CHAPTER ELEVEN

The Enlightened Colony

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When college teachers of Mexican history introduce the transition from Hapsburg to Bourbon rule in the early 18th century, they frequently offer a droll disclaimer to explain that they are referring to the dynastic family and not the distilled alcohol. In spite of the flippancy that this suggests, teaching about the 18th century requires navigating a series of scholarly debates that can be sorted into three main categories: The first involves periodization itself because, although we can put a time line on the period of Bourbon rule—which spanned the 18th century beginning in 1701 with Philip V—no changes occurred in that year to mark a clear break from the Hapsburg period, and no single set of policies distinguished Bourbon rule in Mexico. The second debate has to do with the nature and the effects of the Bourbon “reforms.” Some scholars charge that the designation itself is misleading since Bourbon policies did not produce profound economic or political changes. A third discussion revolves around the issue of social control and the extent of state power to regulate the behavior of New Spain’s inhabitants. Under this grouping we could also place the relationship between church and state and the evolving intersections of race, class, and gender in the casta system.

All these issues have generated questions about what actually transpired in 18th-century New Spain. When did the Bourbon 18th century begin? If reforms did occur, what was their nature and whom were they designed to benefit? To what degree were reformist tendencies related to changes taking place in northern Europe? To what extent did the Bourbons succeed in their plan to modernize society, curbing the temporal authority of the Catholic Church, and imposing order and hierarchy on a popular culture deemed to be undisciplined and backward-looking? Finally, did Bourbon policies provoke resistance and how were they linked to Mexican independence from Spain in 1821?

Many scholars who claim to study the 18th century actually cover only the period of the reign of Charles III (1759–1788), when Spain more energetically aimed to transform its most prosperous colony through the so-called Bourbon reforms. For these historians, the first half or first third of the 18th century has more in common with the 17th century. Another tack has been to look at the period from mid-18th to mid-19th century.
as a unit that encompasses late Bourbon and early republican policies. Scholarly disagreement still persists around these questions, but most agree that the transition from Hapsburg to Bourbon rule in the early 18th century brought few immediate changes to Mexico. Nor did Charles III’s attempts to reform the political and economic structures of the Spanish empire after the 1750s much alter the basic contours of the economy or the political culture. At the same time, the 18th century did witness changes in economic, demographic, social, and cultural terms.¹

We know that Hapsburg rule during most of the 17th century was characterized by [1] local elite control of limited markets in an agrarian economy that did not yet uniformly conform to the capitalist mode of production; [2] a decline in silver remittances to the metropolis; and [3] forms of social control flexible enough to keep Indians, blacks, and mixed groups in their places. Paradoxically, some have noted that the hesitant nature of some economic activities in the non-Indian sectors left the Indian laboring population in relative peace, especially in southern New Spain. As a result some native communities attempted to reconstitute village politics, culture, and create hybrid forms of local Catholicisms (Farriss 1984, Carmagnani 1988, Zeitlin 2005).² Ranged against this backdrop, we might see the period from 1680 to 1730 as a transitional phase that encompassed and planted some seeds for change. The Indian demographic recovery that began in the mid-17th century (even earlier in some regions) continued into the 18th, prefiguring overall population growth in the last half of the century. Although the indigenous population taken as a whole grew throughout the century, epidemics and subsistence crises affected regions differently (Garner 1993). In some cases Indian villages were decimated and mestizo communities took their places (Brading 1978, MacLeod 1986, Deeds 2003).

The transition period in the late 17th and early 18th centuries also witnessed economic shifts. Spain, faced with increasing challenges from the Atlantic expansion of its northern European neighbors, sought solutions to expand trade benefits for the metropolis, first by increasing the number of ports and ships that could legally engage in commerce, and eliminating the almost obsolete fleet system. Meanwhile other developments had signaled portents for the future: elites in Mexico stepped up labor exploitation as they looked for new export products, and the silver mining sector began to bounce back after 1670 (Bakewell 1984, MacLeod 1984). Spain itself began to experience an economic and possibly demographic revival in the 1670s, with increases in shipbuilding, agricultural production, and commerce.³ This revival positively impacted transatlantic commerce, only to be handicapped anew by the War of Spanish Succession (1700–1713). The Duque de Alburquerque, appointed by the Bourbon king to placate the losing faction of Hapsburg supporters, served as New Spain’s viceroy during this decade, and his policies did not displace the networks of patronage and clientelism already in place in the colony (Rosenmüller 2008).

Nonetheless, a cadre of Spanish bureaucrat-intellectuals who advised the Bourbons had it in mind to capitalize on the 17th-century portents that signaled productive changes. Would they be influenced by currents of “enlightened” thought emanating from northern Europe, especially from their ties with the French Bourbons, directed toward the formation of a true bourgeoisie that would become the backbone of industrial capitalist development and limit monarchical power? Would they move to restrict the considerable temporal authority and wealth of the Catholic Church? The short answer finds that the privileged sectors of Spanish society vigorously resisted the would-be reformers who proposed a Spanish version of liberalized trade and economic growth,
thus blunting the reform efforts attempting to extract more wealth from New Spain by stimulating mining production, creating a loyal but efficient bureaucracy to collect taxes, and appropriating a share of the Church's immense assets in money and rural and urban properties.

At the same time, the reform efforts experienced considerable success in exporting New Spain's capital, above all silver, to the metropolis, especially after the late 1770s, thus draining the colony of coinage, and causing difficulties, if not disruptions, in local exchanges (Garner 1990). This somewhat counterproductive success was limited by persistent mercantilist structures in trade and manufacture zealously defended by the "old guard" of monopoly merchants in Cádiz and Mexico City so closely linked to the silver mining economy. Determined to maintain exclusive control, this privileged sector undermined reforms designed to free the Spanish empire from dependence on foreign merchants, bankers, and manufacturers. As Stanley and Barbara Stein stated so aptly, in the end the Bourbon policymakers "could at best initiate cosmetic change when more radical change was made imperative by the rapidly developing English and French economies of the time" (Stein and Stein 2003: 351). The so-called Esquilache Riots in Spain in 1766, instigated by the "old" aristocracy and the merchant guilds against the reform efforts of Charles III's minister, the Marquis de Esquilache, and during which the king fled Madrid, signaled an end to any serious systemic reforms.

On the political front, the Bourbons attempted to exert greater control over New Spain. In 1762 the Spanish crown created a professional standing army in Mexico and moved to strengthen local militias (McAllister 1967, Archer 1977). In 1776 Minister of the Indies, José de Gálvez, established a new command structure for New Spain's northern territories called the Provincias Internas. This innovation was only partially successful in keeping hostile Indian groups (such as Apaches and Comanches) from menacing Spanish settlements in the far north and in curtailing territorial threats from the French, English, and Russians (Weber, 2005, De la Teja and Frank eds. 2005, Barr 2007, Hämäläinen 2009, DeLay 2009).

Limits to state power can also be seen in the oft-thwarted efforts of the Bourbons to create a less corrupt and self-interested bureaucracy. In 1786, Gálvez implemented a new system of provincial administrators called intendants who, along with their lieutenants (subdelegados), were to be given salaries adequate to keep them from augmenting their income by exploiting native peoples. Although royal income rose slightly from taxes collected under the new system, the attempts to create a professional bureaucracy did not fully displace longstanding avenues of corruption and exploitation based in patron-client relationships. Even viceroys saw their power of patronage limited by well-established, dispersed networks of political and ecclesiastical power that thwarted centralized rule (Arnold 1988, Cañeque 2004, Rosenmüller 2009). Intra-elite conflicts had been common throughout the colonial period, but the tensions between peninsulares (native Spaniards) and criollos (American-born Spaniards) were exacerbated by Bourbon attempts to limit criollo access to political power while favoring the appointments of peninsulares to the newly created political positions.

Looking more deeply at the intertwining of political and economic changes with demographic fluctuations within New Spain itself, we can see that the years between the 1730s and the late 1770s merit further study. In general, with some notable exceptions, the economy grew more rapidly than during any other period in colonial history. Silver production, interregional trade, urban growth, and some agricultural expansion due to rural demographic increases were accompanied by a very slow, healthy inflation
The prices of maize and other staples fluctuated widely over the short term, pushed by epidemics, droughts, floods, and freezes, but then typically stabilized quite quickly at their formal levels and then continued their slow inflationary ascent (Florescano 1969, Garner 1990).

The horrendous matlázahuatl* epidemic of 1736-1739 illustrates the intertwining of demographic and economic phenomena and provides a contrast to the smallpox and famine (años de hambre) episodes of 1779-1780 and 1784-1786 (Cooper 1965, Malvido 1992). The matlázahuatl was probably the deadliest of the 18th century with mortality exceeding that of the smallpox epidemic in the late 1770s. Shortages plus hoarding drove up prices, yet recovery to the norm was quite rapid (MacLeod 1986, Molina de Villar 2001). These middle years of the 18th century had a downside, nonetheless. Increased economic activity and intensified production of mostly non-perishable goods for medium and long distance trades led to renewed pressures on the laboring population, including rural Indians. Pressures caused by demographic growth, along with increasing intrusions on and seizures of Indian communal lands and casta smallholdings, led to land hunger and flight to the cities. This phenomenon has been most clearly demonstrated around Guadalajara and in parts of the Bajio (Brading 1978, Van Young 1981).

The disastrous years between 1779 and 1784, which left such a lasting imprint on popular memory, were quite different and ushered in a new phase. Prices shot up during the hunger years but, unlike the crisis years of the previous half century, did not return to pre-crisis levels. Instead they remained high and the rate of inflation subsequently increased. Indications are that the wages of ordinary people stagnated and fell more and more behind the price increases of basic commodities, with resulting misery. Demographic growth also fell in the hunger years and then again during the civil wars from 1810 to 1816. The prolonged wage-price squeeze that ran from about 1782 to 1816 probably played a significant role in late colonial popular uprisings (Brading 1971, Van Young 1981).

Yet some sectors benefited from economic growth; this was especially true in the mining centers. Mining output increased at an annual average of nearly two percent throughout the century although this growth came in spurts (with peaks in the 1770s and 1790s) and alternated with periods of stagnation. Guanajuato experienced the most sustained mining growth, but other regions flourished at times (e.g. Pachuca, Bolaños, Chihuahua). Periods of growth cannot be attributed to radically improved technology as smelting remained the primary method for extracting silver (thus contributing heavily to deforestation), and the amalgamation (patio) process continued. But the crown did provide tax and credit incentives, as well as better access to mercury for amalgamation, and some improvements such as blasting and new mechanisms for draining water. Heightened labor exploitation, deteriorating working conditions, and the loss of some incentives for mineworkers offer a partial explanation for increased mining output, as do new silver finds and persistent exploitation of old veins (Brading 1971, Bakewell 1984, Martin 1996).

The major success story in mining recounts that of Pedro Romero de Terreros, a poor immigrant from Andalucía, who arrived in New Spain around 1730, and like other Spanish immigrant nephews began his career working for an uncle in Querétaro. By diversifying his investments and using family and political connections, he eventually amassed a fortune which came primarily from his silver mines in Real del Monte and Pachuca between 1747 and 1774, probably making him the richest man in the world at
the time. Like other wealthy miners who generously gave money to the crown, Terreros obtained a noble title of the Count of Regla in 1768. His philanthropy went much beyond his gifts to the crown, including large charitable donations to the Catholic Church and the 1775 founding of the Monte de Piedad, a government-controlled pawnshop. With the latter he hoped to reform the habits of workers whom he had long exploited and despised (Couturier 2003, Ladd 1976, 1988). Another mining triumph was the great Valenciana mine at Guanajuato, where immense capital investment and advanced technology paid off. “It was without a doubt the largest single mine ever worked in colonial Spanish America, employing at its peak over 3,300 underground workers and between 1780 and 1810 yielding 60–70 percent of the total output of Guanajuato, itself the unchallenged silver capital of New Spain” (Bakewell 1984) 147.

By 1800, silver mining was experiencing a downturn, but it had provided the bulk of the crown’s income from New Spain (which itself furnished more than 60 percent of Spain’s colonial income); additional revenue sources included the valuable cochineal dye (Hamnett 1971, Baskes 2001), the tobacco monopoly (Deans-Smith 1992), and other agricultural products such as sugar. In addition to the transatlantic trade, Manila galleons carried Asian goods exchanged for silver.

In general, agrarian production expanded within the colony as the population rose in the latter half of the 18th century, accompanied by shifts from livestock raising to arable farming in areas like Morelos, Guadalajara, and Yucatán (Van Young 1981, Martin 1985, Patch 1994). Increased agricultural output resulted in profits for landowners who expanded and concentrated their holdings, while many peasants were losing access to their subsistence and workers’ wages were falling. In the small industrial sector, limited demand due both to falling wages and to contraband stunted the production of textiles and other local manufactures (Salvucci 1988). The changes, often accompanied by increased labor coercion, tended to magnify inequities and create discontent among the lower classes (a topic discussed below).

Although environmental historians (Melville 1994, Miller 2007) differ over the extent to which New Spain’s environment deteriorated after conquest, they do agree that by the late 18th century, economic activities introduced by Spaniards, especially mining and livestock grazing, had contributed to deforestation, loss of ground cover, and a decreasing volume of available water. Differences in land and water use practices by Indians and Spaniards inevitably resulted in conflict as population increased and these resources became scarcer in the late colonial period (Meyer 1984, Lipsett 1999, Melville 2000). These problems were magnified in New Spain’s arid northern regions (Radding 1997, 2005). As pioneer environmental historian Elinor Melville concluded: “In the struggle to maintain their individual worlds intact within the context of hybrid colonial societies, the different ethnic and economic groups that made up colonial society shaped and constrained one another, and change occurred as Spaniard and Indian, mestizo and mulatto, struggled to reproduce familiar landscapes, very often in the same space” (Melville 2000) 242.

Ecological transformations were not alone in changing New Spain’s contours in the 18th century. Dynamic social, ethnic, and cultural ferment was apparent everywhere. Scholarly interest has been most heavily focused on the latter over the last two decades, and most of the published studies share a common theme. Although changes varied across regions and localities, they bore the imprint of local indigenous or creole agency in the shaping of racial discourse, ethnic identity, social hybridity, popular culture, and juridical notions—all processes that often contradicted Bourbon aims to create a more rational society.
Imposed racial hierarchies did not consistently match the realities on the ground. Although scholars have long been aware of this, the attempts to analyze social hierarchies have shifted in focus to reflect the themes of “new cultural history.” One approach traces the rationale for the sistema de castas by examining the changing meanings of limpieza de sangre as the concept was transferred to New Spain and took on a more secular (racial) than religious meaning, with purity of blood becoming more linked to Spanish-ness (or phenotype) than Christian-ness (Martínez 2008). In the 18th century, Spanish elites, obsessed with safeguarding their claim to social primacy, promoted the production of casta paintings that depicted unions between partners of different races and their mixed offspring in unflattering ways (Carrera 2003, Katzew 2004). Despite their censorious aim, the paintings reflected what was actually happening in terms of race mixing. Biologically separating the two republics of Spaniards and Indians had never been feasible, but early architects of this attempt probably never imagined the degree to which the sistema de castas would be turned inside out and become more unstable as the colonial period progressed.

Across time and space, to varying degrees, particular social and economic conditions encouraged mixed-race liaisons and sometimes advanced social mobility, producing a racial milieu that was highly fluid and vibrant. Nevertheless, both peninsulares and criollos continued to try to enforce standards of purity, partially by placing more importance on maternal genealogies to prove limpieza de sangre and also by promulgating the Real Pragmática de Matrimonios in 1776 which gave parents greater control over the marriage choices of their children (Seed 1988). Interestingly, indigenous peoples also came to invoke blood purity to advance their claims to privileges. Recent scholarship has highlighted how impossible it is to appreciate the complexities of inter-ethnic relations in colonial Mexico without examining the intersections of gender, race, and class. For example, blood was not the only determinant of lower status: economic roles (mechanical trades) also made blacks and Indians impure. Women were seen, at least in theory, as vehicles that could preserve or taint purity through reproduction.

Once again, the theory did not match the practice, as we know from the burgeoning scholarship on women and gender in the 18th century. In addition to the studies of women’s experiences, historians have increasingly incorporated gender into their larger analytical schemes. Much of the new scholarship portrays women as active agents in their daily lives and emphasizes women’s contestation of Spanish patriarchal norms through which men theoretically exercised control over the sexuality, reproductive capacities, labor power, and public behavior of females. This scholarship makes careful distinctions across ethnic and class lines. For Spaniards, the ideal woman—pious, chaste, and submissive—lived under the authority and protection of her father or husband. When women challenged these expectations, they stained the honor and threatened the racial purity of the family; on the other hand the promiscuous sexual behavior of men was accepted as a natural component of machismo. At the same time women did have the right to inherit and control some property (especially dowries); a significant number of Spanish women, especially widows, ran businesses.

They could also choose the convent, where life was not as constraining as one might expect. Many nuns (almost exclusively Spanish women until the 18th century when Mexico became the only Spanish colony to establish Indian nunneries) enjoyed material comforts and were attended by servants. Most chose the profession for spiritual reasons, but others benefited from the possibilities that conventual life offered for education, self-expression in writing, and membership in a supportive and economically productive
community. When some religious authorities tried to purify convents of their worldly ways in the late 18th century and impose more ascetic practices, nuns successfully resisted these threats to their version of cloistered life fashioned over centuries in Mexico (Lavrin, 2008).

Marriage (beyond the spiritual version of the conventual “brides of Christ”) was an essential component of strategies to perpetuate elite superiority and dominance, but even within the idealized Spanish patriarchal order, there was much deviation from the norm, thus explaining the implementation of the Real Pragmática mentioned above. In general, Spaniards and Indians tended to marry within their racial groups while castas were more eclectic in their choices. Racial exogamy may have increased in the late 18th century in areas of economic growth; at the same time, the numbers of consensual unions seem to have decreased. Across ethnic groups, perhaps one-quarter of households were headed by women at the end of the colonial period, indicating high rates of abandonment by husbands or informal partners (Lavrin 2000).

In general lower strata casta and indigenous women were not held as tightly to the Spanish ideals, although rural Indian women were bound by hybrid patriarchal customs that evolved in their often more cohesive communities. Deborah Kanter’s (2008) detailed community analysis of Tenango del Valle, south of Mexico City offers a microcosm of the scholarship that portrays the complexities of gender and family relationships as they operated in an idealized social order that was often subverted. In the 18th century when the meanings of being Indian were in flux, both women and men defied the prescribed norms of complementarity and reciprocity. Some women engaged in economic activities outside the home and in promiscuous sexual behavior, and they used the courts to demand redress against husbands who abused and did not provide for them. Sometimes they prevailed and at other times authorities placed them in depósito or correctional places that promoted moral reform and pious behavior. Kanter also demonstrates, as others have, that as indigenous communities increasingly suffered land encroachments in the late 18th century, women’s claims to land were the first to suffer.

Mestizas and mulattas were often unmarried heads of households; many worked as street vendors, maids, cooks, washerwomen, and midwives. Some were petty merchants with their own stalls in the markets. Indian women also filled the role of market women, but those who lived in rural areas were more likely to be married and performing agricultural labor, domestic chores, and perhaps weaving or other skills. Across the ethnic spectrum, women negotiated their status through a number of channels that included the church, the courts, and even petty witchcraft. The images that we now have of these negotiations of power and of women’s lived experiences in transmitting social and cultural values within families and communities are richly diverse, but they do not always present a pretty picture, to the extent that they expose patterns of domestic violence resulting from conflicts over gender rights and obligations in differing cultural contexts (Stern 1995, Kellogg 2005). The new scholarship also begs the question of whether negotiated gendered relations of power provided a foundation for, or rather reflected, general understandings of authority and power.

It takes no stretch of the evidence to suggest that the most pronounced shift in recent colonial Mexican scholarship can be seen in the emphasis on the negotiation of power and especially its relationship to identity, trends reflecting the concerns of a postmodern and postcolonial world. The emphasis has shifted from prescriptions, imposed categories and their meanings, and whether caste or class provided better schemes of classification, to how colonial peoples gave meaning to themselves and their lives—to explore “how
structures of colonial rule were transformed into venues of lived experience, were transformed into identities” (Fisher and O’Hara 2009 ix). Historians have increasingly turned their attention to the interrelationship between how people were categorized and how they understood themselves. To what extent could people recast colonial normative racial prescriptions and negotiate their rights? These processes had evolved over the entire colonial period, but in this chapter we are most interested in how they played out in the face of Bourbon attempts to impose order.11

This shift in focus has resulted in innovative new scholarship on Afro-Mexicans in terms of how they appropriated and manipulated Spanish institutions, such as militias and religious confraternities, as well as how they interacted with other racial groups. Although new scholarship has shown how people of African descent had the most trouble overcoming the taint of impurity (Martínez) because they were seen as a threat to the social fabric needing tighter control, they were not without the capacity to make decisions and to act on them (Velázquez 2006). Militias offered free Afromestizos the possibility to advance socially and make strong claims to masculinity (Vinson 2001), although the Bourbons eventually succeeded in blocking access to this path. Afromexican confraternities helped slaves, including women, negotiate between Spanish and African worlds and eventually facilitated the assimilation of mulattos into the larger multiracial society (Von Gernuten 2006). The idea that slaves could deploy their Christian status to temper their condition as slaves and form social ties had been explored by Bennett (2003) for the 17th century, and others have shown how slaves used the Inquisition and ecclesiastical courts to protect themselves against brutal exploitation (Villa-Flores 2006).

A number of case studies (Restall 2005) highlight a dialectic of both hostility and peaceful interaction between natives and Afromexicans (both slave and free). Unions (formal and informal) between males and females of the Spanish, Indian, and African ethnic groups had an enormous impact on the ways in which race and status boundaries could be negotiated. Different conceptualizations of a “black middle” and its role in cultural crossings emerge in studies by Laura Lewis (2003) and Matthew Restall (2008). In the former, Spaniards used blacks to control Indians; in the latter, blacks in Yucatán occupied a middle position, engaging both Maya and Spanish worlds, and eventually became part of a vital mixed race society.

How indigenous peoples came to see themselves as imperial subjects entitled to rights over the course of the 17th century has been skillfully developed in older and more recent studies (Borah 1983, Owensby 2008). The flexibility of the Spanish legal system allowed Indians (and others) to pursue litigation as a way of defending their interests. Indigenous collectivities used this tactic most effectively, mastering Spanish legal concepts and vocabularies, to protect themselves in cases related to land, labor, and municipal governance. Although this phenomenon might be seen as proof of royal hegemony as subaltern groups bought into institutions of imperial rule, many studies illustrate that it favored the persistence of indigenous nobilities and ways, albeit often hybridized, at least until the Bourbon period when authorities moved decisively to curb the litigiousness of Indians.

Yanna Yannakakis’ study of the Villa Alta region of Oaxaca (2008) provides a twist on how this process unfolded. She demonstrates how a variety of intermediaries (village governors, legal, religious, and commercial representatives, and interpreters) were able to resist attempts by religious and civil authorities to reduce native autonomy and to retain control over the cochineal trade. This “shadow system” of intermediaries and cultural brokers offered a parallel system to colonial institutions for the advancement of
indigenous interests (notwithstanding divisions within and between communities). Determined to end practices that strengthened indigenous autonomy and reduced royal revenue, Bourbon officials, after 1760, developed policies to undermine longstanding webs of negotiations and costumbres.

This pattern was repeated throughout New Spain as indigenous rights to land and water, village autonomy, and longstanding exemptions granted to indigenous military allies came under increasing attack in the 18th century (Taylor 1979, Hamnett 1986, Tutino 1986, Van Young 2001). Spanish institutions that had allowed indigenous communities to keep some of their own resources became more vulnerable. For example, Indian cofradías had also enabled Indians to manage assets of livestock and even small properties that were rented out. In some cases they served as credit institutions, loaning modest amounts to their members. As the population grew and Bourbon political pressures increased, these resources became more circumscribed.

As we saw in the case of Afromestizos, cofradías organized indigenous religious activity and offered Indians crucial space for cultural and social transformations in an era when unconventional religious devotions proliferated. Baroque Catholicism has been characterized as a mixture of “local interpretations, traditions, and festivals that did not always coincide with Catholic orthodoxy” and filled with “excessive exuberance or supposed superstition” (Curcio-Nagy 2004: 108). Its outward displays of processions and fiestas could masquerade as contestations of hegemony.

Local Catholicisms and popular religion took many forms and reflected all manner of syncretisms and hybridities deriving from the interrelationship of religious practice, gender, and ethnicity (Nesvig ed. 2006, Schroeder and Poole eds. 2007). The degree of incorporation of indigenous values and beliefs into these local versions varied throughout New Spain across space and time. Interestingly, scholars who have been able to work with native-language documents in central and southern Mexico have made the strongest case for indigenous re-fashionings of Christian messages (Terraciano 2001, Tavarez 2006). Other scholars agree with William Taylor (1996) that Christianity had a major impact on Indian spirituality although natives identified saints, cults, and miracles in their own cultural terms and with a palpable sense of the sacred.

A recent study by Matthew O’Hara (2009) emphasizes the role of Mexican Catholicism in shaping popular politics. He argues that in late colonial Mexico City and surrounding areas, multiethnic parishioners used church institutions and sodalities as ways of organizing politically and advancing their aims. The church offered plebeians and peasants “modes of belonging” that persisted into the republican era and belied the new nation’s ability simply to erase colonial social identities by formally abolishing the caste system.12

The strong hold of popular religion on hearts and minds partially explains the Bourbon assault on the Mexican church, although the crown also wanted to restrict the church’s control of material assets (Farriss 1968, Brading 1984, Taylor 1996). Bourbon bureaucrats moved to curb the power of the regular clergy through secularization of Indian parishes, restrictions on the building of convents, the expulsion of the Jesuits in 1767, and eventually, in 1804, the appropriation of church assets related to chaplaincies and pious works (Von Wobeser 2003). Limiting the judicial privileges of the church contributed to the overall erosion of clerical power over parishioners, but the crown also hit at the heart of local religious practices by increasingly curbing public religious and civic celebrations (Viqueira Albán 1999, Curcio-Nagy 2004). Ostentatious fiestas, in the Bourbon view, wasted money but worse yet they fostered the overall decadence and laziness of the poor. Such frequently drunken
celebrations represented the antithesis of the values of hard work and frugality that the Bourbons wished to promote. According to the crown, popular piety (especially as demonstrated in the cult of the saints) needed to be purged of excesses and naïve beliefs, but such actions flew in the face of popular religious sensibilities. They contradicted a religious culture visible everywhere in art and architecture and in the ubiquitous visual images of saints, especially the Virgin of Guadalupe. In 1750, in another effort to eradicate superstitious beliefs and control village life, Bourbon officials ordered the establishment of primary schools to teach not only catechism, but also reading and writing (Tanck de Estrada 1999). Since pueblo governments were required to pay teachers, it is not clear that the measure was widely implemented.

The values deemed to promote economic modernization and public order in rural villages also informed Bourbon policies in urban areas. In Mexico City, authorities sought to instill civic virtue by substituting formal, scripted theater for popular festivities like carnival and street performances of music and dance. They discouraged bullfights, policed the streets (that had become the privileged space of the popular social classes), and limited the number of pulquerías and other drinking establishments. The second Viceroy Revillagigedo (1789–1794) carried out a campaign to clean up and beautify the city, to remove animals and vagabonds from the streets, and to mandate dress codes for workers (Viqueira Albán 1999). Although these efforts were not successful in stamping out popular traditions, they discouraged participation by the elites who took up other more orderly and less public entertainments from which the lower groups were banned. When the upper classes did linger in public, they were more likely to be found strolling along the promenades (paseos) constructed exclusively for their use and entertainment. Attempts by the Bourbons to curb urban crime and control the poor experienced mixed results (Haslip-Viera 1999, Arrom 2000). Nonetheless, Bourbon initiatives to regulate were manifold, reaching across all sectors of society, and especially into associations like religious sodalities and guilds where officials aimed to reinstate racial hierarchies and boundaries. Even Mexico’s most prominent painters could not elevate their guild to sufficient respectability for royal approval (Deans-Smith 2007).

These Mexican policies represented a variant of Spanish enlightened thinking: practical, mildly anticlerical, and designed to apply reason and science to achieve “progress”, especially in ways that would benefit the Spanish crown. Architects of the Spanish Enlightenment wanted to reform Catholicism, not question the institutional beliefs and practices that impeded modernization (Sarriañ 1957, Herr 1958, McClelland 1991). With this understanding of the religious bias of Spanish reformers, one scholar sees the Mexican reform agenda as guided by an “enlightened Catholicism” focused on the practical application of reason and the eradication of superstitions and exaggerated ritual (Voelkel 2002). A group of Mexican reformers who hoped to instill the values of modesty, individualism, and humility directed one of its initiatives against the excessive vanity of ostentatious burials in churches. Not only did the latter have little to do with genuine salvation, they were also a plague-causing health hazard that could be remedied by building public cemeteries away from centers of population.

Empirical thinking also began to permeate the study of medicine, stressing practical experience and requiring physicians to pass medical exams (Hernández Sáenz 1997). These medical reforms, nevertheless, did little to curb longstanding folk curing practices and petty witchcraft among the popular classes. Just as the Bourbon campaigns against popular celebrations promoted the segregation of elites and lower groups, doctors advocated the idea that individual responsibility for the body was the key to good health, thus
placing the blame for illness on the poor themselves. "Enlightened" thought was resolutely hierarchical, inequitarian, and racist and, more disturbing for Spain's long-term goals, it embodied a deep prejudice toward creoles that fueled a reaction—a uniquely Mexican creole patriotism.

No one has written more passionately to develop the idea of "creole patriotism" than David A. Brading (1984, 1991, 2001) whose own corpus of colonial scholarship surpasses that of all others for the 18th century. For Brading, creole patriotism consisted of pride in the Aztec past, the disparagement of the conquest, a heightened resentment against Spanish *gachupines*—a derogatory term for peninsular Spaniards—and the devotion to the Virgin of Guadalupe. Although its roots can be found in 17th-century baroque Catholicism, its inspiration was magnified as a result of the late Bourbon reforms. Alan Knight summarizes the antipathy between *peninsulares* and creoles that resulted from Gálvez's favoring of the former for positions in the courts, military, and bureaucracy. "So strong and pervasive were these notions of creole incapacity and contrasting Spanish efficiency" that some Spaniards could barely hide their contempt. "To the creole, of course, the European appeared as a privileged interloper, enjoying political power out of all proportion to his talent, his local expertise and (often) his material assets" (Knight (2002) 280). In this milieu, creoles reworked history to encompass the elements outlined above and to celebrate their distinctive natural history and heritage.34

Criollo grievances no doubt escalated in the 18th century as their political power became more restricted, but most creoles retained their status as prominent members of the economic elite, especially in the landholding sector. They also had outlets for expressing their concerns in local societies and literary clubs established in the 18th century to discuss scientific and economic innovations. Indians, peasants, and urban workers affected by the unfavorable material changes elaborated in this article had fewer avenues for giving vent to their discontent, although popular resistance strategies were increasingly apparent as the century wore on.

A number of studies have highlighted adaptive resistance and "weapons of the weak" (Beezley, Martin, and French eds. 1994). Ethnohistorians have been prolific in developing the histories of indigenous responses to colonial rule, with an emphasis on everyday forms of resistance and rebellion. Because colonization occurred later in the north, mission studies constitute a subgenre of works in this vein for the 18th century. They feature the adaptation and resistance strategies of northern indigenous groups, including Pimas, Yaquis, Tarahumaras, Tepehuanes, and Pueblos, among others (e.g. Radding 1997, Deceds 2003, Hu-Delhart 1981, Patch 2000). Some of the 18th-century resistance studies use the concept of "moral economy" to explain how rebellions occurred when a colonial pact that had evolved between colonizers and colonized was breached, as for example in the case of the 1712 Tzecatl Rebellion in Chiapas (Gosner 1992). Rebellions continued in other Maya areas throughout the century (Patch 2002, Rugeley 1996).

For the most part, these rebellions did not succeed in expelling colonizers, even in peripheral areas, and groups that persisted ethnically did so by fleeing to places difficult of access and bereft of resources attractive to Spaniards. In some more settled areas, local outbursts succeeded full-scale rebellion and were designed to achieve concessions from authorities around particular issues, a process described by E.J. Hobsbawm as "bargaining by riot" (Taylor 1979, Tutino 1986). Indians and peasants tried to defend their communities and resources while outside pressures increasingly conspired against them as Bourbon officials limited their strategies for negotiation. Localized grievances seethed beneath the surface, sometimes erupting in violence. The fact that these grievances
largely went unanswered begs the question of their relationship to the outbreak of rebellion in 1810 in the Bajio.

The events leading up to Mexico’s eventual break with Spain were multifaceted, reflecting material and ideological factors at different levels of society (many of them developed in this chapter), and both internal and external causes. Earlier historiography emphasized particular prominent leaders and ideologies in the context of Spain’s fortunes in the Napoleonic wars and stressed peninsular-creole antipathy. This was followed by structural approaches emphasizing the population pressures, subsistence crises, land conflicts, rising taxes, and falling wages that affected the masses (Hamnett 1986, Tutino 1986). The most recent, sweeping account by Eric Van Young (2001) posits a strict separation between national creole elite and local community politics (the latter constituting “the other rebellion”). This scheme rejects the idea that the independence movement was fueled by broad cross-ethnic and class coalitions and insists upon the local, atomized character of Indian/peasant communitarian resistance, dissociated from liberal ideology and nationalist aspirations. No matter which interpretation one finds most compelling, Mexico’s first great revolution can only be explained in the context of its colonial experiences and how these were scrambled and reordered in the 18th century. The Bourbon reforms did not produce the modernization imagined by visionaries, but they catalyzed changes in a richly complex and eclectic social and cultural milieu in quite unexpected and consequential ways.

Notes

1. The periodization debate has been ongoing for several decades; for an early discussion of the issues, see Woodrow Borah, “Discontinuity and Continuity in Mexican History,” Pacific Historical Review 48:1 (1979).

2. A good deal of scholarship on the effects of conquest on native communities and attempts to reconstitute them has been produced by students of James Lockhart who were able to use native language documents.


4. A good overview of the literature on this period is found in Alan Knight, Mexico: The Colonial Era (Cambridge, 2002), 202–296. Several of the major scholars of the economic and social history of the period (David Brading, Eric Van Young, and William Taylor) later moved in the directions of resistance and cultural studies.

5. Historians have not reached consensus in classifying this disease, identifying it variously as typhus, bubonic plague, or hantavirus.


7. New cultural history flows from post-modern, post-colonial shifts that put more emphasis on cultural and moral mediations of the social and the economic. It includes a range of analytic approaches that draw more heavily on humanities than social sciences and that aim to deconstruct texts, giving special attention to how power is negotiated and contested. New cultural
history looks more closely at the hybridity of cultural forms (mentality, ideologies of subalterns) and the construction of identity, ethnicity, religion, and popular culture. For Mexico, this has meant increased use of judicial records (ecclesiastical, civil, criminal) to get at these more elusive areas of human experience. For an extended discussion of the shift to and pitfalls of new cultural history approaches, see Eric Van Young 2004. In this article, Van Young also distinguishes between ethnohistorical and "cultural" approaches; I would argue that there is much crosstalk between them.


9 See the introduction to this book for an extensive discussion of the historiography on nuns by the foremost scholar of Mexican convents.


11 I offer two reflections on this swing in the scholarship to suggest what I see as some strengths and weaknesses. The emphasis on the subjective political behavior of subalterns and the creative use of untapped sources have been highly productive in uncovering the complex webs of power and social ties that could disrupt the state's dictates and desires. These new studies help us see the intricacies and complexities of social and cultural currents that played out over time and that defy easy categorization as merely responses to state policies. However, in our eagerness to find out how colonial peoples gave meaning to themselves—to find dignity—we have a tendency to gloss over the fact that colonial societies had massive majorities of the desperately poor, both in cities and in the countryside. Poor peoples' preoccupations, indeed their daily obsession, had to do with how to find and keep food and shelter, where to get a small loan, the multiple and always unexpected threats of ill-health, premature deaths of children, volatile prices or shortages of maize and beans, locusts, epidemics, droughts, sexual and physical abuse from the strong, theft or loss of what little they had, crop failures, etc. That was daily life for many, but it is curiously submerged in most histories.

12 This book is an outstanding example of the benefits to be gained by looking at the period from mid-18th to mid-19th century as a whole. Other examples include Arron (2000) and Connaughton (2003).

13 The monumental work of William Taylor, Magistrates of the Sacred, develops the reception of the cult of the Virgin of Guadalupe in Guadalajara and around Mexico City, in addition to explaining other manifestations of popular piety. The book also examines tensions over control of community resources among priests, parishioners, and officials in many rural areas, demonstrating also how the Bourbon reforms undermined the integrity of priests in the eyes of the faithful. Public celebrations were at the heart of religious devotion everywhere, and Taylor provides explanations which link indigenous beliefs and practices to the popularity of particular religious fiestas, saints, and images. Taylor also concludes, as did Van Young later
that the overall participation of parish priests in the independence movement was
minimal despite the erosion of clerical authority provoked by the Bourbon reforms.

Ironically, even in Spain reformers adopted parts of the patriotic argument that painted
the metropolis as having embraced and then acculturated the advanced indigenous cultures they
encountered (Cañizares Esguerra 2001).

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