newscaster David Frost (b. 1939– ) on April 1, 1977, Nixon was very more sure of himself when he reflected upon the administration of self-professed Chilean Marxist Salvador Allende. While the Frost interview focuses on the larger policy context, Laura, a 24-year-old "leftist," describes her work with the urban poor at the local level, in Santiago de Chile. Laura's struggles are in marked contrast to Nixon's concerns, as are the programs of Grenadian prime minister Maurice Bishop and U.S. president Ronald Reagan.

### Mexican Constitution of 1917, February 5, 1917 (Excerpts)

*Mexico was the first Latin American nation to address the plight of rural and urban labor as described below by José Carlos Mariátegui and Juan D. Perón. Mexican history is replete with the exploitation of the lower classes. During the Spanish colonial period, Amerindians, mestizos, and their descendants labored on large landed estates and in the mining industry for the benefit of the Spanish government. The practice continued following Mexican independence in 1821, when a local elite emerged to dominate the agricultural and mining sectors. Foreign investors, mostly North Americans, arrived late in the 19th century and soon played the most prominent roles in the export of agricultural produce, mining, railroad construction and operation, and banking.*

*The Mexican Revolution (1910–20) was an attack on Mexico's socioeconomic and political inequities. Its 1917 constitution, excerpted below, detailed the rights of urban labor, which many analysts assert reflect the ideas of Mexican Marxist labor leader Vicente Toledano (b. 1894–d. 1968).*

*The same document granted the Mexican federal government control over all land and natural resources, including the redistribution of property and exploitation of natural resources, a clear strike against large landowners and foreign investors.*



Article 27. Ownership of the lands and waters within the boundaries of the national territory is vested originally in the Nation, which has had, and has, the right to transmit title thereof to private persons, thereby constituting private property.

Private property shall not be expropriated except for reasons of public use and subject to payment of indemnity.

The Nation shall at all times have the right to impose on private property such limitations as the public interest may demand, as well as the right to regulate the utilization of natural resources which are susceptible of appropriation, in order to conserve them and to ensure a more equitable distribution of public wealth. With this end in view, necessary measures shall be taken to divide up large landed estates; to develop small landed holdings in operation; [and] to create new agricultural centers.

In the Nation is vested the direct ownership of all natural resources.

[T]he Nation is inalienable and imprescriptible, and the exploitation, use, or appropriation of the resources concerned, by private persons or by companies organized according to Mexican laws, may not be undertaken except through concessions granted by the Federal Executive, in accordance with rules and conditions established by law.

It is exclusively a function of the general Nation to conduct, transform, distribute, and supply electric power which is to be used for public service. No concessions for this purpose will be granted to private persons and the Nation will make use of the property and natural resources which are required for these ends.

Only Mexicans by birth or naturalization and Mexican companies have the right to acquire ownership of lands, waters, and their appurtenances, or to obtain concessions for the exploitation of mines or of waters. The State may grant the same right to foreigners, provided they agree before the Ministry of Foreign Relations to consider themselves as nationals in respect to such property, and bind themselves not to invoke the protection of their governments in matters relating thereto; under penalty, in case of noncompliance with this agreement, of forfeiture of the property acquired to the Nation.

Religious institutions known as churches, regardless of creed, may in no case acquire, hold, or administer real property or hold mortgages thereon; such property shall revert to the Nation, any person whosoever being authorized to denounce any property so held. Presumptive evidence shall be sufficient to declare the denunciation well founded. Places of public worship are the property of the Nation. Bishoprics, rectories, seminaries, asylums, and schools belonging to religious orders, convents, or

any other buildings built or intended for the administration, propagation, or teaching of a religious creed shall at once become the property of the Nation by inherent right, to be used exclusively for the public services of the Federal or State Governments.

Article 123. Workers, day laborers, domestic servants, artisans and in a general way to all labor contracts:

The maximum duration of work for one day shall be eight hours.

The maximum duration of nightwork shall be seven hours.

The use of labor of minors under fourteen years of age is prohibited. . . .

For every six days of work a worker must have at least one day of rest.

During the three months prior to childbirth, women shall not perform physical labor that requires excessive material effort. In the month following childbirth they shall necessarily enjoy the benefit of rest and shall receive their full wages and retain their employment and the rights acquired under their labor contract. . . .

The general minimum wage must be sufficient to satisfy the normal material, social, and cultural needs of the head of a family and to provide for the compulsory education of his children. The occupational minimum wage shall be fixed by also taking into consideration the conditions of different industrial and commercial activities.

Farm workers shall be entitled to a minimum wage adequate to their needs.

Equal wages shall be paid for equal work, regardless of sex or nationality.

Wages must necessarily be paid in money of legal tender and cannot be paid in goods, promissory notes, or any other token intended as a substitute for money.

In any agricultural, industrial, or mining enterprise or in any other kind of work, employers shall be obliged to furnish workmen comfortable and hygienic living quarters for which they may collect rent that shall not exceed one half percent monthly of the assessed valuation of the property. They also must establish schools, hospitals, and any other services necessary to the community. If the enterprise is situated within a town and employs more than one hundred workers, it shall be responsible for the first of the above obligations.

Employers shall be responsible for labor accidents and for occupational diseases of workers, contracted because of or in the performance of their work or occupation; therefore, employers shall pay the corresponding indemnification whether death or only temporary or permanent incapacity to work has resulted, in accordance with what the law prescribes. This responsibility shall exist even if the employer contracts for the work through an intermediary.

An employer shall be required to observe, in the installation of his establishments, the legal regulations on hygiene and health, and to adopt adequate measures

for the prevention of accidents in the use of machines, instruments, and materials of labor, as well as to organize the same in such a way as to ensure the greatest possible guarantee for the health and safety of workers as is compatible with the nature of the work, under the penalties established by law in this respect.

Both employers and workers shall have the right to organize for the defense of their respective interests, by forming unions, professional associations, etc.

Strikes shall be legal when they have as their purpose the attaining of an equilibrium among the various factors of production, by harmonizing the rights of labor with those of capital.

An employer who dismisses a worker without justifiable cause or because he has entered an association or union, or for having taken part in a lawful strike, shall be required, at the election of the worker, either to fulfill the contract or to indemnify him to the amount of three months' wages. The law shall specify those cases in which the employer may be exempted from the obligation of fulfilling the contract by payment of an indemnity. He shall also have the obligation to indemnify a worker to the amount of three months' wages, if the worker leaves his employment due to lack of honesty on the part of the employer or because of ill treatment from him, either to himself or to his wife, parents, children, or brothers and sisters. An employer may not relieve himself of this responsibility when the ill treatment is attributable to his subordinates or members of his family acting with his consent or tolerance.

Enforcement of the labor laws belongs to the authorities of the States, in their respective jurisdictions, but it is the exclusive jurisdiction of the federal authorities in matters relating to the textile, electrical, motion picture, rubber, sugar, mining, petrochemical, metallurgical, and steel industries, including the exploitation of basic minerals, their processing and smelting, as well as the production of iron and steel in all their forms and alloys and rolled products, hydrocarbons, cement, railroads, and enterprises that are administered directly or in decentralized form by the federal Government.

Source: Thomas M. Leonard's excerpt and translation from *Constitución política de los Estados Unidos Mexicanos*, 5–7, 42–46 (Washington, D.C.: Organization of American States, 1968).

### José Carlos Mariátegui, "Peru's Agrarian Economy in the 1920s," 1928 (Excerpts)

*Peruvian essayist and political thinker José Carlos Mariátegui (b. 1894–d. 1930) best describes the plight of the poor farmworkers, usually Amerindians, mestizos, and their dependants. Born into poverty, Mariátegui received only a primary education in Peru. Subsequently, he spent four years in Europe (1919–23), where he fell under the influence of Marxism. Upon his return to Peru, he became an outstanding leftist*

*personality and a prolific writer. One essay from his most prestigious work, Seven Interpretative Essays on Peruvian Reality (1928; reprint, 1971), is excerpted below.*



Peru, despite its expanded mining industry, remains an agricultural country. The great majority of the population is rural, with the Indian, who is usually and by tradition a farmer making up four-fifths of the population. . . . Mining employs . . . a small number of workers, 48,592 in 1926. . . . sugar cane haciendas alone employed 22,367 men and 1,173 women . . . sugar haciendas used 40,557 laborers and rice haciendas 11,332 laborers. . . .

The landowning class has not been transformed into a capitalist middle class, ally of the national economy. Mining companies and transportation are in the hands of foreign capital. The *latifundistas* (landowners) have been satisfied to serve as the latter's intermediaries in the production of sugar and cotton. This economic system has kept agriculture as a semi-feudal organization that constitutes the heaviest burden on the country's development.

The survival of feudalism on the coast is reflected in the stagnation and poverty of urban life. There are few towns and cities on the coast and village as such hardly exists except for the occasional cluster of plots that still adorns the countryside in the midst of a feudalized agrarian structure.

In Europe, the village is descended from the fief. On the Peruvian coast, the village does not exist because the fief is still preserved virtually intact. The hacienda with its more or less classic manor house and usually wretched workers' compound [*rancheria*], and the sugar mill with its outbuildings are the typical rural community. The lack of villages and scarcity of towns prolongs the desert into the cultivated and fertile land of the valley.

Cities, according to the laws of economic geography, are formed regularly in the valleys where roads intersect. The rich and broad valleys of the Peruvian coast, which head the statistics of the national production, have not yet produced a city. At their crossroads or railway stations may be found scattered towns—torpid, malaria-ridden and feeble, lacking either rural health or urban attire. And in some cases, as in the Chicama Valley, the *latifundium* has begun to suffocate the city. Capitalist enterprise, more than the castle or the feudal domain, opposed the prerogatives of the city by competing for its business and robbing it of its function. . . .

. . . The countryside, however secluded, needed the town. It had, above all, surplus cotton or sugar cane for distant markets. Assured of the transport of these products it has little interest in relations with its surroundings. Food crops, when not completely eliminated by the cultivation of cotton or sugar cane, are raised only for consumption on the hacienda. In many valleys, the town receives nothing from and possess nothing in the countryside. Therefore, it lives in poverty from a few urban trades, from the men it sends to work at the hacienda, and from its wearisome employment as a way station for the many thousands of tons of agricultural products that pass through it

annually. The rare stretch of farmland supporting an independent and industrious community is a oasis in succession of fiefs that, defaced by machinery and rails, have lost the stamp of a noble tradition.

In many cases, the hacienda completely closes its doors to outside trade: only its company stores are allowed to supply its workers. On the one hand, this practice indicates that the peasant is treated as a thing and not as a person; on the other hand, it prevents the town from fulfilling the role that would maintain it and guarantee its development within the rural economy of the valleys. The hacienda, by taking over the trade and transport as well as land and dependent industries, deprives the town of a livelihood and condemns it to a sordid and meager existence.

The industries and commerce of cities are subject to supervision, regulation, municipal taxes. Community life and services are sustained by their activity. The *latifundium*, however, escapes these rules and levies. It can compete unfairly with urban industry and commerce and is in a position to ruin them.

The favorite legal argument for large estates is that they are essential to the creation of great production centers. Modern agriculture, it is claimed, requires expensive machinery, huge investments, and expert management. Small prosperities cannot meet these needs. Exports of sugar and cotton safeguard Peru's balance of payments.

But the crops, machinery and exports of the *latifundistas* boast of are from being their own achievement. Production of cotton and sugar has flourished thanks to the stimulus of credits obtained for that purpose and on the basis of cheap labor. The financial organization of the crops, which depend for development and profit on the world market, is not the result of either the foresight or the cooperation of landowners. The *latifundium* simply has adapted itself to outside incentive. Foreign capital, in its perennial search for land, labor and markets, has financed and directed the work of landowners by lending them money secured by the latter's products and properties. Many mortgaged estates already are being directly administered by foreign exporting firms.

The country's landowning aristocracy has most clearly shown its incompetence in the department of La Libertad where it owned large valley haciendas. Many years of capitalist development brought the following results: the concentration of the sugar industry in the region of two huge sugar mills, *Cartavio* and *Casa Grande*, both foreign owned; the absorption of domestic business by these two enterprises, especially the second, which also monopolized import trade; and the commercial decline of the city of Trujillo and the bankruptcy of most of its import firms.

The old landowners of La Libertad, with their production and feudal customs, have not been able to resist the expansion of foreign capital enterprise with its scientific methods, discipline, and determination. In general, all this has been lacking in local landholders, some of whom could have accomplished as much as the German industrialists if they had had the same entrepreneurial temperament.

The *criollo* [creole] landowner is handicapped by his Spanish heritage and education, which keeps him from clearly



perceiving and understanding all that distinguishes capitalism from feudalism. The moral, political, and psychological elements of capitalism apparently have not found a favorable climate here. The capitalist, or rather the *criollo* landowner, believes in income before production. The love adventure, the drive to create, and the organizing ability that characterize the authentic capitalist are almost unknown in Peru.

Capitalist concentration has been preceded by a stage of free competition. Great modern property does not arise, therefore, from great feudal property, as the creole landowner probably imagines; all to the contrary, it could only emerge after great feudal property had been broken up and dissolved. Capitalism is an urban phenomenon, it has the spirit of the industrial, manufacturing and mercantile town. Therefore, one of its first acts was the liberation of land and the destruction of the fief. The development of the city had to be sustained by the free activity of the peasant.

In Peru, the meaning of republican emancipation has been violated by entrusting the creation of a capitalist economy to the spirit of the fief—in the anthesis and negation of the spirit of the town.

Source: José Carlos Mariátegui. *Seven Interpretative Essays on Peruvian Reality*, translated by Marjory Urquidi, 16–21 (Austin: University of Texas Press, 1971).

### Juan D. Perón, "On Labor, 1943–1947," 1948 (Excerpts)

*From 1943 until his death in 1974, Juan D. Perón (b. 1895–d. 1974) exercised significant influence over Argentina's urban labor, or the descamisados (shirtless ones), whom he organized into powerful trade unions and then consolidated into the 2-million-strong General Labor Confederation (Confederación General de Trabajadores, or CGT). The CGT, in turn, was the backbone of the Peronist Party, today known as the Justicialista Party. His influence over labor can be measured by its electoral support for Perón's successful presidential candidacies in 1946, 1951, and 1973. Even during Perón's exile from 1955 to 1973, the Peronists worked to undermine every presidential administration.*

*Urban labor, long the largest single bloc of people in Argentine society, were exploited by native and foreign (largely British) companies. Until Perón, labor was denied the right to form unions, which, in turn, led to poor wages, working conditions, and human dignity. As indicated in the excerpt below, Perón argued that urban labor was entitled to an improvement in its quality of life.*



... "[W]hen both factors, capital and labour, under the tutelage of the State act and develop harmoniously, the symbols of social peace will watch over the vigorous progress of the Nation. . . . Both the representatives of capital and labour should conform

to more Christian principles and have due respect for one another". . . .

"Employers, labourers and the State constitute the elements of every social problem. The and no others are the ones to solve it. . . . Unity of purpose and comprehension among those three elements should be the basic principle of the struggle against the real enemies of society, represented by bad policy, alien ideologies, whatever they may be, false apostles who get into trade-unions to thrive by deceiving and betraying labourers, and the hidden powers of disturbance in international policy."

... "Up to now [in Argentina], manufacturers, traders and all those who employ human labour have had extraordinary advantages with respect to the labourers. . . . The employer is a man who has . . . very often met dishonest men who had to decide as judges . . . bribed them." . . . The worker, on the other hand, "never had money to buy what he needed, and consequently the results of his law-suits always favoured the employer." . . .

On the other hand, Perón continued, "The labourers themselves and their authentic leaders should be the ones most interested in maintaining discipline in labour, as without it, productive work is impossible. Discipline is not authoritative-ness; but a feeling of personal responsibility. . . . he must work with a will to do all he can as well as possible, fully convinced that a decrease in the normal output is wrong, for it is not detrimental to the employer's interests but to society itself and the labourers who intentionally reduce their output. . . . To prevent labourers who have received the necessary and logical social justice from demanding more than their due, the first remedy is the organization of those labourers . . . with responsible, logical and rational organizations, under a good management, they will not ask for anything unfair." . . .

"Work is the indispensable means of satisfying the spiritual and material necessities of the individual and of the community, it is the cause of all the conquests of civilization and the basis of general prosperity; therefore the right to work should be protected by society, by giving it the dignity it deserves and by providing those who need it with occupation." . . .

"The State acting as a judge must legally assert the terms, obligations, rights and guarantees for all who work. Nobody will be left to the free and untrammelled contrivances of those who contract or pay for work and in this way we shall have suppressed the principal cause of disunion, disorder and abuse." . . .

Perón concluded that because of labor's importance to society, the Argentine government had the responsibility to insure that labor:

1. "make possible and guarantee the worker a moral and material retribution to satisfy his vital needs and to compensate the result obtained and the effort made." . . .
2. supply "the means which enable every individual to have an equal chance to exercise the right to learn and perfect his knowledge." . . .
3. have "the right to exact fair and proper [working] conditions for the development of their activities and oblige

society to . . . institute and regulate these conditions are strictly observed.” . . .

4. “not lack the adequate requirements of hygiene and security, that they should not exact excessively heavy effort and should enable the individual to recover his energy through repose.” . . .
5. the right . . . “to well-being, the minimum expression of which is made concrete in the possibility of possessing an adequate dwelling place, adequate food, of satisfying without too heavy toil his and his family’s necessities in such a form that he can work with satisfaction, rest free of worry and enjoy spiritual and material freedom.” . . .
6. “to be protected in cases of decrease, suspension or loss of his power to work, brings about the obligation of society to take unilaterally into its charge the corresponding grants or to promote régimes of mutual obligation destined one and all to cover or to supplement the insufficiencies of certain periods of life or those which result from bad luck arising from possible dangers.” . . .
7. must have his family protected “since it is here that his most elevated affectionate feelings have their origin and all we do for his well-being must be stimulated and favoured by the community.” . . .
8. has the zeal for economic improvement “society must support and favour the initiatives of those who aspire to such an end and to stimulate the formation and utilization of capital in so far as it constitutes an active element for the production and contribution to general prosperity.” . . .
9. “The right to group together freely and to participate in other Legal activities which promote the defence of professional Interests constitute an essential right of the workers that Society must respect and protect.”

Source: Juan Domingo Perón. *Perón Expounds His Doctrine*, 180–184, 202–205 (1948. Reprint, New York: AMS Press, 1973).

**Thomas M. Leonard,  
“Communism or Nationalism?”  
1990 (Excerpts)**

*Guatemala’s socioeconomic and political experience paralleled that of Mexico: Spanish exploitation during the colonial period and the dominance of a landed elite following independence from Spain in 1821. The elite produced the military officers who secured the socioeconomic and political structures, often governing itself. One such ruler was President and General Jorge Ubico y Castañeda (b. 1878–d. 1946) who ruled over Guatemala from 1933 until 1944 when he was forced to resign. The following president, Juan José Arévalo (b. 1904–d. 1990), was an idealistic university professor who brought about only minimal social changes but at a cost to the landowning elite. His successor, Jacobo Arbenz Guzmán (b. 1913–d. 1971), went further. Not only did he promise government control of foreign investments in Guatemala but introduced a*

*land reform program that confiscated idle acreage for distribution to the rural poor.*

*The Guatemalan elite asserted that Arévalo was leading the country down the road to communism, a view not shared by U.S. policy makers through 1950. Rather, these policy makers argued that Arévalo’s social programs were legitimate responses to long-standing inequities. With the hardening of the cold war lines—the Soviets in Eastern Europe, its saber rattling against the European Recovery Program, and the Communist takeover of China in 1949—along with a younger diplomatic corps that witnessed these global experiences, found themselves in agreement with the Guatemalan elite regarding Arbenz: He was a communist who had to be replaced. The essay below illustrates the changing U.S. attitude during the early cold war years that subsequently culminated in the CIA-sponsored and -directed overthrow of Arbenz in 1954.*



[The overthrow of President and General Jorge Ubico in July 1944,] “effectively moved the political scale leftward, [but] the extent of nationalistic fervor could not be immediately” determined.

The articulate middle sector played a significant role in vaulting [Juan José] Arévalo into the presidential palace in February 1945, but it did not anticipate that his “Spiritual Socialism” would appeal to Guatemala’s impoverished masses. Arévalo’s “Spiritual Socialism” promised a new order for Guatemala without the dominant presence of foreign capital and the implementation of a “square deal” for the common man, promises that appealed to 80% of the Guatemalans. In application, “Spiritual Socialism” meant rent and housing legislation to control rents and provide appropriate maintenance on the rented properties; a social security program similar to that in the United States; a labor code to set minimum wages, hours and permit the organization of labor unions; and a proposed income tax to provide government revenues. Such legislation was designed to improve the quality of life for the downtrodden masses at the expense of the wealthy. Furthermore, the administration’s \$100 million in expenditures through 1947 frightened many who were used to pre-war national budgets of \$10 million. When Arévalo directed a revision of the Electoral Code, several newly formed conservative political parties found themselves ineligible for the 1948 congressional elections, a situation that only exacerbated the tense political climate. . . .

. . . These programs did not appeal to the traditional Conservative and Liberal parties who wanted to maintain their own privileged position, nor did they appeal to the middle sector which was concerned only with its own participation in the political process. Not interested in social reform, both elite and the middle sector viewed Arévalo’s appeal to the masses as a threat to their own positions. They quickly labeled Arévalo and his followers as “communists.”

As the 1948 congressional elections approached, Arévalo’s opponents increasingly injected the communist issue into the campaign. The Guatemala Democratic League was founded.

Comprised largely of businessmen, it charged Arévalo with using the plight of the poor to camouflage for his communist intentions. Archbishop Mariano Rossell Arellano warned Catholics not to vote for communist candidates in the congressional elections without suffering church condemnation. Subsequently, the Social Democratic and Constitutional parties, both representing the elite, withdrew from the race in light of Arévalo's communist leanings. . . . The opposition to Arévalo was so intense, that he survived a reported twenty one coup attempts during his presidential tenure. . . .

In 1950, the intelligence units of State, Army, Navy and Air Force concurred with a CIA report that described Arévalo's policies as "strongly nationalistic and influenced by modern socialistic ideas" favoring the interests of the impotent laboring groups, but that they were not communistic. . . . A year later [1951], the State Department concluded that . . . [Arévalo's] "government cannot be said to be communist or controlled by communists."

In contrast United States officials presented evidence of communist growth in Guatemala. As early as 1945, the FBI described the rhetoric used by labor leaders José Manuel Fortuny and Alfredo Pellecer as communist inspired. Both wrote and spoke against "foreign capitalism" and "foreign monopoly capitalists," which the FBI interpreted to mean United States private business interests. Subsequently, a number of known communists held important government posts, . . . [including] the government's Traveling Cultural Mission, charged with stamping out Indian illiteracy in the countryside also injected "a shot of communism" into the curriculum. Also during Arévalo's administration, leading Latin American communists visited Guatemala. . . . The communist presence led Assistant Secretary of State Spruille Braden to conclude that they had a secret agreement with Arévalo which permitted their participation in government and labor. In fact, Braden charged that Arévalo was not a spiritual crusader, but rather was "an agent of Stalin." . . .

A 1948 embassy staff report was even more damning and in many respects, reflected the opinions of the Guatemalan elite. The staff found that an estimated 200 communists, linked to Moscow indirectly through Mexico City and Paris, had secured influential government and labor positions and, that they engineered the abandonment of the 1944 revolutionary goals in favor of the Marxist dialectic. The communist rhetoric was described as an "attempted advance toward dictatorship of the proletariat" and if fully enforced, the labor code "would facilitate the communist objective of state and worker control of industry." Furthermore, the embassy staff described the rent law as a form of confiscatory taxation and the social security program as an unfair burden to industry. In his analysis of this report CPA [Central America and Panama Division] political advisor Robert E. Wilson concluded that when considered alone, Arévalo's reform programs did not constitute a communist threat, but when coupled with the "unmistakable proofs" of communism [which Wilson did not identify], there was cause for concern about Guatemala's political future. Two years later [1950], the CPA staff was convinced that communism had gained more strength in Guatemala than in any other Central American country and, when given Arévalo's known sympathy toward communists, Guatemala had become "a potential danger spot for

the furtherance of international communism in Latin America." In 1950 and 1951 both the CIA and State Department reflected the critical analysis of the Arévalo administration. Each agency concluded that neither Arévalo nor his "Spiritual Socialism" were communist, but that many individual communists had penetrated government and labor circles. However, policy makers failed to determine if the communist growth was by design or because Arévalo was ignorant to the danger. "Perhaps," it was "a mixture of both," the State Department noted, but in either case, the original revolutionary aims became distorted through their confusion with communist jingoism in the domestic and international fields causing Arévalo to lose his original support base. To American policymakers, Arévalo lost sight of his democratic and social justice objectives and adopted the dictums of communist economic, social and political change. . . .

Guatemala's 1950 presidential election came off as scheduled and won by another alleged leftist, Jacobo Arbenz. . . . Throughout the campaign, United States officials failed to reach a consensus regarding Arbenz's social and economic philosophies. Ambassador [Richard C.] Patterson's initial double talk characterized what followed. On the one hand, the ambassador was "inclined to share" a widely held local opinion that Arbenz was an opportunist who was "using labor and if elected will turn on the extremists." On the other hand Patterson continued, "the possibility [that] he shares extremist ideological views may not be discounted." On several subsequent occasions during the campaign embassy officials were impressed with the moderate tone of Arbenz's speeches. In April 1950, Embassy Secretary Milton K. Wells noted that Arbenz "spoke with dignity, with less demagogic allusion to the spectra of alleged foreign influences" exploiting the country.

In contrast to his moderate statements, Arbenz gave several indications of being an extreme leftist. In his initial campaign speech, Arbenz asserted that the electorate had a clear choice between those who defended the goals of the 1944 revolution, and "those old systems which for more than a century have tried to destroy the other social sectors by controlling the national wealth and persecuting the population." In May 1950, Arbenz struck out at UFCO (United Fruit Company) and the Guatemalan landowners when he charged that foreign companies and "creole reactionaries" corrupted the nation's economy and sacrificed its independence. His promises to improve the quality of Indian life at the cost of the "reactionary landlords" sounded like communist rhetoric to the embassy staff. From another perspective Embassy Secretary John W. Fisher concluded that when Arbenz spoke out against communism, he did so only for campaign purposes because he avoided direct answers regarding his position on communism. Two months before the election, Wells reported that the business community accepted the inevitability of an Arbenz victory and that they made "wishful talk of a trend away from the left" once he moved into the presidential palace. In January 1951, following the election, CPA desk officer William Tapley Bennett suggested that the *Arevalista* parties were purging themselves of moderate elements in order to more favorably position themselves of moderate elements in order to more favorably position themselves with Arbenz.

Given the conflicting reports from Guatemala and analysis of them in the State Department, what did United States officials anticipate once Arbenz took office? As early as July 1950, the CIA expected his administration to be more in accordance with traditional Central American practice, in which graft, privilege and arbitrary repression was more prevalent; that he would subvert the army and labor leaders who opposed him; and that he would grant favors to private business groups and welcome United States investment. The agency also anticipated that Arbenz would use labor as a personal political tool to make himself the indispensable arbiter between business, the army and other factions. Embassy secretary Wells shared that optimism in March 1951 when he cabled home that Arbenz, in his inaugural address, called for national unity, not class conflict. Wells also believed that the cabinet was significantly more moderate than its predecessor and, that the extremist members—Galich and MacDonald—would not hold their posts for long because of moderate pressures.

Given the field reports the State Department officers concluded that Arbenz was a political opportunist who could mold events to ensure this continuance in power. Although officials failed to reach a consensus on the nature of his political philosophy, they agreed that “he will steer a more nearly middle course than Arévalo” and given the fact that he controlled the army he could suppress the communists “if he so desires.”

*Source:* Thomas M. Leonard. “Communism or Nationalism? The Truman Administration and Guatemala, 1945–1952.” *Journal of Third World Studies* 7, no. 1 (Spring 1990): 176–180, 183–185.

### Fidel Castro Ruz, “History Will Absolve Me,” September 27, 1953 (Excerpts)

*Fidel Castro Ruz (b. 1926– ), born into a middle-class farming family in eastern Cuba, became one of the 20th century’s most famous revolutionary leaders. He railed against the socio-economic inequities and closed political system that characterized Cuban history since its independence from Spain in 1898. In 1952, after receiving a law degree from the University of Havana, Castro set about to organize a guerrilla army that on July 26, 1953, attacked the Cuban army barracks at Moncada, in Santiago de Cuba. All but 11 of Castro’s estimated 186-man attack force were killed in the assault. Castro was jailed but quickly brought to trial in September 1953. As a lawyer, Castro defended himself in a lengthy essay, “History Will Absolve Me,” subsequently published under the same title. In the portion excerpted below, Castro calls for the need to correct the inequities of Cuba’s past.*

*Castro was found guilty of his role in the attack upon Moncada but served only 11 months of his 15-year sentence. Forced to leave the country, Castro went to Mexico where he organized a small expeditionary force that returned to Cuba on December 2, 1956, and ended with Castro’s triumphant march into Havana on January 7, 1959.*



A revolutionary government with the support of the people and the respect of the nation, once it cleans out all venal and corrupt officeholders, would proceed immediately to industrialize the country, mobilizing all inactive capital (currently over 1,500 million dollars) through the National Bank and the Bank for Industrial and Agricultural Development, submitting that giant task to the study, organization, planning, and final realization by technicians and men of absolute capability, free from political meddling.

A revolutionary government, after making the 100,000 small farmers owners of the land for which they now pay rent, would proceed to end the land problem once and for all. This would be done first by establishing, as the Constitution orders, a limit to the amount of land a person may own for each type of agricultural undertaking, acquiring any excess by expropriation; by recovering the lands usurped from the state; by improving the swamplands; by setting aside zones for tree nurseries and reforestation. Second, it would be done by distributing the rest of the land available among rural families, preferably to those large in number; by promoting cooperatives of farmers for the common use of costly farm equipment, cold storage, and technical-professional guidance in the cultivation of crops and the breeding of livestock. Finally, it would be done by making available all resources, equipment, protection, and know-how to the farmers.

A revolutionary government would solve the problem of housing by lowering rent 50 percent, by giving tax exemption to houses inhabited by their owners; by tripling the taxes on houses built to rent; by substituting the ghastly one-room flats with modern multistory buildings; and by financing housing projects all over the island on a scale never before seen, which would be based on the criterion that if in the rural area the ideal is for each family to own its parcel of land, then in the city the ideal is for each family to own its house or apartment. There are enough bricks and more than enough manpower to build a decent house for each Cuban family. But if we continue waiting for the miracle of the golden calf, a thousand years will pass and the problem will still be the same. On the other hand, the possibility of extending electrical power to the farthest corner of the Republic is today better than ever before because today nuclear energy applied to that branch of industry, lowering production costs, is already a reality.

With these three initiatives and reforms, the problem of unemployment would disappear dramatically, and sanitation service and the struggle against disease and sickness would be a much easier task.

Finally, a revolutionary government would proceed to undertake the complete reform of the educational system, placing it at the same level as the foregoing projects, in order to prepare adequately the future generations who will live in a happier fatherland.

*Source:* Fidel Castro. *History Will Absolve Me*, 41–42 (New York: Fair Play for Cuba Committee, 1961).

**Richard M. Nixon, Memorandum:  
"Meeting with Fidel Castro,"  
April 19, 1959 (Excerpts)**

*On April 15, 1959, three months after his triumphant march into Havana, Fidel Castro (b. 1926) arrived in Washington, D.C., to begin an 11-day tour of the eastern United States and Canada. In his public appearances, Castro spoke of remaining neutral in the cold war, declared that free elections would be held within four years, encouraged additional foreign investments in Cuba, and warned that while there would not be confiscation of private industry, there would be "legal expropriation" of uncultivated or poorly cultivated land for distribution to the rural poor.*

*On April 19, Castro met for two hours with Vice President Richard M. Nixon (b. 1913–d. 1994) because President Dwight D. Eisenhower (b. 1890–d. 1964) refused to meet with the Cuban revolutionary leader. Conveniently, Eisenhower was in Augusta, Georgia, for a golf engagement. Following the meeting, Nixon could not determine if Castro was a communist and concluded that given Castro's current position of power and popular support, there was little that the United States could do except steer him in the right direction.*



Richard Nixon initiated the conversation by suggesting "that while I understood that some reasonable time might elapse before it would be feasible to have elections . . . I urged him to state his position as being in favor of having elections at the earliest possible date and that four years would be the maximum amount of time that would be the maximum amount of time that would elapse before elections were scheduled." He [Castro] went into considerable detail as he had in public with regard to the reasons for not holding elections, emphasizing particularly that "the people did not want elections because the elections in the past had produced bad government."

He used the same argument in justifying the executions of war criminals and his overruling the acquittal of Batista's aviators . . . [and in fact] "it was his responsibility to carry out the will of the people whatever it might appear to be at a particular time" . . . [Regarding his trip to the United States], "his interest was 'not to get a change in the sugar quota or to get a government loan but to win support for his policies from American public opinion.'"

"It was almost his slavish subservience to prevailing majority opinion—the voice of the mob—rather than his naïve attitude toward Communism and his obvious lack of understanding of even the most elementary principles of economics which concerned me the most in evaluating what kind of leader he might eventually turn out to be . . . [Yes], the Cuban people were completely disillusioned as far as elections and representative government were concerned but that this placed an even greater responsibility on him to see that elections were held at the very earliest date and thereby restore the faith of the people in democratic processes.

Otherwise the inevitable result would be the same dictatorship against which he and his followers had fought so gallantly. I used the same arguments with regard to freedom of the press, the right to a fair trial before an impartial judge and jury, and other issues that came up during our conversation. In every instance he justified his departure from democratic principles on the ground that he was following the will of the people. . . .

. . . "He was incredibly naïve with regard to the Communist threat and appeared to have no fear whatever that the Communists might eventually come to power in Cuba. He said that during the course of the revolution there had been occasions when Communists overplayed their hand and 'my people put them in their place.' He implied that this would be the situation in the future in the event that Communists tried to come to power . . . I again tried to cast the arguments in terms of his own self-interest and to point out that the revolution which he had led might be turned against him and the Cuban people unless he kept control of the situation and made sure that the Communists did not get into the positions of power and influence. On this score I felt I made very little impression, if any."

. . . I urged him at the earliest possible moment to bring good strong men into his government and to delegate responsibilities to them in the economic and other areas where he presently was making many decisions. I tried to point out that unless he did this he would have a workload which would be so great that he could not provide the leadership and the vision that the Cuban people needed for the great issues. I put as much emphasis as possible for him to delegate responsibility, but again whether I got across was doubtful.

It was apparent that while he paid lip service to such institutions as freedom of speech, press and religion that his primary concern was with developing programs for economic progress." . . .

Castro further argued that it "would be are better if the money that you [the United States] give to Latin American countries for arms be provided for capital investment . . . I found little here that I could disagree with . . . but "I pointed out that there was competition for capital throughout the Americas and the world and that it would not go to a country where there was any considerable fear that policies might be adopted which would discriminate against private enterprise . . . Here again on this point I doubt if I made too much of an impression.

I tried tactfully to suggest to Castro that Munoz Marin had done a remarkable job in Puerto Rico in attracting private capital and in generally raising the standard of living of his people and that Castro might well send one of his top economic advisors to Puerto Rico to have a conference with Munoz Marin. He took a very dim view of this suggestion, pointing out that the Cuban people were "very nationalistic" and would look with suspicion on any programs initiated in what they would consider to be a "colony of the United States." . . .

"He explained his agrarian reform program in considerable detail justifying it primarily on the ground that Cuba needed more people who were able to buy the goods produced within the country and that it would make no sense to produce more in factories unless the amount of money in the hands of consumers was increased." . . .

He also spoke rather frankly about what he felt was a very disturbing attitude on the part of the American press and the American people. . . . “every place I go you seem to be afraid—afraid of Communism, afraid that if Cuba has land reform it will grow a little more rice and the market for your rice will be reduced—afraid that if Latin America becomes more industrialized American factories will not be able to sell enough abroad as they have previously. You in America should not be talking so much about your fear of what the Communists may do in Cuba or in some other country in Latin America, Asia or Africa—you should be talking more about your own strength and the reasons why your system is superior to Communism or any other kind of dictatorship.” . . .

. . . “His primary concern seemed to be to convince me that he was sincere, that he was not a Communist and that his policies had the support of the great majority of the Cuban people.” . . .

“My own appraisal of him as a man is somewhat mixed. The one fact we can be sure of is that he has those indefinable qualities which make him a leader of men. Whatever we may think of him he is going to be great factor in the development of Cuba and very possibly in Latin American affairs generally. He seems to be sincere, he is either incredibly naïve about Communism or under Communist discipline—my guess is the former and I have already implied his ideas as to how to run a government or an economy are less developed than those of almost any world figure I have met in fifty countries.” . . .

. . . “we have no choice but at least to try to orient him in the right direction.”

*Source:* Papers of Mike Mansfield, University of Montana Library, Missoula, Montana. Richard M. Nixon to Mike Mansfield, April 25, 1959, ser. 22, Leadership Files, Container 44, Folder 12.

### New Havana, an Organized Poor Community in Santiago de Chile (1970–73), 1977 (Excerpts)

*The 1970 election of self-proclaimed Marxist Salvador Allende (b. 1908–d. 1973) as president of Chile brought forth the formation of several nongovernmental groups to work with the urban poor. The Movement of the Revolutionary Left (Movimiento de Izquierda Revolucionaria, or MIR), for example, was active in New Havana (Nueva la Habana), a poor section of Santiago de Chile. One of MIR’s active members was 24-year-old Laura (b. 1946– ), who below describes the thrust of some of the organization’s activities. Her story is instructive for understanding the plight of Santiago’s urban destitute within a city of relative wealth and a country often cited for its progressive government.*



During the Popular Unity [PU] period I was politically active in New Havana, a Santiago *campamento* organized mainly by the MIR. The *campamentos* are poor housing areas on the fringes

of the major cities. They consist mainly of one-room shacks with very little sanitation, running water or electricity. They’re distinct from the *poblaciones*, or traditional shantytowns, in being somewhat organized. This is usually on a political basis dating from the land occupations which first brought them into being.

Their roots thus lie in the housing shortage common to most South American cities. It’s widely assumed that most people in them are unemployed immigrants from the country, but this is only part of the story. In New Havana many people were regular workers, though typically with unstable jobs, in construction for instance. The point is that the living conditions in these areas aren’t unusual—they’re shared by much of the working class, not just the under-employed or unemployed. . . .

. . . [L]ed by the MIR, and involving about eight thousand people, combined to demand a new place to live. The Christian Democrats, eager for votes, gave them some land called “La Florida”, on the outskirts of Santiago. They promptly renamed it “New Havana.” Its development was vital to us. We were still a clandestine organization centered in the universities. New Havana was one of our first mass fronts. . . .

It was probably the cultural front which attracted most participation. . . .

The comrades set up a nursery school where working mothers could leave their children. They lobbied the educational department for the materials for a new school, which they then built, and refurbished buses for extra classrooms. A parent-teacher group was set up to discuss the way the schools were run, and children were represented. They produced some striking new ideas. Especially they challenged the assumption that classroom education was more important than experience. This debate with the teachers was a long one, but finally the classes did get a much more practical orientation. The children went on outings to the nearby foothills of the Andes for botany and biology classes. For mathematics they visited their parents’ work-places to count the machines and learn about angles—and this taught them to respect what their parents were doing, in itself a minor revolution. . . .

We also launched a literacy programme using the methods of Paulo Freire. Politically, it was an ideal time for Freire’s combination of teaching people to read and write and also look critically at their environment. There were lengthy discussions about what were the most interesting and important words to learn, words like “government,” for instance. The illiteracy rate was very high, and the classes were organized by *manzana* [block]. Very few people took part at first. This was partly because the classes were being held in the school, in the evenings. The adults were ashamed to be going to their own children’s classrooms. So we transferred the classes to the *manzanas*. Far more people then took part. By the time the coup put an end to all this, illiteracy in New Havana was virtually a thing of the past.

We also organized leisure activities, song competitions and a youth theatre. This was especially successful. It performed in other *campamentos* and industrial cordons. Its biggest success was *The Story of the Land Occupation* based on local people’s

experiences. The children remembered these vividly and devised most of the play themselves. Even the smallest of them would say: “Well, this is what I was doing then,” and that’s basically how it developed. The six to ten age group presented it on the second anniversary of the formation of New Havana. . . .

. . . Alcoholism was common in New Havana, as elsewhere in Chile. With generations of repression behind them, workers drink heavily as a way of escaping from their problems. This was a major concern of the health front. First, [we] lobbied the National Health Service to sponsor a local health organization—the government was supposed to send its own nurses and doctors, but they hardly ever came. In the end we got permission for this, with a representative of each *manzana* receiving training from the Health Service in nursing and first aid etc. The comrade in charge of the health front had a more intensive course, which even trained her for emergency operations. We also got a clinic, an ambulance and regular visits from a doctor. All this was the product of the health front’s pressure on the Health Service, especially by women comrades.

Many women were also strongly committed to combating alcoholism. . . . Our first step was to eliminate the dozens of small, illicit bars where most of this heavy drinking took place, at extortionate prices. The assembly succeeded in doing this. Just one survived—one stubborn character set up his bar at the very entrance to the *campamento*, with the wine right there in the window. Our long-term solution was to increase alcoholics’ involvement in the life of the *campamento*. We’d encourage them to come home early, for instance, and join in their *manzana* assembly. By these means, and by professional medical treatment, some eighty or so comrades were cured of varying degrees of alcoholism.

This had a visible effect on the everyday life of the *campamento*. You could now go out at three or four in the morning, with little danger of being molested. I often had to, and never had problems. Outside New Havana it was immediately different—any woman out late in a shantytown was likely to run into trouble with drinkers. But in New Havana, no. You were safe. . . .

. . . The New Havana people were known as “the delinquents” to the rightwingers. . . . they were just too used to assuming that shantytown dwellers would always be humble. One confrontation showed especially the difference which grassroots pressure could make. The local mayor was very right-wing, and always harassing the *campamento*. Sometimes, he would cut off electricity, at other times the water supply, and often the rubbish wasn’t cleared. The carts were supposed to come every two days, but once they were missing for a week. It was summer, the stench and flies everywhere. The *manzanas* brought this up in the assembly, which produced a plan of action. Two large trucks were filled with rubbish, and we hoisted the *campamento*’s flags on them. Off we went, with a New Havana security command in front and half the *campamento* following, to the municipal offices. When officials refused to open the gates, we drove the trucks through them. Everyone took a hand in dumping the rubbish in the mayor’s

office. From then on the rubbish trucks were sent to New Havana daily. . . .

In New Havana, small shopkeepers controlled distribution. Most of them were extortionists, although they did provide some employment. Within the *campamento* there were roughly a hundred and fifty of them. People’s purchasing on a small scale—the only one they could afford—increased the scope for profiteering.

The official means of regulating supplies and prices were the JAPs [People’s Committees], promoted mainly by the Communist Party. In New Havana we tried instead for an understanding with the shopkeepers. They agreed to buy from official sources and also to sell at official prices. This would leave them a reasonable profit and prevent hoarding and black marketing. Like the JAPs this had little success, and for much the same reason: the penalties were weak and hard to enforce. Congress rejected Allende’s proposals for strengthening them, and the judiciary hardly applied them, because it was also controlled by the right. So what penalty could the people impose, either with or without the JAPs. In highly organized *campamentos* like New Havana, offending shopkeepers could be expelled. But this was only a local solution, as they then set up in other areas where people were more easily exploited. The assembly was always discussing this problem. It reflected the PU’s weak control in this case of the distributive system, which it was reluctant to really challenge for fear of a right-wing reaction. Our local problems were those of Chile as a whole, of the PU’s limited power and programme.

By early 1973, with the shortage caused by the lorry-owners’ strike, the shopkeepers were holding people to ransom. Despite our efforts to be patient, most of them kept up their old ways. Our only solution was to force them to close. And so instead we relied on a “people’s store” (*Almacén Popular*). This was set up with contributions from the *manzanas*, while the State gave us credit for a stock of supplies. By selling at official prices, this acquired a virtual monopoly of non-perishable goods. This confined the shopkeepers to perishables, which made hoarding and speculation harder. The store belonged to the *campamento* and was managed by the directorate. As it extended its operations and put the small shopkeepers out of business, they were given first choice of becoming its salaried employees. This provided some conciliation, kept them in work and put their expertise to good use.

. . . [W]e kept living standards in the *campamento* rising. For instance the houses, which were wooden and prefabricated, began with bare floors. By the end of three years almost all the floors were covered. Also most families began with only one bed between them, but by 1973 they managed to buy separate ones, and blankets. There was even a communal television in most *manzanas*. . . .

New Havana paid for its reputation. The military and the bourgeoisie had a special hatred for the people there because they were known not just for their words, but for their actions. Whenever they said they were going to take action, they really went ahead and took it. The almost legendary status this gave them was treated as a crime, deserving a specially brutal repression.

Source: Colin Henfrey and Bernardo Sorj, eds. *Chilean Voices: Activists Describe Their Experiences of the Popular Unity Period*, 130–140 (Atlantic Highlands, N.J.: Humanities Press, 1977).

### David Frost, Conversation with Richard M. Nixon: Communism in Chile, April 1, 1977 (Excerpts)

*In contrast to Laura's story above is former president Richard M. Nixon's view of the Salvador Allende (b. 1908–d. 1973) administration in Chile. An ardent anticommunist, Nixon focuses on Allende's nationalization of foreign industries, largely United States based and the example it might set for other Latin American countries to follow. Nixon's perception of Chile fits neatly into that of a traditional cold warrior who saw the world as free or communist and the United States as the leading defender of the free world.*

*Recent scholarship goes further than Nixon does in this interview regarding the U.S. role in the ouster of Allende on September 11, 1973. Nixon asserts only that U.S. officials did discuss the possible overthrow of Allende prior to his inauguration but once in office backed away. Subsequently, the U.S. Central Intelligence Agency pursued policies that disrupted the Chilean internal economy and resulted in demonstrations against Allende that prompted the Chilean military to act alone.*



*Frost: One of the most controversial aspects of your foreign policy, namely Chile. And there were the Chilean elections in September 1970 and after those elections of September the fourth popular traditions suggested that [Salvador] Allende the Marxist would be elected as president in a joint session [of the Chilean congress] on October twenty fourth. And in a meeting with CIA director, Richard Helms, on September fifteenth 1970, you did direct him, didn't you to take such steps as were necessary to prevent Allende from coming to power?*

*Nixon: Yes, there was such a meeting . . . we did not discuss the specific steps, the only steps that were discussed . . . was the use of economic measures that might be effective. And in listing whatever political groups were to be involved . . . in preventing Allende from coming to power, enlisting of course the major military leaders. Because, of course, the military had great influence in Chile, on a political situation. A military coup was not was contemplated and of course it did not take place.*

*Frost: No, but a coup was one of the things that Mr. Helms could have felt was certainly not ruled out?*

*Nixon: . . . What I anticipated was that . . . it might be possible under the circumstances Allende had not gotten . . . a majority of the popular vote, that the other two parties should get together and . . . with proper press support, and . . . support from the military that they would be able,*

*through a coup, if you want to use that term, to prevent him from coming to power.*

*Frost: But never the less, you wanted to prevent him [Allende] from coming to power.*

*Nixon: Yes. . . .*

*Nixon: Let me say . . . let's get our priorities as far as morality into proper perspective here. . . . What we're really talking about is the real world . . . not the world as I know you want and as I want it. Different as our backgrounds are . . . we would prefer a world in the great Anglo-American tradition in which . . . we have freedom of expression . . . in which there are not covert activities, there are no fears, no repression . . . or if there is, that, when it is punished, et cetera, et cetera, et cetera, it isn't that kind of a world. We live in a world where at the present time the greatest threat to free nation is not from Communist nations, potential aggressor nations, marching over borders, it is not from Communist nations with huge nuclear armaments launching a nuclear strike, but the threat to free nations through Communist nations, potentially aggressive Communist nations like the Soviet Union, like Cuba, for example, like Chile if Allende had stayed in power. Burrowing under a border rather than over a border . . . and supporting, and supporting the Communist Party.*

*Frost: What did you have in mind in Chile when you said that you wanted the CIA or you wanted America to make the economy scream?*

*Nixon: Well, . . . Chile, of course, is interested in . . . obtaining loans . . . from international organizations where we have a vote. . . . and I indicated that . . . that wherever we had a vote . . . where Chile was involved that . . . unless there were strong considerations on the other side that we would vote against them. . . since they expropriated property. . . .*

*Frost: [Interrupts Nixon] He had done that on September fifteenth [Chilean election day].*

*Nixon: . . . but I knew that was coming . . . all you had to do was to read his campaign speeches. Let us . . . when we talk about Allende that his history went back, we knew him in 1964 when both the Kennedy and Johnson administrations spent a total of over four million dollars to keep him from coming to power. . . .*

*. . . Because they knew that he was a Marxist and they knew what he would do to Chile and the effect that would have on the countries neighboring on Latin America. But in his campaign in early 1970, he said . . . with Cuba in the Caribbean and with Chile on the southern cone, we—he meant Castro and Allende—will make the revolution in Latin America. Now we had fair warning of that, now, why was Chile, even though it is a small country in terms of population, it has common borders with Argentina . . . it can have influence in Bolivia . . . it can have an influence in Brazil . . . it can have one also in Peru . . . and all of those countries had significant problems and all of them were concerned about the possibility of a beachhead of communism in Chile that would export in the Western*



Hemisphere, Cuba, that is exporting revolution and didn't want another one—Chile—doing it.

*Frost:* . . . [Allende] turned out to be a Marxist. . . . he worked within the system for three decades. He never attempted to introduce political pressure. That only came later. . . . he continued to work within the system to the extent where it was predicted he would lose the next election.

*Nixon:* Well, as a matter of fact. Let's well . . . Allende played it very clever, but he . . . played it as a Chilean would rather than as a Cuban would. The Chileans being . . . frankly less volatile than the Cubans, I would say, but on the other hand . . . there wasn't any question about his turning all the screws that he possibly could . . . in the direction of making Chile a Marxist state. There wasn't any question but that he was cooperating with Castro. There wasn't any question that Chile was being used by some of Castro's agents as a base to export terrorism into Argentina, to Bolivia, to Brazil. We knew all of that. . . .

*Frost:* In fact what they have now with [General Augusto] Pinochet is a right-wing dictatorship. . . . what they had with Allende was a left-wing, or Marxist, democracy. . . . it was never a dictatorship.

*Nixon:* . . . I don't agree with your assertion whatsoever. . . . It was . . . you said it was not . . . a dictatorship . . . and my point is Allende was a very subtle and a very clever man. But he was . . . it was not a dictatorship in . . . the sense that Castro's Cuba is a dictatorship . . . it was not a dictatorship in that sense certainly. On the other hand, as far as the situation in Chile was concerned, he was engaging in dictatorial actions, which eventually would have allowed him to impose a dictatorship. That was his goal. . . .

. . . what we really had here in Chile, I think it was graphically described to me, even though you and many of our audience may disagree with what we did in Chile . . . and disagree with my defense of it . . . but I have to state what I believe, and that's what we're here for in this program. . . . Because here is what was involved in Chile. . . . I remember months before he [Allende] might run again . . . an Italian businessman came to call on me in the Oval Office and said "If Allende should win the election in Chile and then you have Castro in Cuba, what you will in effect have in Latin America is a red sandwich. And eventually it will all become red." And that's what we confronted. . . .

*Source:* Sir David Frost, with Bob Zelnick. *Frost/Nixon: Behind the Scenes of the Nixon Interviews*, 276–287 (New York: Harper Collins, 2007).

### Maurice Bishop, "On the Second Anniversary of the Grenada Revolution" March 13, 1981 (Excerpt)

*On March 13, 1979, the New Jewel Movement, headed by Maurice Bishop (b. 1944–d. 1983), seized control of the government of Grenada, a 133-square-mile nation state in the Windward Islands. Bishop introduced educational and health reforms and proposed to make the island more economi-*

*cally diverse and productive. He also proposed the construction of an airstrip capable of handling large passenger airplanes. Politically, however, Bishop increasingly consolidated power into his own hands, a move that fractured his political party, the People's Revolutionary Government (PRG). The political struggle climaxed on October 19, 1983, when Bishop and several of his close associates were executed and replaced by the Revolutionary Military Council, headed by another leftist, Bernard Coard (b. 1944– ). For many Grenadians and for the Ronald Reagan administration, Bishop's government-directed economy and his close association with Cuba and Nicaragua, indicated his moving into the communist camp and justified his removal from power.*



The approach of the revolution is . . . to make a conscious attempt to transform the economy that we have inherited, to seek to break our dependence on outside forces, to lay the basis for planned and progressive development. For this reason dreams and mysticism and lack of information and lack of statistics are replaced now by a Ministry of Planning that functions as a ministry of serious and committed technocrats who understand the importance of building that mechanism in order to achieve the necessary economic transformation. That is also why, sisters and brothers, we have decided and have laid great stress on the need for us to ensure that the productive sector in our country begins to pay for itself in a serious way; that was the reason for declaring 1980 the Year of Education and Production, that is the reason for declaring this year, 1981, the Year of Agriculture and Agro-Industries. That is why in agriculture we have spent so much time and are making sure that more seeds, that more plants, that more fertilizer, that more extension services, that new crops, that agricultural equipment, that new markets are sought after, so that the farmers in our country will be able to receive a better price for what they are producing. That is also why in the areas of agro-industry we have moved to establish the coffee-processing plant out in Telescope, have moved to establish the agro-industrial plant down in True Blue, that now produces juices, that now produces different condiments. That is also why a new Ministry of Fisheries and Agro-Industry under Comrade Kenrick Radix has been created so as to ensure that even more time and more attention is given to pushing production in this year 1981. That is also why, sisters and brothers, in the area of tourism the Hotel Training School has been established; additional plans have been created in the state sector; more tours from abroad have been organized to bring more and more guests to Grenada. More promotion is being undertaken and discussions are going ahead at full speed to see about the immediate construction of new hotels to add to the size of our existing plant. That is also why in the area of fisheries we have now moved to establish the first fish and fish-products processing plant out in True Blue; that is why for the first time in our country today it is now possible to eat entirely locally produced and locally salted salt-fish. That is why we have been moving to get hold of more fishing boats and better fishing boats and to train our fishermen in more modern techniques of catching the fish, and thereafter in processing what

they have caught; all of this is aimed at ensuring that the productive sector in fact develops. Further, we believe too, comrades, that progress can continue to be made notwithstanding the difficulties in a situation where we continue to struggle as a people for the new international economic order, continue to struggle for better prices for what we produce, continue to look for new markets for what we produce, continue to struggle to have science and technology transferred to the poorer developing countries around the world. We believe too that in order to keep that progress moving that it can be done through developing closer relations among countries that are themselves developing—to continue to develop what is called South to South cooperation to ensure that we talk to each other and look to find ways of helping each other.

That is why one of the most important aspects of our relationship with revolutionary Cuba is the area of economic cooperation and assistance. That is why, as part of this dialogue between developing countries, revolutionary Cuba has been able to come to our assistance, to help us to construct an international airport, to lend us their doctors, to lend us their internationalist workers, to lend us their fishermen, to help us with universities scholarships. Revolutionary Cuba can undertake that kind of assignment because they understand themselves from their own history the meaning of true internationalism. That is one of the things that reaction understands about the relationship between Grenada and Cuba—they understand that this relationship means that the economic development of our country will be pushed even further. And they understand, too, that that means that this will help us to break our dependence on their market and their economies, and that is why they are also so concerned to break those links and bonds of friendship between our two countries. But today again we say what we have always said—that the solidarity, the friendship, the depth of feelings, the unity, the cooperation, the anti-imperialist militancy that keeps us together can never, ever be broken: these bonds between free Grenada and revolutionary Cuba.

As part of this South to South cooperation, comrades, we have also developed very great working relations with another country in this region—the country of Venezuela—and with that country we have in fact been able to develop some good bilateral programs that have sought to advance the cause of friendship between our two countries. We have also been able to develop that kind of relation with the government and people of Nicaragua. That might sound like a strange statement, that Nicaragua—a country like our own, a country at this stage in a period of national reconstruction—it might sound strange that areas of cooperation on the economic front are possible. But I must tell you, comrades, that we in free Grenada, as a contribution to the cause of the Nicaraguan literacy campaign, sent two of our own Grenadian teachers on an internationalist assignment to help the people of Nicaragua to learn to read and to write. Even more importantly, but again showing what is possible between developing countries themselves even when they are also just struggling and starting off, I must tell you that only last week the government of Nicaragua sent us a gift that has been of tremendous importance—a gift that has meant that the militia comrades on duty today are able to have new

uniforms, which came as a gift from the Sandinistas and the junta of Nicaragua.

In that area too, of South to South cooperation and dialogue, we have developed excellent working relations and excellent cooperation with the governments and people of several countries in the Middle East. From the government of Iraq, we have received tremendous financial assistance both by way of gifts and soft loans, and our government and people place on record our appreciation of this internationalist support. Similarly, we have received tremendous assistance from the government and people of Algeria, and I ask the representative of that government to convey our fraternal appreciation. Such assistance has also come from the government and people of Libya and the government and people of Syria. In Africa likewise, among developing countries on that continent, we have received significant assistance from the governments of Tanzania and Kenya, and that again is an example of what can be done if we try to help each other.

*Source:* Maurice Bishop. *Maurice Bishop Speaks: The Grenada Revolution, 1979–1983*, 133–135 (New York: Pathfinder Press, 1983).

### Ronald Reagan, “Address to the Nation on Events in Grenada,” October 27, 1983 (Excerpts)

*On the morning of October 25, 1983, the United States landed 1,200 troops on the island of Grenada, allegedly to rescue an estimated 1,000 U.S. students at St. George’s Medical School. The total number of U.S. troops climbed to nearly 7,000 before the crisis ended in December 1983. President Ronald Reagan (b. 1911–d. 2004) viewed both heads of government—Maurice Bishop and his replacement, Bernard Coard—as communists with close links to Cuba and Nicaragua. Reagan speculated that Bishop’s proposal for an extended airstrip to serve tourist airplanes was, in reality, a cover for anticipated Soviet military aircraft that would then be positioned to threaten the Panama Canal and U.S. oil interests in Venezuela. To emphasize the communist threat, Reagan used a map of the Caribbean to illustrate that communists already controlled Cuba and Nicaragua and that if Grenada fell under communist control the circum-Caribbean region would be threatened by the Soviet military.*



... Grenada, ... [an] island only twice the size of the District of Columbia, with a total population of about 110,000 people, [along with] a half dozen other Caribbean islands here were, until recently, British colonies. They’re now independent states and members of the British Commonwealth. While they respect each other’s independence, they also feel a kinship with each other and think of themselves as one people.

In 1979 trouble came to Grenada. Maurice Bishop, a protégé of Fidel Castro, staged a military coup and overthrew

the government which had been elected under the constitution left to the people by the British. He sought the help of Cuba in building an airport, which he claimed was for tourist trade, but which looked suspiciously suitable for military aircraft, including Soviet-built long-range bombers.

The six sovereign countries and one remaining colony are joined together in what they call the Organization of Eastern Caribbean States. The six became increasingly alarmed as Bishop built an army greater than all of theirs combined. Obviously, it was not purely for defense.

In this last year or so, Prime Minister Bishop gave indications that he might like better relations with the United States. He even made a trip to our country and met with senior officials of the White House and the State Department. Whether he was serious or not, we'll never know. On October 12th, a small group in his militia seized him and put him under arrest. They were, if anything, more radical and more devoted to Castro's Cuba than he had been.

Several days later, a crowd of citizens appeared before Bishop's home, freed him, and escorted him toward the headquarters of the military council. They were fired upon. A number, including some children, were killed, and Bishop was seized. He and several members of his cabinet were subsequently executed, and a 24-hour shoot-to-kill curfew was put in effect. Grenada was without a government, its only authority exercised by a self-proclaimed band of military men.

There were then about 1,000 of our citizens on Grenada, 800 of them students in St. George's University Medical School. Concerned that they'd be harmed or held as hostages, I ordered a flotilla of ships, then on its way to Lebanon with marines, part of our regular rotation program, to circle south on a course that would put them somewhere in the vicinity of Grenada in case there should be a need to evacuate our people.

Last weekend, I was awakened in the early morning hours and told that six members of the Organization of Eastern Caribbean States, joined by Jamaica and Barbados, had sent an urgent request that we join them in a military operation to restore order and democracy to Grenada. They were proposing this action under the terms of a treaty, a mutual assistance pact that existed among them.

These small, peaceful nations needed our help. Three of them don't have armies at all, and the others have very limited forces. The legitimacy of their request, plus my own concern for our citizens, dictated my decision. I believe our government has a responsibility to go to the aid of its citizens, if their right to life and liberty is threatened. The nightmare of our hostages in Iran must never be repeated.

We knew we had little time and that complete secrecy was vital to ensure both the safety of the young men who would undertake this mission and the Americans they were about to rescue. The Joint Chiefs worked around the clock to come up with a plan. They had little intelligence information about conditions on the island. We had to assume that several hundred Cubans working on the airport could be military reserves. Well, as it turned out, the number was much larger, and they were a military force. Six hundred

of them have been taken prisoner, and we have discovered a complete base with weapons and communications equipment, which makes it clear a Cuban occupation of the island had been planned.

Two hours ago we released the first photos from Grenada. They included pictures of a warehouse of military equipment—one of three we've uncovered so far. This warehouse contained weapons and ammunition stacked almost to the ceiling, enough to supply thousands of terrorists. Grenada, we were told, was a friendly island paradise for tourism. Well, it wasn't. It was a Soviet-Cuban colony, being readied as a major military bastion to export terror and undermine democracy. We got there just in time.

The events in . . . Grenada . . . [show that] Moscow assisted and encouraged the violence, [and also] provides direct support through a network of surrogates and terrorists. It is no coincidence that when the thugs tried to wrest control over Grenada, there were 30 Soviet advisers and hundreds of Cuban military and paramilitary forces on the island. At the moment of our landing, we communicated with the Governments of Cuba and the Soviet Union and told them we would offer shelter and security to their people on Grenada. Regrettably, Castro ordered his men to fight to the death, and some did. The others will be sent to their homelands.

You know, there was a time when our national security was based on a standing army here within our own borders and shore batteries of artillery along our coasts, and, of course, a navy to keep the sea lanes open for the shipping of things necessary to our well-being. The world has changed. Today, our national security can be threatened in faraway places. It's up to all of us to be aware of the strategic importance of such places and to be able to identify them.

*Source:* Ronald Reagan. "Address to the Nation on Events in Lebanon and Grenada." October 27, 1983. Available online (<http://www.reagan.utexas.edu/archives/speeches/1983/102783b.htm>). Accessed June 18, 2009.

## Latin America's New Political Paradigm

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*At the beginning of the 21st century, the political scales in Latin America moved to the left, as new political leaders appeared as populists aiming to address the socio-economic needs of the larger populace. These changes began in the 1980s, when a generation of military dictatorships came to an end and the region saw a return to democracy and the implementation of neoliberal, or free market, economics. By the mid-1990s, democratic elections were held in most Latin American nations, and neoliberal structural reforms were in place. Still, nearly 50 percent of Latin Americans remained mired in poverty as the region moved into the new century.*

**Thomas M. Leonard, "Neo-Liberalism  
and Latin America's Political Left,"  
2006 (excerpts)**

*"Latin America Taking Left Turn," a Washington Times headline proclaimed on March 10, 2005. Following a spate of Latin American presidential elections, in late December 2005, London's Daily Telegraph asserted "Latinos Lean Left." An Inter-Press News release on January 4, 2006 read "Morales, Chavez and Castro Begin a New Left Axis." The September 2006 edition of the The Latin American Monitor: Central America reported that Daniel Ortega, leader of Nicaragua's Marxist leaning Sandinista National Liberation Front (FSLN), appears to be the odds on favorite to win that country's presidency in November's elections. And as Mexico approached its July 2006 election, Enrique Krauze, author of Mexico: A Biography of Power, speculated about the country continuing its ride towards democracy and capitalism or reverting to the continual socio-economic crisis that characterized Mexico's past.<sup>1</sup> . . .*

Beginning in the early 1980s Latin America "returned to democracy," a phrase that meant the replacement of military with civilian governments.<sup>2</sup> The new political leaders also adopted the "Neo-Liberal" economic model, sometimes identified as the "Washington Consensus." Eventually, the consequences of the two—democracy and neo-liberalism—would clash. . . .

"Neo-Liberalism" called for the implementation of several measures, including disciplined fiscal policy, moderate interest rates, trade liberalization, openness to direct foreign investment, privatization of state owned enterprises, deregulation, legal security for intellectual property rights, tax reform and the of redirection of public expenditures towards education, health and infrastructure investment. To some, it was simply supply side economics. In other words, Latin America needed to open its doors to foreign investment, encourage domestic investment by lowering taxes on the upper class, strip away protections from domestic industries and protect the new investments from legal challenges. Effectively, "Neo-Liberalism" promised expanded economic activity, which in turn would produce increased government revenues that could be spent on roads to reach the ports and education and health care, two of the most important concerns held by the masses of people across Latin America.<sup>3</sup> Many analysts drew parallels between twentieth century "Neo-Liberalism" and late nineteenth century "Liberalism." Both opened the door to foreign investment and the exportation of primary products, but "Neo-Liberalism" came at a time when democratic governments permitted the participation of the lower socio-economic groups participation in the political arena.

Assessments of "Neo-Liberalism" appeared a decade into the program. At best, they were mixed. The macro instability caused by the debt crisis of the 1980s was corrected. Markets were opened to the world and tariff barriers reduced from a continent wide average of 41.6 percent to 13.7 percent. Also,

structural reforms in banking and commerce made it easier for Latin America to participate in the global market that led to a significant amount of foreign direct investment in the region. The Latin American governments also carried out a substantial proportion of the total amount of global privatization during the 1980s. The changes in economic policies, however, did not "trickle down" to the masses of people. While there was economic recovery, annual growth rates did not match the 5–6% rates of the 1960s and 1970s. This translated into limited job growth. Although unemployment rates were lower by the end of the 1980s, they did not continue into the 1990s, in part due to the increase in population across Latin America. In 1996 eight of every 100 Latin Americans willing to work had no job. In fact, when Vicente Fox assumed Mexico's presidency, he faced the improbable task of creating one million jobs per year over the six years of his presidential term to meet the needs of 16 year olds entering the labor market. Nor did the number of people living in poverty decline from approximately 150 million poverty stricken people in 1980, as Latin America remained the region of the world with the widest disparities in income distribution.<sup>4</sup>

In the late 1990s, Latin America began its "left" turn with the election of Hugo Chavez to the Venezuelan presidency in 1998. At mid-point in the first decade of the twenty-first century analysts have identified other heads of state or potential heads of state to accompany Chavez in the left turn: Argentina's Nestor Kirchner (2003), Bolivia's Evo Morales (2006), Brazil's Luiz Inacio Lula da Silva (2003), Chile's Ricardo Lagos and Michelle Bachelet (2005), Costa Rica's Oscar Arias (2006), Peru's Alan García (2006), and Uruguay's Tabare Vazquez (2005). The list potentially could have expanded with the election of Andrés Manuel López Obrador to the Mexican presidency in July 2006. It is expected to expand In November 2006 with the election of former FSLN leader Daniel Ortega to the Nicaraguan presidency.<sup>5</sup> . . .

As Latin America [continued to turn] politically left in the early twenty first century, in 2002 the Strategy Research Corporation (SRC) surveyed the region regarding marketing possibilities for U.S. companies. . . . [SRC's research] may help to explain Latin America's "left turn." It indicated that the Latin American nations share several facts of life: the great majority of the people residing in each nation are concerned about the health of the national economy as reflected in the high unemployment rate and the number of people living in poverty. Owing to unemployment and widespread disparities in income distribution, as measured by the percentage of people below national poverty levels, there exists an inability to consume. This may help explain the high crime rates, which usually accompany recessionary times. Clearly, [SRC's] survey indicates a loss of confidence in the existing regimes, a clear indication that one could anticipate a forthcoming political change.<sup>6</sup>

As candidates for their respective presidencies, the politicians mentioned above—Chávez, Kirchner, Morales, Lula, Lagos, Bachelet, Vazquez, Obrador and Ortega—campaigns on promises to correct these social disparities within their own borders by promising greater government activism.<sup>7</sup> . . .

This cursory summary of Latin America's recent neo-liberal and democratic experiences begs the question: Has the Neo-Liberal economic model run its course? While the model brought positive structural change to the region, the benefits have not reached down to the masses. But then, the same can be said about the various economic models that preceded it. The end of each economic model was made possible by major events, economic and otherwise, and that the new development models were adopted in response to the failures of the past. The Great Depression brought the Export Based Economies to their end; Fidel Castro's revolution helped to bring down Import Substitution Industrialization and the 1980s Debt Crisis significantly contributed to the end of military rule.<sup>8</sup>

With the adoption of the "Neo-Liberal" economic model in the 1980s, analysts also pointed out that Latin America "returned to democracy." While we can argue whether the term is a valid description of Latin America's previous political arena, for sure, the "return to democracy" meant the re-entry into the political arena the multitude of political parties that dotted Latin America's period of Import Substitution Industrialization (ISI) from roughly 1930 to 1960. These political parties drew support from the masses of the people—those Latin Americans that comprise the largest singular element of electoral power, the lower-socio economic groups. When the promises of the "Neo Liberal" economic model failed to deliver, the people across Latin America turned to politicians not necessarily associated with it. Thus, the movement "left." In effect, the leftward movement of Latin American politics illustrates the application of a Latin American political axiom: the farther down the social pyramid a politician goes to draw his political support, the farther left he goes on the political scale. These factors suggest that unlike the termination of previous models, "Neo-Liberalism" may be voted out of existence, or at least fine-tuned.

*Source:* Excerpted from a paper presented at an international conference on Latin America sponsored by the *Consejo Coreano para América Latina y el Caribe* (Korean Council on Latin America and the Caribbean) in Seoul, South Korea, September 25–26, 2006.

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### Gary Payne, "Venezuela's Chávez as Everyman" March 29, 2004 (Excerpts)

*Elected president of Venezuela on December 9, 1998, Hugo Chávez (b. 1954– ) promised to break with the country's past of elitist rule and to correct the nation's vast socioeconomic problems. He directed the writing of a new constitution in 1999 that promised agrarian reform, health care, education, housing, and a social security program for all Venezuelans. It also provided for the direct election of a president by a plurality of vote, with all people having suffrage. Chávez won the presidential election on July 30, 2000, and his supporting political parties gained control of the national legislature. Opposition to Chávez began immediately thereafter and continued to intensify and reached a high-water mark on November 29, 2007, when a national referendum rejected his proposals to amend the 1999 constitution that would have further centralized government control in the presidential palace.*

*Shortly after Chávez's presidential inauguration on January 10, 2002, Central Lakes College (Minnesota) professor Gary Payne (b. 1953– ) traveled to Venezuela and filed the following report that differed from those by Chávez's critics.*



He looks like he could be the driver of the most decrepit taxi on the streets of Caracas. He could be a street sweeper, a waiter, a shoe shiner. The tiny upper and middle classes of Venezuela think he is uncivilized. But to the three-quarters of *Venezuelanos* [Venezuelans] living in poverty, he is a mirror image of themselves. He is Everyman.

When he addresses the nation on the popular Sunday broadcast, "Hello Mr. President," *bis* somewhat darker skinned crowds gather in Plaza Bolívar to listen to him carry on over government-installed television screens and radio speakers. For five hours. He answers questions from everyday citizens in an engaging conversational tone, without notes, without hesitation, but with an air of calm informality that sets him apart from the pretentiousness of his competition.

And then, without any warning, albeit at regular intervals in the broadcast, he will bathe his detractors—the richest and most powerful people in the history of the world—with a shower of insults that confirm his peculiar position in global politics. For Hugo Chávez is not merely the President of this poor majority, but the long-stifled expression of its collective historical frustration and the embodiment of its hopes. Hopes that would have seemed terribly naive only a few years ago.

Some would say that those hopes are still naive. Like many populist-left leaders before him, Chávez has become an abso-

lutely intolerable barrier to business as usual in this hemisphere. Venezuela's oligarchs and free marketers everywhere both hate and fear him, for nothing succeeds like success. And if his administration is allowed to succeed in South America, a new cadre of followers might rise across the continent, threatening historical privilege and economic privatization like never before.

Not even Cuba poses such a threat, for as an island nation, it has been more easily isolated. What Fidel Castro has accomplished may be miraculous considering the challenges he has faced—attacks, embargoes, harassment, covert destabilization efforts—but Cuba's potential for democracy was subverted by this history. Fidel seems to have recognized this himself, having reportedly told his friend Hugo that he has an historic opportunity in front of him, and he should not waste it.

For by contrast, Venezuela is a vast territory, and Hugo Chávez was twice elected by overwhelming majorities in this oldest democracy on the continent. By all accounts, the nation's energy resources are legendary. Chávez is raising the cost of oil royalties paid by Exxon-Mobil, Conoco-Phillips, and supporting OPEC production limits instead of over pumping as his predecessors have done. This income could be diverted from its customary path to the pockets of the oligarchy and distant stockholders. It could build a modern egalitarian society.

The untold story in Venezuela is that this new society is sprouting legs and moving off the drawing board. Chávez has not yet turned the tide on poverty—not by any means—but he has set the stage for a fundamental shift in economic and educational opportunity. He banned school entrance registration fees for students which previously served as a barrier to much of the child population. "Bolivarian" schools have opened in poor neighborhoods, often maintained and run by parents and volunteers, but supported by the government. Literacy is increasing rapidly as millions of new students have entered school.

Chávez's "Inside the Barrio" health plan is setting up clinics in the poorest communities, often staffed by respected Cuban doctors and nurses who are on loan to a society that in return provides cheap oil to the island nation. Some of the better new Venezuelan students, previously unable to even dream of college, have found themselves enrolled in Cuban medical schools.

His land reform legislation limits individual ownership to 5,000 hectares (12,350 acres), and allows idle land to be redistributed to peasant cooperatives, which will likely lead to much greater fairness in a nation where 2% of the people own 60% of the territory.

The Venezuelan oligarchy and various international entities connected to Venezuela's natural resource food chain have taken notice, and are coordinating actions to bring Chávez down. Their task is formidable, because of his popularity and elected status. But they maintain several overwhelming advantages.

Most useful is information control. Almost all of the private television and radio stations and all but one of the major newspapers in the country are owned and operated by those who loathe the Chávez administration. The feeds that go to the mainstream international media come almost exclusively from

these sources, and the hype and spin against Chávez is spectacular, even by today's cynical standards.

The International Monetary Fund has indicated that it supports a transitional government and was reported by Caracas' right-wing *El Nacional* to be willing to bankroll those who would replace Chávez. The National Endowment for Democracy, long used as a cover for the CIA projects, brought several opposition leaders to Washington for consultations in the months preceding the attempted coup in 2002. *Fedecarmaras*, an unnatural alliance of upper-middle class trade unionists and business owners that called for a strike two days before the coup attempt in order to promote the impression of chaos, is waiting backstage. Coke, along with Venezuelan-owned Polar breweries, recently provided bus service for members of the opposition, and/or help with blockades during both violent and non-violent protests by the opposition. . . .

. . . What remains to be seen is whether a steady diet of it can exhaust the will of Chávez supporters or lead Chavez himself into making a serious mistake with the military forces at his disposal.

In the old English passion play, Everyman asks Death to give him more time. Death complies, although Everyman eventually must succumb, taking only his good deeds with him to the afterlife. Chávez is asking for more time. But in the Venezuelan version of the play, his good deeds may never be fully implemented. And Death, in some form, may be forced upon him prematurely.

Source: Gary Payne, "Venezuela's Chávez as Everyman." Available online (Venquelanalysis.com). Accessed March 29, 2004.

**Andres Martinez,**  
**"They Can't Believe They're Still in Cuba,"**  
**April 30, 2006**

*In contrast to the ebb and flow of international history since the end of World War II, Cuba remains Latin America's constant reminder of a period that passed into history. The island appears to remain in a time warp that predates the Castro revolution, which began in 1959 when Fidel Castro Ruz seized power. Foreign visitors to the Caribbean island are awed by the modern hotel resorts that pepper Veradero Beach on Cuba's north coast and that stand in sharp contrast to the poverty, dilapidated buildings, lack of consumer goods, and massive unemployment in Havana. In 2006, Los Angeles Times writer and editorial page editor Andres Martinez found the Cuban people resigned to their contemporary status, confident that fate will improve their quality of life, but not knowing when or how it will come.*



It doesn't take long to figure Cuba out. The whole island is a stage putting on a rather austere production of Samuel Beckett's "Waiting for Godot." What's hard to figure out, as in the play, is exactly what Cubans are waiting forever they don't know.

But that sense of waiting, of a suspended reality, is as palpable in Havana as is the sticky humidity that corrodes the vintage American cars and the colonial Spanish buildings. Cubans have been waiting, and waiting, for years—whether it was for the revolution to fulfill its promise or to run its course as a result of the Soviet collapse. Neither has happened, so Cubans are left to await, with a mixture of resignation and grudging respect, the death of Fidel Castro, who has been in power 47 years and turns 80 in August.

But even that begs the "what are we waiting for?" question, because no one quite knows what will happen the day after.

Certainly the day after cannot just be about Raul Castro, my host in Havana. The dictator's younger brother runs the Cuban military, which in turn runs the tourism industry, making Raul concierge in chief to the hordes of German, British, Spanish and Canadian tourists who flock to Cuba in part to spite Uncle Sam.

In a recent interview with a French journalist, Fidel seemed to dismiss his brother's future relevance when he pointed out that Raul is only four years younger than he is and that another generation would have to take over at some point. There are a number of other players vying to succeed Fidel—Vice President Carlos Lage Davila; Foreign Minister Felipe Perez Roque and Raul Alarcon, president of the National Assembly—but assessing their relative chances and merits feels like a trivial pursuit best left to those who can name the last leader of East Germany.

The real question in Cuba is whether the system, in all its kitschy, anachronistic glory, can survive the only leader it has known, the *comandante* [commander] who rode into Havana from the Sierra Maestra 47 to serve as impish nemesis to 10 U.S. presidents (and counting). That's highly unlikely, and Fidel seems to know it.

His harsh crackdown of recent years—rounding up dissidents and reversing timid steps toward a market economy—is driven by his desire to ensure that Cuba's socialism outlasts him. But the man who famously declared that "history will absolve me" when tried by his predecessor half a century ago must know that history will catch up with this island.

"We are more *fidelistas* than socialists," says Lizardo Gomez, a veterinary student at San Jose University, located on the outskirts of Havana. Gomez is an earnest believer in the principles of the revolution, but he concedes that Cuba is unlikely to be a socialist nation in five to 10 years. He thinks Fidel's successors will be able to muddle through for a year or two, but after that, who knows?

He says all this in the back seat of my rental car on the way to the city of Cienfuegos—the throngs of hitchhikers such as Gomez and the obligation to pick them up are among the charms of revolutionary solidarity.

Castro likes to bask in his "Bolivarian" partnership with Venezuelan President Hugo Chavez, and he points to the rise of Bolivia's Evo Morales and Brazil's Luiz Inacio Lula da Silva to suggest hemispheric trends are going his way. But it's self-delusional for him to ignore the fact that these and other Latin American leftists were elected, and that their cities remain teeming bastions of private consumerism, while in Cuba you'd

better not lose your rationing card if you want that bar of soap you are entitled to every three months.

Cuba's nightly newscast loves to show fellow Latin Americans rallying against free-trade agreements with the U.S. The goal, once again, is to reinforce the notion that events are going Cuba's way, but the message is mixed.

"If only we could protest spontaneously like that here," says Eliezer, a bookseller in Havana, echoing a common refrain among Russians exposed quarter of a century ago to scenes of anti-nuclear protests in Western Europe. "The trouble with this country," he goes on to say, presumably ignoring the thousands of compatriots who brave the Straits of Florida each year, "is that no one is willing to die for freedom."

Eliezer sells some risqué material in his bookshop, but he says the way to stay out of trouble is to not get air-conditioning (a bourgeois comfort that might raise suspicions), stay off the Internet and never learn English. That's quite a survival guide.

Over in Havana's Miramar district, Natalia Bolivar, a prominent intellectual, says: "This is a mystery island where we all manage to get by fine, thank you, despite such absurdly insufficient rations like a monthly pound of chicken. We all are scamming something, paying a high price to live in the land we love." Her survival guide: surround yourself with art, music and other forms of escapism.

A collective incredulity that dulls the imagination is afflicting the island nation's 11 million inhabitants, akin to the "I-can't-believe I'm-still-here" exasperation Bill Murray's character felt in the movie "Groundhog Day." Cuba's news radio station is called Radio Reloj, featuring a clock's jarring second hand ticking between its propagandistic vignettes, as if to convince the audience that time is actually passing.

Most people seem to know that they are living in a Stalinist theme park—albeit a somewhat whimsical Caribbean version in which the customs agents who grill you wear fishnet stockings and irrepressible salsa tunes still waft. But Cubans no longer dare speculate how they will transition back into the real world.

Church officials worry that much violence, of the spontaneous score-settling variety, is in store. Diplomats speculate about possible "precipitating events," beyond the obvious one of Fidel's passing. A botched hurricane response, ala Katrina? Too many blackouts during this "year of the energy revolution"? You never know. What became the tragedy of China's Tiananmen Square was triggered by the death of an ousted reformer, and protests tied to a visit by Mikhail Gorbachev in the fall of 1989 helped bury East Germany.

The U.S. embargo against Cuba has long provided Castro a convenient, all-purpose scapegoat. Yet compared to a previous visit 14 years ago, I am struck by the extent to which the drama unfolding here, or yet to unfold, is no longer about us.

Yes, most Cubans I met are bitter that Washington wants to make their lives more difficult, but on the whole they don't hold the United States responsible for their hardship.

Even Castro is downplaying the siege theme these days. He must be torn between wanting to gloat that he has stared down the empire and not giving up his scapegoat entirely. In one of his trademark marathon speeches last November, commemo-

rating the 60th anniversary of his admission to the University of Havana—hey, any excuse will do—Castro said Cuba would never become a colony again: "This country can self-destruct; this revolution can destroy itself, but they can never destroy us; we can destroy ourselves, and it would be our fault."

THE REGIME is busy rooting out corruption and what it calls "ideological vulnerability," meaning it doesn't want to be seduced by the types of economic reforms that China's communist leaders have wholeheartedly endorsed. Castro's Chinese comrades are wagering that large doses of economic freedom will keep people so content that the Communist Party will be able to retain its monopoly on political power. Castro worries that once you cede too much autonomy to the private marketplace, your political monopoly is doomed.

Private businesses, and there were never many in Cuba, are being shut down, and Castro no longer allows U.S. dollars to circulate. Angel, a former fisherman who works as a government inspector of neighborhood *bodegas* [warehouses] that distribute the subsidized rations, acknowledges his country is a mess. "How are people supposed to live on a half-pound of beef a month?" he asks, pointing to his rationing card. He thinks it's unconscionable that the regime won't allow people to open up their own stores if they want.

As we sit in his cramped apartment, he shows off his pirated CD collection and offers me a Beck's beer that he obtained because in his position people like doing him *favorcitos* [little favors].

The regime's propaganda has become more muted in recent years, at least judging by the public billboards around Havana. Posters that once boasted that "we owe everything" to the revolution are now deemed perilously double-edged. So most billboards now bash the U.S. for jailing Cubans accused of spying, and for supposedly giving safe haven to Luis Posada Carriles, an anti-Castro militant who stands accused of a 1976 bombing of a Cuban airliner and who is being held on immigration charges in Texas, pending a resolution of his deportation proceedings.

Cuba's more uplifting propaganda is about Castro's foreign policy, which is all about turning the country into another Doctors Without Borders. Some 25,000 Cuban doctors are on missions overseas, and not a day seems to go by without more needy, grateful patients being flown in for treatment.

That may win some hearts and minds elsewhere, but Castro's impulse to dispatch doctors around the globe is creating a backlash at home. "It's all very admirable," says Angel, "but we are a poor nation that cannot afford this at a time when medicines are scarce here."

The United States, for its part, must come up with a new strategy to win over hearts and minds in Cuba as it prepares to engage Castro's successors. Even if the administration refuses to lift the ill-advised embargo, it should find a way to convince ordinary Cubans that their fellow baseball-playing nation—an older sibling, by virtue of culture and history—does not mean them harm. Creating a widely trumpeted, multibillion-dollar transition investment fund to aid Cuba once it has a democratic government would be a good start.



In the meantime, Cubans continue to wait. No experience is more emblematic of life in Havana these days than standing in line to enter the iconic Coppelia ice cream parlor in the Vedado district, a flying-saucer-like structure in the middle of a park. Uniformed guards manage the lines that converge on it from six directions. My first attempt to enter was thwarted by a cop plucking me out of the line and insisting that I go to an adjacent hard-currency ice cream stand, where there was no wait. But the next night the confusion of a tropical storm helped me gain entrance into the high temple of Cuban ice cream.

As luck would have it, I shared a table with two soldiers, Mario and Ramon, on leave and clearly mortified to be sharing

a table with a foreigner. A waitress hurriedly dispensed bowls of an orangy-vanilla ice cream—no choice here—covered in chocolate sauce.

My tablemates each downed three of the bowls, and chided me for having only one after waiting in line for so long. “It’s OK, it was worth it,” I say truthfully, not because the ice cream was any good, but because I hadn’t known what awaited me inside.

I hope most Cubans find their wait worthwhile too.

*Source:* Andres Martinez. “They Can’t Believe They’re Still in Cuba,” *Los Angeles Times*, April 30, 2006, p. 20.

## ❖ GLOSSARY ❖

- Amerindian** an American Indian
- anarchist** political activist, usually from the urban laboring classes, who opposes all forms of organized government
- anarcho-syndicalism** political and social ideology that advocates replacing central governments with worker-controlled communities with the aim of eradicating economic and social inequalities
- audiencia** literally, “court”; in Spanish colonial times, it also functioned as a regional administrative unit.
- ayllu** pre-Columbian term now used as a synonym for self-governing Andean highland peasant communities, whether villages, kinship groups, or labor organizations based on agricultural production
- balance of payments** summary of the monetary value of all economic transactions—goods, services, investment income, credits, loans, and other financial matters—between one country and the rest of the world
- barriada** shantytown located in and around major Latin American cities
- cabildo** an autonomous town council in colonial Spanish America; the lowest administrative unit in the colonial structure. Depending on usage, the term also applies to the building where the council met.
- capital good** machinery or tool used in the production of other goods
- capital intensive** of a productive process, employing a greater amount of technology and machinery than manual labor
- captaincy general** a geographic division within a Viceroyalty of the Spanish and Portuguese colonial empires. Administered by a military captain general or a governor, often times held by the same person
- Carabinero** member of the Chilean national police
- caudillo** political strongman or dictator who governed through the force of his personality with the support of the military. Caudillos existed at the local, regional or national level.
- central** a sugar-refining complex associated with the modernization of the sugar industry through linking factories and estates for greater efficiency
- cholo** in Bolivia or Peru, a Hispanicized term for an Amerindian who dresses, acts, and works like a mestizo or white person in an urbanized setting.
- Christian-based community** group consisting mainly of Christian laypeople who advocate to improve the quality of life of the poor
- científico** adviser to Mexican president Porfirio Díaz (1876–1911) and others who accepted the positivist philosophy as the means to economic modernization
- common external tariff (CET)** common import duty placed on goods and commodities by a group of nations that wish to protect their domestic economic activities
- common market** form of economic integration among several nations that coordinate their agricultural, industrial, and economic and social policies, including a common external tariff
- constituent assembly** body of elected delegates commissioned to draft a new constitution and, in some cases, elect a new president. Traditionally, the assembly reverts to the national congress once its work is completed.
- Contra** member of counterrevolutionary U.S.-supported forces that sought to oust the Sandinistas from political power in Nicaragua during the 1980s
- coronelismo** Brazilian term similar to the Spanish *caudillismo*. A system under which an influential political boss controlled townspeople and peasants but also assumed responsibility for their well-being
- corporate state** political system attributed to Italian leader Benito Mussolini under which various constituencies—business community, middle sector, military, and rural and urban labor—are organized into units that theoretically provide input into government policy and in return receive government patronage. In reality, government control of each unit’s leadership often belies the theory.

**coup d'état** the overthrow of the sitting government, usually by military means

**creole (criollo)** person born to Spanish parents who resided in the New World; over time, the term came to include their descendants

**Cristero** a Catholic who took part in a rebellion against the secularization of Mexican society in the 1920s

**debt peonage** credit system that permits landowners to make cash advances to peasants, who then must work for the landowner to pay off the debt

**decentralization** devolution of centralized government responsibilities to state and local governments

**desaparecidos, los** “the disappeared,” referring to those who were arrested or kidnapped and later died or were killed, from the 1960s to the 1980s, as a result of military and paramilitary actions designed to eliminate leftists, real or imagined, who threatened the established order

**dollar diplomacy** early 20th-century U.S. policy applied to nations in the circum-Caribbean region. It permitted U.S. banks to pay a nation's European debts in return for U.S. supervision of customhouses to ensure repayment to the U.S. banks.

**dollarization** replacement of national currency with the U.S. dollar, as occurred in Argentina and El Salvador in the 1990s

**807 industries** an informal reference to that section of the U.S. tax code that permits U.S. industries to ship materials abroad for assembly or manufacture and be returned as completed goods, exempt or partially exempt from import duties. The program is designed to create employment and contribute to the economic development of underdeveloped countries, particularly in the Caribbean Basin region and Central America.

**ejido** system that provides for Amerindian or peasant collective or community ownership of a large tract of land, which can be subdivided into individual farming units or plots for schools, houses, and urban zones

**embargo** government policy that prohibits the trade in goods, services, and financial instruments with another nation or nations

**enganchado** in Peru, a person caught in debt peonage

**estancia** mainly in Argentina, a large cattle and/or sheep ranch

**estanciero** owner of a large pastoral estate in Argentina

**European Currency Unit (ECU)** unit of monetary accounts used by the European Union. Its value fluctuates with other world currencies.

**expatriate** an individual who voluntarily lives outside his or her native country for an extended period

**expropriation** government seizure and control of foreign-owned properties or businesses, with or without compensation

**extreme poverty** the World Bank benchmark for defining extreme poverty is when a family earns \$1.25 per day, and \$2.50 per day for moderate poverty.

**fazenda** large landed estate in Brazil

**fazendeiro** owner of large landed estate in Brazil

**finca** plot of variable size that is productive beyond a subsistence level

**fiscal austerity** usually required by the International Monetary Fund as a prerequisite for assistance, it entails cutting government expenditure and reducing government subsidies, increasing taxes, and privatizing state-owned economic entities.

**flight capital** outflow of money into more secure banking or investment institutions abroad because the home nation is facing high inflation or possible currency devaluation

**foco** theory of guerrilla warfare popularized during the Cuban Revolution from 1956 to 1959. It postulates that a small group of revolutionaries can carry out a revolution at the same time as they create conditions to gain popular support for the revolution.

**foreign direct investment (FDI)** investment in a foreign company or foreign joint venture. The investment is usually made in cash but can also be in plants, equipment, or know-how that constitutes at least 10 percent of the voting stock in the foreign entity

**foreign exchange rate** the value of one nation's currency in relation to that of another nation

**foreign exchange reserves** the holding of gold or foreign currencies by a government or its financial institutions

**free trade area** a zone in which a group of nations eliminates all trade restrictions among themselves, but each participating nation maintains its own trade policy and separate tariff rates with other nations of the world

**frutera** mainly in Central America and the Caribbean, a large fruit company, usually producing bananas

**Garifuna** ethnic group that descended from the Caribs of the eastern Caribbean islands and Africans who escaped slavery. Many of these people migrated to the coastal regions of southern Belize, Honduras, Guatemala, and Nicaragua. The term also refers to the language of these people.

**gaucho** cowboy who worked the pastoral lands in Argentina and Uruguay. The Brazilian term is *faucho*.

**golden age** time period from the late 1880s until 1930 when Latin America's primary products were in demand on the global market, which contributed to domestic prosperity, at least for the elite

**gross domestic product (GDP)** total value of goods and services produced by the domestic economy of a nation within a year

**gross national product (GNP)** total market value of all goods and services produced by a national economy during a year. It consists of the gross domestic product (GDP), the income received from abroad from both individuals and corporations, minus payments abroad for goods and services.

**Guardia Nacional** National Guard established, often with the encouragement of the United States, in the 1920s and 1930s throughout the circum-Caribbean region to serve the interests of the state rather than the personal interests of a national dictator; in application, however, the Guardia Nacional often served the political leaders

**guerrilla movements** from the 1960s to the 1980s, several Latin American countries saw the rise of guerrilla movements that sought to destroy the existing order and replace it with a socialist or Marxist model. Usually active in the countryside, guerrillas waged violent and brutal battles against the government military.

**gusano** in Spanish, *gusano* means “worm” but used after 1959 by the Cuban leaders to describe an exile.

**hacendado** owner of a large agricultural estate

**hacienda** a large agricultural estate

**Hispanic** of or having to do with the culture and countries formerly ruled by Spain

**huaso** in Chile, a cowboy

**indigenismo** the 20th-century movement to restore the historical prominence and culture of Amerindians

**indigenous people** descendants of the Native American populations encountered by the Spanish and Portuguese in the late 1400s and 1500s

**informal economic sector** the underground economic activities outside government regulation and taxation that include street vendors in urban areas and coca growers in rural areas

**infrastructure** works designed to promote economic development, such as bridges and roads, communication systems, dams, electrical systems, and water and sewerage facilities

**inquilino** in Chile, tenant farmer

**junta** governing committee that usually comes to power via a coup d'état or revolution

**Kennedy Amendment** 1974 U.S. legislation that prohibited all U.S. security assistance to Chile because of its military's repression of political opposition; the prohibition was expanded in the 1976 Security Assistance and Arms Export Control Act to all countries that violated human rights.

**ladino** in the Spanish colonies, a Native American or individual of mixed heritage who adopted Spanish culture. With time's passage, it came to include all individuals who rejected indigenous culture and heritage.

**land reform** the division of large tracts of land into smaller plots for underprivileged rural workers. It is usually accomplished through government seizure of land, with or without compensation.

**latifundio** a system under which large landed estates are held as private properties that are usually farmed as

plantations by tenant sharecroppers or as traditional haciendas

**llanero** a person who resides in the southern plains and prairies of Venezuela and Colombia

**llanos** the plains and prairies of southern Venezuela and Colombia

**machismo** the cult of male dominance

**maquiladora** assembly plant—usually located along the U.S.-Mexican border—that manufactures goods for export using low-cost Mexican labor and taking advantage of duty-free tax laws

**mariachi** street band, common to Mexico and parts of Central America, that usually performs traditional songs; in the 19th and early 20th century members usually played stringed instruments, but beginning in the 1920s wind instruments were incorporated

**maroons** depending on its usage, the term originally referred to runaway slaves or runaway slave communities in Brazil. Following the end of slavery in 1889, the term referred to blacks or black villagers living in remote areas.

**Mesoamerica** literally, “middle America.” Anthropologically, the term applies to the region from Central Mexico to northern Honduras that included advanced civilizations prior to the arrival of Europeans.

**mestizo** originally the offspring of a Spaniard and a Native American. Over time, the term came to include their descendants and, in many cases, nonwhite persons who spoke Spanish and observed Hispanic culture.

**minifundio** small parcels of land worked by peasants for subsistence living

**monteneros** Bolivian and Peruvian guerrilla groups

**most-favored-nation (MFN) status** a trade status granted by one nation to another that provides the receiving nation with the lowest existing tariff on the exporting nation's goods

**mulatto** a person whose parentage and/or ancestry includes both African and white blood

**multinational corporation (MNC) or transnational corporation (TNC)** a large corporation usually headquartered in an industrialized nation, while its production processes are located in several different countries. MNCs are the primary source of foreign direct investment in many developing countries.

**nationalization** process by which a national government takes control, with or without compensation, of foreign- and/or native-owned enterprises operating within its borders

**New World** North and South America, including the Caribbean

**927 industries** an informal reference to that section of the U.S. tax code that permits U.S. industries to ship materials abroad for assembly or manufacture and be returned as completed goods, exempt or partially

exempt from import duties. The law was used successfully after World War II in the industrialization of Puerto Rico.

**Oncenio** the administration of Peruvian president Augusto P. Leguía

**pampas** the plains found in Argentina, Uruguay, and southern Brazil on which cattle grazing is the predominant economic pursuit

**parastatal** partly owned by the government. The board of directors of a parastatal entity is appointed by the head of state to manage it in accordance with government policies.

**parceiro** in Brazil, tenant farmer

**pardo** another word for mulatto, the offspring of a black and white union. Over time, it came to include the descendants of combinations of European, Indian, and African bloodlines.

**patria** one's homeland

**peón** controversial term for a person tied to agriculture; a peasant or peon

**personalismo** a political figure whose popularity is determined by his/her personality rather than political ideology

**plebiscite** a referendum whereby the electorate votes either for or against a government proposal

**"popular" sector** the working class and underemployed and unemployed citizens

**populism** political movement usually led by a charismatic individual that calls for the reduction or elimination of social and economic injustices

**Porfiriato** period from 1876 to 1911 when Porfirio Díaz ruled Mexico

**porteño** resident of Argentina's port city of Buenos Aires

**praetorian state** system under which the armed forces act as a corporate body to maintain control over government or actively intervene in the political arena to select or change a governments

**primary product** raw material or natural resource that is essential to the productive process, such as agricultural products, metals, and minerals

**privatization** the sale of government- or partly government-owned (parastatal) properties to private domestic or foreign investors

**profit repatriation** remittance of profits from a subsidiary operation in a foreign country to the parent company, usually in the industrialized world

**protectionism** economic policies concerning tariffs and other taxes, and import quotas designed to protect and promote domestic industrial development

**pueblo joven** literally "young town." In Peru, *pueblos jóvenes* are the shantytowns that developed in the 1960s in urban centers.

**ranchero** in Mexico, a small-scale farmer or rancher

**soldadera** woman camp follower and often a participant in the Mexican Revolution (1910–1920)

**stagflation** economic situation in which a high inflation rate is coupled with negligible economic growth

**sustainable development** implementation of development policies to meet both contemporary needs and a society's future requirements

**syndicalist** radical labor unionist who, like anarchists, seeks the destruction of government

**tenente** Brazilian military officers and their followers who battled against the central government from 1932 to 1938

**value added tax (VAT)** incremental tax applied to the value added at each stage of the processing of a raw material or production and distribution of a commodity. The VAT is an indirect form of taxation, and its impact on the consumer is the same as a sales tax.

**zambo** child of a union between a black and an Amerindian

**Zapatista** either a follower of Mexican revolutionary leader Emiliano Zapata, who violently protested against the Mexican government's failure to initiate agrarian reform, or a member of the Zapatista Army of National Liberation that emerged in southern Mexico during the 1990s to demand social justice and indigenous rights and a rejection of neoliberalism

# ❁ SUGGESTED READINGS ❁ FOR THIS VOLUME

There is a vast field of Latin American historical literature, as evidenced by the suggested readings appended to the entries throughout this encyclopedia, and it is constantly being updated. This select bibliography is designed to assist readers in framing the larger context of Latin American history and to guide them into more specialized studies. The Web Sites section leads readers to current economic and social information from the Inter-American and World Banks, the United Nations Economic Commission for Latin America, and the U.S. Central Intelligence Agency. The U.S. State Department's Background Notes provide constantly updated statements on internal conditions and U.S. policy toward a particular nation. Atlases and Other Geographic Sources augment the cursory overviews provided by these agencies.

The Historical Studies section approaches the broad context of Latin American history and the place each nation has within it. Readers who wish to delve into the historical experience of any given Latin American country should refer to the Library of Congress Area Handbooks (under Web Sites), which provide excellent historical overviews of a nation's political, economic, and social and cultural structures. The handbooks' overviews are supplemented by the national and regional histories listed in the Country and Regional Studies section. The Specialized Reference Works more fully present the role of individuals, provide explanations of themes, and offer more detail on events and other subjects in the Latin American historical experience than are usually found in general surveys.

The Topical Studies section introduces some of the most recent and salient works on subjects germane to Latin America's 20th-century experience. The works listed under Latin America and the World introduce readers to works detailing Latin America's increasing place in global affairs.

Those who wish to identify other works, including journal articles, are encouraged to refer to the *Handbook of Latin American Studies* listed under Web Sites. This

publication, also available in hardback copy through the University of Texas Press, provides brief explanations for the most important works published each year in all areas of Latin American studies.

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