

UNDERSTANDING CONTEMPORARY

# LATIN AMERICA

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edited by

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## 3

## The Historical Context

*René de la Pedraja*

The conquest and colonization of the Americas in the sixteenth and seventeenth centuries created the conditions for the exploitation of the vast territories described by Marie Price in the previous chapter. Beginning in the late fifteenth century, European imperialist expansion resulted in the defeat and subjugation of the native peoples of Latin America, the first non-European continental area to be westernized. It was not until the early nineteenth century that challenges to European domination unleashed the revolutionary forces that ended in independence. Therefore, an understanding of the enduring legacies of a colonial system that lasted three centuries is fundamental to the illumination of developments and issues in contemporary Latin America. In this chapter, I focus on the ways in which Europe imposed itself on the New World and how independence was achieved. Recent research has shown that the Indians were never passive victims. Despite the ultimate failures of armed resistance, the Indians were still able to decide what elements of the new Spanish civilization to incorporate into their daily lives.

### ■ The Conquest

Spanish colonization began after Christopher Columbus arrived in the Caribbean in 1492. Ineffective resistance in the islands allowed the Spaniards to exploit conquered Indians for forced labor. They did so initially through the brutal system of *repartimiento* (from the verb *repartir*, “to distribute”) in which Indians were seized and enslaved. In 1503, the crown adopted the legal system of *encomienda* (from the verb *encomendar*, “to

entrust") to replace the earlier system. Henceforth, the conquerors were obliged to Christianize the Indians and treat them justly. Nevertheless, this "civilizing" role degenerated rapidly, given an economic imperative for free labor. Therefore, captured Indians remained in a state of virtual slavery.

European diseases ravaged the Indian populations of the Caribbean, leading to slave-hunting expeditions on the coasts of Florida, Venezuela, Central America, and the Yucatán. These expeditions also continued the avid search for mineral wealth, as the small gold deposits in the Caribbean became exhausted. The discovery of pearls off the island of Cubagua in 1510 led the Spaniards to occupy the northeastern part of Venezuela and expand into the interior in search of El Dorado (the legendary city of great wealth).

Hernán Cortés set out from Cuba in 1519 to pursue reports of a rich kingdom in the highlands of central Mexico. Cortés and his small force conquered the vast Aztec Empire—whose population of 20 million was defended by at least 100,000 warriors—by forming alliances with tribes that sought to end Aztec rule and by deceiving Montezuma, the powerful Aztec leader. By 1521, central Mexico was under Spanish control.

Indian laborers then leveled the Aztec capital, Tenochtitlán, and built Mexico City on the same site, which immediately became the wealthiest and largest colonial city in Latin America. From the central location of Mexico City, Spanish expeditions fanned out in all directions to subdue any pockets of Indian resistance. The march into Central America brought Spanish rule to Guatemala, El Salvador, and Honduras by 1525. The Yucatán Peninsula, however, was successfully defended by the militaristic city-states of the Maya until 1527, when Francisco de Montejo and his son began the conquest they finally completed in 1546.

Vasco Núñez de Balboa crossed Panama and discovered the Pacific Ocean in 1513, and Panama City was established in 1519. From this strategic location, Spanish explorers spread over the surrounding regions. The Indians of the highlands of Costa Rica had repulsed the sporadic Spanish expeditions until the 1570s, when the Spaniards were able to complete the conquest of the Pacific Coast and the highlands in Central America. Only on the Caribbean side of Central America did Spanish rule fail to take hold, not because of any major opposition but simply because the sparse Indian population, the lack of any immediately valuable resources, and the sweltering tropical climate combined to make the region unattractive to the Spaniards.

Rumors of a rich kingdom to the south along the Pacific Ocean led Ferdinand Magellan to discover the straits at the extreme southern tip of South America in 1520. In an attempt to find what lay between that point and Panama far to the north, Francisco Pizarro took two exploring expedi-

tions south from Panama along the Pacific Coast of Colombia in the mid-1520s. Pizarro returned to the coast of Peru in 1532 with a force of roughly two hundred explorers and soon discovered the Inca Empire, the largest in the Americas. Rather than conducting a frontal attack, Pizarro entrapped the unsuspecting Inca emperor in 1533. The huge Inca armies could not be assembled in time to try to stop the advancing Spaniards. Hence, Cuzco was captured easily, and the capital of the Inca Empire—which had stretched from Quito, Ecuador, to Santiago, Chile—came under Spanish control. In 1535, Pizarro established the Spanish capital in Lima, which became—after Mexico City—the second most important urban center in colonial Latin America.

Expeditions fanned out from Peru in all directions in the hope of finding either precious metals or large numbers of Indians for free labor. To occupy the southernmost parts of the Inca Empire, Pizarro sent Pedro de Valdivia, who established Santiago, the capital of Chile, in 1541. South of Santiago, the Araucanians mastered European methods of warfare and successfully resisted Spanish control. But the region contained gold, and miners and settlers continued to clash with the Indians in almost continuous warfare until the late nineteenth century.

An expedition from Spain landed on the coast of Colombia, and Gonzalo Jiménez de Quesada took this force up the Magdalena River into the highland Indian kingdom of the Chibchas. After defeating the Chibchas, Jiménez de Quesada established the capital at Bogotá in 1537. Through a piecemeal process, Spanish colonizers gradually converged from the original pearl fisheries on the east coast of Venezuela and the trading routes on the west toward the central region in Caracas, founded in 1567. An expedition from Spain had established Buenos Aires in 1536, but the bitter hostility of the seminomadic Indians forced starving colonists to relocate in Asunción, Paraguay, where the friendly Guaraní Indians developed a uniquely harmonious relationship with the settlers. Only later, in 1580, did the Spanish colonists feel strong enough to reestablish Buenos Aires as a permanent settlement.

Spanish explorers continued to push into distant areas. Although the Indian civilizations were very advanced in aspects of astronomy and mathematics, they lacked basic elements of technology—in particular, the wheel and iron. Thus, hundreds of Spaniards could easily defeat tens of thousands of their opponents using steel swords, firearms, and cannons. Also, horses terrorized Indians, who were unfamiliar with them. Even though the conquerors were only slightly better than armed civilians, with very few professional soldiers among their ranks, the Spaniards' knowledge of tactics and strategy far surpassed the Indians' sometimes rudimentary conception of warfare. And the European diseases were the most terrifying weapon of all, decimating millions of Indians. Against such odds, the desperate Indian

resistance against the invaders should evoke as much admiration as the boldness of the Spaniards in entering unknown regions.

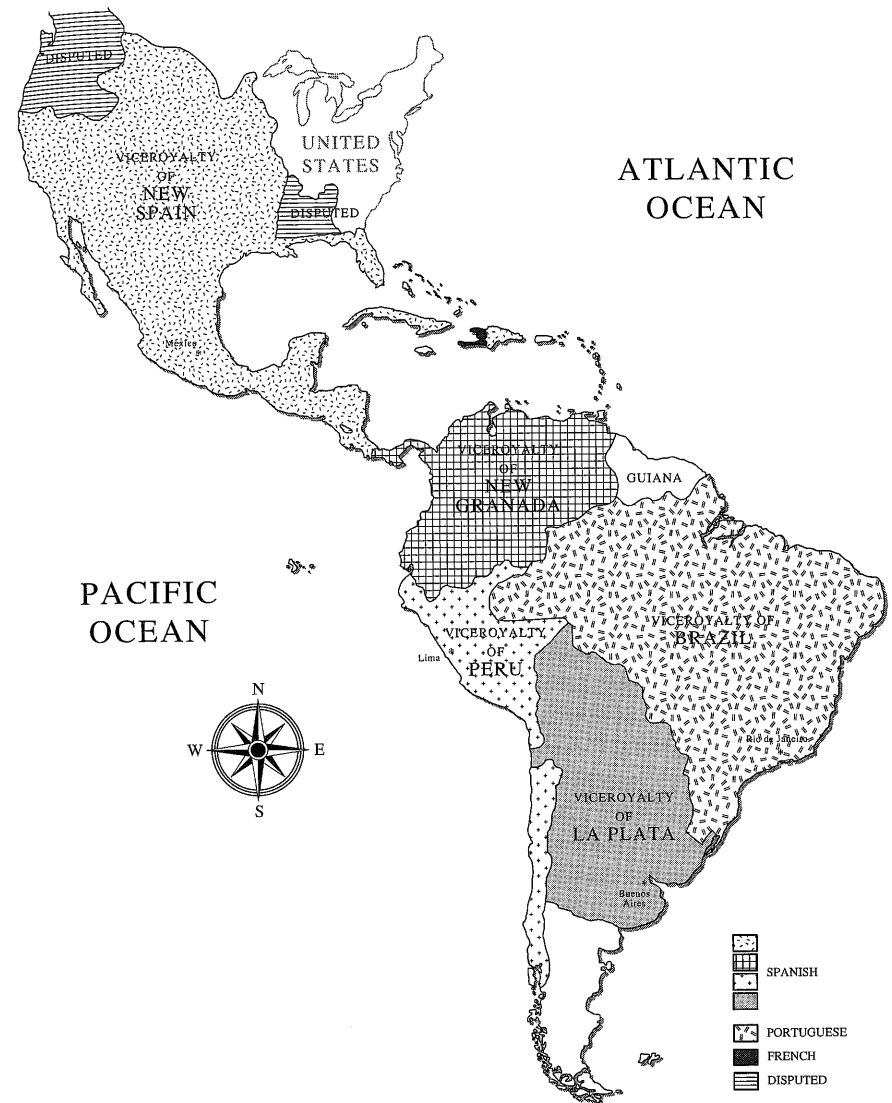
The plight of the native peoples gave enemies of the Spanish crown ample reason to be extremely critical of the conquest and colonization of the Americas. For example, La Leyenda Negra (the Black Legend) attributed only great cruelty, evil, and exploitation to the Spaniards. Ironically, the Black Legend was based in part on information from missionaries such as Bartolomé de las Casas (1474–1566), who attempted to end the abuse and enslavement of the Indians. Later, leaders of the Latin American independence movements used the Black Legend—a mixture of fact and myth—to justify revolution against the crown. More objective interpretations of this history include references to the achievements and loftier purposes of the conquest, as well as to the negative impact of this encounter between cultures.

Although formal conquests had ended by 1580, the task of incorporating frontier regions was far from over. The Spanish Empire continued to grow until it reached its greatest extension in the eighteenth century.

### ■ The Colonial Period

The conquerors gave their colonies such names as “New Spain” and “New Granada,” thus affirming their desire to reproduce Spanish civilization in the New World. Map 3.1 illustrates the colonial divisions. The colonies were treated as the personal possessions of the Spanish monarchs, who created structures for government, the church, and the economy that essentially transplanted their European institutions into the Western Hemisphere. Hence, social classes and cultural values, particularly Latin American ones, emerged very gradually—often with unexpected consequences.

Spain was able to duplicate its institutions and culture fairly closely in areas with scant numbers of Indians, such as the Rio de la Plata, as well as in areas where the Indian population rapidly disappeared, such as the islands of the Caribbean. Spanish became the sole language and Hispanic practices rapidly took root. However, in areas of dense Indian population, particularly central Mexico and the Peruvian highlands, the process of transmitting Hispanic structures and customs took much longer and was seldom ever completed. Where Indians survived the ravages of war, diseases, and exploitation, they aptly selected those Spanish objects or traits most suitable for their daily lives. Indians quickly adopted practical materials like iron, the wheel, and wool clothing, as well as the corresponding nomenclature. The Indians came to accept selected Spanish items, customs, and terminology as integral parts of their timeless traditions. The Indians readily accepted some new foods (particularly chicken, eggs, and sugar), but they steadfastly refused to accept the wheat the Spaniards so insistently imposed upon them.



Map 3.1  
Eighteenth-Century Colonial Latin America

The Spanish *encomienda* succeeded only because the authorities based it on existing pre-Hispanic structures. Outwardly converted to Roman Catholicism, the Indians preserved many of their spiritist beliefs within the new Christian rituals. In spite of repeated orders to use only the Spanish language in official documents, not until the 1770s did the Mexican Indians

finally adopt the language of the conquerors for paperwork. As Indian rebellions became infrequent after the sixteenth century, the Spanish crown no longer saw the Indians as a threat to Spanish rule and tolerated their failure to adopt all the new customs and official practices. As a result, Mexican and Peruvian Indians found themselves with a significant degree of control over precisely how they would coalesce with the Spanish world.

The Spanish government, which was an absolutist monarchy, relentlessly attempted to maintain its monopoly over political power in the newly conquered territories to prevent the rise of any group or rival institution that might challenge royal authority. The first urgent task of the royal government was to remove from power those men who had carried out the conquest of the New World under the sweeping authorizations the crown itself had granted. Asserting royal power in the Caribbean and marginal areas like Panama proved easier than on the mainland, where the conquerors were well entrenched. The opposition became so violent that in Peru the Pizarro family led an insurrection against Spain. The crown's obsession with absolute power triumphed in both Peru and Mexico largely because the government did not revoke the economic privileges of the original conquerors.

Throughout the colonial period, the Spanish government remained extremely reluctant to share any political power with the wealthy upper class. An unwieldy separation arose between political power and economic wealth, making colonial government ineffective and cumbersome at best, as government officials—who were generally short of funds—tried to impose official policies on the wealthy upper classes. This pattern of conflict between economic and political power has continued to plague Latin American countries in the modern era. Spain left Spanish America a legacy—not of open government and consensus building but of secrecy and absolutism.

The highest-ranking colonial official was the Spanish viceroy appointed by the crown, who, because of the slowness of communications with Spain, enjoyed powers almost comparable to those of the king. The viceroy in Mexico City had jurisdiction over North America, and the viceroy in Lima had jurisdiction over South America. The distances were too vast for the viceroys, so in the sixteenth century, Spain appointed captains general to rule over strategic regions such as Santiago, Caracas, and Havana. The captains general, who were also *peninsulares* (Spaniards) appointed by the crown, were soldiers whose military practices necessarily reinforced the authoritarian nature of colonial institutions. The decline of Peru and the increase in foreign threats convinced Spain of the need to create two new viceroyalties in the eighteenth century, one for Buenos Aires and another for Bogotá.

The colonial government was subject to much abuse and corruption.

Moreover, *peninsulares* looked down on *criollos* (Spanish Americans). Special privileges, called *fueros*, were granted to *peninsulares*, clergy, the military, and government officials. Although abolished in Spain in 1820, *fueros* were continued in Latin America even beyond independence. Membership in the *cabildo* (town council) usually remained the only form of political participation available to upper class *criollos*. In addition, the centralizing tendencies of the eighteenth century came to reduce the modest authority of the municipal bodies and aroused *criollo* resentment.

The viceroys and captains general formed the executive branch of government, yet they also possessed sweeping legislative and judicial powers. The highest courts in Spanish America were the *audiencias*, whose number fluctuated around eight and whose judges (*oidores*) were *peninsulares* appointed by the crown. In effect, the *audiencia* formed the main council of the viceroy or captain general, while functioning as the highest court of appeals in America (appeals later could be taken to Spain). Although most legislation came directly from the king's councils in Spain, the *audiencia* issued local laws and decrees. The principles of Roman law used in the *audiencia* simplified the application of laws at the personal level. Roman law, however, became one more vehicle through which to reinforce absolutism and impose authoritarian principles.

One of the most problematic legacies of the colonial period was the confusion among the three branches of government. The same officials, whether viceroys or judges, often performed legislative, executive, and judicial functions. By the twentieth century, Latin America was able to define the authority of the executive branch and, to a lesser degree, that of the judiciary. The failure to develop viable, independent legislatures, however, has often undermined attempts to practice democracy and has reinforced tendencies toward authoritarianism. The ongoing political implications of this colonial legacy are discussed in greater detail by Thomas J. D'Agostino in Chapter 4.

In pursuit of a policy of divide and rule, Spain created overlapping territorial jurisdictions for viceroys, captains general, and *audiencias* and also for the parallel structure of the Catholic Church. Spain successfully prevented any high royal or church official in the New World from ever challenging the authority of the crown, but it did so at the cost of increased inefficiency. The officials were more concerned with defending their power or spying on each other than with conducting government business. After independence, the vague lines separating the colonial jurisdictions led to conflicting territorial claims and border wars. Most had ended at the end of the twentieth century, but some—like the border between Peru and Ecuador—remain flash points for renewed conflict.

Spain justified its extraordinary authority over the Catholic Church on

the grounds that civil and ecclesiastical officials had to function as one to carry out the vast undertaking of the military and spiritual conquest of the New World. The Catholic Church could do nothing without the approval of the crown, and the authority extended to matters of religious belief or dogma. Whatever doctrine the Pope proclaimed in Rome was only valid for the New World if the Spanish crown approved. But even after almost all of Latin America had been converted to Roman Catholicism, the government continued to preserve its authority over the church for the more blatantly political reason of allowing no rival power base to emerge. In Chapter 12, Michael Fleet shows how this affected the ongoing role of the church in Latin America.

Initially, the task of converting the large native populations to Catholicism was carried out with missionary zeal. The priests learned the Indian languages and established missions in remote areas. The idealism of the first generations of missionaries gradually waned, however, and in any case by the 1560s, few Indians remained to be converted. Unable to enter local politics, the clergy devoted itself to the profitable management of wealth.

The Catholic Church soon owned the largest percentage of the land in Latin America and received a vast income from the properties. The money reserves accumulated, and the church's institutions became the financial lenders of the colonial period (banks did not appear until the mid-nineteenth century). Land was the almost universal collateral, so the failure to repay loans meant the church added foreclosed property to its already enormous holdings.

The spiritual decay of the clergy caused the Spanish government, in part out of religious conviction but also to avoid any questioning of its authority, to attempt to revitalize the Catholic Church. Supported by the Spanish government, the Jesuits (members of the Roman Catholic Society of Jesus) entered Latin America in 1572. Although the Jesuits encouraged scholarship and independent thinking in their schools, the Inquisition (a special Spanish law court designed to identify heretics and "allow" them to repent or be put to death—at times by torture) severely limited intellectual activities. The Inquisition began its Latin American operations in 1569 in Lima and Mexico City and gradually opened branches in other major cities. Although staffed by clergy, the Inquisition was a governmental body that made its most valuable contribution by detecting and punishing sexual crimes by priests and other religious personnel.

This moralizing effect on the clergy, however, came at the high price of an unending series of witch-hunts against ordinary people. The inquisitors eagerly searched for any signs among the local population of unusual behavior that could fall under the broad definition of heresy or "crimes against the faith." The favorite investigative techniques of the Inquisition

were anonymous accusations and torture, and its jail cells remained filled with supposed criminals. Although the Inquisition executed fewer than two hundred men and women, its most ruinous effect was to stifle free inquiry in the New World. As all Indians were considered minors and not fully responsible for their actions, they were, in principle, exempt from the Inquisition's jurisdiction. However, in Mexico, some unlucky Indians occasionally fell victim to it. The environment of fear made dissent dangerous, and the Inquisition reinforced the tendency toward absolutism. Spain accepted the Inquisition because, as an institution independent of the bishops and viceroys, it provided one more check on the government and the church in the New World. It could be argued that the Inquisition was the forerunner of the infamous secret police and intelligence services that emerged in Latin America in the early twentieth century.

Throughout colonial Latin America, both the Catholic Church and the Spanish government constructed extensive institutional structures that were supported by the material resources of the New World. The Spanish crown had not only expected the new institutions to be self-supporting but from the start had also demanded a major share of the wealth coming out of the New World. To extract the largest amount of wealth from the New World in the easiest way possible, the Spaniards established a colonial economy whose two foundations were the exploitation of local labor and the mining of precious metals—activities that often occurred simultaneously. In Chapter 6, Richard Harper and Alfred Cuzán analyze the negative impact of the colonial economy on future Latin American development.

Throughout the colonial period, gold and silver exports paid for imports from Europe and brought additional wealth to Spain. The apparently endless waves of precious metals leaving Latin America created the image of a rich paradise. Consequently, England, France, and Holland sent trading expeditions to the Caribbean from the 1530s until the 1620s. Gradually, a pattern of trade and smuggling with Europeans became an accepted practice for the Spanish American population, which sought to avoid high Spanish taxes on the imported merchandise.

The decline of the Spanish Empire in the seventeenth century gave Europeans the opportunity to establish bases in many of the deserted islands of the Spanish Caribbean, starting with the British island of Barbados in 1627 and the Dutch island of Curaçao in 1634. Seduced by tales of great wealth and aware of Spanish weakness, an English force tried to capture the entire West Indies, only to meet with dismal failure in its attack on Santo Domingo. This same expedition did capture Jamaica from Spain in 1655, and this island became the staging base for subsequent English penetration into Spanish America. France also began to occupy islands in the West Indies and by 1665 had gained control of the western part of Santo Domingo, which is now Haiti.

The islands occupied by the Dutch, French, and English served as excellent ports for an extensive smuggling trade with Spanish America, but by the second half of the seventeenth century the non-Spanish Caribbean had turned to plantation agriculture as the main source of its wealth. Examination of parallel events in Portuguese Brazil illuminates how the plantation system spread to the Caribbean.

### ■ Portuguese Brazil

During the same period when Spain conquered the West Indies, Mexico, and Central America, Portugal had barely a presence on the Brazilian coast. Pedro Cabral, leading a Portuguese fleet to India in 1500, was blown off course and landed on the coast of Brazil, which the king of Portugal decided to claim as a resupply base. Not until 1532 did the Portuguese establish the first permanent settlement at São Vicente (near present-day Santos on the coast). The two key elements of the Spanish American economy—precious metals and abundant Indian labor to exploit—appeared to be lacking in Brazil. Therefore, the Portuguese, who were driven by profit and commercial concerns even more than the Spanish, invested not in the Brazilian wilderness but rather in the lucrative spice trade between Europe and the Indian Ocean.

The reddish dyes drawn from brazilwood trees were in demand in Europe, however. This attracted the French, who poached on the forests the Portuguese crown considered its own private reserve. To repel both the French and expansionist Spanish expeditions, the Portuguese government sent the first royal governor to San Salvador in 1549. Ultimately, the Portuguese expelled the French from Rio de Janeiro. In the early seventeenth century, the French attempted to reestablish settlements on the north coast of Brazil, only to have the Portuguese push them into what is now French Guiana.

As brazilwoods became scarce due to excessive logging, expeditions called *bandeiras* set out for the interior of Brazil in search of precious metals and Indian slaves. Initially the *bandeiras* (whose members were called *bandeirantes*) found no precious metals and only a small number of slaves among the widely scattered Indian villages. Brazil found its economic salvation not in the interior but on the coast.

Sugarcane grew well in the hot, humid lands along the Brazilian coastline. Spanish America had neglected the agricultural potential of its tropical lowlands for the sake of mining, and prices for sugar remained high in Europe. Portugal had only to draw on its prior experience with sugarcane plantations in the Atlantic islands of the Madeiras and the Cape Verdes to introduce a proven and profitable economic model into Brazil. Essentially,

to supply the European demand for tropical crops—sugar in particular—Portugal imported large numbers of slaves from Africa annually to work in the sugar plantations in Brazil. Sugar and slaves remained an inseparable link during the colonial period, and the profits from the sugar exports sustained Portuguese colonization in Brazil.

Slaves and sugar made Brazil very wealthy, and many Portuguese migrated to the new country in the hope of finding fortunes. Portuguese merchants enjoyed a monopoly (similar to Spain's in its empire) over Brazilian trade, and the Portuguese government taxed the European imports and the sugar that passed through Portugal. The rising revenues from Brazil were very important to the Portuguese government, whose commercial empire in Asia was collapsing in the early seventeenth century. Henceforth, Brazil replaced Asia as the source of most of Portugal's wealth.

The Dutch, who had attempted to take over Brazil in the mid-seventeenth century, abandoned the struggle in the face of armed local resistance. The Dutch instead introduced plantation agriculture in the Caribbean as a more profitable alternative to hostile Brazil. Other European powers followed this example. In fact, British Jamaica and French Haiti became the principal sugar producers in the world. Production outpaced European demand, however, and as sugar prices dropped, the sugar mills in Brazil entered a prolonged period of depression after 1680. Planters struggled to meet their loan payments in the face of rising production costs—in particular, the higher prices of imported slaves. Brazil stagnated, and Portugal suffered loss of income and revenue because of the colony's economic problems.

By 1700, the *bandeiras* had found gold deposits in the region of Minas Gerais (general mines). Mineral exports—mainly gold and, after 1729, diamonds—became the driving force behind the Brazilian economy as sugar sank to a secondary position. Plantation owners found the task of supplying their slave force much more difficult as the slave trade shifted to providing Africans for the mines.

Immigrants flocked from Portugal and other parts of Brazil to participate in the gold rushes, and the demand for food and goods in the new mining cities provided a powerful stimulus to agriculture and commerce. To supply the meat and leather, ranches pushed farther into the interior, thereby broadening the areas under effective Portuguese colonization. The gold fields were located primarily in the southern half of Brazil. In response, the Portuguese crown shifted the capital in 1763 from San Salvador in the north to Rio de Janeiro in the south.

The reliance on mineral wealth made Brazil resemble Spanish America but with the crucial difference that without a large Indian labor force, the Brazilians had to turn to African slaves and, to a lesser degree, *mestizos* (the offspring of Europeans and Indians) to work the gold deposits. By the

eighteenth century, *mestizos* had become the largest racial element in the interior, whereas the *mulatos* (the offspring of blacks and Europeans) had gradually become the majority racial element in the coastal sugar regions. Because of the constant arrival of new African slaves, many *mulatos* eventually acquired their freedom. In Chapter 9, Kevin Yelvington analyzes patterns of ethnicity and class that were set into motion during the colonial era.

Brazil faced hardships as gold output fell after 1750. To try to save the Portuguese Empire from economic collapse, the marquis of Pombal—a virtual dictator because the king had lost all interest in ruling—undertook major initiatives from 1750 to 1777. Pombal tinkered with the bureaucratic structures of the Portuguese Empire, but the very nature of his personal rule precluded any fundamental change.

The imperial bureaucracy—although never as extensive as that of Spain—continued to suffer under the weight of corruption, slowness, overcentralization, and conflicting jurisdictions. To increase trade between Portugal and Brazil, Pombal attempted to improve the system of annual fleets (similar to Spain's) but without success. He abolished the annual fleets in 1765, allowing individual Portuguese vessels to sail between Brazil and Portugal at any time. Similar to the Caracas Company in Spanish America, Portuguese monopoly companies failed and were abolished by 1779.

With gold exports declining, both Brazil and Portugal attempted to grow crops and manufacture products that previously had been imported. Pombal encouraged the expansion of agricultural production to include new crops, such as rice, wheat, and coffee. This combination of import substitution and the development of new crops had restored Brazil to prosperity, although it always depended on the constant inflow of slaves from Africa.

During the second half of the eighteenth century, no serious challenge to Portuguese rule in Brazil appeared. To eliminate any possible rival power base, Pombal had expelled the Jesuits and confiscated their properties in 1759. In the more religious areas of Spanish America, the expulsion of the Jesuits had undermined royal authority, but this was not the case in Brazil, where planters and merchants eagerly purchased most of the Jesuit lands at bargain prices. Rather than sell the lands to peasants, the Portuguese government reinforced the overconcentration of wealth in less than 1 percent of the Brazilian population.

Brazil, which did not have a single university or printing press, appeared content to remain under Portuguese rule, and the few failed conspiracies did not disrupt the colonial peace. The first plot was that of Tiradentes (Joaquim José da Silva Xavier) in 1788–1789, but, like the others, it gathered conspirators only from the lower and middle classes. Without the support of the upper class, no challenge to Portuguese rule

could have been successful. After the slaves revolted in the 1791 Haitian Revolution, no planters dared to suggest any political change for fear of provoking a similar uprising among the slaves in Brazil.

## ■ The Bourbon Era

As the Spanish American empire faced a real danger of collapsing, during the eighteenth century its reforms were considerably more extensive than those in Brazil. When the last Spanish king of the Hapsburg dynasty died without leaving an heir, European powers fought the War of the Spanish Succession to determine which royal family would occupy the Spanish throne. Spain ultimately selected a member of the Bourbons (the royal family that also ruled France under Louis XIV), hoping to avoid French invasions. Spanish America, however, was left exposed to repeated English naval attacks during the rest of the Bourbon period (1700–1808).

Fear of English attacks gave a military urgency to reforms in Spanish America, a strategic concern less prevalent in the more economically driven reforms of Portuguese Brazil. The economic dimension was no less absent in Spanish America than in Brazil, however, because of the bankruptcy of the model based on the exploitation of Indian and *mestizo* labor and the export of precious metals. The Bourbon reformers thus faced the double task of creating effective defense forces for the many distant frontiers of the Spanish Empire and of finding new sources of economic wealth to support the vastly enlarged military establishment.

Before the Bourbon reformers could make any changes, they needed to establish an effective government structure to carry out their orders. New institutions and new taxes were the order of the day. Spain had ruled Spanish America with institutions largely unmodified since their creation in the early sixteenth century. The Bourbons in the eighteenth century attempted to replace the original institutions with new dynamic agencies staffed largely by *peninsulares* and with the minimum possible participation by *criollos*. The old bureaucracy proved remarkably resistant, however, and the Bourbons could often do little more than add another layer of bureaucracy to these decrepit institutions.

Beginning in 1763, the combination of newly formed royal monopolies and the presence of the new intendants disrupted the existing power relationships. The new intendants, independent of the viceroys and the captains general, aggressively began to collect taxes in 1763, thereby antagonizing both elite groups and the masses. Rather than binding Spain closer to Spanish America, the intendants further strained the imperial relationship.

The intendants, viceroys, and judges of the *audiencia* all continued to mix judicial, legislative, and executive functions. Accountable only to

Spain, each was, in effect, independent and could easily display despotic excesses of power. Secrecy remained the rule; only a few privileged insiders had access to information within the bureaucracy, and officials kept the public ignorant of deliberations and of many decisions. Therefore, the Bourbon reforms reinforced authoritarianism and the expectation that policies should flow from rulers rather than the people.

Although the local elites had always embraced the principle of keeping the masses out of government, the Bourbon challenge to the elites themselves engendered a struggle to preserve their influence. At the same time, the military began to function as a separate group and to feel superior to the rest of society in many ways. Ironically, the Bourbons trained the officers and soldiers who later gained great distinction in fighting against the Spaniards during the wars of independence. The role of the military in Latin America is analyzed further by Paul Zagorski in Chapter 5.

By 1800, it was clear that no further reforms were possible from the Bourbons, who desperately attempted to retain their eroding power over Spanish America. Because of the rigid class structure and fears of unleashing a popular uprising by the masses, the elites were reluctant to defy the established authority of Spain. When it became clear that the monarchy was endangering the established order, however, the resulting stress gave the local elites the opportunity to escape once and for all—not only from the stifling Spanish commercial system but also from the domineering royal bureaucracy.

## ■ Independence

### Early Rebellions

Although the independence period formally began in 1808, in reality earlier colonial revolts and British attacks formed the opening acts of the struggle for independence. Indian rebellions had been frequent in the sixteenth century and had never totally ended, whereas urban riots had shaken even Mexico City at times. In the late eighteenth century, however, two revolts of a magnitude previously unknown threatened to overthrow the colonial order completely.

The first occurred in the highlands of Peru and Bolivia, where Indians and *mestizos* rose up in November 1780 to overthrow corrupt officials and abolish the new taxes of the Bourbons. The leader of the uprising was a *mestizo* merchant who, as a descendant of the last Incan emperor, took the name Tupac Amarú II. In an attempt to rally the Indian masses behind him, Tupac Amarú II declared himself king but never declared independence from Spain. This unclear position undermined his support among Spanish Americans and many *mestizos*. The fighting soon degenerated into a war of

racial extermination against the white *criollos*, who joined with the Spanish forces to crush this bloody insurrection by the end of 1781.

In contrast with the huge number of casualties in Peru, the rebellion in Colombia was relatively bloodless and lacked the racial overtones that had generated so much hatred. As in Peru, the revolt in Colombia was caused by popular opposition to the tax policies of the Bourbons, but the Indian population was considerably smaller than that in Peru, so *mestizos* and *criollos* made up the bulk of the rebels, who called themselves *comuneros*. During mass rallies in March 1781, the townspeople chose leaders to call for repeal of the new taxes. The movement spread like wildfire, and soon a huge crowd was marching on the capital city of Bogotá.

The Spanish government kept almost all of its forces near the coast, especially in the fortress city of Cartagena, as a defense against foreign attack; thus, the military could not quell the revolt. Consequently, on June 4, 1781, the *audiencia* in Bogotá caved in and granted the *comuneros'* demand to repeal the taxes. The crowds dispersed, and with the exception of one rebel leader, who was later captured and executed, the movement was over.

Whereas in Colombia the revolt had taught the upper class how easily Spanish rule could be overthrown, in Peru the lesson learned was that any change in government released bitter class and racial hatreds. Thus, while the upper class in Colombia remained open-minded about exploring new political alternatives if the opportunity arose, the upper class in Peru was so obsessed with its very survival that it resisted any attempt to change the political status. These contrasting attitudes in Colombia and Peru later played a major role in shaping events during South America's struggle for independence.

### External Influences

By 1800, Latin America had been overtaken economically by both Europe and the United States. Nevertheless, the promise of wealth and plenty persisted for the British, who maintained their designs of conquering the region's mineral wealth. The outbreak of the French Revolution in 1789 ended Spain's alliance with the French Bourbons, who were overthrown, and Spain joined England in a coalition that attempted to destroy revolutionary France. Fear of French armies compelled the Spanish government—foolishly—to switch sides and to return to an alliance with France in 1796. Once again, to safeguard Spain's frontiers, the government was willing to expose Spanish America to English attacks.

British warships began to raid many coastal ports, and old plans to capture Panama and other strategic points resurfaced. A British expedition captured the ill-defended island of Trinidad near the coast of Venezuela in

1797 but failed miserably against the determined opposition of the new militias in the fortress city of San Juan, Puerto Rico. The most significant British attack came in 1806, when a British force captured Buenos Aires after royal officials—including the viceroy—fled in panic rather than face the advancing British troops. The *criollos* were shocked by the disgraceful performance of the royal officials, and the local militias decided to avenge the dishonor by secretly organizing the expulsion of the British troops, who surrendered when surprised by the unexpected *criollo* attack. A second British expedition had come too late to save the garrison, but it did attempt to recapture Buenos Aires in 1807. The assault was unsuccessful, and determined resistance by well-prepared militias persuaded the British commanders to abandon the attack.

The British continental offensive had barely dented the outer defenses of Spanish America, whose protection depended not on the inefficient institutions of a corrupt empire but rather on the dedication and discipline of the new militia units. Military power had passed imperceptibly into the hands of the *criollos* under the Bourbons. Thus, the transfer of political power to the *criollos* who already dominated the economy could not be far away. It later came as no surprise that Buenos Aires was the first region to throw off Spanish rule permanently.

Moreover, news of events in other parts of the world filtered in, despite the attempts of the Inquisition and the Spanish government to keep subversive ideas out of the region. After 1783, U.S. ships engaged in smuggling brought news of U.S. independence and ideas about how to set up a constitutional republic, thereby destroying the myth that a country in the Western Hemisphere could not exist without support from Europe.

The 1789 French Revolution seemed to offer a compelling example for all of Latin America, although the upper classes quickly tempered their revolutionary enthusiasm when the slaves in Haiti rose up and eventually established the first black republic in the Western Hemisphere in 1804. The landholders and miners in Latin America would not rush into independence because of fear of triggering social revolts, but no lingering attachment to the old colonial order would deter them from taking advantage of a favorable opportunity to gain control over the political structures in their regions.

The decay of Spanish institutions was pervasive and reached right up to the king and the royal family, who foolishly allowed themselves to be taken prisoners by the French. Napoleon Bonaparte attempted to place his brother on the throne of Spain, but the Spanish people indignantly rejected the new French ruler and began popular uprisings on May 2, 1808. Meanwhile, throughout Spain a large number of regional juntas, or governing boards, appeared to rule in the name of the captive Spanish king, Ferdinand VII.

Loyalty to the crown, the last cement bonding the Spanish Empire

together, dissolved, as competing groups attempted to fill the power vacuum left by the capture of the royal family. French armies continued their relentless advance through Spain, until only the junta in Cádiz was left to defy Napoleon. Spanish America had watched these incredible events closely, and finally, in summer 1810, the elites in Bogotá, Caracas, Buenos Aires, and Santiago decided to overthrow the royal officials and establish governing juntas of Spanish Americans. In other places, particularly Havana and Mexico City, elites had tried to establish their own juntas but had failed because of fear of unleashing revolts by the black slaves in Cuba or the Indian and *mestizo* masses in Mexico.

### The Wars Against Spain

The independence of Spanish America began without bloodshed, but the struggle soon turned into bitter and constant warfare that devastated large areas for over a decade. These independence movements are illustrated on Maps 3.2 and 3.3. The juntas tried to ease the transition by not declaring independence immediately and maintaining the fiction that they, too, ruled in the name of the captive Ferdinand VII, but even this concession failed to calm diehard royalists, who soon started revolts against the juntas.

Caracas proclaimed itself a republic in 1811, but the next year it was recaptured by royalist forces. Simón Bolívar attempted to reestablish the republic, but a brutal royalist campaign ended Venezuelan independence in 1814. In Bogotá, Buenos Aires, and Santiago, internal quarrels and even civil wars divided the *criollos*, who wasted the opportunity to drive the *peninsulares* from their last strongholds in Peru, Bolivia, and Uruguay.

Meanwhile, in Mexico a very different type of independence struggle had erupted. When the elite in Mexico City threw away the opportunity to establish its own junta, the initiative passed to provincial groups. Without access to the levers of power in Mexico City, the plotters in the provinces counted on a movement of Indians and *mestizos* to overthrow Spanish rule. On September 16, 1810, Spanish American priest Miguel Hidalgo—a key plotter—sounded the church bells to urge his parishioners to join the rebellion, which spread rapidly throughout nearby provinces. At the last moment, however, Hidalgo turned his huge forces (more a mob than an army) away from Mexico City and toward Guadalajara. The failure to capture the capital gave the Spanish government time to regroup and to regain the full support of the upper-class Mexicans who had panicked when Hidalgo's forces engaged in wholesale slaughter of all whites, whether *criollos* or *peninsulares*.

Hidalgo was soon defeated, captured, and executed, but the insurrection continued under *mestizo* priest José María Morelos. Defeated in formal battles, the Mexicans adopted guerrilla warfare against the Spanish armies,



**Map 3.2**  
**Early Independence Movements**

whose morale began to suffer under the constant campaigning and the effects of tropical diseases. The capture and execution of Morelos in 1815 did not end the popular insurrection, and Mexican guerrillas continued to harass the increasingly exhausted Spanish troops. Meanwhile, the efforts of



**Map 3.3**  
**Later Independence Movements**

the royal government to collect more taxes to pay for the large counterinsurgency army only increased resentment of Spanish rule. The Spanish government appeared to have clung to power in Mexico, but its control rested on disintegrating foundations.

The defeat of Napoleon Bonaparte in 1814 brought Ferdinand VII back to the Spanish throne and also released large numbers of Spanish veterans for the campaign of reconquest. Spanish battalions had contributed to the defeat of Hidalgo in Mexico, but counterinsurgency campaigns did not seem very glamorous to the Spanish government, which decided instead to pursue a grand strategy against the independent countries of South America. First, an expedition sailed from Spain to the Caribbean to crush the last patriot strongholds in Venezuela and then to reoccupy Colombia. Afterward, this force would then join Spanish forces in Peru to make a final push down the Andes Mountains to press the forces in Buenos Aires from the north, which then would be struck from the sea by a second force sailing directly from Spain. Pablo Morillo, who imagined himself to be another Hernán Cortés, led this huge Spanish expedition that first subdued Venezuelan resistance and then sailed to Colombia and landed off the coast of Cartagena in 1815. In a supreme irony, the Spaniards, who had spent entire fortunes to build this fortress city, had to lay siege to Cartagena, which surrendered only because its defenders were starving. The Colombians, who were too divided among themselves, could put up no significant resistance, and Morillo had soon reestablished Spanish rule in Bogotá and throughout Colombia. Meanwhile, Spanish forces in Peru had managed on their own to reconquer Chile in 1814, so by 1816, of all of the original independent countries, only Buenos Aires remained under patriot control. It, too, expected land attacks from the Andes Mountains and a sea invasion from Spain at any moment.

Before Spain could complete the reconquest of Buenos Aires, Simón Bolívar returned from exile to Venezuela and raised a patriot army in the plains of the Orinoco River in 1816. Morillo was forced to postpone his plans to march against Buenos Aires until he could destroy Bolívar's forces. In Venezuela, Colombia, and Chile, the *criollos* had come to hate Spanish rule. The Spanish government, rather than seeking a reconciliation, had become more inflexible than ever. Ferdinand VII and Morillo not only refused to share any power with the *criollos* but also took economic and political reprisals against all those who had participated in the independent regimes.

Spanish control rested only on brute force. Both Simón Bolívar in Venezuela and José de San Martín in Argentina saw the chance to end Spanish rule once and for all through brilliant military moves. Bolívar left behind some troops to distract Spanish forces in Venezuela, while he marched with his main army westward across the plains into the Andes Mountains of Colombia. His flanking march came as a total surprise, and after several engagements he decisively defeated the Spanish army in the Battle of Boyacá in August 1819.

All of Colombia fell under patriot control, and with these larger

resources Bolívar led an expedition to drive the Spaniards out of Venezuela. This more difficult task was completed only after his troops had defeated the Spaniards in the Battle of Carabobo in June 1821. Bolívar sent another force south to expel the Spaniards from Ecuador, which joined the union of Colombia and Venezuela proclaimed in 1821. Panama, the best transit point for moving troops from the Caribbean to the Pacific Coast, had also joined the new country.

The areas of South America still under Spanish control continued to shrink, not only because of Bolívar's actions but also because of a separate campaign conducted by the Argentine José de San Martín, who adopted a new strategy to protect Argentina from an expected Spanish invasion. Previous attempts to march north directly into Peru had failed. Instead, San Martín decided to march across the Andes to surprise the Spaniards in Chile before sailing by ship to attack the lightly defended coast of Peru.

After over a year of preparing an army on the Argentine side, San Martín crossed the Andes and defeated the Spaniards in several battles, until the last one at Maipú in 1818 ended Spanish rule in Chile. He formed a navy with English sailors and ships, and his new fleet took the army to Peru and captured Lima in 1821. The Spanish troops had merely withdrawn into the interior highlands, however, and Bolívar took over the task of destroying the last Spanish forces in South America. With the resources of Colombia, Venezuela, and Ecuador at his disposal, Bolívar arrived with a considerable force. Extensive fighting ensued, but finally, in December 1824, the patriot forces defeated the last Spanish army at Ayacucho. Spanish rule had completely ended throughout South America.

Mexican independence took place in a rather sudden but almost inevitable manner. In 1820, Ferdinand VII gathered a second expedition in Cádiz to attack Buenos Aires. A mutiny, however, forced the king to hand over power to a Liberal government in Spain. By then, the Spanish forces in Mexico had become thoroughly demoralized by the unceasing guerrilla war, and the Mexican population saw the coming to power of the Liberal government in Spain as an excuse to stop paying the large war taxes.

The royal government in Mexico was disintegrating, but unlike the case in 1810, when the elites missed an opportunity to take power, this time Agustín de Iturbide, the *criollo* commander of the army in Mexico, was the right person to achieve independence. The rebels who had fought against Spanish rule were brought into the movement, and without firing a shot, Iturbide was able to proclaim Mexico's independence on September 28, 1821. Only the Spanish garrison in the main fortress of Veracruz refused to obey Iturbide's orders and did not accept Mexican control until 1823.

Central America, which traditionally had enjoyed close links to Mexico, was sufficiently impressed to break its ties with Spain and join the new Mexican Empire in 1821. Thus, all of mainland Spanish America—

from Mexico to Argentina and including Chile, Peru, Colombia, Central America, and Venezuela—had gained permanent independence from Spain. All that remained of the Spanish Empire were the islands of Cuba and Puerto Rico in the Caribbean and the distant Philippine Islands in the extreme western Pacific. Spain retained these territories until 1898.

### Brazilian Independence

Brazil, with its large slave masses toiling in the gold mines and sugar plantations, was the least likely candidate for independence. If Cuba—with the largest number of slaves in Spanish America—had remained under Spanish dominance, then fear of slave rebellions promised to keep Brazil under Portuguese rule for a long time. However, as in the case of Spanish America, actions in Europe unleashed a chain of events that finally culminated in Brazil's independence from Portugal. Although Napoleon Bonaparte was unable to capture the royal family as he had done in Spain, the entire Portuguese government had to flee to Brazil in November 1807, just a few days before French armies captured Lisbon, the Portuguese capital.

British warships escorted the Portuguese royal family to Brazil until it was safely established in Rio de Janeiro, which, in effect, became the capital of the Portuguese Empire. This was the only time in history a government in Latin America ruled over colonies—in this case, the Portuguese territories in Asia and Africa. The British wanted favors in return, and Portuguese ruler Dom João complied by opening Brazilian ports to direct trade with the British.

Dom João was so happy in Rio de Janeiro that he refused to return to Portugal, even after Napoleon had been decisively defeated in 1815. Furthermore, he formally ended Brazil's colonial status when he proclaimed the country to be a "coequal kingdom" with the same rank as Portugal.

The printing press finally came to Brazil, and for the first time the king established institutions such as academies and universities. The Brazilian elite was delighted to have its king nearby and shared enthusiastically in the prosperity and feeling of progress that existed during the 1810s.

The new government in Portugal, however, demanded that Dom João return, and in a vain attempt to preserve the political unity of the Portuguese Empire, the king agreed. He left his son, Dom Pedro, behind and told him to declare Brazil independent if the necessity arose. When Dom João arrived in Portugal, the government was outraged to find he had left his son behind and not only insisted on Dom Pedro's prompt return but also began to strip Brazil of many of the privileges Dom João had granted. Portugal was determined to reduce Brazil to colonial status, but the Brazilian elite was not about to surrender its newly gained influence.

With the full support of the Brazilian elite, on January 9, 1822, Dom Pedro refused to obey the order to return to Portugal. Events flowed forward with an air of inevitability, until the king proclaimed Brazil's independence on September 7, 1822. The Brazilian elite rallied behind Dom Pedro I, and only some isolated Portuguese garrisons briefly resisted the proclamation of the Brazilian Empire.

Troops from poverty-stricken Portugal deserted almost as soon as they landed, making any Portuguese reconquest of Brazil pointless. Unlike the rest of Spanish America, Brazil had achieved independence with almost no bloodshed, so the country escaped both the destruction of war and the legacy of a large military establishment. Unlike Spanish America, which disintegrated into many rival nations, Brazil—under the unifying force of a traditional monarchy—remained a single country in spite of repeated regional revolts. The Brazilian monarchy inherited the existing structure of government and retained the overwhelming majority of officials in their posts, unlike the countries in Spanish America, where Spain's more extensive colonial bureaucracy usually failed to survive independence. Clearly, Brazil enjoyed distinct advantages in the challenging task of creating a new government and, at the least, seemed to have escaped the worst ravages of its Spanish American neighbors.

### Conclusion

The early-nineteenth-century independence of Spain's and Portugal's vast colonial territories carries great historical significance in the emergence and subsequent evolution of Latin American countries. Three centuries of dominance were followed by the elimination of two great colonial empires from the Western Hemisphere.

Although the *peninsulares* lost power to the *criollos*, independence did not result in democratic government. Indians, persons of African descent, and *mestizos* did not benefit; the successful slave revolt in Haiti and the Indian rebellion led by Hidalgo were exceptions. Liberation allowed for expanded U.S., British, and French trade and investment. Hence, the newly developing Latin American economies came increasingly under the control of foreign investors. *Caudillismo* (rule by military dictatorship), civil war, anarchy, and foreign intervention in the lengthy period immediately following independence and subsequent government instability reveal the perseverance of the strong colonial impact, as well as modern Latin America's difficulty in developing alternative stabilizing systems.

Conquest allowed European institutions to be transplanted in the distant territories of the New World. As in most experiments in colonial governance, political, economic, and social systems were modified by indige-

nous cultures, thereby producing innovative patterns. In the case of the Americas, Eurocentric societies were influenced by Indian and African traditions. Conditioned by both integrative and disintegrative forces, the resulting fusion became known as Latin America.

The absolutist and centralized political tradition Spain transferred to Latin America continues to be manifested, even during a period of supposed democratization, in a strong tendency toward authoritarianism. This tendency had been bolstered by moral and theoretical foundations provided through the church as an instrument of the state. The power of the church and the importance of land ownership continued after independence. In effect, the separation from Spain and Portugal, far from initiating a liberal social revolution, left intact the transplanted conservative triumvirate of power: the church, the military, and the *criollo* oligarchy.

Attempts to hold on to privilege and the status quo, however, produced great political instability in the absence of a unifying central authority, such as that previously provided by the crown. Rival *caudillos* and elite factions entered into open conflict. The institutions transferred through conquest and colonialism persevered but were highly problematic in light of changes set into motion by the new political, social, and economic imperatives of independence.

In Chapter 4, Thomas J. D'Agostino discusses the ongoing effects on politics of this historical background. In this context, it is important to remember the profound impact of the conquest and colonization periods in the evolution of contemporary Latin America.

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