To the Faculty of Washington State University:

The members of the Committee appointed to examine the dissertation of Eugene Mark Moreno find it satisfactory and recommend that it be accepted.

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ACKNOWLEDGEMENT

The ambitious task of combining three regional histories into a holistic study of four years during nineteenth-century Mexico necessarily includes many individuals. My fascination with the French Intervention goes back to high school years in San Jose, California. But my immediate gratitude goes to my former committee chair John E. Kicza, who agreed that it was a pivotal time in nineteenth-century Mexico, and whose guidance in Mexican historiography provided a foundation upon which to produce this work. Although illness prevented Prof. Kicza from continuing on my committee, Heather Streets-Salter, my mentor in World History, guided me through the rest of the process as chair, and provided the needed insight with which to formulate my analysis. As a working college instructor, it was at times difficult for me to maintain a satisfactory level of production, but Prof. Streets-Salter was always accessible, and always ready to lend her historical expertise. She has my eternal gratitude and friendship.

Special thanks are also in order for my three other committee members. Benjamin Smith of Michigan State University has helped me both professionally and academically in Mexican historical studies. I was extremely fortunate to have Prof. Smith as the Latin Americanist replacement on my committee, and will forever be thankful for his help. Candice Goucher of WSU Vancouver has been a good friend and mentor over the past several years, and her words of encouragement, in past times and present, have been exceptionally motivating. Finally, Robert Bauman of WSU Tri-Cities has been a helpful friend and mentor since sitting on my master’s thesis committee several years ago, and even further back when I was an inexperienced first-year graduate student. Overall, it was a high-powered and knowledgeable committee, and I was lucky to have had such people. Financially, I was assisted by two Gillis Family Graduate Research
Fund grants and a Cooney Family Graduate Research Fellowship, both of the history department at Washington State University, which made this project possible. For these I am grateful.

Early in the development of this dissertation, I was acquainted with Ilihutsy Monroy Casillas, who is now at archivist at the Biblioteca Nacional in Mexico City, and who shares an interest in chinaco fighters of the French Intervention. Generously, she has shared some of her meticulously collected data on guerrilla activity in Mexico, and provided early inspiration and many ideas. She deserves a special thank you, and I look forward to further collaboration with my “chinaca” comrade-in-historical-work. In addition, Guillermo Sierra of the Archivo General de la Nación (AGN) in Mexico City has also become a great friend and has even gone out of his way to send me copies of needed documents. I must also say that Mexican archivists must be the best such people to work with for historians – after hearing stories of scholars of other world regions. The staffs of the state archives of Aguascalientes, Hidalgo, Oaxaca, and Yucatan were all wonderful; all were very helpful, and comfortingly cordial. The same is true for the Mexico City archives, including the staff at the Biblioteca Nacional, the military staff at the Archivo Histórico Militar of the Secretaría de la Defensa Nacional (SEDENA), and the archivists of Sala 5 in the AGN – especially Ernesto. A special thank you is also due to the very patent staff members at the Centro de Apoyo Investigación Historica in Mérida, Yucatan.

Last (but first), my gratitude is extended to my wife, Rocío, whose accounting skills transferred perfectly into the world of historical research. She is trained to sift through mountains of information, both mundane and exhilarating, and she understood the complexities of a very complex time in Mexico. More importantly, she has my thanks and love for all time.
“World at War” focuses on the conditions of warfare inside Mexico during the mid-nineteenth century, specifically from 1862 through 1867. Despite 140 years of general Euro-American fascination with the French Intervention, and with Maximilian in particular, the role of resistance among Mexicans in the affair has been ignored until relatively recently. And there has not yet been a holistic study of the various movements of resistance to the European military presence and to the Mexican Empire. This is a macro-study of three separate insurgencies, in the central states of Mexico, in Oaxaca, and in Yucatán. All were different in origin and nature from one another, whether the resistance emanated out of the rural working class of Michoacán and other parts of central Mexico, the Oaxacan indigenous peasantry, or Maya separatists in Yucatán.

In addition, the role of European and American mercenaries who joined the republican side of the war under Benito Juárez is examined in this dissertation. Taken as a whole, the various strands of resistance and warfare in Mexico, along with involvement by foreigners in the resistance, prevented complete pacification by French-led forces under the Empire, and led ultimately to victory for the Juarist republican cause. This is not a study of nationalism *per se*, but an analysis of Mexican internal conditions as they relate to warfare during the nineteenth century. At the same time, it examines the transatlantic martial connections created by the French
Intervention. The strands of native Mexican resistance and its causes, and such connections, make this period important to the study of modern world history.
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Dedication

This dissertation is dedicated to John E. Kicza
Introduction: A World at War

“Juárez, conquering hero of Mexico’s fieriest days … And in the story of his deep struggle to free his country from the yoke of European rule is found one of history’s most amazing chapters! Napoleon III had taken advantage of a United States divided by civil war to flaunt the Monroe Doctrine and invade Mexico. His soldiers crushed the untrained armies of the young republic, laid waste to cities, slaughtered the innocent …”

– “Juarez” (Warner Brothers Pictures: trailer, 1939)

The French Intervention period in Mexican history (1862-1867) has, in the one hundred forty-four years since it ended, been the subject of innumerable novels, popular histories, a play, and at least two films.\(^1\) The standard English-language popular narrative is, first, that French troops serving under Napoleon III arrived in the Mexican interior in 1862, where they were defeated by local forces at the first Battle of Puebla on May 5 of that year. Following a year-long lapse, invading troops successfully overthrew the young Mexican Republic, forcing its President, Benito Júarez, to flee to the north. The United States government under Abraham Lincoln, meanwhile, was embroiled in its own Civil War and was unable to enforce the Monroe Doctrine. This allowed the French to impose their own Emperor, Ferdinand Maximilian of the Austrian House of Hapsburg, on the “throne of Mexico.” Somewhere in the traditional narrative is general acknowledgement of the Mexican guerrilla war carried on against the European occupiers.

However, the ending of the American Civil War, the narrative continues, allowed the U.S. to intimidate the French, who ultimately withdrew from Mexico in February of 1867.\(^2\) The

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\(^1\) For example: See C.M. Mayo, *The Last Prince of the Mexican Empire: A Novel based on the True Story* (Denver: Unbridled Books, 2009); For an early example of popular histories, see Percy F. Martin, *Maximilian in Mexico: The Story of the French Intervention* (New York: Charles Scribner’s Sons, 1914), and for a more recent book, see Jasper Ridley, *Maximilian and Juárez* (New York: Ticknor & Fields, 1992); The film “Juárez” (Warner Bros., 1939) was based on a Broadway play, “Juárez and Maximilian; A film based on the life of Empress Carlota of Mexico, “The Mad Empress,” was released the same year (Miguel Contreras Torres, 1939).

Emperor Maximilian, left alone with a native force, finally capitulated to the patriots of Benito Juárez, was captured, and then was executed by a firing squad. Liberty triumphed.

Maximilian’s inglorious death was acknowledged among contemporary governments in Europe as an unspeakable tragedy – and inspired a famous painting by Édouard Manet. The general outline of this episode of nineteenth-century history, with its array of colorful characters, has until the present mainly inspired published accounts for popular consumption. Surprisingly, some details of the traditional narrative are well-known among younger people. Among my own students in history classes, nearly all Mexican Americans know who Benito Juárez is, and most understand him to be a nation-builder of some sort. And many students – of differing ethnic background and ages -- understand that someone named Maximilian had once been the Emperor of Mexico while French troops occupied the country. Indeed, Maximilian appears to be the historical actor most fixated upon in the popular imagination, both in the twentieth century and today.3 To use journalistic parlance, the French Intervention in Mexico was, and remains, a “good story.” It contains the right combination of drama, heroism, and tragedy.

**Problems in Studying the French Intervention**

The problem, for historical studies, is that the epoch of the Intervention has often been lost or buried within other themes of serious academic studies of Mexico and world history, perhaps as a result of its popular appeal. Another problem is that past studies of the period tended not to focus on Mexican resistance as a causal factor in the French failure to pacify large areas of Mexico. Fortunately, no current Mexicanist historian earnestly believes that invocation of the Monroe Doctrine induced the French to withdraw from Mexico. Similarly, many Europeanists

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3 For example, C.M. Mayo, *The Last Prince*. 
are aware of one major factor in the French withdrawal – the impending threat of Prussia and the need to muster forces in eastern France. But until relatively recently, Mexicans themselves, particular those of indigenous populations, were left out as political actors in the fall of Maximilian and the second Mexican Empire. One study, of Oaxaca during the period in question, generally attributes failure of the French occupation to internal problems among the occupiers and Mexican collaborators. And in another, more recent study, it is argued that Maximilian was the first “strong leader” of a chaotic Mexico in the mid-nineteenth century. However, over the past fifteen years, important works have shed light on individual regions of Mexico during the Intervention, and highlight the important aspect of indigenous involvement in resistance. Still, a comprehensive look at resistance during the “Mexican adventure” of Napoleon III is still lacking in the historiographies of Mexico and of world history. There is a very good reason for that vacuum. The mid-nineteenth century was an extremely complicated period of Mexican history, since it was a nation-state that stretched some 2,700 miles from northern to southern border, which contained populations that spoke at least sixty different indigenous languages in addition to Spanish, and it was comprised of innumerable regional ethnicities.

When I began work on this dissertation, I naïvely assumed that the French presence in Mexico fomented stirrings of nationalism in relation to a foreign “other.” However, as will be demonstrated in this study, there was no cohesive sense of martial patriotism that united cross-


sections of Mexico. In my experience, no single collection of Mexican archival documents clearly reveals the nature of local resistance to the French and the Mexican Empire. For instance, there is no grand repository of resistance to the French occupation in the Mexican General Archive of the Nation (AGN) in Mexico City. The AGN does house a helpful collection on the “Second Empire” – which Mexicans generally call the period of imperialist government from 1864 to 1867. In addition, the published archives of the French Marshal François-Achille Bazaine, supreme commander of occupying forces during the Intervention, are found at the AGN and in many American libraries. However, both the AGN collections and Bazaine’s papers present the point of view of the Mexican Empire and the occupying forces, and it is difficult to detect the nature of resistance within them. Similarly, the military archives housed within the Mexican Secretariat of Defense, while providing rich details of the armies of resistance and their general movements, reveal little as to the causes and motivations of Mexican guerrillas during the French occupation. But what emerges is evidence of multiple insurgencies during the period of the Intervention, and not all of them had strictly nationalist overtones.

When one delves further into the archival material at the state level, the picture often becomes still more complicated. A good place to start research on resistance to the French, it seemed, was in the archives of Yucatán in southern Mexico, which was already in the throes of a Mayan Caste War (*Guerra de Castas*) in 1862. How did the French fare there? The documentation in both state and private archives of Yucatán shows that European troops generally avoided contact with the fierce Mayans, who were not in any way Mexican nationalists. Research at national archives in Mexico City, and in the state archives of Oaxaca, revealed the disparate nature of resistance to the French. In central Mexico, for example, the nature of political and economic change as it affected rural workers is essential in understanding
resistance in the region. And in Oaxaca, local resistance was tied to local autonomy and political participation among peasant populations. In the latter case, other recent scholarship, cited below, sheds light on the nature of nationalism among Indians.

The Argument

In every case study of the following pages -- central Mexico, Yucatán, and Oaxaca -- populations had engaged in civil conflicts and regional rebellions prior to the French Intervention. What emerges here is not a unified story of resistance to French invaders, but rather a study of three separate regions at war with the French and the Mexican Empire.

Another factor affecting resistance to the European presence in Mexico, in a transatlantic context, was the cause for which Juárez and Mexican nationalists fought – liberal republicanism. This cause in Mexico attracted European veterans of republican warfare in Europe – which occurred during the years between the revolutions of 1848 and unification of the Italian nation-state in 1861. The Mexican cause also attracted former Union soldiers of the American Civil War. Individuals of both groups believed the liberal republican cause in Mexico was theirs also: It was a war against absolute monarchism. Elements of resistance listed above, whether of Mexican regional causalities in one case, or Euro-American military involvement in the other, form the central argument of this study: The heterogeneous nature of resistance -- centered on issues of space, place, and identity -- combined with transatlantic currents of republicanism, was enough to impede and permanently stifle European hegemony in Mexico. This is not a history of nationalism per se, but a general study of armed resistance to the European coercive presence in Mexico during the French Intervention from 1862 to 1867.
The Evidence

Mexico at mid-nineteenth century harbored various populations that were in a constant state of war and rebellion for several years leading up to the Intervention. From Mexican independence in 1821 to the republican presidency of Juárez in 1860, the country went through more than fifty changes in government and a bloody three-year civil war – the War of the Reform (1857-1860). During such tumultuous times, various groups rebelled against national and local authorities for different reasons. For example, the Caste War of Yucatán began in 1848, and centered on historic grievances concerning taxes and autonomy, as described in Chapter 3. In Oaxaca, Indians in the Isthmus of Tehuantepec were in rebellion against the Juárez-led liberal government of Oaxaca from 1850 through 1855, as described in Chapter 4. In central Mexico, origins of rural resistance were traced to political and economic changes in the decade preceding the Intervention. For this reason, explaining the roots of resistance to the French occupation and the installed Empire required providing regional information before the period of 1862 through 1867, especially in the case of the Caste War.

My argument involves individual examinations of the three regions listed above, and it also examines the effect of transatlantic republican warfare on Mexico, which is treated separately in the first chapter. This study entailed research in three different areas of historiography – that of rural central Mexico in the mid-nineteenth century, of Oaxaca during the same timeframe, and of the Caste War in Yucatán. For the first chapter, regarding the involvement of European and American soldiers in the Juarist resistance, secondary sources on European and American soldiers in Mexico during the French Intervention provided a foundation for research. In addition, records and periodicals from four state Mexican archives were reviewed; those of Aguascalientes, Hidalgo, Oaxaca, and Yucatán. Regarding the Maya
insurgency in Yucatán, one private archive – the Center for the Support of Historical Research (CAIHY) contained correspondence detailing the efforts of beleaguered Mexican Imperial officials to request assistance from European troops in 1864. It was a fruitless attempt, as will be seen in Chapter 3.

In Mexico City, military records of the Second Empire provided useful information, as did records of the Historical Military Archive of the Mexican Secretary of Defense, both mentioned above. At the National Library of the National Autonomous University of Mexico City, one contemporary newspaper, _El Pajaro Verde_, recorded incidents of guerrilla warfare in central Mexico and other regions, on a daily basis. Martial propaganda abounded within the pages of another newspaper, _La Chinaca_, which apparently ceased publication in May, 1863. Some interesting conclusions arose in studying that publication, as the imagery conjured up by the paper’s writers and illustrators provided clues to the rural nature of guerrilla warfare in central Mexico. As described in Chapter 2, such images of Mexican _rancho_ workers who fought against the French survived as mythic symbols of resistance even after the Intervention. In general, Mexican archival sources have unearthed many details regarding the myriad flashpoints of warfare in central Mexico, Oaxaca, and Yucatán.

Although this is the first attempt at a comprehensive study on various forms of resistance to the French and the Mexican Empire of Maximilian, there are topics previously uncovered by published sources, and they are presented here for the first time as original research. For example, the phenomena of martial propaganda -- based on rural life -- as recruitment tool of resistance as described in Chapter 2, is new research based on an analysis of the contents of _La Chinaca_. Similarly, information from primary documents concerning resistance in the Oaxacan district of Juchitán during the Intervention is presented here for the first time. Many
excellent studies of recent years assisted in this dissertation. Two works in particular, by Patrick J. McNamara and Benjamin Smith, were invaluable in understanding causes behind peasant participation in the republican cause in Oaxaca.\(^6\) Regarding rural life, economics, and culture in the central states of Michoacán and Guanajuato, works by Luis González and David Brading provided useful knowledge.\(^7\) Among the historians of Yucatán during the nineteenth century, Terry Rugeley recently provided a detailed macro-study of the Caste War period.\(^8\) I have also benefitted from works by Thomson and LaFrance, who have described state-building among peasant populations of the Puebla Sierra in central Mexico. An important work on the same topic, by Peter F. Guardino, served as a guide for understanding Oaxacan resistance to the Intervention.\(^9\)

Michelle Cunningham has produced the most recent and precise insights into the motivations of Napoleon III in sending thousands of troops to occupy Mexico.\(^10\) There is no generally acknowledged historiography for European and American involvement in resistance against the French in Mexico. But a little-known manuscript housed in the state archives of Aguascalientes describes the life and death of Luis Ghilardi, who was a former officer under

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Garibaldi in Italy who loaned his services to the Juarist republican armies of Mexican resistance. He was eventually captured and shot by a firing squad. In the 1970s, Robert Ryal Miller examined American assistance in smuggling arms to the Juarist armies in Mexico, and the Americans who fought there during the Intervention. Both works were useful in constructing the first chapter.

**Organization of the Dissertation**

This study is organized into four chapters, each dealing with different aspects of resistance during the Intervention. Chapter 1 explains the transatlantic currents of republicanism and warfare as they affected Mexico during that time, particularly in regard to Europeans and Americans who fought in the resistance. The second chapter examines the links between rural – particularly *ranchero* – culture in central Mexico and liberal republican resistance, based on Mexican military archives, contemporary newspaper accounts, and popular depictions of country-dwellers. Chapter 3 provides both background on the Caste War of Yucatán and its effect on local Mexican officials serving the Empire. It also provides evidence regarding the reluctance of European occupation forces to engage the Mayan separatists. Chapter 4 examines republican resistance against the French and Mexican collaborators in Oaxaca, with particular emphasis on the involvement of indigenous communities in resistance. Each separate chapter pertains to a specific area of resistance. Taken together, the evidence presented in the chapters reveal in detail the multiple flashpoints of violence within Mexico during the Intervention, and the attendant difficulties for French-led occupation forces in pacifying such a landscape of

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Examinations of each area, in separate case studies, are essential in understanding the nature of Mexican resistance during this timeframe. And it is important to understand the impossibility of European political dominance in Mexico during the mid-nineteenth century. The complex political, economic and social history of Mexico during the “long nineteenth century” could easily fill several volumes. For the purposes of this study and this introduction, it is necessary to present some of the historical factors that affected the French Intervention. In the following chapters, some topics, including the nature of Mexican monarchism in the nineteenth century (Chapter 1) and the successful French invasion of 1863 (Chapter 4) are described in more detail. However, it is important to describe here the meaning and roots of “Juarist republicanism,” and to describe how the French Intervention is important both to Mexican and world history.

**Historical Background: The Mexican Reform**

With independence in 1821, Mexico established a monarchy under Emperor Augustín de Iturbide, a *caudillo* (military chieftain) who had earlier fought for Spain against insurgents seeking to sever ties to colonial rule. Within eight months, he was overthrown and replaced with a federalist government that established the first constitution of Mexico of 1824. A series of changes -- both electoral and violent – eventually led to the first presidency of General Antonio López de Santa Anna, whose life would be interconnected with the country’s misfortunes over the next twenty-one years. In the years of the early Mexican republic, much instability was caused by individual caudillos, such as Santa Anna, who led armies loyal only to their chieftains in revolts against various governments; which led to complete collapse of presidential administrations and installments of new regimes. During the 1830s, Santa Anna led such revolts, and in one case, led his armies to overthrow his own vice president. The general’s policy of
conscription – mainly of Indians – into his armies led to military inefficiency and low morale among his soldiers, who often lacked any sense of national consciousness. Such an army was defeated by Texas rebels in 1838. During the Texas rebellion, Santa Anna’s cold-blooded massacres at the Alamo and Goliad infuriated and motivated the Texans, who eventually triumphed. In 1846, the general – back from exile – again took charge of the armies of Mexico during the Mexican American War. Although he fought bravely and brought out the best fighting instincts of his men, the Mexican army was defeated by the Americans, who occupied Mexico City. In the Treaty of Guadalupe Hidalgo (now part of Mexico City), the national government ceded nearly half of its territory to the United States, resulting in the anguished humiliation of literate Mexicans of the capitol who pined for a cohesive nation-state that did not yet exist.

From this humiliation came soul-searching, mostly out of Mexico City, and two political camps that would fight a blood feud over the soul of Mexico in the years to come: liberals and conservatives. The chief articulator of the conservative consciousness was Lucas Alamán, who laid out the aims of his faction in many writings (described in Chapter 1). For Alamán, the instability and lack of national awareness in Mexico was caused by the rejection of its colonial past. Only a monarch, Alamán argued -- or some other authoritarian figure -- could make the nation strong. Only by embracing colonial institutions could Mexico maintain its stability and promote economic growth. In the system proposed by conservatives like Alamán, the Catholic Church—which traditionally held jurisdiction over family laws, and registries of marriage, births, and deaths—would maintain a dominant place in Mexican society. The Church was also the single largest landholder in Mexico. The colonial system also granted special juridical privileges to the clergy and the military, members of which could be tried only by their own
courts of law. Traditional indigenous communal lands would, in theory, retain the autonomous rights given them under the Spanish Crown.

This was a corporate system as defined in an earlier era; a system that also, technically, made allowances for the practice of slavery. The issue of slavery was nonexistent in Mexico after 1828, when it was abolished by Afro-Mexican President Vicente Guerrero, but it would lead Union veterans of the Civil War to side with Benito Juárez in battle during the Intervention.

In general -- although not always -- conservatives tended to be of the landowning and official military classes, and were predominantly of Spanish ancestry. Many resided in Mexico City, and identified with urban culture. They tended to be older than liberals, and most conservatives came of age during the violent years of Mexican independence; some saw firsthand the atrocities committed by Indians and other people of color when they were given the opportunity to revolt against Spanish authority during the wars of independence, from 1810 to 1821.12 Liberals, on the other hand, tended to be younger: many had come of age during the Texas Rebellion and the Mexican American War. They were largely of an emergent class of professionals and property-holders; journalists, lawyers, younger military officers, and provincial landowners. This group also included more men with indigenous or African ancestries — *mestizos* and *mulatos*—as well as a smaller number of men from pure indigenous ethnic backgrounds. Of the latter, the most renowned in Mexican history is Benito Juárez, born in the Zapotec village of Guelatao in the Sierra Norte of Oaxaca. The intellectual roots of liberals stemmed from the European Enlightenment, the American Revolution, and more importantly, the French

Revolution. Mexican liberals were also influenced by liberalism in Spain as it affected King Fernando VII during the wars against colonialism in Mexico. Mexican liberals believed in representative, elected governments, free enterprise and free markets, and civil registries administered by secular governments rather than by the Church. Over time, many liberals would target Church land ownership as stifling to the principles of free enterprise and private property. Indigenous communities in many parts of Mexico viewed the liberal program with suspicion, as it threatened traditional land rights and favored private development. Also, many of these village-based indigenous communities -- collectively known as republica de indios in colonial times -- were profoundly religious, and some would side with conservatives during the coming conflicts.

The liberal party contained its own factions. There was a moderate wing that argued for gradual change, and a radical wing that was willing to fight a civil war to establish its vision of government in Mexico. At the beginning of his governorship of Oaxaca in 1850, Juárez could be described as a moderate. But events would soon radicalize him, and others, over the course of the next decade. In 1853, Santa Anna came to power for the 11th and last time. In nearly twenty years of his political career, the general had swung from being an advocate for federalist republicanism, to being an avowed conservative. Now with a conservative administration, Santa Anna demanded to be called “His Most Serene Highness,” and steered his government toward dictatorship. Two years later, a regional political boss, Juan Alvarez of Guerrero state in southwest Mexico, declared revolution in the name of his liberal Plan of Ayutla, and pronounced against Santa Anna’s government. He quickly picked up supporters, and Santa Anna was overthrown and sent into exile. The new liberal government that took power began to institute
policies that greatly challenged the privileges of the Church and the military, and have come to
be known collectively as the Mexican Reform.

As Minister of Justice and Ecclesiastical Affairs in the new regime, Juárez penned
legislation named after him (the Juárez Law) that took away the juridical privileges -- or *fueros* --
of the clergy and military establishment. The Minister of Finance, Miguel Lerdo, issued a
sweeping overhaul of land and property rights (the *Ley Lerdo*) which sought to break up both the
vast properties of the Church and traditional indigenous holdings. The intent of the Lerdo Law
was to transform corporate holdings into private property, as a way toward economic
development, or “progress,” as the liberals saw it. In central Mexico, the law had ramifications
for rural workers and smaller landowners, who might benefit from such a policy. It was not
warmly received by indigenous communities, of course. However, local implementation of the
law could be a mitigating factor in preventing peasant resistance or outright revolt. At the state
and district level in Oaxaca, for example, local versions of the Lerdo Law, in fact, left communal
properties intact through clever legal wordings (Chapter 4). As a result, some indigenous groups
would be supporters of Juárez during the French occupation. The official Church hierarchy
reacted strongly against the legalized disamortization of its properties, and clergymen hardened
in their opposition to the national government. The Constitution of 1857 -- approved by the
unicameral liberal Congress -- provided an institutional foundation to the Reform laws. The
conservative backlash to them grew ever more vociferous and uncompromising.13

At the end of 1857, conservative military officers led a coup d’état (*golpe de estado*) in
Mexico City, forcibly removing the liberals from power and gaining control of the national

capitol. What followed was a three-year civil conflict known as the War of the Reform (1857-1860). By way of legal succession, Juárez was technically president of the deposed government. Officials of the liberal administration fled to Veracruz on the eastern coast and benefitted from customs revenue, and also arms shipments to the port city. For three years, liberal forces waged a guerrilla war against the conservative regime, concentrating its attacks in the areas surrounding Mexico City. The experience with guerrilla warfare became useful for liberal republicans when the French later occupied large areas of central Mexico. By December of 1860, the liberal armies had defeated conservative forces and retaken Mexico City. The next month, Juárez entered the national capitol in triumph as president of a new Republic. For purposes of this study, references to liberals in the context of war from 1860 through 1867 are interchangeable with “republican."

**The French Intervention**

The ouster of conservatives from power in 1860 was just the beginning of more civil strife in Mexico. Some the defeated officers, although out of Mexico City, waged their own guerrilla war against the liberal government in peripheral areas of the national capitol, and central states such as Michoacán. Others fled to France, where they enjoyed warm relations with Empress Eugenie (Armijo), daughter to the Spanish King and wife of Napoleon III.

Causal factors in the French imperial decision to send troops to Mexico appear, on first examination, deceptively clear. There is no question that Mexican conservatives sought the ear of Eugenie to air grievances against Juárez and the liberal government as anti-Christian promoters of political chaos. Reiterating their core ideals, the exiled conservatives implored the French Emperor -- through his wife -- to send his troops to Mexico and overthrow the liberal regime. And they were, by the fall of 1861, openly seeking a European who could serve as
monarch of Mexico – preferably of the Hapsburg family, which had ruled over colonial New Spain (Mexico) for more than two hundred years. Louis Napoleon (III) himself had spent time in the Americas as a young man, and had earlier expressed his wish to build a canal linking the Atlantic and Pacific oceans in Mesoamerica, perhaps through Guatemala. The Second French Empire also harbored expansionist ambitions, and through the 1860s would annex the southern tip of Indochina; tighten control over Algeria, and exert imperialist hegemony in Senegal. Also, Mexico was deeply in debt to the European powers, and France was the second-largest foreign investor there, behind Great Britain. In correspondence, Louis Napoleon never clearly spelled out a “grand design” for empire in Mexico, although it is generally assumed by traditional 20th-century narratives of the French Intervention that it was an imperialist venture.

By the fall of 1861, the European powers would have some grounds for violating Mexican sovereignty. The Juárez government issued a temporary moratorium on some 80 million pesos of foreign debt – a move which provoked the ire of its top three foreign investors; Great Britain, France, and Spain. The three states entered into a Tripartite Agreement to compel the Mexican liberal government to honor its debts. All three sent warships and military personnel to occupy the port of Veracruz. The American government of Abraham Lincoln, although it shared ideals of republicanism with Mexican liberals and was openly in support of Benito Juárez, was involved in a civil war and refrained from official protest. Meanwhile, the government in Mexico City braced for an invasion, which eventually came. After separate agreements with the Juárez government, Great Britain and Spain withdrew their forces.

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The French, however, mobilized for an invasion. In the context of an expansionist Europe in the second half of the nineteenth century, the Mexican ambitions of Napoleon III were not seen as something strange or unorthodox. An editorialist for the _Times of London_ captured the general sentiments of European conservatives in regard to the “Mexican adventure”:

> If the energies of the French nation are cramped by the limits of the Empire, Mexico offers an admirable field for their employment … We should not undertake such an enterprise ourselves, but if it suits the views of our neighbors to do so, we honestly wish them success. A French army of occupation will find much better employment in Mexico than in Rome.\(^{16}\)

By the spring of 1862, a force of some 5,000 French troops marched inland toward Puebla on their way toward Mexico City, following a route taken by invading American troops sixteen years earlier. On May 5, they engaged a hastily assembled Mexican force of defenders under Antonio Zaragoza, commanding soldiers from throughout central Mexico and Oaxaca. In the United States, Mexican Americans commemorate “Cinco de Mayo” as a reaffirmation of ethnic pride – and other Americans see it as a night of general revelry. But the importance of the Mexican victory -- with a force of 3,000 -- needs to be emphasized for historical purposes. The French withdrew back to the state of Veracruz, and waited for the arrival of reinforcements – a process that took nearly a year. In the meantime, the Juárez government could begin military preparations for another invasion, and the liberal press in Mexico City and in state capitols could fan the flames of martial patriotism by means of propaganda.\(^{17}\)

In the spring of 1863, French invasion forces numbered at least 30,000, and the city of Puebla was overrun after a two-month siege. Mexico City was abandoned by the Juárez

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\(^{16}\) _The Times_ (London), May 21, 1862, 2.

\(^{17}\) Examples of propaganda are shown in Chapter 2.
government in July. That fall, exiled conservatives in Europe offered the throne of Mexico to Ferdinand Maximilian von Hapsburg, brother of Emperor Franz Josef of Austria. The Mexican Empress would be his wife: Charlotte (Carlota), the daughter of King Leopold I of Belgium. The couple arrived in Mexico in June of 1864. But that time, all of central Mexico was occupied by either French, Mexican imperialist, or Austro-Belgian forces. All cities and towns of the central states were administered under the auspices of the Mexican Empire, as was Yucatán. The state of Oaxaca would fall to the French in February of 1865. Again, for this study, the resistance forces ostensibly gathered under the banner of liberalism from 1862 through 1867 are generally referred to as “Juarists” or “Juarist republicans.” Because Mayan resistance to the Empire is of a different nationalist nature, it is treated separately (see Chapter 3).

The Importance of the French Intervention in History

For Mexico, the state of affairs between independence in 1821 and the Juárez presidency of 1860 was marked by political and economic instability, a lack of national consciousness, and general turmoil. The French occupation of Mexico was, in essence, a foreign intervention between two factions -- liberal and conservative -- which were still fighting a civil war. After the final French withdrawal of February, 1867, and the execution of Maximilian that June, Mexico under a Restored Republic transformed into the relatively peaceful and prosperous “constitutional dictatorship” of Porfirio Díaz, a hero of the resistance and avowed republican. Marked as collaborators of foreign occupation, conservatives had no further influence in Mexican affairs. (A similar fate befell French arch-conservatives after World War II.) In turn, the policies of the Díaz government exacerbated the social inequalities which led to the Mexican

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18 See Chapter 4.

19 One could make the argument that religious conservatism in Mexico later found a voice through the National Action Party (PAN), which is now highly influential as a force in Mexican politics.
Revolution of 1910. But the French Intervention was a turning point in Mexican state-building. The chaos of the four decades years after independence transformed into a relatively stable “constitutional dictatorship” -- ostensibly a republic -- after the Intervention. Although the nation faced a more drastic social upheaval early in the next century, the course of democratic republicanism in Mexico was already set in motion. Its transition from an authoritarian government to a more representative one in the 20th century is still in development. And this ongoing development of modern democracy has roots in the era of the French Intervention.

In world history, the French occupation of Mexico coincided with the rise of liberal republicanism in France, and in Europe in general. Post-revolutionary France also experienced bouts of political upheavals. Two different monarchies had established governments in Paris before the republican revolution of 1848, and subsequent rise to power of Napoleon III. After defeat and disgrace for Louis Napoleon in the Franco-Prussian War (1868-1871), the Third Republic brought a measure of stability and imperialist expansion as never before. Similarly, the old monarchies of Europe embraced – to varying degrees – the principles of liberalism. Such ideas helped inspire creation of the new German Empire and its constitution of 1871.

Absolute monarchism in Western Europe was in its death throes by the mid-nineteenth century, and it would be ultimately destroyed with the defeat of Germany and the Austro-Hungarian Empire in 1918. That is why the decline and fall of monarchism as a transatlantic phenomena -- and resistance to it -- makes understanding of the French Intervention imperative. As it progressed in Mexico, heads of state in both Europe and the United States paid attention because of its implications for the future of conservative monarchism in the Western world. This study, therefore, aims to place Mexico in its rightful place within the transatlantic sphere of political conflict during the nineteenth century, as will be seen in the following pages.
In the years after 1848, leading up to the French Intervention, conflicts related to republicanism in Europe and in the United States had a philosophical impact on Mexican nationalists who imagined a new Republic. Such conflicts materially affected Mexico as well; this is demonstrated in outside military assistance to the Juarist cause. Mexico in 1862 was intractably a part of the Euro-American world, with economic and political ties to the United States and Europe as a sovereign state, both then and today. By implication, this means the young republic had more access to modern weaponry, an informal alliance with the United States, and more contact with European republicans than, say, the kingdoms and states of Indochina. This is important to note because Mexico is traditionally viewed, by historians and other social scientists, as a “non-Western” nation.

The European coercive presence in Mexico was structurally unusual – with occupying French troops, an Austrian monarch, and an imperialist structure staffed by Mexican conservatives. The reason for that is because Mexico was a supposedly sovereign nation, and still maintained contacts with the United States and the European powers as an “equal” in 1862 – at least for the sake of appearances. Napoleon III never attempted a direct conquest, but he could mask his occupation as a legitimate attempt to install a government demanded “by the people.”

The French Intervention was an early experiment in European imperialism that drained France of lives, materials, and money. After the withdrawal of French forces in February of 1867, the European powers never again attempted to impose direct hegemony on a sovereign nation modeled on Western liberalism – as Mexico was. Instead, the Age of Imperialism of the late nineteenth century encompassed African and southeast Asian states that had no prior experience with republicanism, no strong political ties to nations of the Western world, and in many cases no national boundaries covering large landmasses – as did Mexico. European
colonies of Africa and Asia would be directly administered, and the model established in Mexico was forever discarded. A product of historic forces in Europe and Mexico prior to 1862, the French Intervention foreshadowed the Age of Imperialism and more efficient methods of colonization. Such a pivotal position in the transatlantic world of the nineteenth century makes Louis Napoleon’s “Mexican adventure” important in understanding modern world history.
REPUBLICAN WARFARE AND THE MEXICAN LANDSCAPE

This is the way the world is – and the Mexican world, in particular, which is capable of startling Louis Napoleon himself, should he even trouble himself to come and live here for a few days. The Mexicans are quite unique: anyone who does not know them and is at the same time conceited, allowing their praises and adulations to intoxicate him, will be cast aside by them and ruined. Anyone who is weak, disheartened by their insults and malicious remarks, will similarly be cast aside and ruined.

– Benito Juárez

In December of 1852, Louis Napoleon Bonaparte was proclaimed Emperor of the French, a course that followed that of his famous uncle – and one that eventually placed traditional European armies in volcanic Mexico at mid-century; it was a place culturally diverse, politically erratic, and exceedingly violent. The Second French Empire – through luck and derring-do – seemed poised to expand its territories after military excursions in the Crimea (1854-1856), and after dictating geopolitics on the Italian peninsula by force, in 1849 and 1859. Against the Russian Empire in the former case and the Austrians in the latter, French military prowess under the new Emperor’s leadership was respected, if relatively untested on the Continent. France’s military grip on overseas territories tightened under Napoleon III. Between 1860 and 1867, the King of Annam surrendered Cochin-China to France; in Africa, the territory of Senegal was conquered, and Algeria was placed under military control after an experiment with civilian rule from Paris. Because of such successes in Europe and in overseas additions to the Empire, Louis Napoleon demonstrated to compatriots that France might be restored to the imperial greatness denied it in Russia and at Waterloo decades earlier.

Over the past century, numerous historians and writers have offered interpretations of Louis Napoleon’s motivations behind the “Mexican adventure” from 1862 to 1867. For some, it

was a “grand design” to halt the spread of protestant Anglo-Saxon power from North America; for others, it was a lifelong desire to emulate his uncle, Napoleon I, who also harbored an unrealistic sense of what was possible. In more recent scholarship, it has been noted that writings, letters, and statements by Louis Napoleon, both as a younger man and as Emperor, indicate his goal of engineering a united, multinational Europe, and a world free of trade barriers. As a young exile, for example, he had traveled in the United States and Central America, and dreamed of organizing construction of a canal in Nicaragua that would link the two oceans of the Americas. While his chief propagandist, Michel Chevalier, argued that France needed to unite the “Latin races” of the Americas against the Anglo-Saxon economic powers -- the United States and Great Britain – there is no historical “smoking gun” directly implicating Louis Napoleon in such schemes. More than simply a grand power play, the so-called “Mexican adventure” carried strategic value for the Emperor, tinged with visions of free trade, peace, and prosperity under European guidance. As Michelle Cunningham has argued, “Few have understood that Mexico provided an opportunity for Napoleon III to extend his vision for maintaining peace beyond Europe to embrace the world.” 21

Facilitated by the French emperor, the tattered state of Mexico became connected to the martial forces unleashed by the French Second Republic and the European revolutions of 1848, and also to the establishment of the liberal Kingdom of Italy in 1861. Several Europeans who fought for the cause of liberal republicanism in Europe were later to fight for the same political ideals in Mexico, and Mexicans also identified with republicans fighting under Garibaldi in the

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wars of Italian unification. Republican warfare in the European fashion took on a uniquely violent form when mixed with native elements of Mexican politics and provincialism – especially the utilization of guerrilla warfare. The political landscape of the Mexican state of eight million people was a hodgepodge of conflicting interests that mirrored, at least superficially, the republican conflicts of Europe at mid-century.

But neither Napoleon III – nor any learned statesman in Europe – could comprehend the local nature of republicanism and its opponents in Mexico. The presence of a French occupying force, enabled by local monarchists, lent weight to the Mexican republican cause and the leadership of Benito Juárez, who assumed the presidency in 1860, who could claim to be fighting for national defense and patriotism. The Juarist republicans in turn were aided by foreign veterans of both European republican conflicts and the U.S. Civil War. Mexico’s violence was an extension of the contemporary political violence of the Euro-American world. That fact is demonstrated by foreign military involvement in what was essentially an ongoing civil war fought by two ideological Mexican factions.

To supporters of the republican cause in Europe and in the United States, internal Mexican conditions reflected European political conflicts during mid-century: for example, the Carlist wars in Spain, the 1848 revolutions within the Austrian and Prussian empires, the unification of Italy and Austrian-Papal opposition to it. In all of these examples, opposition centered on the old monarchical structure of the European world. For many of the foreign soldiers who fought on the Juarist side, Mexico was part of the extended battleground of such warfare on the Continent. Local conditions only added fire to the furnace of transatlantic republican warfare. The historical “conjuncture” – to use the phrase of Robert B. Marks – that brought about Mexican national awareness after 1867 came about with the ascension of Napoleon III,
transatlantic conflicts, and the violent Mexican political landscape. But the war of the French Intervention was a direct result of warfare and political developments in Europe starting in 1848. In addition, the Civil War was seen by many Americans as another front in the war against monarchism – a system that technically made provisions for slave ownership. Because the Juarist cause attracted European and American soldiers, Mexican republicans could see their movement as something bigger than a fight for mere sovereignty. European-American military involvement in Mexico between 1863 and 1867 -- of a republican nature -- is important in understanding the ultimate failure of the French Intervention in Mexico. The presence of foreigners willing to die for the Juarist cause, combined with internal forces within Mexico, prevented the success of the French and the Mexican Empire of Maximilian. Their presence legitimized the Juarist cause in Mexico.  

The roots of Mexican political warfare

The Mexican Republic of 1861 had emerged out of a devastating War of the Reform (1857-1860) between ideological factions. At its end, victorious republicans continued to fight conservative guerrilla bands, which at times targeted prominent liberals for retribution. The liberal government of Benito Juárez also faced an ongoing insurgency in the Maya country of Yucatan, and liberal regional bosses who jealously defended their autonomy. However, the loosely sewn thread of liberalism which united disparate factions, and a social environment seasoned by several years of internal warfare, would bog down foreign occupation forces in endless counter-insurgency campaigns. This was especially true in states of central Mexico such as Michoacán, where open spaces, rangelands, horses, and arms were plentiful and effective in

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aiding guerilla resistance forces. Fought for liberal ideological principles in Europe -- and in another form carried on in the U.S. Civil War -- republican warfare was a transatlantic phenomenon that exploded into widespread and erratic violence in Mexico, impossible to contain by any outside power seeking to impose hegemony. Internal warfare within Mexico encompassed differing conflicts and communities, and was bathed in the blood of all ethnic groups and economic castes. And it affected almost everyone – landowners, statesmen, the rural working class, indigenous villagers -- in some way. Such diversity of armed forces and groups is explained in following chapters.

The roots of Mexican political warfare stretched back to the disastrous Mexican American War (1846-1848), in which nearly half the national territory was lost to the United States. The defeat spurred a war of words among the Mexican intelligencia and a wave of political soul-searching in the young nation-state. “To see in so few years this immense loss of territory,” lamented conservative statesman and thinker Lucas Alamán:

This destruction of a courageous and blossoming army, so that we no longer have any means of defense; and above all this complete extinction of public spirit, which has swept away every idea with a national content: not finding any Mexicans in Mexico and contemplating a nation which has moved from infancy to decrepitude without having enjoyed any more than a glimpse of the vigor of youth.\(^{23}\)

In the years after the defeat of 1848, ideological camps of two literate groups within Mexico, liberals -- split between radical *puros* and moderates -- and conservatives, became hardened in their expressed arguments. But they produced the most potent intellectual commentaries that had hitherto existed in Mexico. Both groups could be considered privileged, with many older conservatives being the products of landholding and mercantile wealth centered in Mexico City and environs; and middle-class or upwardly mobile liberals in the legal and journalistic

professions, rural landowners, and younger military leaders, who often resided in outlying regions (such as Oaxaca and Michoacán), with local bases of power.\textsuperscript{24}

Both political sides competed for the hearts and minds of the literate in newspaper editorials, with impassioned and articulate debate over the political future of Mexico. Alamán had served in several Mexican governments in the thirty years preceding his death in 1853, and had established the country’s national bank and its national archive (now the \textit{Archivo General de la Nación}). He became the leading voice of the conservative movement until his death from pneumonia, which occurred while he was a cabinet minister under Antonio López de Santa Anna. In \textit{El Tiempo}, one of four dailies published in the capital between 1846 and 1848, he stated that “our principles are essentially conservative.” Alamán both created the term and articulated conservative ideology, appealing to popular sensibilities as well as the Mexico City elite.\textsuperscript{25} Mexico had broken with its Hispanic colonial past and taken on “alien institutions and principles, and thus had condemned itself to internal anarchy and external weakness.”\textsuperscript{26} It was a past where the Catholic Church maintained unchallenged wealth, and regulated education, social registries, and familial and gender relations. Royal officials, the clergy, the military, Hispanised \textit{castas} (mixed race), indigenous communities, and slaves were all part of the corporate organization of colonial New Spain. The nation of Mexico rightly derived its culture and functional institutions from Iberia, conservatives argued. Alamán advocated for the virtues of the Spanish past in his authoritative histories of Mexico, the first such works produced, still highly

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\textsuperscript{24} According to Richard N. Sinkin, five of thirty-six leaders of the Mexican Reform period were born in Mexico City. Eleven were Spanish Americans or \textit{criollos}, two were Indians and the rest \textit{mestizos}. See Sinkin, \textit{The Mexican Reform 1855-1876: A Study in Liberal Nation-Building} (Austin: University of Texas Press, 1979), 181-184.

\textsuperscript{25} Charles A. Hale, \textit{Mexican Liberalism in the Age of Mora, 1821-1853} (New Haven and London: Yale University Press, 1868), 12, 15n.

\textsuperscript{26} Ibid., 16.
\end{flushright}
respected. The great achievement of the conservatives was bringing to their side General Antonio López de Santa Anna -- who had ten times previously been head of state, and as a young man had been a liberal. In 1853 he again came to power in a government controlled by conservatives with Alamán as his minister of relations. At the end of Santa Anna’s last reign, he appointed himself “His Most Serene Highness,” and assumed the powers of a dictator. The next year, Santa Anna was toppled by the republican-led revolt based out of Ayutla, Guerrero, never again to return to power.

At the end of the Mexican American war, republicans who adhered to an increasing liberal ideology were in no strategic or economic position to claim the legitimate course for Mexico’s future. In gaining independence in 1821, Mexico became an Empire under Augustín de Iturbide, a self-proclaimed monarch ousted after less than a year by liberal factions. Between 1833 and 1834, liberals formed a federal republic, assisted by Santa Anna’s efforts; before establishment of the “centralist” conservative republic that lasted from 1836 until outbreak of the Mexican American War. After the Ayutla Rebellion that overthrew Santa Anna’s government in 1854 (led by Juan Alvarez of Guerrero), liberals sought to establish a clearly stated Reform program. It proposed civil institutions that encouraged private enterprise:

On the one hand, there was a drive to free the individual from the shackles that bound him under the Spanish system … The representative institutions of a federalist republic, and even a measure of municipal autonomy, must be strengthened. Moreover, protecting property rights and advancing economic liberty through laissez-faire were also directed toward the objective of individual freedom.

On the other hand, the liberals wanted to free Mexico from the regime of corporate privilege. A modern, progressive nation must be juridically uniform under a fiscally strong secular state.²⁸

²⁷ Alamán died later that same year.

²⁸ Hale, Mexican Liberalism, 39.
Liberal politicians and ideologues never intended for democratic republicanism in the French or Jeffersonian sense, and often shied away from “revolutionary” speech. Jose María Luis Mora, an early articulator of Mexican liberalism, witnessed the violence at the 1810 outbreak of the war for independence -- as did Luis Alamán. At the start of that war, Father Miguel Hidalgo y Costilla led an army of Indians and *castas* (of mixed-race) which at one point numbered about 60,000. The unorganized assemblage under Hidalgo massacred several hundred Spaniards and Spanish Americans in the city of Guanajuato, an act which alienated otherwise sympathetic members of those classes. After independence in 1821, the general backlash against such grassroots rebellions continued. Both liberals and conservatives were wary of enfranchising the poor and peasant classes, and concerns involving these groups were omitted from political discourse.

Republican forces were by no means united. Regional caciques (bosses) and liberal governors jealously guarded their own bases of power. Because of their own ambitions, liberal politicians, cabinet members, and military officers often tried to usurp the authority of the soft-spoken and reserved president, Juárez. The state of Mexican political disunity -- on both sides -- was noted by outsiders who arrived in Mexico to take part in the occupation. “Altogether the political state of the country does not seem to be nearly as promising as is affirmed by the press in Europe,” wrote Austrian mercenary Ernst Pitner, who in the spring of 1864 arrived for service under Maximilian, the installed Emperor of Mexico. “And the greatest pessimists in this area the French themselves, who maintain that there is not much more to be achieved with this decimated and corrupted population.”\(^{29}\) On local levels, Mexican identities were far from uniform.

For the most part, average Mexicans, rural and urban, indigenous and Hispanised, strongly attached themselves to regional identities – la patria chica or “little country” – that were socially and ethnically diverse. In central Mexico, republican militias were often headed by wealthy hacendados engaged in liberal politics, who led local forces largely recruited from the rural working classes. Shifting patterns of land ownership and cultural individualism in central Mexican states such as Michoacán and Guanajuato led many rancho owners and workers to align themselves with republicanism. Outside the urban areas of conservative and Church influence in central Mexico, republican politicians maintained their own militias, or organized them at the start of French hostilities. In some cases, as in the highlands and rural areas of Puebla and Oaxaca states, Indian communities under local caciques (bosses) had earlier aligned themselves with republican forces during the War of the Reform, and afterward during the Intervention. In the Oaxacan district of Ixtlán, the political success of local sons Juárez and military commander Porfirio Díaz encouraged villagers in their battles against conservatives and French forces, with equal rights of republican citizenship expected in return. The French also met resistance in the eastern district of Juchitán, and could not penetrate into local Zapotec indigenous communities, which had traditionally been hostile to outside powers.  

Republican warfare in Mexico was also unconventional, as opposed to the practice in Europe at mid-nineteenth century. It took on the characteristics of a blood feud. In the civil War of the Reform, conservatives governed from Mexico City while republicans based at Veracruz organized irregular militias and made guerrilla incursions near the national capitol.

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The final republican victory of 1860 was tenuous, however. The revived liberal government under Juárez faced continued resistance from the remnants of a defeated conservative army. The pro-monarchist Plan of Tacubaya (in Mexico City) stated that the Conservative party represented the “true national interests … based on the principles of order, manifest liberty, and the Catholic religion.” Under its auspices, a handful of defeated generals in central Mexico launched their own guerrilla campaign.\footnote{Conrado Hernández López, \textit{Militares Conservadores en la Reforma y El Segundo Imperio} (unpublished doctoral thesis, El Colegio de Mexico, Centro de Estudios Mexicanos), 274-275.} In one act that roiled the Juárez government, armed men kidnapped and murdered prominent liberal statesman Melchor Ocampo, the anti-clerical former governor of Michoacán, in June of 1861. When French troops forced Benito Juárez and his cabinet to flee Mexico City exactly two years later, a Mexican conservative administration, the three-man Supreme Regency, placed itself in charge of the national government. Maximilian with his wife Carlota (Charlotte) -- the daughter of King Leopold I -- arrived in June 1864, to take the imperial thrones of Mexico as emperor and empress.

Conservative guerrillas in Yucatán in the south, and Aguascalientes in central Mexico, took charge of those republican state governments by force between the spring of 1863 and April of 1864, ahead of advancing French troops. French-led forces helped local conservatives take power in most state capitols by the spring of 1864. But the foreign troops and their Mexican imperialist allies could not penetrate every corner of the country. Republicans loyal to Juárez successfully held parts of northern Mexico and the southwestern state of Guerrero for the duration of the occupation. The Maya enclave at Chan Santa Cruz in Yucatan, in a state of
rebellion for ten years, also remained out of French control. The geopolitical landscape of Mexico contained numerous flashpoints of warfare by the time the French arrived.

By the spring of 1864, European-trained and -bred armies would be forced to fight against disparate Mexican guerrillas within a much larger landmass than the Italian peninsula or the Crimea, where Louis Napoleon had sent 28,000 invading troops in 1854. The “Mexican adventure” necessitated long lines of supply and communication; at times in zones bristling with disease, and among townsfolk leery of outsiders. Over four years, guerrilla warfare against the Europeans and Mexican imperial armies never ceased, and in some cases intensified after implementation of the “black decree” of October, 1865. Under this law, signed by Maximilian, captured guerrillas not recognized as belligerents faced special courts martial, and within twenty-four hours – barring imperial clemency -- were to be shot. The names of the executed were reported in “official” Mexico City newspapers. The harsh French measures ceded the moral high ground to the liberal government “on the run” under Juarez – who eluded enemy troops traveling furiously by carriage throughout northern Mexico from June of 1864 through the end of 1866.

French actions helped feed a sense of “martial patriotism” articulated in popular songs and images generated by republican literati, helping create a Mexican culture of war. The warlike state of Mexican politics only intensified under the occupation. Making violent conditions worse, harsh measures were initiated by the French commander-in-chief--Marshal Francois-Achille Bazaine-- who took charge in the summer of 1863. He was experienced in guerrilla warfare through his Foreign Legion time in Algeria, where nationalist leader Abd-al-

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33 The term “martial patriotism” is used by Thomsen and LaFrance, *Politics and Popular Liberalism*; Draconian measures taken by the French would establish a quasi-legal basis for Maximilian’s later execution.
Qadir was ultimately captured in late 1847. Bazaine’s formula for hunting Juarez was modeled after the pursuit of al-Qadir twenty years earlier. The land mass and geography of Mexico was just as inhospitable, and the country was roughly equal in size to the Algerian territory.

Born among Zapotec Indians of the Oaxaca highlands, Juarez dealt very carefully with his diverse mix of regional allies. (His home state was under the republican military command of one of them – General Porfirio Diaz.) The liberal party itself, and its local partisans, comprised an “uneasy coalition of dissident factions, ideological purists, prima donna literati, ambitious military commanders, state governors determined to retain control of federal resources, and local caciques with their personal armed following.”

The political genius of Juarez, as with nationalist leaders outside Mexico, was in his acknowledgment of the diverse and volatile elements in his ranks. Through correspondence and general notices he facilitated the divergent demands of regional bosses – and at the same time tried hard to reassure the populace of his shaky government’s legitimacy. Talented though some of his liberal leaders were, some had displayed wavering political loyalties in the past. Juarez rarely trusted his own ambitious leadership.

As a result of political and strategic pragmatism, Juarez and his republican leaders could be indiscriminate, allying with armed and mounted bandit groups containing several hundred members in central Mexico, particularly plateados – “The Silver Ones” – in what is now the state of Morelos. The Juarez government issued an amnesty for such groups in exchange for waging guerrilla war on French forces in the region, although their loyalties were suspect and

34 Hamnett, Juárez, 182.
35 Ibid., 54.
open to change.\footnote{36} As will be discussed in Chapter 2, the cattle rangelands of central Mexico also offered up volunteers in the hastily organized armies that sprung up with the French takeover of Mexico City in June, 1863. Relatively well-armed and always mounted, “cowboy” 
\textit{chinaco}\footnote{\textit{chinaco} is an indigenous Mexican term for a person of mixed racial heritage, often of mestizo descent.} groups often operated semi-independently in guerrilla warfare against the French and allied Mexican conservative forces. The mythical image of \textit{los chinacos} and \textit{ranchero} life was popularized by the liberal press in song, poetry and illustrations, and also in novels both during and after the occupation.\footnote{37}

The disparate and distinct elements of Mexican liberal republicanism and its accompanying martial spirit were related to the 19\textsuperscript{th} century conflict of ideologies throughout the Western world. Transatlantic republican warfare of the nineteenth century reached its nadir and arguably ended in Mexico. European monarchical reaction against the violence of the French Revolution and Napoleonic expansion, and against the revolutions of 1848, reverberated in Mexico. Republicanism and liberal ideology throughout the Americas and in Europe was synonymous with the modern term “progress,” as it was among Mexican Juarists. In the Americas, institutional and race-based slavery, the corporate status and communal lands of indigenous peoples, the landholding wealth of the Church, and the special privileges of the military – all characteristic of the colonial period -- were seen by liberal republicans as obstacles to social progress and modernization. Liberal republicans believed Mexico was being left behind as the U.S., Great Britain, and France industrialized and created democratic societies.


\footnote{37} The role of the liberal press in creating popular imagery and in support of republican Mexico will be discussed in a subsequent chapter.
Republican counterparts in France, Spain, the Austrian dominions, and Prussia were involved in parallel Continental conflicts, although such warfare ebbed with Italian unification in 1861. Soldiers without a cause, including many European veterans of the warfare that emanated from the revolutions of 1848 and from Italy, offered their services to the besieged Juarez government. They would discover the particularly unforgiving nature of warfare in Mexico during the mid-nineteenth century, but their expertise was welcomed. By the time of their victory over the conservatives in the War of the Reform in 1860, Mexican republicans tended to view their own political movement as essentially the same in spirit to that of their counterparts in Europe, particularly on the Italian peninsula. Liberal newspapers in Mexico City followed the battles of Italian unification, and one writer one declared that the liberal victory of Garibaldi would start a general European revolution, and be “of great favor to our county.”

**Foreign veterans of republican warfare in Mexico**

The European conflicts at mid-century produced innumerable individuals and groups geared toward perpetual warfare, with ideology the driving force behind their actions. Veterans of republican warfare in the Western world fought in Mexico through civil wars and foreign intervention for more than a decade, from the time of the Ayutla Rebellion through the end of European occupation in 1867. Italians and others from Spain, Belgium, the German states, and Poland (the Austrian Empire), as well as volunteers from the U.S., Spanish Cuba, and South America took part as officers and foot soldiers, in most cases at least nominally for the republican cause. There are no exact figures available on the numbers of foreign soldiers who

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38 *El Monitor Republicano*, Wed., Oct. 1, 1862, No. 4434, Year XV, 2; As was the case in Mexico regarding the rural subaltern classes, Italian republicans similarly failed to incorporate the native peasant class in northern Italy. See Paul Ginsborg, “Peasants and Revolutionaries in Venice and the Veneto, 1848,” *The Historical Journal*, Vol. 7:3 (Sept. 1974), 503-550.
fought in Mexico during the French Intervention, and there is no empirical way of calculating, at this time, the effect of foreign involvement on morale or the final outcome. But Juárez and his representative in the United States, Matías Romero, eagerly courted foreigners, and promised them both salaries and land. In late 1864 the Juárez government, heading north to Chihuahua ahead of French troops – the president in his simple black carriage – offered foreign soldiers monthly salaries ranging from 15 pesos for infantrymen to 500 pesos for division generals.39

As the Civil War ended, American requests for enlistment in the Mexican republican army increased, along with the flow of American arms and military supplies, all facilitated by agents from both sides of the border.40 An Argentine, Edelmiro Mayer, was a veteran of the Civil War and a former army colonel in his own country who took part in the final battles against Mexican imperialist forces in May of 1867.41 The case of Mayer is one of several where foreigners fought not only against European occupation armies, but also were embroiled in the cycle of internal warfare that characterized Mexico in the mid-19th century, from Ayutla through the War of the Reform, the French Intervention, and the Restored Republic era (1867-1876). Some survived, and others did not. After the war of intervention, Mayer joined the rebellious forces of Porfirio Díaz against the restored Juárez government, but he was captured and sentenced to death in 1869. His sentence was commuted through efforts of the U.S. legation in Mexico, and he later returned to Argentina.42


41 Hansen, “Voluntarios,” 221.

42 Thomas H. Nelson to Hamilton Fish, May 17, 1872, Papers Relating to the Foreign Relations of the United States Transmitted to Congress with the Annual Message of the President (Washington: Government Printing Office,
European volunteers on the Juarist side were usually veterans of republican wars during the decades preceding Italian unification, and in most recorded cases entered the Mexican forces as officers. Among those relative few whose martial exploits survive in local historic memory is Nicolás de Régules, a Spanish veteran of the Carlist wars. He arrived in Mexico in 1846 by way of Cuba and the United States, and took part in the military campaigns of the states of Guanajuato and Michoacán during both the War of the Reform and the Intervention. As general of the Mexican republican army’s Third Brigade, he led the capture of Tacámbaro in Michoacán, a fierce battle. That battle, in April 1865, occurred at a time when French troops routed Mexican republicans in nearly every “traditional” confrontation, and the occupation was strongest militarily in central Mexico. Entrenched Belgian mercenaries, called the “Regiment of Empress Carlota,” held Régules’ three children and his wife, Soledad, hostage to discourage attack. The action enraged the local populace and motivated republican soldiers and affiliated guerrillas who encircled the town, preparing to charge. Even while his family remained under guard in Tacámbaro, Régules and his soldiers launched an attack to the general’s cry of “Men, everyone at his position! Complete your duty! The Fatherland (La Patria) is first!” The hostages were rescued unharmed; the Belgian legion commander and his captain were both killed in battle, and the survivors taken prisoner in a rare victory for republican regulars.

1873), 423-424; See Edelmiro Mayer, Campaña y Guarnición: memorias de un military argentine en el ejército de Benito Juárez (Mexico City: Secretaría de Hacienda y Credito Público, Dirección General de Prensa, Memoria, Bibliotecas y Publicaciones, 1972).

Hansen, “Voluntarios,” 210. His birth year is given as 1826, so it is more likely that Régules would have taken part in the Second Carlist War, and briefly. Similarly, the Spanish wars were ideological in nature.

Benito Juárez named Régules to a series of promotions culminating in an appointment as commander of the Central Army (Ejército del Centro) after the capture and execution of General José María Arteaga in June of 1865. He remained as military commander based in Morelia, Michoacán, after the war. A monument bearing his likeness now stands in Tacámbaro. Other European *juaristas* of the historical record, not as well-preserved in local memory, are Jósef Tabachinski of Poland, a cavalry officer killed in battle; Swiss officer Erick Wulff, present at the final siege of Mexico City; Belgian John H. Keats, a Civil War veteran who served under Porfirio Diaz in Oaxaca, and Prussian army veteran Carlos von Gagern, who later became a noted author. The martyr among European *juaristas* was Luis Ghilardi, whose execution sealed his place in Aguascalientes state history, and lent weight to Maximilian’s own death sentence. Perhaps among foreign volunteers, he could be best described as a true ideological mercenary.

The Luis Ghilardi story illustrates the wide range of republican warfare on the Continent, and the martial socialization surrounding it. He was born in Lucca, Tuscany, in 1800, in the shadow of the French Revolution that affected political thought on the Italian peninsula, where militant liberalism germinated over the next four decades. At 24 years of age, he entered combat alongside liberals in French, Belgian, Portuguese and Spanish conflicts, and became a military and ideological disciple of Giuseppe Garibaldi during the Italian revolutions of 1848. Ghilari fought in the unsuccessful defense of Milan against advancing Austrian troops.⁴⁵

When King Charles Albert of Sardinia made peace with the Austrians and abdicated in favor of his son, Victor Emmanuel II, Ghilardi sought other engagements in the ongoing Italian theater of war. Refusing a position in the royal government of his native Tuscany, he was

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recruited by Sicilian insurgents who sought to overthrow the reigning Bourbons. Ghilardi co-organized a corps of 2,000 Swiss troops to aid the Sicilians, but the troops were refused passage through France and Piedmont en route to the island. Native Sicilians eventually defeated royalist troops and declared independence. Ghilardi afterward joined his mentor, Garibaldi, in defense of the Roman Republic against approaching French troops in the service of Louis Napoleon Bonaparte, who needed the political support of Pope Pius IX.  

For reasons that remain unclear, Ghilardi traveled to Mexico in 1853. He was presented to President Santa Anna – who at that time was not a committed republican. Santa Anna’s growing authoritarianism likely changed the nature of the relationship. Ghilardi eventually joined rebels who fought in the name of the Plan of Ayutla, and placed himself at the disposal of General Santos Degollado -- who was later killed by conservative guerrillas. When the War of the Reform broke out two years later, Ghilardi was severely injured in battle and returned to Italy. But with Italian unification and *risorgimento*, he returned to Mexico via Washington, D.C. with a group of fellow Italians, to enter service in the scattered republican army at the rank of brigadier general. President Juárez was presented with a letter by another liberal, Garibaldi: “Allow me to recommend my friend and companion in arms General Ghilardi. I want not just to recommend this brave official, with my sentiments and good will.”

In February of 1863, Ghilardi was attached to the Army of the East (Ejército del Oriente), participating in the defense of Puebla, site of the Mexican victory in May of the preceding year. This time, with several thousand reinforcements, aided by two companies of North Africa-based *zouaves*, the French under generals Forey and Bazaine surrounded the city and forced the

46 Ibid., 3.
47 Ibid., Appendix 3, 17.
Mexicans to surrender. The two-month siege involved a series of trenches dug around the city by soldiers under Bazaine, and ferocious block-by-block fighting. The French faced “a hidden, unpredictable enemy who killed without showing himself,” and who allowed the attackers “only ten squares out of 200” in the space of one month. The republican force finally surrendered the morning of May 19, 1863. Defeated commander Jesús González Ortega, Ghilardi, and other officers including Porfirio Díaz covertly fled the city rather than present themselves to the French prisoner-of-war camp.48 Two months later Ghilardi was directed to organize a brigade under General Arteaga, commander of the Jalisco state military division, and was designated second in command for that division.49 Arteaga eventually met his death by a French firing squad.

In central Mexico, Ghilardi remained active into the fall, organizing guerrilla fighters in Zacatecas and Jalisco, and cavalry in Querétaro, before apparently resigning his army post. Intending to return to Italy, Ghilardi was in Colotlán, Jalisco, when it was set upon by a French force early on January 17, 1864. He was captured and sentenced to death, although several Mexican officers also taken prisoner were later freed.50 Ghilardi faced several charges, including the fact that he fled Puebla when he gave his word that he would surrender; he was also accused of threatening to shoot a French army official. Also, he was not recognized as an “official” Mexican republican officer, but a guerrilla “with arms,” a charge which carried the death


In letters to his wife, he explained that the charges against him were false, and that he had renounced his position in the republican army four months previous, apparently in mourning over his friend and superior officer, Minister of War Ignacio Comonfort. He was taken north to Aguascalientes, where he accepted the sentence of death “with serenity,” but protested the “unjust vengeance” taken against him as he was led to the firing squad at a place called Plaza de Burros. On March 16, two months after his capture, Ghilardi was executed by firing squad.

In his life and exploits, the Italian mercenary anecdotally demonstrates the parallel contours of republican warfare in both Europe and in Mexico. As a movement to make the Western world more politically “equal,” liberal republicanism faced a backlash by the ancien regime in Europe. Similarly, Mexican liberals faced opposition from men who represented older wealth and stronger ancestral ties to colonial New Spain. Republicanism was a revolutionary movement in the Atlantic world for much of the nineteenth century, and for that reason, one local historian called Ghilardi the “Che Guevara of the 19th century,” during a commemoration ceremony at the site of his death in Aguascalientes, capitol of the state of the same name. On the local level, draconian French actions created martyrs and heroes who always would be associated with republicanism and nation. Along with many other local heroes of Mexican national history, Ghilardi is still remembered by the people of Aguascalientes.

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51 The policy of execution for anyone captured “with arms” to be used against the Mexican Empire was codified in the “black decree” signed by Maximilian in October of 1865. But it was a de facto practice to shoot irregular fighters before that, at the discretion of commanding officers.

52 Peconi, “Luis Ghilardi,” 12. Curiously, Ghilardi sent a dispatch to Comonfort about two weeks before the minister’s own death in an ambush, stating the “absolute necessity of a surgeon” because of “developing illnesses” among his troops. That places Ghilardi in military service less than four months before his capture. See AHM XI/481.4/9008: “Military Medical Corps,” Querétaro, November 2, 1863.

53 Gonzalez, Historia, 350.

He was also remembered by Juárez, who received cables from European luminaries, and also from U.S. Secretary of State William H. Seward in Querétaro, pleading for Maximilian’s life after his death sentence in June of 1867. A cable from Giuseppe Garibaldi asked forgiveness for the fallen Mexican emperor:

Pardon him! We plead with you, we fellow citizens of (Ghilardi), who was shot on the orders of henchmen, pardon him! Return him to his family composed of our flesh as an example of the generosity of the people who won in the end, but who also pardon.

In death and in life, Ghilardi was present at key intersections of the Intervention. And, a year after his death, good fortune, incessant guerilla warfare, and U.S. weapons bore fruit for the struggling republicans.

The end of the U.S. Civil War also led Americans into the Mexican conflict. According to two historical sources, about five thousand Americans joined the armies of both Juárez and Maximilian, the bulk of that number arriving in Mexico after April of 1865 and the assassination of Lincoln. However, these numbers cannot be verified or broken down. The majority of American soldiers in Mexico, some three thousand, joined the republican armies. The number of arms shipments to Mexican Juarists from San Francisco nearly doubled in 1866, after a three-year embargo by the U.S. was lifted. Through Matías Romero in Washington, at least a dozen Mexican agents operated in various American cities, soliciting Americans for military service, guns, and ammunition. “Being in heart and in soul a believer in republicanism, I have long sympathized with Mexico and her patriots,” wrote Edward A. Lever, a potential recruit who


appeared in San Francisco for duty in November of 1864. “Therefore I offer myself for any position whereby I might be of service to the sister republic of my own dear native country.”

The end of the Civil War released tens of thousands of soldiers from both Union and Confederate armies, and the Juarez government pledged generous pay and land for those prospective republican recruits who wanted to settle in Mexico.

Some volunteers associated the republicanism of their own Union government with that of the *juaristas*. It is well recorded that Confederate representatives attempted to forge an alliance with Maximilian and the French against both the Union and Mexican republicans. “As the Lincoln government was the ally and protector of your enemy, Juarez, we can have no objection to make common cause with you against a common enemy,” said John Slidell, the Confederate agent in France, during a private meeting with Maximilian in 1864.

Fanning the flames of pro-South sentiment among French conservatives were economic ties connected to “King Cotton” diplomacy: the Confederate attempt to induce British and French involvement in the Civil War. By officially refusing to run the Union naval blockade and stockpiling cotton, Confederate leaders believed they could disrupt the British and French textile industries and force those countries to recognize the Confederacy, or support it with resources, and perhaps military intervention. The strategy eventually failed because of the availability of cotton from other global sources, such as India. Britain and France never bestowed recognition.

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57 Ibid, 23.


In the minds of Mexican liberals, the Confederacy was as tied to the *ancien régime* as the conservative politicians and clergy of Emperor Maximilian’s court. Many American volunteers in the Mexican republican forces also held that view. It is impossible to know how many Americans among the Juarists considered themselves “republican” in the ideological sense, but recorded statements such those of Edward Lever, above, indicates that it was at least superficially a motivator. A post-Civil War lack of employment opportunities and Mexican promises of regular pay, and along with newly confiscated lands, were the practical reasons for rank-and-file American involvement. Probably less than 1,000 served, and many recruits were disappointed with what ultimately resulted when the battles were over.

The well-documented American Legion of Honor, made up mostly of Californian troops, assisted in the republican army drive south from Chihuahua in the last stages of the war, after the French pulled out in February of 1867. As was the case with the procurement of American-made weapons, funding and recruitment of the corps emanated from private “clubs” that “raised fund-raising banquets, torchlight parades, and mass meetings,” all over the U.S. Some groups were republican in orientation; others invoked the Monroe Doctrine in their arguments against the French presence in Mexico. “If the old-world minions on our continent remain, we’ll take the old familiar guns, and go with Grant again,” stated a former U.S. diplomat based in Latin America, who was head of the “Monroe Doctrine Committee.” The legion recruited its members in San Francisco through Mexican agents and army generals Plácido Vega and Gaspar Sánchez Ochoa, whose American chief of staff, Colonel George Mason Green, had joined the republican army in 1858, during the War of the Reform, and was fluent in Spanish.\(^60\)

\(^{60}\) Miller, “Arms,” 37-38.
Green became first commander of the outfit, which started out with about twenty-five members. Two other Americans, Lew Wallace, a Mexican agent and officer in the republican army, and George Church, a former Civil War general, helped equip the legion in exchange for business concessions in mines, telegraph operation, and railroad construction -- none of which came to fruition. The legion picked up several dozen volunteers – including some ex-Confederate Texans -- before meeting in Chihuahua, the northernmost state capitol, where the provisional government of Juárez stationed itself in September of 1866. There the legion was incorporated into the larger republican force. By late January, the combined republican military force and mobile government moved south to Zacatecas, which was defended by the main body of the imperial army. In the battle that followed, the Americans took credit for saving Juarez’ life: He and other republican officials escaped the city on horseback as the legion pushed forward in a counterattack against Mexican imperial and Austrian troops. “If it had not been for us he would have lost his whole army,” said one American soldier, who later sought compensation from the Mexican government for military service. “We covered up his retreat and fought off the pursuers under (imperialist general) Miramón.”61

When the republican army gained the upper hand in a rout of imperial troops at San Jacinto, Querétaro, General Mariano Escobedo ordered the executions of 139 foreign volunteers of the imperial army who were taken prisoner.62 The American legion later joined in the siege of Querétaro under the Spanish republican Nicolás Régules, which lasted two months and ended in final defeat for the imperial regime and the capture of the city and Maximilian on May 15, 1867. Mexico City fell soon afterward. Aristocratic Polish émigré John Sobieski, a veteran of the Civil

61 Ibid., 39-40. Miguel Miramón was the former conservative president and commander of the imperial army, who was shot alongside Maximilian and General Tomás Mejía. Like Juarez, Mejía was of full indigenous stock.

62 Hamnett, Juárez, 186.
War and colonel in the Mexican republican army, was captain of the reserve firing squad, so designated after the death sentence of June 19. He had been had been expelled from northern Italy years earlier by Maximilan, who was a provincial Hapsburg archduke at the time. “Well, time rounds out all things,” the condemned man told Sobieski, who later returned to the U.S.⁶³

After the fall of what remained of the imperial army in Mexico City, the American legionnaires were frustrated in attempts to collect from the restored republican government. Most ended up accepting three hundred dollars in silver to settle accounts and left for the United States by August of the next year. Colonel Green remained in Mexico until his death some forty-five years later. Wartime business concessions offered to potential American investors never materialized; General Lew Wallace later accepted $15,000 in compensation. The United States-Mexican Claims Commission, established in 1869 to settle such disputes, rarely ruled in favor of Americans.⁶⁴ Diplomatic and economic ties between the two nation-states and former enemies strengthened thereafter, into the 20th century. Republican Mexico would become a “constitutional dictatorship” under Porfirio Díaz; and the United States became his top foreign investor.

Conclusion

The fragmented Republic that struggled to create “Mexicans in Mexico” eventually succeeded in uniting groups as varied as the rural working and hacendado classes; elites and professionals of the capitol; diverse regions of Indians and mestizos in the central, coastal, and southern areas, and former bandits who later incorporated as a cruel and effective police force of


⁶⁴ Miller, “Arms,” 47.
rurales. Until his death in 1872, the postwar machine organized by Juárez and his partisans held together most regions of the republic despite armed rebellions and contentious rivals.

The constitutional dictatorship that then emerged under Díaz and which survived for thirty-five years was a particularly Mexican brand of liberal republicanism. The wars of the Reform and of the French Intervention gave it an indigenous martial flavor, but its warlike characteristics were mirrored in the European revolutions of 1848, the wars for Italian unification, and the U.S. Civil War – all of them the products of a post-monarchical world of changing politics and economics. Enlightenment ideals of social progress, rising industrialization – as opposed to agrarianism – the growth of literacy, and the building of republican nation-states were viewed among liberals of the Western world as panaceas for social and economic ills. The need for changing the old monarchical world order led to many forms of violence and revolution, either internally in France, or in nationalist movements of the Austrian Empire and Italy. European and American mercenaries, along with Juarist liberals, saw in Mexico a theater in the battle for “progress” – which proved elusive after the battle there was won.

The new, republican Mexico that emerged – a nation and population beginning to understand the concept of “citizenship” – came about in relation to the European “other.” By its presence and actions, the French Second Empire of Louis Napoleon propagated the Mexicanization of mostly rural inhabitants strongly attached to localities (la patria chica) rather than a nebulous, far-reaching “Mexico.” The Mexican Republic was embraced as a patriotic institution as it had not been prior to 1862. The significance of that historical occurrence was that Mexico was a place so strong with traditions of regionalism, some of them pre-modern in origin. Although, by tradition, the French Intervention is viewed by Mexicans today as a war between
national armies, the bulk of republican forces consisted of irregular guerillas assembled in individual states.

Viewed from a nationalistic perspective, the juaristas were not technically insurgents – their government could rightly claim legitimacy. But the war on individual fronts could be construed as a conflict of multiple insurgencies, loosely affiliated with one another, and collectively called “republican” in the Western sense. Their resistance against the French occupation is properly understood as a series of regional conflicts both locally, and in the context of transatlantic republican warfare in the nineteenth century. The reverberations of republican warfare in Europe and the United States contributed to Mexico’s emergent “imagined community”; a population of eight million that, by and large, would forever afterward understand the idea and practice of republican citizenship within a unified national framework.65

Then we shall begin all over again … But we will fight no more pitched battles with the French. We shall stop fighting Bazaine his way and make him fight our way.66

-- “Benito Juarez”

During the spring of 1863, as French troops laid siege to the city of Puebla and soon were inching toward military control of the national capitol, an image on the masthead of La Chinaca, a Mexico City newspaper, was clear to readers who paid attention.67 A youthful, barefoot soldier – perhaps a bugle boy -- is reading the paper to an assembled, apparently illiterate audience that includes an older soldier, a young boy, and an Indian (or mestiza) woman. Towering in size over the others, leaning over and listening intently -- next to his horse --is a man for whom the nationalist verses of the paper were meant. Writers generically described such men as chinacos; groups of guerrilla horsemen later to be mythologized as symbols of patriotic resistance to the French. The poetry and song lyrics therein aimed to reinforce an idea among members of such a regional class of rural workers: that their economic interests and cultural values were compatible with the Juarist Republic. Such verses were meant to be read aloud to these largely illiterate workers, who were nonetheless skilled with horses, lances, and guns.

The French army was four months away from marching into Mexico City; negotiations were underway for Maximilian to except the throne of a Mexican Empire. In preparation for the French onslaught, the writers of La Chinaca were calling to war an already mobile and armed group of men, of both mixed-race and Spanish American ancestry; an emergent working class in an endangered liberal republic. The writers adopted a composite image of rural central Mexicans


67For example, see La Chinaca, March 12, 1863, 1.
in their attempts to wrap martial propaganda in popular culture, in response to imminent war.

From the fall of Puebla in June of 1863 until the spring of 1867, (when European forces officially pulled out of Mexico), guerrilla warfare and its suppression in central Mexico was unceasing and exceptionally violent; the level of gunfire in some towns and cities, on haciendas, and rural roads appeared to some witnesses as tumultuous storms of blasts, bullets and musket balls, ricochets and bloodied bodies. Nowhere in Mexico would French ‘justice’ be more severe. The irregular status of such guerrilla fighters left them outside the strained legal logic behind the French occupation. By October of 1865, any person captured bearing arms against European occupiers or the Mexican Empire meant almost certain execution. The term *chinaco* is of obscure, possibly of Nahuatl origins. But it is clear the newspaper referred to men specifically of rural central Mexico, and that the term was not universally applied to rank-and-file republican soldiers, as it would be later, during periods of heightened national awareness. *La Chinaca* began publication about a month before the battle of Puebla on May 5, 1862, where an outnumbered Mexican force defeated thousands of invading French troops. The paper was available for an “eighth of a real” – less than one cent U.S. at the time. It provided its readers with images and descriptions of the republic’s potential defenders, men linked to *rancho* culture who had almost no formal schooling or military training, but who lived flexible if turbulent lives on horseback, armed with characteristic, pennant-draped lances in the European style, wearing an early version of the distinctive *sombrero* that would in future years become a symbol of Mexican nationalism and ethnicity. An anonymous writer described an imagined “chinaco” as follows, in September of 1862.

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Crossing the plains
Swift as a gale
Mounted on his beautiful black horse
The brave *chinaco* Juan
Leaving behind his little village
A column of smoke is seen
Which sprouts from his hut
That he leaves to contemplate
Until he crosses the mountain
Leaves his little valley behind
And goodbye to his loving mother
Who sobs in her loneliness
Bent over the cradle
In which she rocked her Juan
In other days passed
Never to return …

The accompanying illustration shows a man on horseback, slightly stooped, carrying his lance with pennant. His facial features are obscured but somewhat caricatured, with protruding nose and lips. Unlike fighters in other regional forms of irregular resistance to the French and Mexican imperialists – as in some indigenous communities -- “Juan” fights away from home; “never to return” regardless of the pain caused to family members. In an additional passage, his “virgin love … knows nothing but to cry.” And, “when the sun of death shines on him/He will sleep in the arms of his *Patria* (Fatherland)/as in a nuptial bed.” The anonymous author affirmed the impending death of “Juan” in the poem’s call to war.

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69*La Chinaca*, Sept. 4, 1862, 4.
The group represented by “Juan” was a creation of an unstable economy born of civil upheaval and land reform. Its collective feelings for la Patria (the homeland) were shaped by changing arrangements of land and power, and the economic vacuum they filled during mid-century. They were relatively numerous, living apart from larger cities and towns, and for most of the first half of the nineteenth century, operated within family units attached to hacienda landholdings. After 1850, for example, the hacienda of Cojumatlán based in western Michoacán contained about 1,000 inhabitants, including families and single residents living in some 200 huts within its rangelands: “A hut with a roof of leaves and walls of stick and mud, which anyone could make … They ate simply and abundantly.”

Rural life and culture as embodied on the ranchos was an identity tied to land and the relationships families had to it. And those relationships were in the midst of a transformation connected to the liberal policies emanating from Mexico City during the period of Reform (1855-1857); after liberals seized power from dictator Antonio Lopez de Santa Anna and his conservative allies.

In the years between the Reform program (see the Introduction) and liberal constitution of 1857, and the major French offensive in the spring of 1863, landownership and rural economics underwent a process of radical change, the final outcome of which was by no means certain at the start of the occupation. The Ley Lerdo (Lerdo Law) led to accelerated redistribution of remaining Church holdings in central Mexico, and it called for privatization of communal indigenous lands. Reform policies led to a proliferation of upwardly mobile landowners in rural areas outside the perimeters of Mexico City, itself a traditional stronghold of conservative politics and governance. Expansion-oriented hacendados and prospective ranchers took advantage of opportunities that came with continued disamortization of ecclesiastical properties,

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70 Luis González, Pueblo en Vilo: Microhistoria de San Jose de Gracia (Guanajuato: Colegio de Mexico, Centro de Estudios Mexicanos, 1968), 85.
and faced contentious litigation with traditional indigenous communities over the reparto, which threatened their colonial land rights. At the same time, traditional hacienda-based agrarian structures were weakened through years of civil war, heavy debt, and bankruptcies, leading to the emergence of independent ranchos, particularly in Michoacán.  

Growth in rancho ownership cultivated a working class culture based on them. The chinacos, or whatever one chose to call them, were not so much a manifestation of “popular resistance,” as is often perceived in Mexico, as “popular liberalism.” They were not revolutionaries but defenders of changing status quos, potential capitalists as well as workers. This mobile working class formed a recruiting ground for republican armies in central Mexico, such they were. And it also produced the guerrilla horsemen of central Mexico – chinacos – which pestered the French and Mexican imperialist with irregular warfare. This is true, again, in Michoacán, where guerrilla activity increased after October of 1865, when anyone caught raising arms against the Empire faced swift execution, as explained below. Such stubborn resistance came out of the necessity to defend any perceived gains related to changes in land relationships.

The newspaper La Chinaca captured the imagined cultural traits of rural life and ranchero sentiments, and attempted to orient them toward warfare during its brief time of publication,

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from March 1862 through May of 1863. An example from May 1, 1862 – four days before the Mexican victory at Puebla – reiterated the theme of sacrifice and bloodshed:

SONG OF WAR

In each man, the foreigner can perceive a warrior

The future is ours,

their cannons already rumble,

Their graves or our graves!

To succeed or to die!

Goodbye to our workshops,

Good bye to our women,

To our children, good bye.

Victory is offering us

In our palms the glory.

God is with us …

In another poem – or song – called “The March,” the language was more graphic: “Revenge or Perish! War! War! The earth is thirsty for French blood.” \(^{73}\) It appeared in the paper three days after the battle of May 5 at Puebla.

Commentaries in *La Chinaca* could also be eclectic and comedic in style, appealing to everyday aspects of rural working life, despite such poetic but dark messages in regard to prospective guerrillas. While covering events on French hostilities in Mexico or the impending arrival of Maximilian, and in between myriad nationalist odes, writers could capture items of

\(^{73}\) *La Chinaca*, No 6, May 1, 1862, 4; *La Chinaca*, No. 8, May 8, 1862, 2.
rural subaltern culture in humorous ways. Perhaps knowledgeable of the familiar habits of peasants and workers of Michoacán, an anonymous columnist, “La Marihuana,” wrote on the effects of drinking fragments of a certain plant served “in the coffee”:

It evoked memories of excursions to the South … rapid hallucination, lucidity, peaceful dreams, foresight, the faculty of knowing thoughts, even secrets, knowledge of all languages, when not possessing the ability to speak them.74

The assembled writers of La Chinaca were among the most well-known liberals of the Juarist circle, among them Guillermo Prieto, who occupied various government posts, and would become Mexico’s poet laureate during the Porfirian years (1876-1911). Another, Jose Maria Iglesias, was a journalist and newspaper editor who was also prominent in the Juarez administration. Both men – Mexico City natives -- accompanied the mobile government in its flight from Mexico City, then to San Luis Potosí and points north. Pedro Santacilia, a dissident of colonial Cuba, would become Juarez’ son-in-law, and later looked after the republican

74Ibid., Sept. 1, 1862, 3; See Alan Knight, “Popular Culture and the Revolutionary State in Mexico, 1910-1940,” Hispanic American Historical Review, Vol. 7:3 (Aug., 1995), 443.
president’s wife and family during their New York exile. Others included Francisco Schiafino, of whom little information has survived: He was once a military adjutant of General Antonio Lopez de Santa Anna, and is credited among the authors of an account of the Mexican American War, which was translated into English.  

Alfredo Chavero, another writer, was later among the collaborators of Vicente Riva Palacio in his epic history, *Mexico a través de los siglos*; a lawyer, prominent liberal politician, and archeologist. How such men of middle-class and intellectual sensibilities captured on paper the working-class *ranchero* culture of central Mexico, and their effectiveness in recruitment, is obscure. They were successful, however, in articulating an image of culturally Hispanised hacienda and ranchero horsemen as a distinct group identified with the republican cause, who asserted space and identity in a changing political and economic landscape.

The idealized cultural traits of ranchero men and families were captured in popular culture of the mid-nineteenth century, including during the Intervention period. Engaged in warfare, they are described specifically in relatively few instances. But images of *rancheros* were established in popular culture by the time the French took Puebla in June of 1863; such images continued to circulate during the occupation. During the Intervention period, for example, author and printer Luis Gonzaga Inclán published his novel *Astucia*, about the ranchero leader of a gang of tobacco smugglers who defy customs officials. Inclán was not a target of retaliation by authorities, and the novel was not overtly political in nature.

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Contemporary popular culture depictions and at least one modern study indicate the cultural traits, tranquil living conditions, and relative solitude of ranchero families. More than ten years before the French invasion, romantic images of ranch life and culture were published in *La Ilustración Mexicana*, a Mexico City magazine that sought to “correct the vices and defects that, because of disgrace, afflict society, for sometimes advice and perceptions are not enough; against them lay a terrible weapon, ridicule.”\(^{77}\) In satirical fashion, the magazine criticized aspects of Mexican daily life, but also described the ranch worker in terms which idealized his culture:

Loving and affectionate with his family, officious and loyal in friendship, the *ranchero* has, in the end, the virtues and defects of men who live separately from society; it is ingenuous and good to be as them; it is also raw and energetic.\(^{78}\)

The accompanying illustrations feature mounted *rancheros* wearing wide-brimmed hats, long *serapes*, and wide-bottomed chaps, along with machetes and muskets. Its images of women in the same culture show them wearing long, wide dresses, or *faldas*, with their hair rolled up in buns. One woman wears a *rebozo* (shawl) that covers her head and torso, carrying a wrapped infant. Writing in the 1960s, Luis Gonzalez stated of ranch life and workers, “It was a regimen of seasonal cycles, but not entirely dependent on them. Also, if it was possible to pass the time without working, (they subsisted) with very little effort, the free air, the shade of the oaks, or living, eating, sleeping, and dreaming while mounted on good horse.”\(^{79}\) Vicente Riva Palacio, future governor of Michoacán and military commander in the state during the French occupation, described a family of four “chinacos” – parents and two children – who would not compromise

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\(^{78}\) Ibid., 1178.

with “the intervention” even as they were uprooted from their home during battle.\textsuperscript{80} Rural horsemen and their families, alongside others of the central Mexican working class, were important in maintaining a collective front against militarily superior French and imperialist armies.

Contemporary descriptions of mounted guerrillas, which are scant, resemble the popular images of both “chinacos” and ranch workers. “The irregular squadrons wore red shirts and the great national sombrero,” recalled a European observer. “They were called ‘chinacos’ and they were explorers comparable to the Cossacks. Their animals, of small size, but vigorous, were fatigued and little cared for.” Their firearms ranged from revolvers, sabres and muskets to modern Enfield carbines during the course of the war.\textsuperscript{81} Their skills, it was said, allowed them to outmaneuver traditional French cavalry. In forests or in rocky terrain, rancheros had the upper hand, because of sheer skill and smaller horses, as one Mexican contemporary wrote:

The French cavalry attack is impressive and terrible; but it needs open space to function, and charges in tight formation, where discipline is practical, or, lacking these conditions, where surprise is possible; but, from the moment the attack coverts into individual combat, because as such the terrain demands it … the French are way behind our chinacos, who in many instances profit by the occasion of darse gusto (“give it good”), as they say … What does it serve, in the thickness of a forest, those corpulent (horses) of the French dragoons, before the lightness of our small, but vivacious horses, whose rider can move it with a finger?\textsuperscript{82} (Original emphasis)

\begin{itemize}
\item[\textsuperscript{80}] Vicente Riva Palacio, Calvario y Tabor: Novela historica y de costumbres (Mexico: Manuel C. de Villegas y Compañía, 1868), 176.
\item[\textsuperscript{81}] Martín Quirarte, Historiografía sobre el Imperio de Maximiliano (Mexico: Universidad Nacional Autónoma de México, Instituto de Investigaciones Históricas, 1970), 234. The passage quoted is excerpted from Albert Hans, La Guerre du Mexique selon les Mexicains (Paris: Berger-Levrault & Cía, 1899).
\item[\textsuperscript{82}] Eduardo Ruiz, Historia de la guerra de Intervención en Michoacán (Mexico: Oficina Tipográfica de la Secretaría de Fomento, 1896), 60.
\end{itemize}
At the outset, judging by La Chinaca’s depictions of “Juan,” they fought in campaigns away from home. Much of the fighting against foreign and domestic forces was carried out by such individuals of horse and ranch culture, who were supported by rural families and communities.

Rural working families of central Mexico, accustomed to civil war and a countryside infested with bandits, saw opportunities in a liberal Reform program that led to shifting patterns of land ownership and economics. The men of these families were relatively undisciplined in traditional warfare, and dogged in defense of the rural culture from whence they came. Male ranchero workers comprised the bulk of several dozen guerrilla bands operating independently, but often in concert with regular republican forces, and were the among the soldiers of the semi-independent forces of liberal military and political leaders such as Riva Palacio of Michoacán, Manuel Doblado of Guanajuato, the entrepreneurial Cravioto family of Puebla, and José María Chavez of Aguascalientes. They served either under leaders of their own class – who appear somewhat fleetingly in the historical record -- or in the armies of “establishment” liberals attuned to rural values and culture, such as Riva Palacio, a native of Mexico City who entered the War of the Reform on the liberal side before becoming a republican officer based in Michoacán.

Although the irregular forces of central Mexico never forced the French out of major cities, and did not replace imperialist authority in its designated districts, guerrilla violence was incessant, the possibility of death from battle or execution lingering daily during nearly four years of military occupation. At the outset of war the Juarist government counted on their loyalties.

A five-year period of civil war – beginning with the War of the Reform -- and grassroots mobilization had primed men of the central Mexican countryside for the upcoming French invasions of 1862 and 1863. By the end of 1861, British and Spanish occupation forces under the Tripartite agreement departed Veracruz. The French had moved inland, at Orizaba (Veracruz),
under agreement with the republican government of Mexico. Already, it was common knowledge in the Western world that the aim of the Second French Empire was military overthrow of republican Mexico, and enforcement of the laws of a monarchist new government. In the month preceding the first Battle of Puebla in 1862, liberal state officials in central Mexico circulated calls for irregular militias, planning for a period of sustained guerilla warfare:

Those citizens who attempt to organize guerrilla (armed groups), will request written permission from the Government, manifesting those elements with which you can be of best service. The Government will extend those respective rights, with previous information regarding honor, valor, and political opinions of the requester who favors Independence and Reform.83

The victory on May 5 gave juaristas in the central states time to prepare and recruit – and the French command had to postpone operations for a year. The second invasion, with at least 20,000 reinforcements from overseas, occurred the next year. In May of 1863, the republican army fell in Puebla after a two-month siege, with hundreds of soldiers and a handful of leading officers -- such as Porfirio Diaz and the Italian republican Luis Ghilardi – taken prisoner.

Local Mexican defense forces eventually scattered upon the advance of a superior French-led force of foreigners and Mexicans, including at least 5,000 new imperialist troops who had deserted Juarist armies. On May 21, French commander-in-chief General Forey, soon to be replaced by Achille-François Bazaine, decreed the confiscation of property of all who had taken up arms against the French, and who had not yet surrendered.84 French troops under generals Forey and Bazaine marched into the national capital in the first weeks of June. Patchwork

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83 “State Government: Freedom and Sovereignty of Mexico, Secretary of Relations and War. The Government of the State in accordance with the decree of the twelfth of this month stipulates that the following be observed: Regulation of Guerrillas, Article 1” (Printed announcement, dated April 21, 1862) Hidalgo State Archives (AGEH), Mexico, box 75, folder 6.

republican armies in neighboring states hastily organized, and braced themselves for eventual capitulation. Immediately after Forey arrived in the capital on June 10, French armies set out to occupy outlying cities, including Pachuca, the capital of Hidalgo. In apparently hurried fashion, the “Fourth Reserve Division” of the republican Central Army under General Felipe Berriozábal organized 1,800 infantry in the state of Mexico; and a cavalry brigade of 580 based out of Pachuca, while gathering twelve artillery pieces and 463,000 rounds of ammunition. By the end of October, however, the state capital was abandoned and under French administration.\textsuperscript{85} The liberal leadership abandoned Morelia at the end of November. Berriozabal’s combined central Mexican force, made up of regular infantry, cavalry, and irregular guerrillas on horseback, made one last attempt to capture the city the next month, as described below.

In September, republican forces in Guanajuato numbered slightly more than 2,200--including two separate guerrilla groups attached to the cavalry brigade. The larger of these groups was led by Francisco Cendejas, listed as “colonel” of his cavalry unit, labeled simply “Guerrilla.” He had been involved in liberal struggles since the Ayutla revolt that toppled Antonio Lopez de Santa Anna in 1855. About a year later, when Cendejas was shot and killed by a single, well-aimed bullet, his death was “lamented” by inhabitants of southern Guanajuato as one of its “major leaders.” His band of fighters, which fled without retaliation after Cendejas was killed, left behind eleven mules carrying loads of sugar, and two “hollow-backed” horses. He, like other guerrilla captains, appears very little in the historical record, as is the case with his fellow guerrilla commander of the Guanajuato “First Division, Reserve Army,” Rafael Tavera. In the reserve army, about 1,600 of which were infantry, the Cendejas and Tavera groups were

\textsuperscript{85}Secretaría de Defensa Nacional, Archivo Historico Militar (AHM), XI/481.4/9021, foja 30. Berriozábal was one of the officers who escaped after the fall of Puebla in May.
attached to “guerrilla” cavalry units, along with five official “squadrons.” The presence of cavalry chiefs Cendejas and Tavera, commanding units named after them but not incorporated into the regular ranks, indicates accepted terms of negotiation between independent guerrillas and juarista military officials ahead of the ultimate French victory. Such armed and mounted bands, in this case numbering a combined 246 fighters under Cendejas and Tavera, are listed as legitimate troops of the Republic in reports to Ministry of War in Mexico City. Reports by imperialist officers responsible for Cendejas’ demise called his group “bandidos” rather than “dissidents”; the latter was a commonly applied term used to identify irregular republican forces by the official imperial newspaper. Such were irregular units fighting under formal commands.

Morelia, the Michoacán capital, abandoned by liberal officials by November 30, 1863, was the target of a new attack by the combined central Mexican force the next month. The attempt failed, and the losers incurred several hundred casualties. Afterward, it was clear to the central republican leadership that traditional means of military defense – holding onto population centers with mostly infantry – would fail against French-led troops. Other capitals of the central states were also abandoned without a fight by the end of the year, including Aguascalientes, Guanajuato, and Querétaro. The battle for Morelia was a particularly brutal campaign, however; the last attempt at traditional warfare in Michoacán for several years, it marked the start of the guerrilla campaign in that state. French troops had moved out of Morelia in pursuit of other republican troops under General Uraga -- who eventually switched sides -- in the past month. Conservative troops under General Leonardo Marquez remained to defend what had been the republican state capital. The withdrawal of French soldiers to other parts of central Mexico

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motivated republican commanders aware of the strategic value of controlling the city’s core area: a central plaza surrounded by colonial structures suitable for dense. The Mexican imperialist forces in Michoacán, however, were still untested in warfare.

The republicans attacked before dawn on December 18, at five entry points of the city, under command of General Berriozábal. Officers included Juan B. Caamaño, heading the “Toluca (Mexico) Division,” and Spanish-born republican veteran Nicolas Régules, whose unit was called the “Defenders of the Constitution” (of 1857). Four groups were called “lancers,” which denotes their status as cavalry: The lance was used in 19th century Western warfare for charging and spearing on horseback infantry columns marching out of formation, and as such were suitable for guerrilla warfare under military conditions of the nineteenth century. The groups were named, the “Lancers of Liberty”; “Lancers of Toluca” (in Mexico State); “Lancers of Guerrero” (state), and a “mixed brigade” called “Lancers of Huerta,” likely composed of both infantry and cavalry. Marquez had organized a vigorous defense that included trenches and the placement of “obstacles of every kind” put up to block streets.

The conservative general Marquez was an experienced officer known particularly for brutality during the War of the Reform, but his troops were untested against experienced republicans. They proved formidable, as fighting became vicious, in a block-by-block military struggle that “upholstered the ground with (bloody) cadavers … the air whistled sinisterly with lost bullets.” The main target of the republicans, the central plaza, was particularly intense in fighting. Witnesses reported “8,000 bullets per minute” in three hours of fighting; a “rain of

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87 Ruiz, Michoacán (Mexico: Oficio Tipografico de la Secretaria de Fomento, 1896), 33, 34; “The lance was used … ,” Prof. Robert Chisholm, Columbia Basin College. Interview, Jan. 21, 2011.

88 Ruiz, Michoacán, 34-35;
lead” on the plaza. In the end, Marquez’ trenches could not be entirely breeched, although republicans were able to enter several streets under a hail of bullets, sustaining heavy casualties, with bodies piling on the ground. And, although the attackers were able to penetrate some guarded parapets, hours passed without their gaining control of the central plaza. They withdrew.

More than 1,000 bodies lay on the streets in the aftermath of battle, mostly those of the attackers. Between 700 and 1,200 republican prisoners were taken, according to different accounts, and three hundred rifles -- “many of them magnificent” -- were seized. In the evening, liberal officials and captured military officers were executed on the grounds of two local inns. They were later buried inside horse stables, according to one source. Leonardo Marquez, despite being shot in the face during battle, survived and held a celebratory Mass at his home on New Year’s Day, which rounded out a day of activities that included a parade of soldiers marching to cheering crowds in Morelia, the seat of michoacano clericalism. Remnants of the Michoacán republican force, its surviving officers, and refugees of liberal sympathies from Morelia and smaller towns, fled to Uruapan, the second-largest city in the state, to establish the republican government of Michoacán. Several crates of the state archives were removed and transported, along with disassembled machinery parts that could be used for making arms--including an apparatus used for making copper coins, or tlacos. French General Felix Douay, at first pursuing republican commander-in-chief José López Uruga toward Jalisco, decided to turn his troops toward what was described as a “pilgrimage” approaching the city, including 3,000 horses and 2,000 disorganized troops. Rumors circulated among the French soldiers of barred silver and cash belonging to the republican high command. The guerrilla regiment, “Lancers of

“Liberty,” under a certain Colonel Ronda, fired the first “chinaco” volley since the fall of the capital. The mobile unit kept watch over the approaching French troops, alerted General Berriozábal to the advance, and scurried back, trading shots with a line of dragoons – light cavalry – before disappearing into the countryside west of Uruapan.  

A stream of refugee liberal sympathizers accompanied soldiers and officials – who hauled boxes of the state archives into the city. They were pursued by French troops and North Africa-based zuavos, who occupied the town by New Year’s Day, 1864. Although republican troops, irregular guerrillas, and refugees had apparently fled the French advance, the occupiers incurred the silent wrath of the townspeople. Shopkeepers were compelled to give up corn, bread, hay, and other goods, lodging and other services. The foreign soldiers celebrated the New Year loudly in their “horrible drunkenness.” The “miserable Indian women of the barrios, confidant that they could sell their fruit,” were targets of sexual assault. One woman, called a hetaira (“prostitute”) lay dead after being raped by multiple zuavo soldiers in her home. Scenes of pillage and vandalism were repeated in the next stop by French-led forces at Zitácuaro, a hotbed of liberal sympathies and frequent refuge of republican guerrillas. The venerated image of La Virgen de Zitácuaro, located in the plaza church, was dubbed “chinaca” by the chronicler Eduardo Ruiz -- adjutant to Riva Palacio -- because of the reverence of local Indians toward her. In March of 1864, the soldiers had entered and left images of La Virgen scattered on the ground. Afterward, the Indians displayed “symptoms of rebellion,” leading the French commander to withdraw after four hours. The Virgen, wrote Ruiz, “was a chinaca rather than a traitor.” The

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91 Ibid., Jan. 4, 1864, 15, 2; Ruiz, Michoacán, 53-55.

92 Ibid., 58. According to Ruiz, the archives were destroyed in a mysterious fire at the town plaza.
Indians of Zitacuaro became staunch supporters of the republican cause, and also its “the best scouts, the most faithful messengers, and the most expert spies.” 93

Although the red-shirted, expert horsemen of Michoacán became idealized war heroes in accounts by Ruiz and Riva Palacio after the war, they had stirred up the contemporary popular imagination enough to warrant “official” sanction by the Emperor Maximilian himself, during a visit by the imperial couple to Morelia in early October, 1864. Clad in sombrero and charro attire, the Emperor caused “bitterness among clerical officials in the city by sporting a red tie.94

However, rarely in personal narratives of the post-occupation years is there a specific individual identified as a chinaco. An exception is Nicolás Romero, one of several martyred guerrilla leaders of central Mexico, whose origins and biographical information are not well-documented. His existence is corroborated in Mexican military archives and in press accounts. Of obscure origins, he was said to have been a factory worker in Mexico City as a young man, before entering battle during the War of the Reform. By 1861, he was named a colonel – like Cendejas and Tavera, noted above – and at the head of a cavalry force active against conservative guerrillas in the state of Hidalgo and in the Mexico City area. 95

In early 1864, Romero, by then about 34 years of age, arrived in Michoacán with one hundred cavalrmen, placing himself at the disposal of Vicente Riva Palacio – himself a native of Mexico City, and at the time a subordinate military officer. During his relatively brief career as guerrilla commander during the occupation, Romero led about one hundred fifty riders, always attached to units of the “formal” republican army, which included both cavalry and

93 Ibid, 63-64, 78.
94 Ibid., 217.
95 Ibid, 120; AHM, XI/481.3/8214, fojas 57-59.
infantry. He specialized in surprise cavalry assaults on French and imperialist detachments – including a force of 1,200 in November of 1864 near the liberal stronghold of Zitácuaro, which endeared him to the local population. Details provided by Ruiz, who was apparently acquainted with him, described Romero in heroic terms that cloud the actual individual in idealized terms of admiration; words that echoed those of his boss Riva Palacio, who described Romero as a “semi-god, a species of myth”

(He was) Mestizo in which Indian blood predominated, his color was dark and smooth, hairless, with brown eyes that from time to time flashed, full of fire, but which ordinarily looked humble … Withdrawn in his mannerisms, his appearance was of someone wholly passive. Never had been seen a horseman like Nicolás Romero. He sat on his horse so naturally, as if he had been doing it his whole life.

By January of 1865, Riva Palacio was named governor and commander-in-chief in Michoacán by General Jose Maria Arteaga. The new chief summoned his guerrilla captains and officers to the relatively safe liberal haven at Zitácuaro to mobilize against French-Mexican forces. The impending arrival of enemy troops compelled him to flee the area, however, while Romero trailed him. His last military dispatch to Riva Palacio was sent en route to the meeting from the Papasindan ranch, where Romero injured his leg in a demonstration of horsemanship during a fiesta. Hobbled by the injury, he was captured in a surprise attack on the ranch in late January, 1865.

“In any case,” commented El Pájaro Verde. “Romero has to disappear from the scene, whether he is shot, or whether he is moved from the country. The presence of men like this always makes pacification illusory.” He and three others were shot by firing squad on March

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96 Riva Palacio, Calvario y Tabor, 58.
97 Ruiz, Michoacán, 120-121, 251-252.
20, at an execution site known as the “plaza de Mixcalco”—today the site of a popular marketplace. At his French-administered court martial, he was charged with the murders of a prominent resident named Julian Gutierrez and his children, during a guerrilla attack at the Metepec garrison in Mexico state. According to Ruiz, the family, along with conservative associates, had fired upon passing “chinacos” from their home. The infuriated guerrillas charged into the house and massacred its occupants. Such excesses by irregular forces were often cited by courts marshal in sentencing guerrilla chieftains to death, as in the case of Jose Maria Chavez of Aguascalientes, described below.99

Outside of Michoacán and Guanajuato, guerrilla activity in central Mexico declined sharply after declaration of the “black decree” of October 3, 1865. Signed by Maximilian—and approved by Napoleon III—the law codified and formalized what had been semi-common practice by the French military in the region. All persons caught bearing arms against the Empire, whether or not for political reasons “nor legally authorized” were subject to the death penalty within twenty-four hours. Such imperial courts martial applied to all who assisted guerrillas with goods or information, maintained communications with them, or failed to report their local presence, with sentences ranging from death to fines and imprisonment. In parts of central Mexico announcements were printed in both Spanish and Nahuatl. The law led to an immediate armed reaction by Guanajuato landowners against roving armed groups, as imperial officials happily reported soon after it took effect. The unceasing guerrilla activity in neighboring Michoacán, another state of the Bajío breadbasket region, continued to spill over into southern Guanajuato, especially incursions by republican guerrilla commander Manuel Pueblita, killed by

a zuavo sharpshooter in Uruapan in June of 1865.\textsuperscript{100} In states immediately surrounding Mexico City and the federal district, the only continuous increase in guerrilla actions, as reported by imperialist newspapers, occurred in Michoacán, at least in relation to 1864, the first full year of foreign occupation.\textsuperscript{101} Both in the latter state and in Guanajuato, such activity increased even after the “black decree”:

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<td>Querétaro</td>
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Source: Illihuhtsy Monroy Casillas, Los Chinacos: Resistencia popular en Mexico, 1862-1867.

The first significant casualty of the decree was General José Maria Arteaga, former governor and commander in Michoacán, who earlier in the year named Riva Palacio to replace him. In addition to the October 3 law, Marshal Bazaine issued his own circular shortly afterward dictating the means of execution, allowing no appeal for those caught with arms. Arteaga, who was held responsible for the murders of an imperial official and local sympathizer, was captured

\textsuperscript{100} AGEH (Hidalgo), ca. 15, exp. 44 (Printed announcement); Carlos Armando Preciado de Alba, Guanajuato en tiempos de la Intervención Francesa y el Segundo Imperio, (Guanajuato: Universidad de Guanajuato, 2007), 159-160; Ruiz, Michoacán, 401. Pueblita was official republican governor of Querétaro at the time of his death in Michoacán.

\textsuperscript{101} Illihuhtsy Monroy Casillas, Los Chinacos, 61.
and executed with three other commanders before the end of the month. “This is a war to the
death, a war without quarter which is engaged today between barbarism and civilization,”
Bazaine wrote. In fact, French-administered executions had been a standard fate awaiting
captured guerrillas, whose precarious legal position was further complicated by inevitable
atrocities of irregular warfare. On January 12, 1864, for example, seven men were executed in
Mexico City for “armed robbery in groups” – although tried by official court martial -- the first
such politically oriented mass executions reported by *El Pajaro Verde*. Plundering and
outright massacres by undisciplined troops could lead otherwise honorable guerrilla captains to
their deaths, as in the case of Chavez in Aguascalientes. His execution marked the defeat and
relative pacification of guerrilla forces in that state for the duration of the French military
presence. Relatively miniscule resistance in the state declined after establishment of the “black
degree.”

At the beginning of the French occupation, Aguascalientes, the northernmost of the
central states of Mexico, immediately south of Zacatecas state, was an agriculturally based
region of expansive haciendas concentrated among relatively few owners, as opposed to
Michoacán, for example, with its emergent sector of independent ranch lands and the breakup of
larger haciendas. The stranglehold of *hacendados* on land, water, and timber rights in
Aguascalientes was such that in 1861, Governor Esteban Ávila proposed, unsuccessfully,
fragmentation of their lands to be paid with an elevated tax system. Then as now, the state
contained less than 1 percent of the national land mass, as opposed to Michoacán and
Guanajuato, which contained about 3 percent and 1.6 percent, respectively. The population of the

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former state, for the French the most troublesome in central Mexico, was at 604,500 in 1860, which dwarfed that of tiny Aguascalientes, which contained about 87,000 at the same time. Geography, economics, and land distribution determined the extent and severity of resistance, if the two states are to be compared. In addition, the leadership and demographics of guerrilla forces in Aguascalientes proved ineffective and less resilient. Chavez, the fervent republican nationalist, lacked the grass-roots manpower, sympathetic population, and the large and diverse land mass that sustained guerrillas and their increasing activities over four years in Michoacán.

José Maria Chávez Alonso, originally a native of Jalisco, arrived with his family as a child in the capitol city of Aguascalientes, established himself as an entrepreneur and newspaper publisher as an adult, running businesses ranging from transport to carpentry. In politics, he was firmly on the liberal republican side, but Chávez would discover the unstable political atmosphere of Aguascalientes upon being appointed briefly as interim governor in 1859. The state government was hotly contested by liberal and conservative factions, most of them large landowners; the governor was accused of being indecisive, failing to mediate the political infighting. Local conservative political sentiment was also strong during and after the War of the Reform, and the state was not technically “liberal” in the sense that liberals were not the dominant faction among representatives in the statehouse. However, in October 1862, Chávez was elected governor under provisions of the liberal Constitution of 1857. This occurred after the previous governor, the liberal Ávila, had been removed by order of President Juarez, due to

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105 “José Maria Chávez Alonso,” n.a., in Archivali No. 1, August 1994 (State Government of Aguascalientes), 7-9.
continuing insurgent threats. As governor a second time, Chávez faced the imminent overthrow of his government by reactionary guerrillas and bandit groups with conservative sympathies.\textsuperscript{106}

Armed groups numbering several hundred continually threatened the state capitol, and had briefly occupied it in November and in March. Combined groups under conservative colonel Valeriano Larrumbide and bandit chieftain Juan Chavez overtook the central plaza of the city on April 13, 1863, while a fortified section remained in republican hands, held by armed local residents. “The prolonged and stubborn struggle that you have sustained against those bandits, (gives you soldiers) the stamp of more than glory in your military career that yesterday and today you have sustained with the unique bright shine of the soldiers of Aguascalientes,” Governor Chávez wrote and printed in his “official” state newspaper; while surrounded by his adversaries in the city. Until the march of French troops north from Mexico City that fall, he was able to maintain what remained of his government and to communicate with the Juárez government in Mexico City, which requested his military assistance in establishing a toll system.\textsuperscript{107}

Upon arrival of the French under Bazaine and General Castagny in November 1863, friendly residents of the state capitol provided lodging for the French soldiers. Zuavo soldiers and their mounted counterparts, \textit{cazadores de Africa} (Chasseurs d’Afrique) were greeted with an “avalanche” of cheers by other residents who turned out to greet them. The bandit chieftain -- or conservative guerrilla -- Juan Chávez was soon named imperial prefect of the Aguascalientes region. His liberal namesake and adversary, José Maria Chávez, fled the city to conduct guerrilla

\textsuperscript{106} Agustín R. González, \textit{Historia del estado de Aguascalientes} (Mexico City: Libreria, Tipografia y Litografia de V. Villada, 1881), 273, 326, 329.

\textsuperscript{107} \textit{La Revista}, Vol. I, No. 26, April 16, 1863, 1; AHM, 481.4/9018, foja 2, J. Rangel to the Minister of War, Mexico City, April 13, 1863.
operations in the Aguascalientes-Zacatecas border region for the next several months, organizing his own short-lived corps of volunteers, the “Lancers of Aguascalientes.”

As a guerrilla leader and republican governor of Aguascalientes, José María Chávez attempted to recruit local townsfolk, but attracted few new soldiers. With little popular support or resources, the military inexperience of Chavez and his officers, who commanded force of between 400 and 500, was tragically displayed in late March, 1864.

On Good Friday, the force attacked the Malpaso hacienda near the Zacatecas border, with no clear military objective. Official imperial sources cited twelve wounded and twenty-two dead, including women, the elderly, and children. Afterward, the Chavez force headed north into Zacatecas, stopping to rest at Jerez, just east of the occupied state capitol. A combined French-Mexican force surprised the sleeping guerrillas, including Chavez, taking sixty-two prisoners, and leaving one hundred dead, decimating the only resistance based in Aguascalientes at the time. Four of his commanders and one guerrilla chief, Benito Calera, were shot by firing squad in Jerez. Chavez, who suffered two lance wounds, was taken to Zacatecas city for court marshal as directed by Bazaine, and sentenced to death. Despite a petition signed by friends and supporters in Aguascalientes and Zacatecas, he and eight of his officers were executed in the plaza of the Malpaso hacienda on April 5. “I die with the intent to defend the independence of

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108 Gonzalez, Aguascalientes, 338; Dabbs, The French Army, 89; “José Maria Chávez,” 10.


my Patria (homeland),” he wrote his wife. “And do not believe I have done any wrong; if that is the case, please, God, forgive me, I am in your hands.” He left behind thirteen children.\textsuperscript{111}

Such were the differences in geography, economics, and demographics of central Mexico, and the fact that local resistance was guided and directed by liberal political actors, that military outcomes and local support reflected the political relationship of working people to the lands they worked. In the case of Michoacán, a larger state where regular and irregular republican forces enjoyed pockets of local support, as in Zitácuaro, republican commanders had a broader recruitment base. It also contained larger numbers of emergent landowners and workers of both agricultural and ranchero backgrounds. The resilience of guerrillas in Michoacán correlates with the breakup of larger landholdings and destabilization of land ownership that emerged with the Mexican Reform program that took shape in 1857, as explained more fully in the introduction. Aguascalientes, being smaller than either the latter state or Guanajuato, for example, presented unique problems for the Juarists of central Mexico, as a smaller state with more land stability.

However, the case of Michoacán, where several hundred republican soldiers and guerrillas were led by several commanders who originally operated outside the area, such as Riva Palacio, Berriozabal, Romero, and Arteaga, demonstrates the importance of that region to the republican high command under Juarez. Resistance was supported by geopolitical and economic currents rippling through the state since the War of the Reform (1857-1860), and continued even as executions increased. The relationship of workers, families, and culture to warfare in the state during the Intervention is open for further investigation. Liberal politics within the rangelands of Michoacán are even more difficult to gauge when measuring whether

\textsuperscript{111} Gonzalez, Aguascalientes, 348-349; “José Maria Chávez,” 7.
the Church enjoyed much rural support there, or elsewhere outside major cities within the state. But the evidence thus far demonstrates that republican support in central Mexico was related to relationships between workers and land. Related to those relationships were issues of political space and “place.” Again, such issues were related to land use and ownership.

The links between ranch lands and church at the time of the French occupation – or lack thereof – are unclear. The religious undercurrent in Michoacán – home state of Pelagio Antonio de Labastida, contemporary archbishop of Mexico, and member of the triumvirate that awaited Maximilian’s arrival – suggests a degree of religious familiarity, if not hostility among rancho inhabitants, particularly. According to Luis González, rural families of central Michoacán were “distant from sacerdotal residences … it is not known if they made pilgrimages to sacred places, or to places where images were venerated.” But families took part in ritualistic accoutrements of the Church: regular prayers at home, organization of annual festivals, baptismals, and paying of tithes.¹¹² Again, further research is needed to determine connections between religiosity in Michoacán and other states of mixed agrarian economics and culture, and republican support.

Another factor making warfare more complicated for the French forces, along with Mexican imperialist and foreign mercenary troops, was the proliferation of rural bandit groups in central Mexico. Since independence in 1821, and through scores of changes in government and civil war, many of them became embedded in the socio-political fabric of the region, with some leaders assuming a type of warlord status. By the 1860s, travelers through central Mexico had grown accustomed to them; even bringing extra coins for the purpose of satisfying the robbers.¹¹³

¹¹² Gonzales, Pueblo, 86.

The bandits had fought on both the conservative and liberal sides in the War of the Reform. And when the French pacified the population centers of central Mexico after 1863, Juarez and his leaders sought their assistance in destabilizing the region, often deputizing them as republicans.114

Notable among the bandits are several groups of paramilitary *plateados* -- named for their silver adornments. Before the occupation, they plundered towns and haciendas in what is now Morelos state, and sold stolen goods to local “contrabandista” ranchers in the years immediately before and during the occupation. Comprised of the “indigenous and mestizo races,” they held hacienda owners hostage to their whims, and were often provided with shelter and goods. Along with plunder and skill with horses, guns, and lances, they were known for their broad-brimmed sombreros and flamboyant attire. Even as the French withdrew after the disastrous Battle of Puebla, military officers in Cuernavaca appeared more concerned about potential threats from such bandits than foreign invaders.115 The Juarez government issued an amnesty for such groups in exchange for waging guerrilla war on French forces in the region, although they were known to switch sides if the price was right. As the war of intervention progressed, so did the spread of “plateado” groups outside of Morelos, then part of the state of Mexico, to other central Mexican regions, including Puebla, where they were recruited into the forces of muleteer and local political boss Rafael Cravioto, and often condemned in the imperialist press for their excesses.116

114 Ibid., 6-7.


However, such bands, often called “gavillas” (sheaves) by the French and imperialist Mexicans, are of different types than the horsemen exalted by writers of La Chinaca: which brings us back to “Juan,” the fictional character described at the beginning of this chapter. His description was not that of a well-dressed man, and he was generally place-bound. He had his own horse, but the poem describes his home as a hut, in which he lived with his mother, and apparently did so from birth. “Juan” was a worker tied to the local agrarian economy, likely associated with cattle-raising. But for now, he remains elusive as a living person. Further study is warranted to further uncover issues of identity, economics, and land regarding “Juan” and his peers, and the role that emergent ranch owners and their workers in particular played in nineteenth century Mexico. “This class formed a broad, middle segment in agrarian society,” wrote David Brading. “However, the significance of this class resides not so much in numbers as in its strategic social position between the landed elite and the mass of countrydwellers (sic).”\textsuperscript{117}

The multi-level social changes of Mexico – of which “Juan” was part – collided with Old World militarism and a Western world on the verge of global expansion. The rising imperial powers Great Britain and France were still a few decades away from the “scramble for Africa.” But the French military establishment and Napoleon III – and European powers in general – could scarcely comprehend the nature of social change surging through a tattered Mexico at mid-century. Even with past guerrilla experience in Algeria, the French faced internal conditions in central Mexico far from anything in recent collective memory. The land and people in central Mexico, and particularly in Michoacán, were situated in an historic moment that reflected the broader, violent changes wrought by republicanism throughout the Americas. The republican wars of the transatlantic world took on uniquely Mexican characteristics in the central states,

\textsuperscript{117}Brading, \textit{Haciendas and Ranchos}, 38.
amid societies suited toward irregular warfare at that particular moment. It was a complex world reflecting volcanic political currents few Europeans could yet grasp.
The esteemed President (Juarez) condemns energetically how abuse in this State is made through brutal force, condemns the war that is made against the indigenous … because it can be given the same horrible character of the exploitation of their brothers among the unhappy castes of Africa … It is no surprise, then, that death arose from the war the indigenous have made against those so-called whites in Yucatan.\textsuperscript{118}

\begin{quote}
-- Melchor Ocampo, Cabinet Minister of the Mexican Republic (1859)
\end{quote}

\begin{quote}
… Every hostility or act of rebellion against the Government, implicates a criminal connivance with the Indian savages, enemies of society and of civilization, due to such a case bringing disgrace upon the Government to see its troops obligated to retire from its military lines, leaving free the camps of the barbarians …\textsuperscript{119}
\end{quote}

\begin{quote}
-- Domingo Bureau, Imperial Commissioner of the Mexican Empire, Yucatan (1866)
\end{quote}

The scion of an elite local family, José María Martínez de Arredondo was appointed Imperial Prefect of southern Yucatan in March of 1865, serving under a provincial government loyal to Maximilan von Hapsburg at Mexico City.\textsuperscript{120} The peninsular states of Yucatan and Campeche had fallen to pro-French military forces in a \textit{golpe de estado} less than two years earlier, and were now joined under a regional dictatorship. Martínez had arrived from various travels to take political charge of an area containing hundreds of “pacified” Maya Indians, or \textit{pacifcos}. The territory straddled the frontier separating Hispanic Yucatan from the insurgent

\textsuperscript{118} Marie Lapointe, \textit{Los Mayas Rebeldes de Yucatan} (Zamora: Colegio de Michoacán, 1983), 117.

\textsuperscript{119} \textit{La Guerra de Castas} (Mérida), No. 5, Sept. 8, 1866, 1.

\textsuperscript{120} See Terry Rugeley, \textit{Rebellion Now and Forever: Mayas, Hispanics, and Caste War Violence in Yucatan, 1800-1880} (Stanford: Stanford University Press, 2009), 147-149. Rugeley called Martínez the “era’s greatest confidence man.” He had been a fugitive suspected of slave trading at one time, but apparently pardoned due to connections with Mérida officials of the Mexican Empire; See Centro de Apoyo a la Investigación Histórica de Yucatan, Archivo Histórico (CAIHY-AH), Correspondence of José María Arredondo, Vol.XLVII, exp. 42; Also “Oficio por el que José María Martínez de Arredondo nombra un juez de paz en Mesapich,” Mesapich, March 27, 1865, 1 foja,), CAIHY, Vol. XLVII, exp. 43; Fausto Sanchez Novelo, \textit{Yucatan durante la Intervención Francesa} (Mérida: Maldonado Editores, 1983), 88.
Maya at Chan Santa Cruz, which stretched along the eastern coast. Martinez approached his new job aggressively, but often governed arbitrarily. It was hazardous, but he found that out too late.

The Mexican Empire’s war against the Mayas to the east, and also against scattered republican forces in the neighboring Campeche territory, required revenue. On Martinez’ orders, new tariffs were required on goods produced in and around Mesapich, the district seat where he resided. The price paid by Maya to transport goods such as lard, pigs, cotton, beans, tobacco, and rice was one real on all items, whether they were leaving or entering Mesapich.121 In another order of the prefect, strangers entering town required papers of identification, to prevent Indians from escaping work duties in surrounding areas. In another case, a widow named Leandra Keb and a compadre, Isidoro Chan, were given more than thirty lashes between them for taking part in an unauthorized transaction of fifty-eight pesos, which involved an inheritance. Martinez kept the money. By September, an official lawyer for the Indians -- defensor de indios -- relayed complaints about the prefect to the Imperial Commissioner for Yucatan, José Salazar Ilarregui. Perhaps aware of the sensitive relations between Mayas and Hispanic yucatecos in the heart of pacífico territory, the Commissioner considered removing Martinez from office. Sensing trouble, Martinez dashed off letters to his boss, inquiring as to his status. They were not answered.122

And then came the reckoning. One day while his subprefect, Pablo Encalada, busied himself in the town plaza, settling a few minor disputes at a local gathering, Martinez reclined on a hammock nearby in his home. As the “judicial” matters were finalized by Encalada, about one hundred Indians of the district suddenly burst onto the plaza, some armed with machetes, others

121 One real was equal to 12.5 centavos, or an eighth of a peso.

122 Ibid., 89-90; “Oficio de José Ma. Martinez de Arredondo informando la tarifa del pago que sse hará de los efectos que se extraigan en la Península Yucateca,” March 27, 1865, 1 foja. CAIHY, Vol. XLVII, exp. 42; José Ma. Martinez de Arredondo to José Salazar Ilarregui, Mesapich, March 27, 1865, 2 fojas. CAIHY, Vol. XLVII, exp. 44.
with firearms. The mob headed for the front door of Martinez’ house, and ordered him up from his hammock; the hapless prefect pleaded in the name of God for his life to be spared. Tied with rope and dragged from the house, he was hit with rifle (or shotgun) butts. Martinez let out a “very painful” groan, while the Indians laughingly mimicked the sound and clapped. Dazed and bloodied, he remained on his feet, while a man in the crowd, Rufino Trejo, struck the first machete blow, which was followed by several other machetazos by others. Martinez still remained on his feet, albeit nonresponsive, which puzzled his assailants. Finally, he was brought down with a tug of the rope which tied his arms, and he was dragged “into the mountains”; all the while, the Indians watched his face for signs of life. In the end, his teeth were knocked out, and the lifeless body was stripped naked. As a further insult to Martinez’ corpse, its penis was hacked off and placed his mouth. His tongue was carved out and shoved up his nostrils.\textsuperscript{123} It was late October of 1865. The next month, Empress Carlota, wife of Maximilian and daughter of the Belgian king, paid an official Imperial visit to troubled Yucatan, accordingly with much pomp.

The above example demonstrates the autonomous and volatile nature of Mayan settlements on Yucatan Peninsula, and a collective legacy of rebellion at mid-century; especially in light of European interference in Mexican internal affairs. The Mexican Empire headed by Maximilian, himself of an old European royal lineage, encompassed many peoples, cultures, and pre-existing conflicts within its borders. One of them, the Caste War of Yucatan, had raged in different forms since 1847, and would continue for the rest of the century. The spiritually inspired Mayas at Chan Santa Cruz, a community of several thousand in eastern Yucatan, continued that war during the French occupation of Mexico, between the years 1863 and 1867.

The Caste War, as it progressed during the occupation, absorbed precious resources from Mexico City and from local coffers. It caused such instability that the power held by Yucatecan functionaries of the Empire remained tenuous until their rule collapsed in the summer of 1867, when republicans took over. At the local level, Maya insurgents could embolden so-called pacified Indians formerly under rebellion, as in Mesapich. Mexican imperialists in Yucatan could never militarily dominate the Maya separatists, and were naturally wary of alienating pacifcos in areas near the rebel strongholds.\(^{124}\) While the French military focused its pacification efforts on central Mexico, Austrian mercenaries sent to aid the beleaguered yucateco imperialists in the south were plagued by disease and the tropical landscape. In the end neither they nor the French were of help against the rebels of Chan Santa Cruz – called the Cruzob, or “people of the cross.” The Mexican Empire had to deal with the Maya largely on its own, but it was ineffectual.

The Caste War of Yucatan developed out of conflicts unique to Mexico, and it was another example of the disparate points of violence in a national landscape of general warfare. Although no European troops had contact with Cruzob warriors – and purposely avoided them – officials of the Mexican Empire and Maximilian himself came to understand the resiliency of Chan Santa Cruz as a pseudo-sovereign entity. It was spawned by chaotic Mexico of mid-century, and it was a unique product of Mexican regional conflict, of which there were many types in the two decades preceding the French Intervention. The European coercive presence in Mexico as manifested in the Mexican Empire was in the end, powerless against the Cruzob. Maximilian’s government would have neither the resources, the soldiers, nor assistance from French and Austrian troops, to fight the Maya. There could be no European hegemony in Mexico

\(^{124}\) Mesapich had been formerly under the influence of Chan Santa Cruz, and had been in rebellion against the Yucatecan government twelve years previously. See Don. E. Drummond, “The Talking Crosses of Yucatan: A New Look at Their History,” in *Ethnohistory*, Vol. 32:4 (Autumn, 1985), 296.
while the Caste War continued on the Yucatan Peninsula. The government of Maximilian seemed to have no understanding of its historical complexities, or it never fully appreciated the threat posed by Chan Santa Cruz. The ambivalence of Imperial officials toward the war is demonstrated in this chapter. Moreover, the Mexican Empire collided with the dual nationalisms of both the Cruzob and the relatively few republican guerrillas in the region. By early 1867, the Empire on the peninsula would collapse as both entities grew stronger.

Traditional narratives of the class war, as presented by Nelson Reed and the earlier chronicler Eligio Ancona, place race relations at its core. Undoubtedly, this was the case to a large extent, but more recent scholarship, especially by Terry Rugeley, highlights the complexities of Yucatecan social castes and their interactions. Changing economics and political violence were also immediate causes of the Caste War, launched in the midst of Mexico’s war with the U.S. The social separation among Hispanic Yucatecans and Mayas was a legacy of Spanish colonial rule that continued in practice after independence in 1821. Whites (or blancos) many of the landowning classes and urban centers, and working-class mestizos – both groups together called ladinos – were by tradition socially distant from the village-based Maya, even as race distinctions became blurred among Mexicans in general. The “white” population of the city of Valladolid, for example, a center of old wealth and Spanish colonial traditions, by custom prohibited both Indians and mestizos from public ceremonies and fiestas in its central plaza area. However, all ladinos generally aspired to “whiteness” in culture and social standing; both Spanish-speaking groups would be targeted in the Caste War. The overwhelming majority of workers on the haciendas, and as servants in cities such as Valladolid, were Mayas.

Custom and established practice, perhaps hundreds of years in development, marked the social divide between Hispanic and Maya Yucatan. “The skin color and the opposition that reigned over their characters, the nature and customs of the two peoples, were obstacles powerful enough to maintain the antagonism of which we speak,” wrote Eligio Ancona, himself of a prominent yucateco family of the time, in his early chronicle of the Caste War.\(^{126}\) However, economics and migration led to more interracial contact and personal relationships by 1840.

Economics transformed land relationships in the years after Mexican independence in 1821. A sparse blanket of topsoil on foundations of limestone made planting and growing historically difficult on the peninsula. Despite torrential rain seasons in that tropic zone, water could not easily absorb in the ground, and it was relatively scarce. Maya communities had traditionally clustered around cenotes – circular wells that were once underground caves. Corn, the traditional food of life for indigenous Mesoamericans, was a staple for individual Indian peasant families. Villages still held collective lands called ejidos, as was the case for other such communities -- or republicas -- in Mexico. In the decades after independence, enterprising Yucatecans were able to make use of the soil. Sugar became an important crop that could flourish under the right conditions – one of high investment but potentially phenomenal returns. Henequen, a plant for which fibers are woven into rope, became an agrarian boom industry and chief export crop. Sparsely uninhabited and unclaimed lands, or terrenos baldíos, became profit-generating areas of sugar and henequen plantations. In the face of agricultural expansion and state laws passed to support it, many ejidos were forced to defend and prove their traditional rights to lands and water in court – at least until the start of the Caste War.\(^{127}\)


\(^{127}\) Reed, *Caste War*, 3-8.
For many Maya communities since the end of the Conquest period (1535-1540), corn cultivation for sustenance and trade allowed them relative economic and social independence. Traditionally, Spanish centers of population and culture revolved around three cities – the port of Campeche; Mérida, the capitol, and Valladolid, the “Sultana of the East.” But the isolated rural Mayas of the peninsula also competed economically with ladino migrants into their territories by the time of the Caste War. Further, with growing agricultural enterprises supported by state governments, the independence and relative isolation of agrarian Indian villages faced challenges. The loss of communal water and land rights – to landowners, or *hacendados* -- brought debt peonage; growing numbers of Mayas were trapped into serfdom by 1840.128 While indigenous ways of life were transforming with Yucatan’s expansion into the world economy, the ladino world itself would transform. In the 1840s Yucatecan nationalism resulted in periods of independence from Mexico, and the experience of warfare for Mayan men.

In the late 1830s, many yucatecos were angered by the military and economic demands of the central Mexican government, itself dominated by conservatives who, after 1834, rejected federalism and preferred a centralist form of government. Under authoritarian President Antonio Lopez de Santa Anna, the Mexico City government conscripted both Hispanic Yucatecans and Mayas to fight overseas against Texas republicans, who acquired independence in 1838. The next year, Santiago Imán, a regional landowner and militia captain from northern Yucatan, declared independence from the Mexican government in the name of federalism, sounded the call of war, and recruited for his armies of independence. Mayas were welcomed into the ranks with their machetes and shotguns, the latter used for hunting and self-defense. As the wars for

independence progressed, military-grade weapons became available to them.\textsuperscript{129} Invading Mexican troops were eventually repelled by Yucatecan forces with help from thousands of Mayas, and the state became an independent federal republic. It made peace with Santa Anna’s government in 1843 in return for increased autonomy in trade and military affairs, and was reincorporated into Mexico. The centralist policies of Santa Anna were not abandoned, however, and friction again developed with Yucatan. A new state government under Governor Miguel Barbachano -- the former Yucatan Vice-President -- broke off ties with the Mexican government at the end of 1845.

When war with the United States commenced in 1846, the government of Yucatan was again enticed into union with Mexico by the wily General Santa Anna. But officials of Campeche were fearful of being targeted by American warships, and declared rebellion against Mexico. They were joined by armed Yucatecan rebels who overtook the state government at Mérida by the beginning of 1847. In January, Mayas fighting ostensibly for the \textit{yucateco} cause, aided by mestizos among them, massacred some eighty-four white residents of Valladolid, according to early accounts, and committed other atrocities. Governor Barbachano, by that time a committed Mexican nationalist, left office and fled to Cuba rather than face Yuctecan rebels and a possible Indian uprising.\textsuperscript{130} The separated state of Yucatan declared neutrality in the war.

The state had declared independence from Mexico three times in one decade, and throughout its battles for nationhood, yucateco leaders recruited Mayas with offers of unused -- or \textit{baldío} -- land, and relief from taxes and mandated Church duties. But with both a growing

\textsuperscript{129} Ibid., 27; Rugeley, “Origins,” 484.
\textsuperscript{130} Ancona, \textit{Historia}, Vol. 3, 468.
population and land-based economic expansion, there was no available land to give away.¹³¹ Thousands of Mayas now had military training, war experiences, and extra weapons. In addition, the chaos of changing governments in Mérida led to local electoral violence among all classes, providing an atmosphere of insurrection that affected pro- and anti-Mexican factions, and also the Indians. The tax burdens of the colonial era – whether to state or Church – remained in practice; the Mayas had risked their lives for the state, and got nothing in return. “Worst of all,” argued Terry Rugeley, “all of this took place against heightened expectations on the part of Maya peasants who, since the last decade of colonial rule, had come to believe that their ancient burden of tribute and taxation was finally over.”¹³²

In the summer of 1847, as Mexican nationalists in the state organized an offensive against the secessionist government at Mérida, rural Mayas of the east were again being called to fight. The memory of atrocities at Valladolid caused increased vigilance, however. Suspicions of a planned Maya rebellion, not unfounded, led to the execution of a local Mayan leader named Manuel Antonio Ay in Valladolid. Military detachments searched for two suspected co-conspirators, Jacinto Pat and Cecilio Chi, local batabs – hereditary chieftains and property owners. When the men could not be found, soldiers sacked and burned the rancho properties of Cecilio Chi, and a young girl was raped. In retaliation, a Maya force led by Chi struck at Tepich, his local power base on the east-west frontier; ladino residents were massacred, women were in turn raped¹³³ This type of gendered violence, along with other cruelties inflicted by both

¹³¹ According to calculations made by Viviane Brachet de Marquez, the state population grew from 561,496 in 1835 to 593,483 by the time of the Caste War. See Viviane Brachet de Marquez, La poblacion de los estados mexicanos, 1824-1895 (Mexico: Instituto Nacional de Antropología y Investigaciones, 1976), 97.

¹³² Rugeley, Rebellion, 3.

¹³³ Reed, Caste War, 59
Hispanic and Maya in the coming war, had been relatively uncommon in Yucatán, even for such an unequal society. But such were the first recorded actions of the Caste War. For close to three years, it entailed a vicious cycle of race-based atrocities by all sides, where innocent Indian and Hispanic populations were slaughtered, villages destroyed, and prisoners of war murdered.

Indigenous forces grew into thousands, organized along lines of conventional Yucatecan militia regiments and ranks. The fighters became experts at swiftly constructing barricades of loose limestone rock, both for sieges and for defense. Disappearing into forests at the right times, Mayas made used their knowledge of the tropical terrain in guerrilla warfare, and their machetes were useful weapons in such conditions. Their armies were financed with plunder, and an avenue for obtaining modern weapons was opened through British traders at Belize.

Despite having capable officers, Yucatecan troops often suffered from low morale, desertion, and absolute fear of capture. After a string of military victories in the spring of 1848, the combined Mayan forces had come out of the frontier and forests toward the capitol of Mérida. A panicked population of residents, officials, and refugees began to evacuate the city. They headed to the ports of Sisal to the north and Campeche to the south, and escaped by sea. And then, for reasons still obscure, the frontal attack abruptly stopped. The bulk of Mayan forces headed back toward their villages and cornfields in the interior, and prepared for another planting season, leaving the remainder depleted of manpower. The ladino armies reassembled, and received a boost when Yucatan again reunited with Mexico – out of military necessity. Beginning in September, the state received shipments of weapons, gunpowder, and supplies from the metropole. The resurgent ladinos pushed back what remained of the Maya forces, and occupied the frontier areas. Hispanic Yucatan regained control of the state. The surviving Mayan rebels, their leaders, and their families, went further into the eastern jungle.
The war shifted from the frontier areas of central Yucatan. Frontier roads between east and west were located within a bustling rural trade zone, with growing towns. The region ran through the center of the peninsula; an area of established indigenous communities and migratory ladinos, with Valladolid and Tizimín located at the northernmost points. That region contained the home bases and subordinate populations under Cecilio Chi and Jacinto Pat, of Tepich and Tihosuco, respectively. They and other batas of the frontier, along with dissident mestizos, led the first Caste War uprising. As that phase ended, towns of the southern perimeter of the Orient, such as Mesapich, became “pacified.” The war then progressed toward the hard-scrabble and densely forested eastern half of the state, where traditions of indigenous village autonomy and isolation were strong – and so was indigenous Mayan Christianity.

By the beginning of 1849, Yucatecan military forces established control over all areas that had previously been overtaken by the Maya rebels. The surviving remnants were constantly pursued over the next two years, and pushed deeper into the tropical forests. But they were not entirely defeated. The Mayas, many of them refugees from the frontier, were loosely organized according to local village ties and spread out in an area unfamiliar to many ladinos from the north and west. Jacinto Pat and Cecilio Chi were both assassinated that year due to internal politics and personal vendettas. Their replacements, Florentino Chan and Venancio Pec, led the Mayan exodus of fighters and families closer to the eastern coast and British Honduras.

In the jungle, José María Barrera, a mestizo caudillo of Maya rebels formerly under Jacinto Pat, discovered a precious water source; a rather small grotto that was little used at the time. Near its mouth, three carved crosses on a tree of mahogany – the number varies in the

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accounts – captivated the commander and those with him. According the early chroniclers Serapio Baqueiro and Eligio Ancona, a “ventriloquist” named Manuel Nahuatl was appointed protector of the crosses, and he could make them speak to the assembled Mayas.

The people were given instructions by “The Speaking Cross,” and Barrera responded to them: three larger crosses were constructed and placed on a platform, prompting adulation, the burning of candles, and more adherents to the new cult. The Indians were told by “The Cross” to lift themselves out of their “dejected courage” and were “filled with enthusiasm in the war against the whites.” The Mayas were told to attack Kampocolché, a village from which they had been pushed out by Yucatecan forces.\(^{135}\) Dispatches from the ensuing battle first recorded the name of the place of worship: Chan Santa Cruz – “little holy cross.” In the traditions of rural, indigenous Yucatan, crosses at times had their own spiritual properties. The advent of Christianity among the Mayas in the mid-16\(^{th}\) century augmented the powerful forces of the forest that had co-existed with them for hundreds of years, for both good and evil.

The chroniclers did not list a specific date for the discovery of the crosses, but it was likely around New Year’s Day, 1851. On January 4, the Mayas attacked the Yucatecan military force at Kampocolché. The attackers were repelled after fierce fighting, the Mayas believing the crosses would safeguard them from harm. Seventy-nine of them were killed in the battle. Those taken prisoner informed the commander, a certain Colonel Novelo, about the crosses and their power. The Indians told their captors that the Speaking Cross spoke in the name of God:

… and that his promises with respect to the cause they have sustained were assured, for that reason from all parts flocks of people arrive to with the objective of bringing their

offerings and directing their prayers, consisting first of money, food, bouquets, and other things …

In March, a force of 220 men under Novelo made a surprise attack at Chan Santa Cruz, which now contained some three hundred huts around the original site. Barrera was caught off guard, and narrowly escaped; Nahuat was martyred, dying in battle. The crosses and any valuable offerings were carried off, along with supplies. Two to three thousand people from the community were taken as prisoners to Kampocolché. Hundreds more remained behind. Because of the trade established with the British at Belize, Novelo reported, the Maya at Chan Santa Cruz “not only lack nothing of supplies for war, but have them abundantly to continue hostilities.”

Over the following months of 1851, several letters were received by state authorities, including the office of Governor Miguel Barbachano. The incensed Maya decried the theft of their crosses and the offerings, and the death of Miguel Nahuat. The Speaking Cross now spoke through a patron named “Juan de la Cruz” -- who may have been a composite rather than a single person. In some of the letters, his name differed slightly. The letters generally stated, in Baqueiro’s account:

Juan de la Cruz Puc, appeared as minister and privileged priest for whose measures the crosses had a new announcement for the Indians, saying they have suffered much because of the death of their patron (Miguel Nahuat), sacrilegiously murdered on March 23; for that reason none had communicated since that event, and they only talked with Seraphim and the Apostles; that they were taken to Kampocolché … where the whites demanded that (the crosses) speak, but this they could not do because the hour had not arrived, and because they could only confirm it with their patron; now that hour has arrived, and they are communicating with their children, the Indians, announcing that the Spanish were to be punished severely for the harm done by their troops; That their own troops would rise in a vengeance of spilling blood …

137 Ibid., 389-390.
In the letter to Barbachano, “The Cross” announced that it spoke for itself and also in the names of “Jesus, Mary, God the Father, God the Holy Son, and God the Holy Spirit.” By then, Barrera had 1,500 fighters under his command.138 The Caste War continued, and the people of Chan Santa Cruz would identify themselves as Cruzob, subjects of a sovereign power.

Over the next two years, yucateco armies attacked and raided Chan Santa Cruz three times, although the Mayan fighters would flee into the forest, and reassemble in the home space when the invaders were gone. Homes and were destroyed in the raids, and sacred crosses were again seized, but the Maya rebuilt or replaced everything. Even in the midst of several attacks, they created a structured society of military and religious hierarchies. Supreme power rested with the “patron of the cross,” or Tatich. Captured prisoners -- non-cruzob Indians and ladinos -- would comprise a slave class.139 Limestone structures, including a “church of the cross” and housing for the leadership, eventually were built around a plaza, as in the traditional towns of Spanish America. Directions still emanated from “The Cross,” sometimes through creative means of voice projection and amplification. The three crosses -- always replaced if destroyed or taken by soldiers -- were dressed in the traditional attire of Mayan women.140 Over Indian towns and villages on their periphery, the cruzob would claim hegemony, and demand allegiance.

In 1853, towns on the southern border of Chan Santa Cruz territory, such as Mesapich, Lochhá, and Xmabén made peace with the liberal state government of Yucatan and became “pacified.” They were granted freedom of movement; they retained their arms and received tax

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139 Reed, *Caste War*, 212.
140 Drummond, “Talking Crosses,” 295.
relief. After General Felipe Navarrete declared Yucatan part of the Mexican Empire by force of arms in the summer of 1863, the rights of the *pacificos* of the south were defended violently in the murder of Mesapich prefect Martinez, as we saw at the beginning of this chapter. But the murder was a product of local grievances. Pacificos never rebelled against the Mexican Empire itself during the Intervention, although they were jealous of maintaining their autonomy and subject to the influences of rebellious forces. To the northeast of pacified territory, the Cruzob were resilient in their faith and resistance, and were materially supported through traditional corn cultivation and British trade.

In the spring of 1854, Lieutenant Colonel Lázaro Ruz led another Yucatecan excursion to Chan Santa Cruz, despite a recent cholera epidemic in the area. After heavy resistance, the Mayas retreated into the forest. Canoes filled with water were left behind; when the soldiers drank it, they were hit with symptoms of cholera. While they vomited and curled on the ground, the soldiers were taunted by Mayas hidden in the forest. Ruz split his forces; one column headed toward an alternate water source, and the other stayed behind to care for the sick. The Maya attacked both, decimating the Yucatecans. The remaining ninety soldiers were outnumbered and fled, leaving behind the sick and wounded. Ruz and another officer died of sickness and were buried in the forest. In November, Colonel Pablo Gonzalez led another force to Chan Santa Cruz; it was again successfully occupied after the Mayas fled. He found two hundred skeletons and an equal number of “recent” dead bodies; the sick, wounded, and captured Yucatecans of the prior spring. After 1854, such military campaigns trailed off. The cruzob became the attackers,

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141 The three towns listed here were referred to in documents relating to the death of José María Martínez de Arredondo.

plaguing the Yucatan frontier with raids, more looting, and military victories through the decade. The Yucatecans reciprocated the brutality by selling captured Mayas into slavery.

Impressments of Maya slaves on Cuban sugarcane and tobacco fields predate the Caste War in Yucatan. However, the trade grew and flourished as the war progressed, and became – at the very least – a secondary source of funding for the state’s military. At its height, men, women, and children were taken in shipments of one hundred to four hundred people at a time, at least 2,000 over twelve years; from 1849 to 1861. At times, Maya noncombatants and mestizos were included in the human cargoes to meet the contracted quotas of Spanish traders. In 1854, the trade was condoned by the head of the national government at Mexico City – again, Santa Anna. His appointees in Yucatan profited by the trade. When Santa Anna was toppled by revolution the next year, it continued under successive Yucatecan governors -- both liberal and conservative -- through 1860. In May of 1861, however, the Juarez government enacted the death penalty for the enslavement of Mayas. The slave trade apparently ended at that point, although market forces may been a chief factor in its demise. The Republic lacked enforcement powers; it was fighting conservative guerrillas, heavily in debt, and facing an imminent European invasion.

By the time French troops occupied Mexico City in July, 1863, the Caste War had been in development for fifteen years. The “people of the cross” adhered to a spiritual blend of Western Christianity and indigenous beliefs that were centuries old. The forests of the east on the Yucatan peninsula provided an environmental basis for defense. Through the plunder of towns on the frontier – which included mules and livestock – the trade through Belize continued, as

traders based there were not restricted by British foreign policy.\textsuperscript{144} In the vast forests of Cruzob territory, loggers from Belize were given timber concessions, a lucrative business not discouraged by British colonial officials. In return for their goods and services, the Mayas were able to obtain weapons such as Enfield rifled muskets, precious gunpowder, uniforms, and essential supplies to support a population and military. Over time, they developed small bombs to inflict psychological damage on civilian populations. The cruzob were in the crossroads of transatlantic trade, politics, and warfare at mid-century, and benefited from being in that position.

With their own government and society at Chan Santa Cruz-- compulsory military service, the collective ability to mobilize for war, and a cadre of spies to infiltrate Maya communities for news of blanco incursions-- the Cruzob were virtually conquerable by local forces as the French advanced in Mexico. The Europeans largely left the nationalistic Mayas to be dealt with by forces of the Mexican Empire, while foreign efforts focused upon republican guerrillas around the port of Campeche. Chan Santa Cruz became an obsession for Mexican imperialists in Yucatan; the most problematic, destabilizing force opposing their designs on the peninsula.

As the French marched inland to meet the Mexican force at the first Battle of Puebla in May of 1862, political factions in Yucatan had emerged from their own civil wars. Three years earlier, after a series of revolts and military clashes, the peninsula was divided into the two states of Campeche and Yucatan. As stipulated in the documents of separation, the new state would

\textsuperscript{144} There was no official prohibition on general trade between British subjects in Belize and private entities in neighboring Yucatan, and no curtailment when the Maya trade was in contraband. By 1867, Chan Santa Cruz was given de facto recognition as a sovereign power by the British, in an economic bond that was mutually beneficial. However, Louis Napoleon’s good relationship with Queen Victoria’s government might explain the French reluctance to directly confront Chan Santa Cruz. This is an area of transatlantic diplomacy that is understudied.
renounce “retribution or benefit … of the plunder made by the barbarians (of the Caste War) or for whatever use by which the state of Yucatan is diverted by them.”

The Campechanos, natives of the southwest portion of the peninsula and insulated from Caste War troubles, wanted nothing to do with Chan Santa Cruz, but agreed on paper not to establish trade relations with it, and continued with its limited military obligations toward the Caste War. That same year, Valladolid native Pedro Acereto, whose late father was a former governor involved in Yucatan’s infighting of the previous decade, led a revolt against Governor Liborio Irigoyen. Colonel Acereto had earlier led a failed assault on Chan Santa Cruz, and suffered a humiliating defeat. In part, his revolt against the state government centered on Irigoyen’s perceived inaction in the Caste War. The “Facción Acereto” was ultimately defeated at Tunkás, about fifty miles northwest of Valladolid, and put to flight on October 19, 1862. The colonel himself died shortly afterward. In many ways, Chan Santa Cruz affected the calculations of the peninsula’s political elite.

Maximilian, however, was either insufficiently informed of the Mayan war, or was not told enough to be worried about it. In October 1863 he was in Europe, having accepted the throne of Mexico. At his Miramar Castle in northern Italy, he met with one of the envoys responsible for the arrangement: Jose María Gutiérrez de Estrada, a native Campechano, who bestowed the honors fitting the Emperor. By then, Yucatan had already become part of the Mexican Empire; French warships patrolled the peninsular coast. The state became the Imperial

145 Sergio Quezada, Breve historia de Yucatán (Mexico: El Colegio de Mexic, 2001), 149.

146 Archivo General del Estado de Yucatán (AGEY), Fondo Poder Ejecutivo: Jefe Prefectura, Serie: Milicia, Espita, Box 100, Vol. 8, exp. 4, Nov. 21, 1862.

147 Reed, Caste War, 185-186.
Department of Yucatan, and would eventually become an albatross for officials of the Empire in Mexico City.

In July of 1863, still another Yucatecan civil war ended in victory for General Felipe Navarrete. Earlier that year, Irigoyen, the liberal governor and ally of Benito Juarez, faced growing disenchantment with his rule. The Juarez Republic had defeated conservatives in the War of the Reform, and was 80 million pesos in debt to European powers. Related tax demands of the Irigoyen regime caused a backlash among landowners ravaged by internecine warfare and problems related to the Caste War. Navarrete, a native of the Valladolid area, rallied opposition to the liberal state government, citing the governor’s failure to continue the war against Chan Santa Cruz. Landowning interests of northern Yucatan rallied behind Navarrette, and he persuaded Church clergy -- enemies of Juarist liberals -- to support him.¹⁴⁸

The Yucatecan military, a maze of regional militias and regular forces beholden to individual caudillos, and racially mixed, began to declare for Navarrete. The General pushed the forces mustered by Irigoyen out of Mérida, and the governor himself into eventual exile in Havana. General Navarrete swiftly arranged the printing of a propaganda organ, without a plan for government, or an ideology. His loyalties were regional, rather than to the liberal-conservative factions fighting over Mexico City since 1857. Addressing his readers in the republican mold (“citizens”), and in the politically charged tone of Yucatecan factions, he wrote:

Fellow citizens: Providence, wise regulator of all events of life, has given glory to our guns, that for over the space of three months have combated to defeat an administration that forgets its promises, now enthroned, (which) has only at its base more scandalous oppression, the trampling of laws, the squander of properties and their particulars … an

¹⁴⁸ Rugeley, Rebellion, 198.
administration of which espionage and gossip are the movers of its decisions, and never the truth or justice. 149

By December, a French war fleet blockaded the port of Campeche. Within two months, Campechano armies under liberals Manuel Cepeda Peraza and Governor Pablo Garcia also capitulated. The latter, who held out until January of 1864, agreed to a peace settlement after the French captain George Charles Cloué threatened to bombard the plaza of Campeche. 150 The two peninsular states were reunited; Navarrete became governor of Yucatan. He soon declared his support for the Supreme Regency in Mexico City, which awaited Maximilian’s arrival. What started only as a regional revolt led to Yucatan’s incorporation into the Empire. The landowning classes of the state and their workers, both Hispanic and Maya, had tired of warfare.

As a native of Valladolid who recalled the Maya atrocities there, Navarrete sought to continue the Caste War and subdue the “barbaros” of Chan Santa Cruz. His reign was brief, and Jose Salazar Ilarregui was appointed in August as Imperial Commissioner of Yucatan by Maximilian. An outsider to Yucatan, Salazar was a former functionary of Santa Anna, an ex-liberal, an educated mining engineer, and recently minister of development for the Empire. 151 Like his predecessor, he set his sights on Chan Santa Cruz, the perpetual menace. But as always, the peninsula lacked the available local soldiers and officers able -- or willing -- to confront it. The Cruzob had repelled every outside invasion during the past ten years; hundreds of yucateco lives had been lost in the attempt. For Ilarregui and his patron Maximilian, some hope rested on the Austrian volunteer corps dispatched to Mexico in the spring of 1865.

150 Sanchez Novelo Yucatán, 39.
151 Rugeley, Rebellion, 208.
Most of the Austrian corps arrived in Mexico during the spring of 1865, and individual units were assigned to different regions thereafter. About 7,000 in total arrived, augmenting a Belgian force of 2,000. The two European armies were to be elite forces operating in conjunction with the native Mexican imperialist military, answerable to Maximilian. All of their expenses were to be paid by the imperial Mexican government. Most of the Austrians were in their thirties, and their ranks included soldiers of Polish, Hungarian, and Bohemian ethnic background. While stationed in Mexico, many of them were belligerent and given to drink; at least one was shot and killed by an officer for chronic insubordination. Before the corps arrived in Veracruz that spring, the Mexican imperial government – namely Maximilian – and Ilarregui appear to have believed that at least part of its number would assist the struggling Yucatecans in pushing into the territory of Chan Santa Cruz, and to help boost local troop morale.

The expedition was sent courtesy of the other Hapsburg, Maximilian’s brother, Emperor Franz Josef of Austria. The corps was comprised of able and adventurous veterans, from an army accustomed to putting down local revolts in the multi-ethnic Austrian Empire. It appears the terms of the operation were misunderstood by all parties; and that the Austrians felt, literally, out of their element. In the end, the Austrian assault on the Maya separatist state hoped for by Yucatecan officials of the Mexican Empire and their monarch never materialized.

The first discussions on the topic began in early December, 1864. In letters between Ilarregui and Juan de Dios Peza, the Minister of War, plans for the expedition were at first talked about in general terms, and cheerfully. Yucatan’s problematic past with the Maya was something of concern for the imperial government. The two men were friends, and familiar with

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one another’s lives and families. “I have not stopped working to the utmost trying to support all your measures and to see that you realize your wishes,” de Dios wrote to Ilarregui. “Because no one knows how important these are for the future and for the government.” Although there were no available Mexican Imperial forces, he continued, “His Majesty the Emperor has resolved that of the first Austrian troops that should arrive, I am (sending) 1,000 men … they will be the center and base to support you … Austrian troops are even better than the French, according to what sampling we have.”

In a follow-up letter dated three weeks later, de Dios reiterated his commitment to sending the Austrian force, although reduced in number. Ilarregui received the next letter from his friend in Mexico City about two months later, in which de Dios reported:

Great difficulties have arisen for departure of the thousand Austrians to the Peninsula and for that reason, and for your urgent need of troops, I have organized a section with the Troops of Jalapa (Veracruz), commanded by General Galvez, which departs soon. His Majesty named this chief. I do not like him for his arbitrariness and his cruelty.

De Dios made no mention of the Austrians in this letter, but does add that he is anxious to see “that Country” (Yucatan) for health reasons. Also, the Empress Carlota was fond of organizing dances, he said, “and they are magnificent.” At this time there is no available record of Ilarregui’s response. Whatever it was, it compelled de Dios to continue his reassurances.

In early February, the minister of war “expressed regret” that:

serious matters have caused the delay of His Majesty’s planned trip to the peninsula. But the promise of Austrian troops was renewed with vigor, because Maximilian has resolved to open a campaign against the rebel Indians, to finish once and for all that inhumane and devastating war… for that reason, he has ordered that, besides the Galvez section, we send one thousand Austrian men commanded by General (Franz) Thun … The troops will take time to organize and they will arrive about one month from today.

153 CAIHY-AH, Vol. XLVII, exp. 4, Juan de Dios Peza to José Salazar Ilarregui, Dec. 2, 1864.

154 CAIHY-AH, Vol. XLVII., exp. 8, Juan de Dios Peza to José Salazar Ilarregui, Jan. 20, 1864.

155 CAIHY-AH, Vol. XLVII, exp. 9, Juan de Dios Peza to José Salazar Ilarregui, Feb. 7, 1864.
The mention of Austrian General Thun was no doubt comforting to Ilarregui, as Thun was a top military advisor to Maximilian in the capitol, and future supreme commander of the Mexican imperialist army. De Dios also urged his friend in Yucatan to organize as many Indians as possible “for the jobs that are indispensable to the expedition,” probably in roles of support. That same day, Ilarregui sent his own letter, acknowledging the imminent departure of the Austrian troops to the peninsula, specifically, to fight at Chan Santa Cruz.

In a letter dated February 15, the minister of war informed Ilarregui that the Austrians had arrived at Veracruz, and were merely waiting to have uniforms tailored. The next letter was sent during the second week in March; the news was likely disappointing to Ilarregui:

You are in the midst of so many difficulties you have to overcome. Today I have to announce to you a new one: Finally, the Austrian troops will not depart now for bad weather and fear of sickness. For that reason, the departure is delayed until it is favorable. Instead, you already have Galvez, who is enough to have fighting any day, for any cause.156

The Austrians never arrived at Chan Santa Cruz, nor did General Thun. The next month, a detachment of Austrians finally made their way to the peninsula – staying on the Campeche side.

A fleet carrying 150 Austrian volunteers dropped anchor outside of the port city in the first week of April. They remained through the summer, assigned to patrol the coastal waterways where republican guerrillas were embedded in the forests. The Austrians sailed into the interior alongside French naval vessels, and the two forces often fought side-by-side, as guerrillas fired from the brush. The irony of soldiers who had once opposed each other in battle in Europe – and were now allies – was not lost on Ernst Pitner, a young officer of the Austrian corps. Most of his

156 CAIHY-AH, Vol. XLVII, exp. 13, Juan de Dios Peza to José Salazar Ilarregui March 11, 1865.
French comrades-in-arms were “pretty good soldiers, but not at all gentlemen.”\textsuperscript{157} Although it appeared to Pitner, at the start of his journey, that he would face the Mayas, the combined European forces spent months chasing down guerrillas in a series of minor skirmishes. One fortified position -- flying the flag of the Republic -- was overrun, and about four hundred guerrillas dispersed. Afterward, yellow fever began to ravage the Austrian force, which was being picked at constantly by mosquitoes. Eight men died of the disease over two days in July.\textsuperscript{158} After soaking in the humidity of Campeche, mostly traveling by river, and marching through swamplands for days at a time -- all with few results -- the force left the peninsula by the beginning of August. Such was the Austrian experience on the peninsula.

Meanwhile, General José María Gálvez, who had been sent from Mexico City in place of the Austrian volunteers, led a force of two hundred Mexican imperialists and several hundred Yucatecans toward Tihosuco in the frontier zone. The Cruzob were coming out of their eastern settlements and reasserting themselves, threatening \textit{pacifico} communities and attempting to expand their sphere of influence. The Cruzob, serving under leaders Bonifacio Novelo, a mestizo, and Cresencio Poot, met Galvez force at Dzonot, west of Tihosuco and just northeast of Chan Santa Cruz. Now taking on the characteristics of a conventional Euro-American army, the Mayan force was of a “considerable number, with uniforms, and very well-armed.” By the end of June, 1865, the combined Mexican-Yucatecan force was utterly destroyed in the battle. The Mayas cost Galvez three hundred casualties; four officers were killed, and five hundred soldiers and Indian workers deserted. Ilarregui was furious at the quality of his local Yucatecan troops. “Of all that happened and all that was lost,” he wrote in frustration to Mexico City:

\textsuperscript{157} Pitner, \textit{Lieutenant}, 65.

\textsuperscript{158} Ibid. 77.
What I feel most sorry about is that the dead or wounded men were of Galvez’ section, because each one of them is worth one thousand Yucatecans, and a little more … if they see only one Indian, they run away and toss their weapons. And the few Yucatecan soldiers that do not disband are useless.  

Afterward, Ilarregui was told that no other Mexican Imperial forces would be forthcoming, and he was ordered to organize a rural brigade of 1,500 Yucatecans under generals Galvez and Navarrete, to fight the Mayas. But Galvez, a former Apache fighter in Sonora, left Yucatan shortly afterward, to be replaced by local Colonel Daniel Traconis.  

Commissioner Ilarregui had been virtually abandoned by Mexico City, which granted only token assistance thereafter. At least outwardly, the Imperial Department of Yucatan was still valued by the Emperor, whose wife arrived in November. But it was the beginning of end for the Empire on the peninsula. Outside of a few select French officers, there would be no further foreign assistance.

On the morning of November 22, 1865, the Empress Carlota arrived at the port of Sisal, to an honorable one-hundred-and-one gun salute. José Salazar Ilarregui and a “commission of ladies” entered the steamship Tabasco to formally invite her to the Department, displaying proper protocol. The next day, the city of Mérida welcomed the young monarch, twenty-five years of age, beautiful, and adored by supporters of the Mexican Empire. Daughter of Leopold I, first King of the Belgians, the former Charlotte had Hispanicised her name after she and husband Maximilian formally accepted their titles in Mexico City, sixteen months earlier.

The city had rarely seen such splendor and ceremony. The cannons roared at the citadel of San Benito, and church bells rang at the central plaza, announcing the arrival to residents. The

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159 CAIHY-AH, Vol. XLVII, exp. 21, José Salazar Ilarregui to Juan de Dios Peza, June 24, 1865.
160 CAIHY-AH, Vol. XLVII, exp. 23, Office of Juan de Dios Peza to José Salazar Ilarregui, July 12, 1865; Reed, Caste War, 191.
161 Novelo, Yucatán, 105.
alcalde (mayor), and a special commission of the city’s ayuntamiento (council) presented Carlota with the keys to the city, under a rustic arch adored with Yucatan’s unique fauna. Dressed in white, with a black hat, Carlota was conspicuously without jewelry. At church, she piously crossed herself, and listened to the traditional Te Deum; the hymn was composed especially for her visit. Wealthy residents of the city rode in a procession of fine carriages through the city, stopping at the illuminated Plaza of Independence, near her temporary residence. As night fell, she emerged from a balcony to officially greet her meridano subjects: The burst of “vivas” erupted. Visits included schools, a hospital, a convent, the local jail, and a school of languages, which taught classes in Mayan dialects. The Empress stayed thirteen days in Mérida, and left for Campeche, again greeted with much pomp and ceremony. In the town of Bécal, she met with the local batab – an act which no previous Mexican head of state had occasioned. For a short instance in Yucatan during the French Intervention, supporters of the Empire could be hopeful.

Still, the Yucatecans were reminded of troubles unresolved. On Friday, the official newspaper printed an editorial imploring the Empress to “cut the head of the ferocious Hydra of the Caste War that agitates us.” On Saturday, a party of six hundred Mayas -- presumably Cruzob -- attacked the town of Cenotillo, about sixty miles west of Mérida, but they were repelled by local residents. Eighteen were killed and another seventeen wounded. Carlota ordered compensation, military titles, and supplies for the latter. In addition; rumors abounded in Mérida and Mexico City, concerning Maximilian’s inability to accompany his wife, and the purpose of the trip itself. Did the Emperor need to meet with his new finance minister, arriving

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162 Ibid., 106-111; Rugeley, Rebellion, 203.

163 Novelo, Yucatán, 113.
from Europe? Did Carlota need to excuse the Austrian volunteers personally? Did Marshal Bazaine “order” Maximilian to stay in Mexico City? The questions went unanswered, but the rumors expressed the general uncertainty concerning a final outcome in Yucatan. In January, Louis Napoleon ultimately decided to withdraw his troops from Mexico, over the coming year.

Although such bad news did not reach Yucatan for several weeks, it came in the midst of a military crisis. Desertion, always problematic, took on hemorrhagic proportions, even as Ilarregui was ordered to create a local force capable of confronting the insurgent Mayas. The departmental treasury was nearly depleted, and the yucateco soldiers – Hispanic and Maya – were expected to live on “five tortillas and a glass of pinole,” the latter a drink pulverized corn mixed with water. Whenever possible, hacendados and other landowners sheltered workers and potential workers who were eligible for conscription. Unless they were residents of the frontier, many young men who could not buy their way out of the draft were unconcerned about a distant and dangerous war that ravaged local economies. One of the last attempts at assistance from Mexico City came in January, 1866, as Ilarregui was pledged a corps of captured “guerrillas,” with instructions to have them paid a monthly salary. The suspect quality and loyalty of the fighters demonstrates the desperation of Yucatecan imperialists, willing to accept any kind of support from the capitol. “We warn you,” de Dios cautioned. “That even though these individuals are going to be free, they will need to be policed”:

Also, they will be obliged to present themselves periodically to the authorities. You need an order to especially ensure that these individuals do not go to any ports of the Peninsula,

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165 Rugeley, Rebellion, 235.
from where they could escape and come back to their old rabbit holes to disrupt the public order and continue their depredations.\(^{166}\)

A list of eleven men sent from Mexico City was enclosed, along with the name of the designated Yucatecan commander, Patricio O’Horan. There was no follow-up correspondence that survives. But such specific instructions indicate that there was some substance to this commitment from Mexico City. Yucatan could not be ignored with the looming Mayan attacks on frontier in danger. By the summer, further signs of crumbling arose for the Department; In June, the first Hispanic-led rebellion broke out, and in August, the Cruzob launched a full-scale assault.

The trickle of revolt against the Empire, which became a flood, occurred under a nondescript provincial landowner name Buenaventura Martínez. The product of a patrician family in Beca, east of Mérida, he led a small band of army deserters in June, 1866, raiding the town of Mocócha, and afterward spending several months on the run; raiding towns and pilfering municipal coffers, gradually building up his forces. In time, the small force would transform into the Yucatecan army of republican resistance, under Manuel Cepeda Peraza on his arrival from exile, in Havana. Another rebellion led by the brothers Laureano and José de los Angeles Rodriguez, arose in the town of Dzitbalché, to the south near pacifico territory. It was put down by a Yucatecan force, and the brothers fled and found haven in Mesapich, another troubled spot for the Empire.\(^{167}\) Then, another front opened in the Caste War, which – aside from skirmishes of the Maya advance from Chan Santa Cruz – was largely dormant for the past year.

In early August, thousands of Cruzob, now entrenched around the frontier, surrounded Tihosuco, laying siege while the Yucatecan force and local residents held on, even while

\(^{166}\) CAIHY-AH, Vol. XLVII, exp. 40, Office of Juan de Dios Peza to José Salazar Ilarregui, Jan. 15, 1866.

\(^{167}\) Rugeley, *Rebellion*, 243-244. For a detailed biography of Martínez, see 240-242.
retreating toward the central plaza. Volunteers arrived from neighboring towns, while three hundred troops under General Navarrete fought their way inside. Local residents generously offered soldiers corn, beans, salted meat, lard, and cigarettes. On September 4, the replacement Imperial Commissioner, Domingo Bureau, called for a general conscription of all men 18 to 50 years of age to aid at Tihosuco; among the various exceptions were “indios de raza pura.” It was an unwarranted and unenforceable gesture, and fortunately, circumstances changed.

By mid-September, the Mayas gave up the siege and retreated. The residents and Yucatecan forces rolled back the “indios sublevados,” and declared victory on September 15. Included among the relieved populace were fifty Yucatecan deserters who earlier had left the front to find refuge within the town. Close to one thousand outnumbered Yucatecans took part in the battle, and overcame the odds. It was a moment of unprecedented unity within the Imperial Department of Yucatan. “Vivan los Valientes!” proclaimed the official imperial organ for the war, appropriately called La Guerra de Castas. The “heroes of Tihosuco” were celebrated and cheered in the capitol. But the energy and resources consumed at the battle were unrecoverable, and the tide of local rebellion grew. Inadvertently, Chan Santa Cruz had turned the fortunes of the Empire and delivered Hispanic Yucatan into the patient, symbolic arms of Benito Juárez.

In December, eighty-four Yucatecan soldiers, serving under French officers, mutinied while traveling northwest from Mérida to the port of Sisal. The French commander was shot to death after raucous proclamations of “Death to the Empire!” and “Viva Juárez!” The mutineers seized the cache of coins belonging to the detachment, and headed to Baca, where they joined the

168 La Guerra de Castas (GDC), No. 12, Oct. 2, 1866, 1; GDC, No. 4, Sept. 7, 1866, 1; AGEY, Fondo Poder Ejecutivo:Presidencia, Serie: Espita, Espita, Box 2, Vol. 9, exp. 1, Aug. 17, 1866.

169 GDC, Sept. 4, 1.
swelling forces of Buenaventura Martínez. Meanwhile, the liberal Campechano Pablo Garcia, back from exile, was equipped by republicans of neighboring Tabasco state, and marched toward Campeche, where French guns had earlier forced his surrender. The next month, Martínez ceded his command to the returning Manuel Cepeda Peraza, and recognized him as commander of the resurgent Yucatecan republican force. The Cruzob, meanwhile, steadily made inroads from the east – or at least it sounded that way to townsfolk, judging from the explosions.

In January, 1867, the Caste War veteran Felipe Navarrete was assigned to the front once again, assigned to headquarters at Ticul, twenty miles south of Mérida and eighty miles northwest of Chan Santa Cruz. Within a fifty-mile radius, about sixty miles south of the capitol, field officers reported spurious activity among the *sublevados*. It was a harsh week for Navarrete, who received the news of mass desertions from the Tihosuco garrison, site of the valiant Yucatecan battle of the fall. The local commander asked for eighty reinforcements in their place; the town was often a target for the Cruzob, and a gateway to the west and Valladolid.

The desertions came at a particularly bad time. The enemy, it seemed, was active everywhere in the region, and every movement or suspicion reported: A suspicious “marauding Indian” was seen near the Peto army headquarters; and the village of Ticum in the district of Tekax was overtaken by a Mayan raiders. On January 17, three explosions were heard within forty miles of one another, in one case on an open road, and in two others near a rancho. Two days later, another explosion in the district of Peto was attributed to the Cruzob. There were no reported injuries in those blasts, but the bombs served as a means of a means of psychological

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warfare, which the insurgents had mastered. There were raids of ranchos and haciendas in the area, groups of “savages” captured, and rumors of impending assaults.\textsuperscript{172}

On January 22, the Mayas kidnapped twenty servants from the Canalum rancho, in the Peto district (presumably for use as slaves). Three days later, an escaped prisoner of the Mayas told of plans for an attack on Mérida itself: The “sublevados” planned to use five hundred fighting men, it was said. By the end of the month, however, the imperialists had shifted focus to the western coast, where republican forces badly defeated their army at Hecelchacan, in what is now Campeche.\textsuperscript{173} And suddenly, after the raids, kidnappings, and explosions on the southern frontier line – the Cruzob gradually halted their advance. Instead, the Yucatecans again fought among themselves, this time over the dueling imagined communities of “empire” and “republic.”

By the summer of 1867, republicans under Cepeda Peraza seized Mérida after a long and bloody siege. They declared victory on June 15, three days before Maximilian’s execution. Although the Mayan rebels, for the second time in twenty years, failed to attack Mérida, the Caste War was not over. But Manuel Cepeda Peraza, Pablo Garcia, and the triumphant republicans were at the moment focused upon the restored Republic. None of the resurgent liberals in Mérida or Campeche would ever acknowledge their inadvertent allies, the people and armies of Chan Santa Cruz and of the areas under its influence. The War would continue, but a more unified national government under strongman Porfirio Diaz finally ended it in 1901.

The planned structure of European occupation and government in Mexico hinged on the idea that the vast majority of Mexicans and of indigenous communities would accept them, and that rebellious elements could by successfully tamed by force of arms. But Mexico had been

\textsuperscript{172} CAIHY-AH, Vol. XLVI, exp. 44, 55, 56, 57, 58, 60, 61, Correspondence, Jan, 16-19, 1867.

\textsuperscript{173} CAIHY-AH, Vol. XLVI, exp. 67, Felipe Navarrete to José Salazar Ilarreggui, Jan. 19, 1867.
mired in warfare of various shapes and characteristics in the decades since independence. Those years of conflict molded the identities of regional populations within its borders, and they were multifaceted. This is true in the case of the Caste War, which developed out of conflicts and values peculiar to Mexican regionalism. The separatist nationalism of the Cruzob was not a product of Mexican state-building, but it was a reaction to conflicts emanating from it.

As with the transatlantic republicanism that provided impetus to Juarist liberals, Chan Santa Cruz grew more resilient with the force of events and politics outside of national boundaries. European institutions in Mexico confronted an indigenous culture – of which both pacifico and Cruzob belonged – that sought violently to maintain a separate ethnic identity or “space.” And the territory of Chan Santa Cruz served as its homeland. That was also the case, in a different way, with chinaco guerrillas and with Oaxacan peasants; who were themselves products of a regional culture and identity, and tied to a home front. The issues for all forms of resistance were land, space, and identity. That mixture, in diverse regions of Mexico, could never peacefully accommodate the European presence. Moreover, by virtue of their own presence, the Mayas allowed Mexican nationalism to prevail on the Yucatan Peninsula.
PLACE, PEASANTS, AND RADICALS: WARFARE IN OAXACA

Having much fondness for the militia, I tried to organize a National Guard in this district, but the governor of the department prohibited me from doing so, sending me a decree of the State that exempted from military service all from the Department of Villa Alta, by considering its residents little suited toward such a career.

-- Porfirio Diaz, political chief in the Ixtlán district of Oaxaca, on his first attempts to militarize the Zapotec Indian male residents of the area (1855)174

In the blood-soaked political strife that characterized Mexico at mid-nineteenth century, perhaps no people were stuck with tragedy as much as Oaxacans, in one incident, and almost two hundred miles away from home. On March 6, 1862, the French were massed at Orizaba near the eastern coast in Veracruz, preparing for their first assault on Puebla with at least 5,000 soldiers. Meanwhile, the First Brigade of the Mexican Army of the East, comprised of about 1,500 Oaxacans, was assembled along the road to Puebla, in a town then called San Andrés Chalchicomula.175 That evening, hundreds of troops were quartered in La Colecturía, an old storage house of stone masonry, used by Catholic Church officials in earlier times, and since commandeered by Mexican liberals to store barrels of gunpowder. In the surrounding area, more troops were settling in for the night. Hundreds of women – mostly soldiers’ wives – burned fires for heat and cooking; women food vendors were also camped out, having followed the troops to sell their goods. Suddenly, the force of 50,000 tons of gunpowder in and around the edifice erupted in a powerful blast that sent body parts, blood, and bones in all directions, the latter

175 Now officially Ciudad Serdán.
acting as shrapnel and embedding in some of the victims; while limbs scattered in the streets nearby. In the warm spring daylight of the next day, the stench of dead flesh was such that bonfires were lit around the town to block it out, and those outside helping to collect bodies and tend to the injured held handkerchiefs to their faces. The ruins of nearby homes were covered in dried blood, and the painful wails of women were heard everywhere, according to an eyewitness: “The womenfolk (las gentes) were shuttered in their homes, some crying for the losses they suffered; others for never having witnessed such scenes off desolation and horror ....” More than 1,000 soldiers and officers were lost, along with four hundred seventy-five women who accompanied them, and five hundred people of the town. More than two hundred people were injured, although several died in the following days. Such was the entry of militarized Oaxacans into the war of the French Intervention, a sacrifice remembered in the years ahead.

The ruins of La Colecturía today

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176 “50,000 tons”: According to Santibañez, cited below, the amount of gunpowder was 460 quintales = 100 kilograms, or 46,000 kilograms; 100 kilograms = 220.46 pounds; Mexico officially converted to the metric system in 1857, although it was not widely used among the population until the early 20th century. See Hector Vera, “The Social Life of Measures: Metrication in the United States and Mexico, 1789-2004” (PhD dissertation, The New School for Social Research, May 2011). In earlier English-language accounts of the incident, the amount of gunpowder is listed as 46,000 pounds. See the works by Charles R. Berry and Patrick J. McNamara, cited below.

177 Most of this account is taken from Manuel Santibañez, Reseña Histórica de Cuerpo de Ejército de Oriente, Vol. 1 (Mexico: Tipografía de la Oficina Impresora del Timbre, 1892), 47-50; See also Patrick J. McNamara, Sons of the Sierra: Juárez, Díaz, and the People of Ixlán, 1855-1920.(Chapel Hill: University of North Carolina), 52.
For their part, French and Spanish doctors sent from the eastern coast rushed to the scene to assist the overworked Mexican physicians who were attending to injured people. Generous contributions to assist affected families were sent from Oaxacan state residents, in amounts totaling 1,200 pesos. Despite the tragedy, about one hundred surviving soldiers went on to participate in the fateful Battle of Puebla on May 5, almost exactly two months later. In the aftermath of the blast, its cause was generally attributed to a spark from one of the many fires in the area of La Colecturía during a slightly windy night. But emotions were running high, and a dissident military commander, Manuel Robles Pezuela, was suspected of complicity in the explosion, having criticized Juarez and the Republic, and earlier being granted a lenient sentence for his part in a local revolt. Before the month was out, he was shot by firing squad.178

As in other parts of Mexico before and during the Intervention, political stakes were high, and death by execution could often be the price of taking the wrong side. Oaxaca during the years leading up to the French occupation of central Mexico in 1863 was the scene of sometimes violent and always heated political conflict, Indian revolts, radical liberal politics, and also of nascent Mexican nationalist sentiments. In many ways, the state was representative of the cross-currents of warfare and violence wracking long-suffering Mexico, with multiple factions and communities involved, often for their own, locally based reasons. As with Yucatan, the state harbored a quagmire that mirrored general conditions in the country itself.

The resistance against the European occupation and the Mexican imperial government in Oaxaca emanated from three distinct regions of indigenous populations. During the course of the Intervention, all of them took up arms against the French, Austrians, and Mexican imperialist

178 Santibáñez, Reseña, 52-56.
troops ostensibly for the cause of republicanism. However, each population had its own reasons for doing so; in two cases presented here, the Mixteca Baja and Juchitán, they were practical in nature. In the other, the Zapotecs of the Sierra Norte made a collective political choice to join the Juárist republican cause. Although Oaxaca City, the capitol, had been a center of liberal thinking and learning for thirty-five years preceding the French occupation of Oaxaca, adherence was not automatic among the Indians. But the strain of liberalism – for different reasons -- induced all of them to resist the French-led forces and deplete their energies after less than two years of occupation. The invading armies and their Mexican collaborators were defeated by the end of 1866, when republicans again controlled the state through armies comprised of large numbers of indigenous Oaxacans. By going to war for the Juarist Republic, they were exercising nascent sentiments of citizenship. This will be demonstrated in the three regional examples cited above, with causes listed for each as allowed by documentation gathered from the state archives of Oaxaca, and information provided by recent studies.

Recent scholarship highlights the issues of identity and politics among Oaxacan Indians, who comprised perhaps as much as 90 percent of the state population of about 530,000 people in 1861, according to some estimates. To the north of Oaxaca City, the capitol, the people of Ixtlán in the Sierra Norte, under the leadership of charismatic mestizo and radical liberal Porfirio Díaz, became a center of resistance against European troops and Mexican imperialists. The Zapotec Indians there, in the home district of Benito Juárez, were undergoing a process of Mexicanization; and their collective understanding was that they could maintain their autonomy and regional identity under the Republic, Patrick J. McNamara has argued. To the northwest, the

179 Vivian Brachet de Marquez, La población de los estados mexicanos en el siglo XIX (Mexico: INAH, 1976), 78; See also McNamara, Sons, 31; Paul Garner, Porfirio Díaz (London et al.: Pearson Education Ltd., 2001), 22.

180 It is now commonly known as the Sierra Juarez.
Indians of the Mixteca Baja region were of traditional religious sentiments and conservative leanings. However, the advent of Maximilian, the Mexican Empire, and European occupation produced mixed loyalties, and it also created areas of negotiation by which hundreds of Mixtec Indians fought on the republican side, a fact recently noted by Benjamin Smith in his forthcoming work.\textsuperscript{181} To the southeast along the Isthmus of Tehuantepec, a distinct Zapotec community in the district of Juchitán had been in revolt against liberal state governments for over the fifteen years, preceding Oaxaca’s capitulation to the French in February of 1865. Although Díaz had organized a loyal militia in the area, the town was historically a center of restless Indian resistance to outside forces of liberalism, as represented by the government at Oaxaca City. In the end, however, Juchitán would be the site of a major French defeat that coincided with Juarist gains in central Oaxaca, several months before the execution of Maximilian in 1867. European occupation of the region lasted less than three years.

As local governments in central Mexico dissolved with the rapid advance of French troops and French-directed military operations in the second half of 1863, the liberal Oaxacan state government, under Díaz’ direction, remained sovereign for nearly two years. The Oaxacan insurgent leaders -- a majority of them radical liberals -- and their local militias then waged guerrilla warfare for nineteen months against French and Austrian forces that occupied the region, and also against the Mexicans who governed in the name of the Emperor. But the European occupation of Oaxaca ultimately failed because of the continuous armed mobilization of liberal forces there -- largely comprised of Indians-- and the indefatigable leadership of Díaz, who seemed to embody republican nationalism. The militarization of Oaxacan peasants had been in development for the past ten years, and it ultimately led to the final defeat of European and

\textsuperscript{181} Benjamin Smith, \textit{Provincial Conservatism in Mexico: Religion, Society, and Politics in the Mixteca Baja, 1750-1962} (Forthcoming, University of New Mexico Press), unpublished manuscript, 1-49.
Mexican imperialist forces. Resistance against the French and their Mexican collaborators rested on the promotion of Western liberal ideals of government. In the regions of Ixtlán in north-central Oaxaca, Huajuapan in the Mixteca Baja, and Juchitán in the Isthmus of Tehuantepec, such ideals -- through differing ethnic lenses -- were seen as compatible with local values embraced by indigenous peasants. However, liberal factions were far from cohesive in the decade preceding the Intervention, and the state capitol, Oaxaca City, maintained a strong ecclesiastic presence and retained conservative sentiments through the 1850s.

**Historical Background**

The region that became the state of Oaxaca had been a booming center of the cochineal and plant-based dye trades in the late eighteenth century, enterprises relied upon by Indians. Hispanic merchants in Antequera (Oaxaca City) and in provincial urban centers often prospered in cotton textiles, while others developed silver mining enterprises in the Sierra Norte. After independence in 1821, Oaxaca’s economy was ravaged by the ten years of revolutionary warfare throughout Mexico. The resulting procession of unstable national governments which resulted in also affected Oaxacan politics. The process of Mexican state-building involved a generation cultivated on Enlightenment ideals, and also one that came of age during the Mexican American War (1846-1848), the subsequent loss of territory, and the national identity crisis that followed.

Over the course of the Empire’s reign in Oaxaca, the face of regional liberalism would be Porfirio Díaz, and the emerging “little father” of the nation-state was Benito Juárez, who was born in the Sierra Norte in the pueblo of Guelatao. Their indoctrination into politics began in the nation’s first secular college, the Institute of Sciences and Arts, which nurtured three

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182 The native inhabitants of Ixtlán called him *Goo Beguu*, See McNamara, *Sons*, 7.
generation of liberal nationalists from the time of its founding in Oaxaca City in 1828. Drawing on ideas of the Atlantic revolutions in France and the Americas, and on the French and Spanish Enlightenments, the Institute charged no fees for registration. It aimed to prepare young men for careers in the post-colonial governments of Oaxaca, especially in legal studies. Rather than focusing on religion, philosophy, ethics, and Latin, as did the ecclesiastical colleges of Mexico, the Institute emphasized studies in physics, law, and French, among other topics, and generally advocated for the development of civic rather than religious values.

Among other prominent liberals of the next few decades, the college produced alumni such as Marcos Pérez, another Zapotec of the Sierra -- or Serrano -- who became a political patron of Díaz; both were to be prominent among radical liberals in the state. In addition, Matías Romero, of Oaxaca City, was another former student who, in his early twenties, met with President Lincoln as the Juarist emissary in Washington, D.C., and he would also secure American dollars, weapons, and political support for Mexican republicans during the French occupation. “Several open-minded priests, doctors, and lawyers taught at the Institute,” wrote historian Enrique Krauze. “The majority of these teachers were loyal Catholics who felt a need to keep scholastic works on the shelves but also to open windows toward intellectual freedom, new professions, and the sciences.”183 The Institute co-existed relatively peacefully with the Church in Oaxaca for nearly thirty years, although it was a city of active convents and monasteries, and several religious orders. The Reform years between 1855 and 1857 led to an irreparable rift between the Church and secularism in the capitol, as in the country, as both sides hardened, beginning with the governorship of Benito Juárez in 1847. The next thirteen years would be a painful process of conflict and local government formation, as emergent liberals and their

program ran into heated opposition by the Church and conservatives, mainly in Oaxaca City and the Central District; and also from Indians at Juchitán in the Isthmus. Liberals themselves were divided into moderate camps – the *borlados* – and radicals, or *rojos*. The differences between the two factions would become more pronounced as French troops occupied Mexico.

**The Zapotecs of the Sierra Norte**

The causes underlying the reasons people of this mountainous region just north of Oaxaca City embraced liberalism stretch back to the Reform period which started in 1855. The Reformers in Mexico City -- which now included Júarez -- embarked on a program of disamortization (The Lerdo Law). The law induced the Church to sell off its vast properties, to both private parties and local governments. Other Indians of Mexico – including those of the Mixteca Baja – might join the Church in protest, being traditionally religious and under its influence, but those of the isolated, rugged Sierra Norte were traditionally aloof from religious authorities, and resentful of its mandated fees. However, that fact alone did not lead to an automatic embracing of liberal republicanism. The Indians would be given incentives to take part in a liberal National Guard, and see how their actions as part of that organization would affect the state government. And their perception of “nation” in the years that followed was connected collectively to regional autonomy, an extension of a collective sense of “place.”

At first, liberal ideals and buzz words such as “prosperity,” “freedom,” or “equality” had little meaning for large and disparate groups of Zapotecs in the northern sierra. Such indigenous, pueblo-based groups enjoyed corporate rights to collective lands and relative political autonomy for almost three hundred years under the Spanish Crown. With the advent of independence and

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184 McNamara, *Sons*, 16-17.
nationhood in 1821, however, indigenous land rights faced increasing challenges as private
landholders sought to expand with government support. In Oaxaca, such conflicts were mediated
to some degree when the state constitution of 1824 granted municipal status to Indian pueblos
that had formerly been under Crown protection as corporate entities (la republica de indios). Their first incorporation into an institution of the state occurred in 1855, with the arrival of Díaz
as an agent of the liberal state government.

The athletic and restless Díaz had been a librarian before he passed his law exams in
1854. The next year, he was appointed jefe politico (political chief) of Ixtlán district by General
José María García, Governor of the Department of Villa Alta, after the fall of Santa Anna’s
dictatorship. Despite opposition from the state government, Díaz saw an opportunity to militarize
the Zapotecas of the district, and indoctrinate them into liberal republicanism. His first order of
business was to organize a National Guard battalion among the Indians of the district, and
encountered few apparent obstacles to this task. Such battalions in Oaxaca and elsewhere were a
creation of liberal governments, oriented toward defense against the traditional conservative
military apparatus. With this consideration, locating precise reasons -- at precise moments -- for
the Serranos’ immediate willingness to accept Western liberalism, for their own perceived
advantages, is still an elusive historical task. The Zapotecas of Ixtlán, through their elders, and
perhaps through the few literates in the populace, and word-of-mouth, must have had some
awareness of the upward descent of their native son, Benito Juárez. However, the classic “boot-
straps” example does not offer hard evidence that the person of Juárez alone was somehow
responsible for the Mexicanization of his people in the Sierra Norte. In Díaz’ own rather dry
account of Indian participation in liberalism, some answers are offered, if taken at face value: It

185 Garner, Díaz, 23.
was a conscious effort to foster a grass-roots political and military culture within a tight-knit ethnic community. Although it is difficult to assess all of the complicated historical reasons for the Serrano Zapotecs to align with the liberal faction of Oaxaca, which may have been decades in the making, there were also precedents for their political leanings. With two natives of the Sierra -- Juárez and Pérez – now involved in liberal state politics, and a need to defend regional autonomy, the Serranos understood the political winds sweeping Mexico, and chose to incorporate on the liberal side.

First, Díaz assured potential members of the Guard that they would not be imprisoned for non-payment of taxes. An advocate of physical fitness and exercise, Díaz oversaw the construction of a gym, specifically for his recruits, and organized private dances for them. Leadership within the ranks was based on pre-existing lines of patriarchal authority, even while many pueblo elders were illiterate and unfamiliar with numerical systems, according to Díaz:

As my officials did not know how to count, and I could not replace them because they were the most prestigious Indians in the pueblos, I had to teach them military paperwork, the ordering and maneuvering of infantry, and with this same objective I established a night academy that I gave in the schoolrooms [used by] children.

The first test of the new indigenous militia occurred when conservatives launched a local coup d’État, and occupied Oaxaca City in the fall of 1855.

Díaz led his militia of four hundred barely armed, and often barefoot, peasants toward the capitol. The large volunteer force stopped to prepare for the final push in a hillside town, with the Oaxaca City visible in early daylight. The Zapotecs entered the city peacefully and

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186 APD, 1:51.
187 APD, 1:54.
188 APD, 1:52. For a colorful account of this mobilization, see McNamara, Sons, 1-2.
victoriously the next day, preventing a conservative takeover. During their occupation of Oaxaca City, the militiamen were given their first payments as soldiers, and thereafter paid according to rank. By January, the returning Juárez again became governor, and he authorized uniforms and new weapons for the Ixtlán militia force. Two years later, Juárez was again called to Mexico City, to fill the post of President of the Supreme Court. When the War of the Reform broke out in January of 1858, he was propped into the national presidency during a time of unprecedented civil strife, and never returned to Oaxaca. The Ixtlán militia remained a loyal republican force through the Intervention, and made up a sizable portion of the Oaxaca republican force.

The Zapotecs of the Isthmus of Tehuantepec, Juchitán

The first test of liberal government in regard to Indian peoples arose during the first governorship of Benito Juárez in 1847. He was in his early forties, and it had been some thirty years since the Hispanised and educated Zapotec left his village in the Sierra Norte for Oaxaca City, barely literate in Spanish. He was now governor at a time when American troops circled Mexico City, and they would soon occupy the national capitol. One of Juárez’ first major tasks was to prepare local militias in defense against a possible U.S. invasion. During the decade of the 1840s, the Mexican federal government, under direction by liberals, incorporated local National Guard militias, in part to diminish the power of established armies – which often fought for conservative interests and were aligned with the Church and landowners of central Mexico. Another intended function of the Guard was to control local troubles, which could erupt when Indian pueblo autonomy was threatened, or when rebellious officers decided to initiate a pronunciamiento (regional military revolt). It was important to Juárez and his government to organize Guard units at the Isthmus, as American agents had already been granted transport rights there, and had expressed interest in constructing a canal across it. The granting of private
transport rights in the heart of Zapotec territory on the strait was already putting a strain on relations between the emergent liberals in Oaxaca City and native inhabitants in Juchitán.

In addition, liberal policies under the Juárez administration had accelerated the process by which commonly held Indian lands and resources were being placed into the hands of new Hispanic owners. For example, many Zapotecas of the Isthmus depended upon natural salt beds for their livelihoods, which became essential due to the decline in cochineal production and profitability – in turn caused by foreign competition and global markets. But rights to the salt beds were granted to private owners by the liberal government. Migrant Hispanic rancheros also brushed up against traditional native landholdings.  

As American troops withdrew from Mexico, Juárez had to deal with a fierce Juchiteco rebellion that had been brewing for some time, and which lasted six years. Being of another region, familiar with a different Zapotec dialect and of a differing ethnic identity, at least in his early years, Juarez had no special history with the Indians of the Isthmus. His authoritarian approach to the troubles precipitated rebellion. The Indians were led by Gregorio Meléndez, also called “Che Gorio Melendre,” a cigar-smoking, burly local chieftain who led frequent rebellions over the past decade. His Juchitecos were mostly armed with machetes, and, as with other Indians of Oaxaca and the rest of Mexico, well-skilled with them. Their latent hostility toward outsiders, but also their cordiality, impressed one European traveler, who described them in Orientalist terms:

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189 John Tutino, “Ethnic Resistance in Juchitán,” in Zapotec Struggles: Histories, Politics Representations from Juchitán, Oaxaca (Washington and London: Smithsonian Institution Press, 1993), 57-58; Hamnett, Juárez, 40-41. Contemporary Latin American studies scholars have widely researched the Zapotecas of Juchitán because of the strong roles that women play in their society. Their role in the Juchiteco battle against the French on Sept. 5, 1866, has also been noted, and will be briefly be discussed later in this chapter.
There is nothing like showing oneself fearless in intercourse with Indians; shake them vigorously by the hand, look boldly into their eye, and you have got them as servants, who would have been your masters if your footsteps had been wavering, your hand timid, and your eye winking when approaching them. They are, in that respect, like wild beasts of the forest.\footnote{G.F. von Tempsky, *Mitla, a Narrative of Incidents and Personal Adventures on a Journey in Mexico, Guatemala, and Salvador in the Years 1853 to 1855* (London: Longman, Brown, Green, Longmans, & Roberts, 1858), 281.}

The rebellion took on the characteristics of a separatist movement, with the Indians under Meléndez raiding privatized salt beds and *hacendado* lands, and overtaking the government of the neighboring district of Tehuantepec. Juárez sent in a large Oaxacan force, and enticed rebels to lay down their arms with offers of amnesty in exchange for sworn obedience to the state. But Meléndez, in early 1851, joined forces with a Juárez appointee, Tehuantepec Governor Máximo Ortiz, and again declared rebellion against the state government. A frustrated Juárez left office at the expiration of his term the next year, while the upheaval continued.\footnote{Hamnett, *Juárez*, 43.}

Early in 1853, General Antonio Lopez de Santa Anna was again brought to national power, in a military revolt, and was for the eleventh last time head of the Mexican state. Although Meléndez was said to have had an “inextinguishable hatred for Mexicans in general, and Santa Anna in particular,” he was mysteriously poisoned that year.\footnote{Von Tempsky, *Mitla*, 285.} Afterward, Santa Anna created a separate Department of Tehuantepec, as a counterbalance to the liberal-leaning government seat at Oaxaca City. Juárez, and other prominent liberals fled into exile in New Orleans, and Santa Anna formed a centralist dictatorship staffed with leading conservatives, including historian and ideologue Lucas Alamán. Juárez and other comrades, including radical liberal Melchor Ocampo of Michoacán, waited two years before returning to Mexico.
The Juchitecos’ “conversion” to liberalism occurred during the War of the Reform (1857-1860). While conservatives occupied and governed from Mexico City, they were not militarily dominant at the Isthmus of Tehuantepec. During a recruitment drive among the Indians of Juchitán at the beginning of 1859, Díaz was able to win over many Indians, and establish the foundation of a loyal militia through his political skills. According to Díaz, he had discreetly distributed arms to Juchiteco Indians celebrating New Year’s festivities in Tehuantepec, seat of the state department of the same name, and a short distance from Juchitán. The trail of Juchiteco families that headed back home afterward – accompanied by an escort led by Díaz -- was attacked by conservative guerrillas on the way. One of the Juchiteco leaders, an elderly man, died in the attack, and the Juchitecos inquired of the visiting Oaxacan delegation if he could be properly embalmed. A doctor in the escort was persuaded by Díaz to perform the service, using only straw and lime to embalm the body. The deceased and preserved elder was given an honorable burial, and -- as the Juchitecos believed -- in “toda regla” (officially prepared), which left the inhabitants “very satisfied.” This personal touch by Díaz may be something of an exaggeration, but the establishment afterward of Juchiteco militias in the service of liberalism is a surprising turn in the history of the region, and is still poorly understood.

The population of that district had been involved in mass uprisings against different state governments -- liberal and conservative -- for at least two decades, and it especially resented the first Juárez administration in Oaxaca that took power in 1840. Although a brief Juchiteco uprising would take place in 1863, and local liberal officials in the district could be abusive toward residents during that same timeframe, loyal militias still took part in resistance against French troops that occupied the area during the Intervention. The alliance of Juchitecos and

193 APD, 2: 86-87.
liberals was also linked to a legacy of hostility toward neighboring Tehuantepec, a Hispanic-dominated town that claimed jurisdiction over Juchitán after February of 1865, when it became the seat of Imperial government on the Ishmus, allied with the French.\textsuperscript{194}

\textbf{National Events and Oaxaca}

Conservatives attained power in Mexico City in a military coup toward the end of December, 1857, leading to the War of the Reform and an alternate, refugee liberal government at Veracruz on the eastern coast. In January, conservative generals acting independently invaded Oaxaca from central Mexico, targeting the liberal state government, which was still loyal to the Juárez administration in Veracruz.\textsuperscript{195} Although the conservatives briefly occupied Oaxaca City, the attack, led by General Jose María Cobos, was eventually repelled by Oaxacan militias, and the state government remained beholden only to the Veracruz government. The Ayutla Rebellion, led by landowner, political boss, and archenemy of conservatives Juan Alvarez of Guerrero state, gathered enough support to topple Santa Anna from power in the spring of 1855.

Juárez traveled to Mexico City in June, immediately entering the cabinet of President Ignacio Comonfort. As cabinet minister, he promulgated the Juárez Law (\textit{Ley Juárez}), limiting the judicial privileges of Church and army officials, which provoked a conservative backlash in Oaxaca – and led the Sierra Norte Indians to march into the capitol, described above. Fortunes changed for the state liberal leadership in October of 1859, when revived conservative armies, again under Cobos, invaded and successfully seized Oaxaca City. The latest attack led to an exodus of liberal sympathizers, military men, and family members toward safe haven in the

\begin{itemize}
\item \textsuperscript{194} Howard Campbell, \textit{Zapotec Resistance: Ethnic Politics and Cultural Revivalism in Southern Mexico} (Albuquerque, NM: University of New Mexico Press, 1994), 50.
\end{itemize}
Ixtlán district among the Zapotecs. On November 4, “a ragtag caravan pulled out in carts, wagons, on horseback, walking, pushing, carrying, dragging and their belongings”:

… and strung out along the dusty road that climbed up into the steep foothills and onto the mountain barrier. In the line was Margarita Maza de Juárez, wife of Benito, astride a burro with her three children riding in baskets hung on the animal’s sides.¹⁹⁶

By the summer of 1860, several hundred fighters under liberal commanders, operating out of Ixtlán, with Porfirio Díaz in the leadership ranks, besieged and finally took back control of Oaxaca City. Meanwhile, after two years of guerrilla warfare directed out of Veracruz, liberal forces defeated conservatives based at Mexico City. The national capitol fell to the liberals in December of that same year. The national government was again in liberal hands under President Juárez. The French would force that government out of Mexico City three years later.

At the end of the War of the Reform in 1860, moderate borlado liberals held control of the Oaxacan state government under Governor Ramón Cajiga. They had been the controlling faction for much of the previous ten years, but were less willing to engage in warfare, preferring not to upset the local economy. They included among their number merchants and landowners of the upper classes. With the European occupation of Veracruz in the fall of 1861, however, the power would shift to the radicals, who were preparing for a French invasion into central Mexico.

The Tripartite Agreement between Great Britain, France, and Spain, was created in the fall of 1861 to force payment of outstanding foreign debts owed by Mexico. Earlier that year, the Juárez government had instituted a moratorium on payment of 80 million pesos to the three powers, which the prompted British, Spanish, and French to send naval and military forces to the port city of Veracruz in October. Although British and Spanish forces pulled out after separate agreements with the Juárez government, the French commanders refused to leave. Instead, an

¹⁹⁶ Berry, Reform, 68.
arrangement was made with Mexico City for the French force to remain for the time being at Orizaba, about fifty miles inland. In the spring, the French force began its march toward Puebla.

Most of the Oaxacan forces sent to the impending battle were Indians, and not all had gone voluntarily. Although Díaz had managed earlier to recruit Juchitecos into his Oaxacan National Guard during the War of the Reform, relations were frayed between the Indians and the state government at the start of the French invasion. In February, 1862, in the Juchitán district, local authorities resorted to extreme measures to acquire recruits for the republican army. The jefe político of San Francisco municipio (municipality), Pedro Gallegos, ordered nighttime raids into private homes, seizing men “without distinction” -- both young and the elderly. The men were then pressed into the march to central Mexico and incorporation into the national defense force. Despite the general panic which resulted from such forced conscriptions, a small force of Juchiteco irregulars was eventually sent to join the Mexican forces converging at Puebla.

In addition, several local chieftains vowed to take part in sending “soldiers of the pueblo, participating in the glory of rejecting the foreign invasion.” Among those pledging their help was Apolonio Jiménez, a local leader who had at one time opposed Díaz, and threatened to kill him years earlier, when the latter was recruiting for the liberal cause in the region in 1859. It is likely that indigenous Juchitecos were among the dead at San Andres Chalchicomula.197

After the disaster at La Colecturía in March, 1862, the survivors joined the combined Mexican force at Puebla, while the French under General Lorencez marched inland. Under General Antonio Zaragoza, the republicans numbered 3,000 infantry and five hundred cavalry,

and were outnumbered by about 2,000 men. Outside of Oaxaca, troops arrived from Veracruz, Hidalgo, Michoacán, and Guerrero, along with Indians from the Puebla Sierra. They all assembled at the twin hilltop forts of Guadalupe and Loreto. The Mexican artillery lacked the range of the French cannons, and some of the central Mexican troops were fought barefoot, although most had at least antiquated muskets. The French attacked the Guadalupe fort in lineal formation, and were surrounded and outflanked by Mexican troops who fought more on instinct than in the traditional European fashion. At closer range, the Mexican cannons halted the forward motion of the French ranks, which broke ranks and retreated by the early evening.

Gathering disparate troops with a wave of his sword, Díaz led a small force in pursuit some distance away from Guadalupe, against orders from Zaragoza. If he did not keep up his advance on the French troops, “they would have advanced toward me,” Díaz explained to his superiors afterward. The victory provided impetus to the liberal republican cause, and some solace for the Oaxacans who remembered Chalchicomula. The account of the battle provided in Díaz’ memoirs, published thirty years afterward, is rather bereft of emotion. However, a letter sent to his sister immediately following the battle captures his jubilation, and pride in gathering up the abandoned French objects of war:

I have collected their red hats, their crosses and medals, and their arms. In short, I have never had a more pleasurable day, nor a day as great as the memorable 5th of May, a day of glory and greatness …

In Veracruz, the French were to wait another eight months for reinforcements.

The following year, some 30,000 French troops arrived and, following the same route to Puebla, were prepared to attack the city directly. The Mexican republican army was faced by

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198 APD, 2:157, Gen. Antonio Zaragoza to the Minister of War, May 10, 1862.
199 APD, 1: 149-156; McNamara, Sons, 55.
overwhelming numbers, and the French skillfully dug a progressive series of trenches around the city, ready to lay siege for an extended period of time. During last days of the siege, the French were fighting for every block. But the outnumbered republicans were slowly starved of food and resources, capitulating in May, after almost two months. Porfirio Díaz and other officers escaped after initially offering to voluntarily turn themselves in to the victorious French. Instead, they fled into central Mexico. After this second battle of Puebla, the moderate Oaxacan government under borlondo Ramón Cajiga took a cautious approach to events unfolding in his country, and he was largely unresponsive to correspondence sent by the Juárez government, which urged the governor to send soldiers in preparation for the second invasion.200

Meanwhile, the situation in Juchitán again erupted with a rebellion of Mariano Gallegos, described in documents as a “resident” (vecino) -- likely an indigenous Juchiteco -- who had a force of two hundred men at his disposal. The rebellion lasted less than two weeks, apparently with little bloodshed. In the end, the Cajiga government pardoned Gallegos and his band, although officials of the Department of Tehuantepec, where Juchitán is situated, lamented the lenient treatment of the rebels:

… the First Chief of the State, using the paternal element that characterizes it, pardoned Gallegos and friends, [from] the punishment that the vigilant laws denoted for the dissidents, for the uprising stirred up in Juchitán, who should have been punished severely, treated as traitors, perpetrators of such a movement in moments when the Fatherland finds itself in danger, [instead] mandating that these individuals retire to their homes to live peacefully and passively … 201

Such decisions might have signaled the end of the moderate borlado regime in Oaxaca, which had for the past year provided troops and war materials to the republican government only

200 Berry, Reform, 84.

201 AGEO, Gobernación: Tehuantepec, Guerra, 1863, Legajo 1, exp. 30, various documents; Juan Avendaño to the State Government of Oaxaca, Tehuantepec, May 30, 1863
reluctantly. In the fall, Díaz sent a detachment of his own troops to Juchitán to maintain peace, and marched toward Oaxaca City from central Mexico intent on replacing the complacent moderate government. By July of 1863, the French occupied Mexico City and began the process of pacification in central Mexico which was complete by early the next year, with the capitol cities of Morelia, Guanajuato, Guadalajara, and Aguascalientes under their military control. Although French troops patrolled the Oaxaca-Puebla border areas, preparations were just beginning for a full-scale invasion of the state. Meanwhile, military activities circulated, in subdued fashion, in the northern district of Huajuapan, in the northwestern Mixteca Baja region.

Wandering groups of soldiers arriving from recent battles with the French in central Mexico began to appear in the northern part of the district, haggard and seeking refuge. One detachment of Pueblans asked to incorporate into the Oaxaca forces for the “same rates of pay” as soldiers native to the state. One group of about thirty Oaxacan soldiers on horseback, on their way to Huajuapan de Leon, the district seat, asked for grain or straw to feed their horses, which were “starving to death.” A local military command provided six pesos for a “bushel of grain” and then asked the district government to reimburse him for the expense.

The French, meanwhile, established headquarters in far north of Huajuapan, near the Puebla border at Zapotitlán Salinas. One unfortunate French soldier, who apparently lost his way, was captured by a local Oaxacan patrol. Called a “Turk,” he was probably a member of the turbaned Chasseurs d’Afrique corps (cazadores de Africa). The French commander and local Oaxacan authorities negotiated for the soldier’s release, along with his gun, bayonet, backpack,

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202 APD, 2:42-43, 45.

203 AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 50, 10-11, Municipal President of Chazumba to the Secretary General of the Department, Chazumba, July 28, 1863; AGEO, Fondo Gobernación: Huajuapan, Guerra, Legajo 1, exp. 50, 12, Col. M. Gonzalez to the Governor of Oaxaca, Huajuapan de Leon, July 31, 1863.
and ammunition. But the correspondence involved in this incident should be noted, in that the French commander wished to avoid sending in his own troops, and intended to respect Oaxaca’s boundaries. Such communications are indicative of the delicate relations between the moderate liberal government and the French occupiers in the border region by the fall of 1863.  

The nature of such relations would change with the arrival of Díaz and his Army of the East in the last week of November, after a march through central Mexico. Cajiga was suspected of having an informal truce with the French, and Díaz had been instructed by the republican government, now situated at San Luis Potosí, north of Mexico City, to remove him from office. When Cajiga protested, by messenger, that his removal by force would be unconstitutional, Díaz responded that weapons have no other objective than to “defend the nation against foreign invaders and traitors; which I consider in the second case all who resist compliance with the Federal Government.”  

On December 1, Díaz took over as governor, naming radicals to key positions, gathering recruits, organizing his cavalry, artillery units, and infantry, designating officers for each unit, and generally preparing for war.  

In the spring of 1864, the central states of Mexico were under French occupation, and administered by Mexican imperialists; Maximilian and Carlota arrived in June to accept their respective thrones in Mexico City. Meanwhile, French troops directed by Marshal Bazaine, began improvements on an existing highway, La Cañada, which led from Tehuacán in Puebla to

\[204\] AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 50, 13-14, Two letters: Municipal President of Chazumba to the Jefatura Política (Political Chieftancy) of the District of Huajuapan de León, and to the Secretary General of the Dept. of the Supreme Government of Oaxaca, Chazumba, Nov. 9, 1863.  

\[205\] APD, 2:45; AGEO, Gobernación, Gobierno de los Distritos, Huajuapan, Legajo 1, exp. 51, 8 fojas, Jose Alvarez to the Secretary of the Superior Government of Oaxaca, includes chart, Feb. 29, 1864.  

\[206\] APD, 2:65
Oaxaca City. Another, new road under construction was to link Acatlán, on the Oaxaca-Veracruz border, to Huajuapan, the district seat, which contained a republican force numbering less than two hundred men and officers, but it was a major strategic target.\(^{207}\) The roads were to crisscross, and were to enable thousands of European troops, with their artillery and animals, in the invasion at the Mixteca Baja and at the central district, where the capitol was located. In guerrilla attacks, the Oaxacan forces under Díaz harassed French forces at the lines of construction, and may have delayed the invasion and siege of Oaxaca City, which did not begin until early the next year.

In July, an Ixtlán militia unit assembled in Guelatao, the hometown of Juárez, to hear a declaration of its local captain, Felipe García, in response to developing events: The villagers would fight to maintain “the form of our government, which is a popular representative republic” against the foreign emperor, Maximilian, and the troops of Napoleon III. “As their declaration made clear,” Patrick J. McNamara argued, “they thought of themselves as Zapotec Mexicans.”\(^{208}\) This kind of public declaration in favor of the Juárez Republic was rare in the indigenous districts of Oaxaca, but it demonstrates the sentiments of Díaz’ loyal fighters in Ixtlán, the nucleus of resistance in the state. In August, preparations began for the defense of Oaxaca City.

The invasion of Oaxaca

Marshall Achille Bazaine arrived in Etla, just north of Oaxaca City, to take charge of the siege on January 15, 1865, while French troops had been preparing themselves and their equipment for the past month. His total force consisted of between 8,000 and 9,000 soldiers,

\(^{207}\) APD, 2:46.

\(^{208}\) McNamara, Sons, 56.
including 1,000 Mexican imperialists, and enough artillery and mortars to sustain long bombardments. Díaz had less than 3,000 fighters, and had incurred the anger of many of the city’s nominally liberal residents by digging trenches through city streets, and having the walls of homes around the plaza area knocked down in anticipation of heavy mortar fire.\(^\text{209}\)

Defections among the republicans occurred even before Bazaine reached Etla, leading Díaz to order the executions of deserters; “one to five men” every eight days. But such heavy-handed measures only deteriorated the already low level of morale among the troops, and casualties also mounted. Díaz rested his hopes on a cavalry unit of between 450 and 500 men, supported by National Guard militias from various districts, who were to cut off Bazaine’s forces before they reached the main body of French troops. But Colonel Jerónimo Treviño, who headed the cavalry force, deserted with two units from outside Oaxaca, followed by groups of National Guard soldiers.\(^\text{210}\) Abandoned by such a large force, the troops inside Oaxaca City were forced to abandon artillery positions and assemble in the central plaza area. By the time he surrendered, Díaz was left with less than 1,000 soldiers. In the last days of the siege, several officers defected, as did a unit of two hundred Sinaloans.\(^\text{211}\) Between February 6 and 8, four hundred mortars had hit the center of Oaxaca City, where the republican forces were concentrated, unable to move about. During the evening of February 8, Díaz and an armed escort rode out to headquarters of Marshal Bazaine and offered to surrender with a pledge that he would not again take up arms against the Empire. Díaz slept in Bazaine’s quarters that night, not far from the cots of the marshal and another French officer. In the morning, Díaz was escorted by a troop of Chasseurs

\(^{209}\) APD, 2:70; Berry, Reform, 90.

\(^{210}\) Ibid., 90; APD, 2:68.

\(^{211}\) APD, 2:71-73.
d’Afrique to the plaza of Oaxaca City, where his republican troops had gathered, to announce the formal surrender. His barely audible voice “trembled with emotion … drowning in suffering that showed in his countenance the indefinable signs of pain.”\textsuperscript{212} He was again a prisoner of war, and led under guard to confinement in Puebla, and remained imprisoned for seven months.

**The Mixteca Baja: Huajuapan de León**

Although the French invaded and captured Huajuapan in the summer of 1864, the district seat was under Imperial administration by early March, 1865. As with other regions of Oaxaca during the war of Intervention, the indigenous population in the district had relatively cordial relations with liberal governments, and it was not particularly warm to the Empire even at the beginning. During the Mexican Reform period (1855-1857), where, throughout Mexico, Indian communal lands were threatened by landowners and liberal local governments, there were mitigating factors in Huajuapan which curtailed potential anger and agitation. For example, while the Lerdo Law (\textit{Ley Lerdo}) issued by the Mexican Congress in 1857 forbade communal purchase of property, Huajuapan officials allowed peasants to buy lands as shareholders. Such organizations, called \textit{sociedades agrícolas} (agricultural societies), provided legal sanction for traditional practices.\textsuperscript{213} (This was similar to the Oaxacan governmental policy of 1860, where Indian communities were given status as municipalities, as described earlier.)

As authorities in the Huajuapan instituted Reform-era policies, they were also careful not to pick apart religious practices that were technically incompatible with liberalism. Public religious ceremonies and the Church-mandated payment of tithes continued unmolested, and

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\textsuperscript{212} El Pájaro Verde, Vol. 3, No. 39, Feb. 17, 1865, 2; APD, 2:76-78; Santibañez, Reseña, 243. \\
\textsuperscript{213} Smith, Conservatism, 40.
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priests continued to prohibit civil marriage.\textsuperscript{214} The Empire’s lukewarm reception in Huajuapan can be attributed to a comfortable status quo under liberal governments, among the Indians and in the population at large. Independent guerrilla bands operated in the area even before Díaz escaped from prison in September of 1865, and he drew many new recruits from the district.

**Ending the Empire: From Huajuapan to Oaxaca City**

After the fall of Oaxaca City, scattered guerrilla activity against the French in Huajuapan occurred through early March, 1865, when Mexican imperialists took over the district government. “I feel deeply honored by His Majesty, for having decided to decorate me with a medal of military merit,” said the new prefect and head of the Mexican imperialist militia of Huajuapan, Jose Acevedo, “having defended this locality (plaza), with the civil guard and residents of the population.” But resistance continued. A few days afterward, Acevedo reported that a combined French and militia force of ninety-five men pursued rebels who were disrupting “order” in Silacayoapam, about twenty miles south of Huajuapan.\textsuperscript{215} In April, an imperialist militia pursued one hundred guerrilla horsemen under Juan Avalos, an otherwise obscure figure in the documentation. His band eluded the local imperialists throughout Huajuapan, and it also occupied towns in the neighboring district of Jamiltepec, to the west. In at least one case his men were fought off by local residents. In the confused terminology employed by the both French and

\textsuperscript{214} Ibid., 40.

\textsuperscript{215} AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 52, Jose Acevedo to the Superior Political Prefect of the Department of Oaxaca, March 5, 1865; AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 53, Jose Acevedo to the Sub-Secretary of the Superior Political Prefecture, Department of Oaxaca, March 8, 1865.
Mexican imperialists in describing guerrillas, the Avalos rebels were referred to as both “bandits” and “dissidents” in different reports to the Imperial government in Oaxaca City.\textsuperscript{216}

The Oaxacan resistance began to intensify with Porfirio Díaz’ escape from imprisonment in September, 1865. With characteristic athleticism, he used a smuggled rope to pull himself up to the roof of the Convent of La Compañía, which had been adapted to house captured republican officers. Sliding and climbing down the domed roof and walls of the convent, to the street below during a particularly dark night, Díaz then journeyed across central Mexico back to Oaxaca. By the time he reached the town of Piaxtla, about forty miles northwest of Huajuapan, he had acquired seventy-eight new foot soldiers, and thirty mounted guerrillas under chieftain Tomas Sánchez. On Oct. 1 in Tulcingo, on the Oaxaca border, his small force defeated a larger force of Mexican imperialists, capturing three hundred infantrymen. The imperialist commander, counter-guerrilla fighter Jesús María Visoso, fled with his cavalry, leaving behind 3,000 pesos in gold that went to Díaz. The gold was placed under the charge of a paymaster, licenciado (degree holder) who had been earlier recruited into his growing ranks.\textsuperscript{217} The three hundred captured soldiers were incorporated into the growing republican forces.

Crossing over into the state of Guerrero, still unoccupied by European troops, Díaz was assisted by the old political chieftain Juan Alvarez, who led the Ayutla Rebellion ten years earlier, and who donated two hundred muskets, which was somewhat disappointing. Díaz was also provided with supplies from nearby townspeople, and soon picked up two experienced

\textsuperscript{216} AGEO, Gobernación: Huajuapan, Sublevados, Legajo 33, exp. 25, Arturo Castaneyra to Secretary General of the Prefecture Superior of the Department of Oaxaca, April 10, 1865; AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 53, Antonio Castaneyra to the Secretary General of the Superior Political Prefecture of the Department of Oaxaca, April 13, 1865.

\textsuperscript{217} APD, 2:90-91, 96-97.
officers from Guerrero. As he set out for Oaxaca from the Alvarez ranch at La Providencia, more
than one hundred miles northeast of Huajuapan, recruits came forth, including twenty Oaxacan
National Guard members who had escaped the French capture of the capitol in February, 1865.
From several villages along the way, about 2,000 Indians joined the growing army, although
most were without firearms – many likely carried machetes. The large column of soldiers under
Díaz was visible in the mountains as it approached the town of Tlapa, Guerrero, on November
25. There, a force of 1,000 Austrians and Mexican imperialists were garrisoned. According to
Díaz, the Austrian commander withdrew his force at the site of such numbers approaching the
town from the mountains, not knowing that many of them were unarmed. When the combined
Guerrero-Oaxacan force occupied the town, Díaz thanked his Indian recruits and released them
from duty.218 By the end of the year, the revived Oaxacan republican army under Díaz was
active in the Mixteca Baja, now targeting the city of Huajuapan de Leon.

During the fall, problems arose for the Empire in Oaxaca, as friction built up between the
department government under prefect and “imperial visitor” Juan Pablo Franco, and the Austrian
commander sent to fight in Huajuapan. In August, the Austrian captain, Karl (Carlos) Thindeis,
provoked complaints by Jose Acevedo of the “hard hand” employed in regard to local residents
and officials. Thindeis had rejected the state of his quarters, a room in local inn that had been
used by Mexican officers. He ordered changes which included “a window in each room, a table,
seats, and a lamp,” and one room to be converted into a kitchen. Thindeis’ arbitrary actions
increased the next month, when a Mexican imperialist officer was thrown in jail, against
Franco’s wishes. At the same time, Huajuapan civilians were ordered to turn in their firearms,

and men were recruited to fight in the Austro-Belgian force in the area.\textsuperscript{219} In late September, Thindeis was appointed interim supreme commander of the Oaxaca imperialist forces. Immediately after assuming his post, Thindeis ordered all Mexican soldiers in Oaxaca City to assemble for review, and then proceeded to insult the Oaxacan government in front of them. Franco complained to General Franz Thun, the officer in charge of Austrian forces, who was based in Puebla. Complaint letters streamed into the Oaxacan Imperial office, with one calling for violent action against Thindeis. Franco eventually chose to comply with the captain’s orders, while waiting for a permanent Austrian commander to arrive from Puebla.\textsuperscript{220} Meanwhile, Díaz marched from Guerrero into Oaxacan territory. Desertions of imperialist units were increasing, as mid-January, 1866, when a Mexican “mobile rural battalion” fled its post in Huajuapan.\textsuperscript{221} By early February, Díaz was notified of his appointment by Juárez as General of the Line of the East, with jurisdiction over the republican armies of Mexico state, Puebla, Oaxaca, Tlaxcala, and Chiapas, essentially the same official duties he had before his surrender in Oaxaca City.

By that time, Louis Napoleon had decided to pull his troops out of Mexico over the course of the next year. As the French commitment became more uncertain, the Díaz force grew stronger, attracting the scattered bands in Huajuapan district that had operated since his capture and imprisonment the previous year. Mariano Reyes, leader of a guerrilla band allied with Díaz, occupied Silacayoapan in late January, and surprised a Mexican imperialist patrol under

\textsuperscript{219} AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 53, Jose Acevedo to the Secretary General of the Superior Political Prefecture of the Department of Oaxaca, August 4, 1865; AGEO, Gobernación, Guerra, Legajo 1, exp. 53, Rafael Castillo to the Secretary General of the Superior Political Prefecture of the Department of Oaxaca, Oct. 6, 1865.

\textsuperscript{220} Berry, Reform, 101-102.

\textsuperscript{221} AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 55, Rafael Castillo to the Provisional Secretary of the Superior Prefecture of the Department of Oaxaca., Jan. 19, 1866.
commander Manuel Primo, who was captured and summarily executed.\textsuperscript{222} By late April, an expanded guerrilla army under Díaz operated in the areas of Silacayoapan and Justlahuaca, both within thirty miles to the south of Huajuapan, the district seat.\textsuperscript{223} Independent irregular groups and the larger republican guerrilla force steadily made gains closer to the city through the summer, occupying smaller towns and bringing them under the republican sphere of influence. In August, the Oaxacan republican was nearing the peak of its military strength, as guerrilla bands and deserters flocked to it. Even imperialist colonel Jesus María Visoso, who had fled Díaz’ force the prior spring at Tulcingo, Guerrero, switched sides and had his own republican command.\textsuperscript{224} Huajuapan fell to the republicans on September 18, and the army headed toward the capitol.

**The Battle of Juchitán**

In Juchitán during 1866, indigenous inhabitants were in rebellion against the Imperial department government in neighboring Tehuantepec, and republican commander Luís Pérez Figueroa was also active in the area, conducting guerrilla operations in the Isthmus. Juan Pablo Franco briefly left his office as Oaxacan prefect to personally lead Mexican imperialist troops there earlier in the year. The Juchitecos and their allies of San Blas, which abuts Tehuantepec, created such instability that French troops were sent to occupy the area in late summer. Although the Juchiteco rebels abandoned the town to the occupiers, the Indian force quickly turned around and attacked the French in a conflict forever remembered locally as the Battle of Juchitán.

\textsuperscript{222} AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 55, Rafael Castillo to the Provisional Secretary of the Superior Prefecture of the Department of Oaxaca, Feb. 2, 1866.

\textsuperscript{223} AGEO, Gobernación: Huajuapan, Guerra, Legajo 1, exp. 55, Antonio Navarro to the Provisional Secretary of the Superior Prefecture of the Department of Oaxaca, April 27, 1866.

\textsuperscript{224} APD, 2:136, Porfirio Díaz to the “Citizen Minister of War,” Aug. 20, 1866.
September 5, 1866. The attack turned into a general uprising as Juchiteca women joined the rebels. Weary and running out of food, the French retreated through swamplands in the direction of Tehuantepec, but they were pursued and suffered heavy casualties before the machete-wielding Juchitecos headed back home.225 Few battles remained for French troops in Mexico after Juchitán, as the first military contingent set sail for the return trip to France in October of 1866.

**The End of Empire in Oaxaca**

The transforming battle of the war in Oaxaca occurred at Miahuatlán, about fifty miles south of the capitol, as the republican army of seven hundred under Díaz took on a Franco-Mexican force 1,400 on October 3. By this time, Félix Díaz had arrived from outside the region with his own soldiers to assist his brother, and concentrated them in the mountains directly north of Oaxaca City, to confuse and distract the Mexican imperialists in the capitol. The commander in the capitol, Carlos Oronoz, decided to head south against the Porfirian army, which allowed Félix Díaz to cautiously approach Oaxaca City and establish a siege line along its northern boundaries. It was a crucial, decisive time for the Díaz force marching toward Miahuatlán. Food was running out, and having marched without results in September, morale was becoming dangerously low among the soldiers. Many of them were “badly armed, naked, and without discipline or ammunition,” in their commander’s own words. Díaz’ decision to fight the imperialists at Miahuatlán gave the soldiers an emotional boost.226 Although Díaz believed constant firing would deplete the ammunition “in fifteen minutes,” strategic placement of

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226 APD, 2:147.
squadrons around the central plaza, firing in sequential volleys, kept the imperialists at bay, while local townspeople with arms surprisingly joined in the fight. Unfortunately, the locals suffered heavy losses because they were “very brave and very drunk.” In the end, Díaz’ strategy of luring in the invading force and attacking from different angles paid off, and Miahuatlán was a devastating loss for the imperialists. It was also the beginning of republican retribution.

Although Oronoz escaped, several French officers had been killed in battle or captured. Díaz ordered the immediate execution of twenty-two Mexican imperialist officers, but spared the foreigners, apparently regarding treason as a higher crime than invasion. His former adjutant, Captain Manuel Alvarez, who defected during the siege of Oaxaca City the previous year, was brought before his former commander, and then died gruesomely at the hands of Díaz’ escort with sabers and lances. In later years, Díaz recalled this incident with regret, but he always considered Miahuatlán his greatest victory of the war of intervention in Oaxaca.227

Before preparing a siege of Oaxaca City, Díaz took 1,600 of his republicans to meet the multi-ethnic Imperial army at La Carbonera, made up of some 1,300 soldiers -- Mexicans, Austrians, Hungarians, Poles, and Frenchmen. The town was nearly three hundred miles north of Oaxaca City, and the plan was to cut off the invading force before it could reach Oaxaca City. It was the last hope of the Empire in the region. At the same time, Felix Díaz occupied the capitol, and kept in check the remaining foreign and Mexican imperialist troops holed up in the city. After a battle lasting less than a day, the republican forces at La Carbonera issued the final defeat of the occupying forces in Oaxaca: Porfirio Díaz acquired almost four hundred prisoners of war.

227 APD, 2:154
and six cannons. On October 31, General Oronoz formally surrendered in the capitol, and the State of Oaxaca was no longer part of an Empire. The French occupying force in Mexico was gone by the end of February, 1867, and Díaz took his army north to fight the fading forces of empire in central Mexico, where his Oaxacan Indians were instrumental in forcing the final surrender and capture of Maximilian at Querétaro, in June of that year.

**Conclusion**

There was long time lapse between the successful French invasion over the spring and summer of 1863, and the occupation of Oaxaca in February of 1865. During that time, the liberal government under Díaz had been relatively stable, after a decade of civil war of Reform within the state’s borders as well as nationally. And in the few years leading up to the Intervention, indigenous populations, such as that in Juchitán, were warming to the republican vision even if they did not fully embrace the concept. They were in effect becoming political players.

The involvement of the Indians of the Sierra Norte, Juchitán, and the Mixteca Baja were essential in efforts to resist the French-led occupiers and the Imperial government in Oaxaca, and the ethnic differences among them made no difference in the final outcome. They were populations that had been exposed to war and political turmoil – whether on the national or local levels – for some time. They were in all cases protecting regional autonomy, which was tied to their collective ethnic identities. By affecting the final outcome of the Intervention in Oaxaca, they were also consciously creating a republic. “The struggles in which peasants took part in

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228 APD, 2:164-165.

229 APD, 2:170.
nineteenth-century Mexico,” argued Peter F. Guardino, “were not battles over whether there was to be a state: they were contests over what the state was to be.”

The idea of republicanism as nationalism needed to accommodate values peculiar to the indigenous ethnic groups that contributed soldiers to the resistance. The European occupiers and their collaborators dealt with at least two populations -- in Ixtlán and in Juchitán -- that had to some extent been militarized over the previous decade; either through formal indoctrination, as in the former case, or through a history of insurrection, as in the latter. Oaxaca was another complex landscape of warfare in the Mexican quagmire of mid-century.

There, too, is another factor that could never allow the French and Mexican imperialists to entirely pacify the ethnic and liberal martial elements in Oaxaca: the absurd idea that a foreign force could install a monarchy, and system of administration that sought to emulate the system of colonial New Spain (Mexico). Within that imposed system -- with unclear lines of authority between Mexican and European, and with Austrian officers approaching Oaxaca as if it were the site of a Polish peasant revolt -- there would be no unifying force to calm a population geared toward perpetual warfare. As Charles R. Berry has argued, concerning such problems in Oaxaca:

The epistolary exchange among Franco, Thun, and Bazaine was seemingly a tempest in a teapot but in reality had far-reaching repercussions in that the dispute over jurisdictions and prerogatives and the lack of cooperation between Mexican officials and their French and Austrian overlords so debilitated the administration that when a true crisis arose, no effective action could be taken. Herein lies the fundamental reason why Liberal Republic triumphed and the Intervention failed.

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231 Berry, Reform, 103.
Observation of the Oaxacan landscape of warfare in the years leading up to and during the Intervention unearths an alternate argument: that the myriad nature of the resistance was the decisive factor, and ultimately the reason that it failed.

**Postscript**

The death of Juan Pablo Franco, Superior Prefect of the Department of Oaxaca and imperial visitor under Maximilian, deserves mention.\(^{232}\) With the triumph of the Republic in the summer of 1867, the Juarists reserved the ultimate revenge for a select few. The execution of Maximilian, along with his generals Miguel Miramón and Tomás Mejía, has been well-documented and commented upon since that time. Another noted victim of circumstance was Santiago Vidaurri, former political boss of the northern states of Tamaulipas and Nuevo León, who deserted the Juarist cause and ended up in the Imperial administration of Mexico City. Porfirio Díaz himself captured Vidaurri in the national capitol after the republican victory, and the once-powerful boss was shot by firing squad; the most Mexican of deaths, to paraphrase Enrique Krauze. Unfortunately for Franco, his time came in the emotional aftermath of the Juarist seizure of power in Oaxaca, when the forces under General Díaz sought a high-profile scapegoat.

Franco had fled Oaxaca City before the arrival of occupying republicans under Felix Díaz in October of 1866. He was captured while trying reunite with his wife and children, and planned to whisk them away to Puebla. Collaboration among officials of Oaxaca City – among both conservatives and moderate liberals – was not uncommon. And Franco was not known for cruelty; he often interceded on behalf of the residents of Oaxaca City who suffered abuse from

\(^{232}\) See the account in Ibid., 111-112.
the European occupiers, as Berry has noted. However, after his capture, he was quickly sentenced to death, for which Díaz, writing years later as authoritarian president of Mexico, expressed regret. Patrick J. McNamara has put forth some possible reasons for the order to have Franco executed. “Franco had enjoyed some popularity in Oaxaca City and had proven he could work with both conservatives and liberals,” he argued compellingly. “By eliminating Franco as a potential rival, Díaz strengthened his control over his home state.”

For his part, Díaz included a chapter on Juan Pablo Franco in his account of the Intervention, and also included the contents of a letter Franco sent to his wife the night before the execution. “They have committed an injustice against me,” he wrote, “But I forgive the perpetrators with all my heart and I ask you for the well-being of my soul, because that’s what the Redeemer commands, and for the love that you have had for me, that you forgive them too.” He ended the anguished letter with, “Your husband who has loved you, and who hopes to be reunited with you in a better Fatherland …” Díaz, perhaps after a bit of soul-searching, provided his own reason for the execution, of which he ultimately approved. During Franco’s reign as the prefect of Oaxaca, an Indian merchant in the town of Yanhuitlán, Justo Rodríguez, had secretly joined Díaz as a guerrilla, but continued to keep his residence in town. He had been discovered, arrested, and sentenced to death after a court martial. While in jail awaiting his sentence, he had commissioned a portrait of himself by his brother, an artist. “Take this portrait to General Porfirio Díaz the day that he occupies the city. That will be very soon,” he instructed the brother:

In this supreme hour, I just ask for a favor. Do not have clemency for traitors! Whenever he wants to forgive one of those who has sold the Fatherland, tell him to look at my portrait and remember that when I was marching to the gallows I have not asked

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233 McNamara, Sons, 64.
compensation for my services other than revenge in the name of my Fatherland and in the name of my family…

In January of 1867, Díaz received the painting on a visit to the Rodriguez family. At that “precise moment,” the general received the petition requesting clemency for Franco. On the 27th of that month, the former Oaxacan imperial prefect was executed -- by a firing squad.

\[234\] APD, 2:347, 350-351.
Conclusion

“Our sole motive is that we love our state and are no longer willing to see our peoples’ dignity trampled on.” – Statement of principles, La Familia drug cartel of Michoacán (ca. 2009)

This is a holistic study of the French Intervention period in Mexico, with a focus on regional resistance to the regime that was established during that time. What is absent, the reader will find, is detailed information on the lives and policies of Maximilian and Carlota, as well as the politics and culture of their Mexican Empire. This is not a military history, and the strategies, trials, and challenges of the French-led troops, as recorded by Marshal Bazaine, are similarly left out. There is a healthy body of research and popular works produced on both topics. Omissions in both cases are intentional. The reason for that is the almost complete absence of a comprehensive view of the resistance within Mexican historiography, and because prior studies on the period tended to focus exclusively on the French military point of view in Mexico, and on the Empire itself. On Juarist guerrilla warfare in central Mexico, it is well-established that French troubles were also tactical. The tactic of republican guerrillas was to occupy smaller towns and villages, and haciendas, for plunder and strategic purposes. The French, for close to four years, were often bogged down in pursuit of the Juárez, who reappeared as soon as regions were


vacated by the occupiers. Prior studies have laid out the general patterns of guerrilla warfare, and the topic deserves treatment in the future.\footnote{237} For this study, it was important to explain causal factors rather than to reiterate already established facts of military logistics concerning guerrilla warfare in central Mexico.

This dissertation is focused on regions of resistance, on the one hand, and on the affects of transatlantic republican warfare, as applied to Mexico during the Intervention, on the other – four chapters that represent unique areas of study. Except for the first chapter, which places the resistance in a Euro-American context, all chapters highlight the Intervention’s regional nature – which itself was a stubborn holdover from the Latin American colonial era and also what continues to allow Mexican communities to retain distinct cultural flavorings: the patria chica, or “little homeland.”

When both the factors of Mexican regionalism and transatlantic currents of republicanism are placed together in history, they emerge as a single force for which monarchism – supported by a modern European army – was no match. That phenomenon that defeated monarchism is what we now call “modernization.” Unfortunately for Maximilian and the Mexicans conservatives who supported him, they were on the losing side of history. For Mexicans such as Lucas Alamán, a governing model reminiscent of the Spanish colonial system was more compatible with Mexican cultural values, rather than the chaos represented by liberalism. A monarchical Mexico could embrace its myriad ethnicities and regional interests under a strong centralist leader and church, as had been the case for three hundred years. “His defense of the church, his attack upon liberal doctrines and the utilitarian spirit, his evocation of Hispanic values and traditions,” wrote Charles A. Hale, in reference to Alamán, “all would logically close the door on economic modernization by any means.”\footnote{238} While the winds of liberalism swept Mexico during the


\footnote{238} Charles A. Hale, Mexican Liberalism in the Age of Mora, 1821-1853 (New Haven and London: Yale University Press, 1868), 289.
Intervention, it is surprising that the ethnic and cultural regionalism which typified it -- itself “premodern” -- actually assisted in dealing the death blow to monarchism.

The retention of Mexican regional cultures is obvious on separate visits to, say, Oaxaca City and Pachuca, the capital of Hidalgo state just north of the state of Mexico and the federal district, respectively. The indoor marketplace of the former city features several dozen food vendors, a majority of which sell distinctly Oaxacan tamales, wrapped in green leaves and filled with black mole sauce, for example. In Pachuca one day in November of 2007, a procession of families compelled me to leap from the street to the sidewalk. Brass horns played slightly off-tune, drums kept a steady rhythm, and a painting of a Catholic saint was held high in the air – the patron of that colonia (district) where I found myself that day. Such a procession had likely been organized, for that specific day of the year, for nearly five hundred years. In the same city, residents take pride in their flour-wrapped paste turnovers – known everywhere else in Mexico as empanadas. As a source of violence, identity and regionalism emerge in the state of Michoacán, where La Familia drug cartel has proclaimed itself protector of its state against rivals like Los Zetas – and also against the Mexican federal government. Regionalism and the patria chica survive, even if their symbols carry at times the disappointing taint of tourist marketing or criminal enterprise. But they remain as reminders of how difficult it was for nineteenth century statesmen -- either liberal or monarchist -- to form a popular nationalist consensus. At bottom, the conclusion reached in this study is that many groups and ethnicities, whether Indian or Hispanic, made collective decisions to affect the outcome of the Intervention, for collective self-interest. The process included a fair degree of implied political agreement -- or “deal making” -- between each group and liberal leaders who had de facto jurisdiction over them, as the occupation commenced and solidified. All groups who took part in the martial nationalist project during the mid-nineteenth century, including rural workers of Michoacán and Guanajuato, and Oaxacan peasants, took great risks to take political sides in a war that might have been lost.

And even where both Hispanic and indigenous regional cultures negotiated a place within the republican cause during the Intervention – others, such as the Mayan separatists, offered no compromise
with either Juarism or the Empire. If the Europeans ruling from Mexico City and also leading armies into the Mexican heartland had managed to pacify populations within most geographic regions, there would still be pockets of resistance – such as Chan Santa Cruz – that would create complications for them. Maximilian, the French, and Mexican collaborators might have spent decades battling one insurgency or another.\footnote{Use of the word “insurgencies” serves the purpose of this study, as an examination of regional resistance. Today the Mexican government and Secretariat of Defense take the position that the Intervention was a war between two sovereign powers – which is technically true. But the organization of this dissertation necessitated study of individual regions which, treated apart from one another, take on the characteristics of insurgencies. It is safe to say that the ousted Juárez government, being mobile and out of Mexico, was at best a conditional sovereign power from July of 1863 until June of 1867.} As this dissertation asserts, the Mexican landscape of warfare – whether or not nationalist in origin – created an impossible situation to contain militarily. Even if regional insurgencies could have been minimized, there was still be the philosophy of Western liberalism to deal with, which itself would have had an impact on local Mexican populations and individuals inclined to resist the Europeans.

To shift focus to the transatlantic side of the argument, put forth in the first chapter, the reasons that mercenaries such as Luis Ghilardi of the new Italian state, or the Polish émigré John Sobieski risked their lives in Mexico, for ideological purposes, are more detectable. But direct involvement of Europeans and Americans in the Juarist war of resistance to French occupation indicates a worldwide political and cultural movement that was wholly modern in nature. As communists of the 20th century regarded their (also modern) movement as a force to improve the state of humanity, held back by antiquated forces of oppression – liberal republicans of the nineteenth century transatlantic world saw their struggle in similar fashion. And for avowed European and American republicans, Mexico was the great laboratory of worldwide liberalism, and its success depended on Juarist successes in battle.

Liberalism was also in the process of influencing a new generation of monarchs or children of nobility at mid-nineteenth century. Among these people was Maximilian himself. It is well-documented that, in his thirties as emperor, the young Hapsburg was basically liberal in his political sentiments – an “enlightened” monarch. That fact caused much friction with church officials and conservatives in his government. For example, Maximilian (by decree) kept intact the structure of the Reform era, and was
unwilling to return Church lands that had been obtained by the Juárez government and private parties. As a result, many conservatives refused their support, and actually hoped for his eventual downfall.\textsuperscript{240} The imperialist Mexican government could not prevent its own head-of-state from adopting liberal policies. Indeed, the French occupation and the Mexican Empire had many currents running against them.

The findings of this study demonstrate, furthermore, the importance of placing Mexico and Latin America within a world history context. As a laboratory of liberalism, much of the Euro-American world looked with either hope or angst – depending on the side one was on. The administration of President Lincoln supported the legitimacy of the Juárez government and viewed it as ally in republicanism. In the diplomacy surrounding the Civil War at its outset, Confederate agents attempted to enlist the support of the Mexican liberal government (in 1860), but Juárez in essence snubbed the Confederacy and met very few times with its representative.\textsuperscript{241} As the French occupation unfolded, the Confederate government of Jefferson Davis was hopeful of establishing an alliance with France, and Louis Napoleon looked favorably on such an arrangement. It would have provided a buffer between his military operations in Mexico and any United States opposition. But after the Battle of Gettysburg in the summer of 1863, that option was crushed for the Confederacy. The French government was only interested in a partnership if the South had a chance of winning in the Civil War. As an international incident or set of incidents, the French Intervention opened up flurries of speculation on the future of republicanism among Americans and Europeans, and sparked new avenues of Euro-American diplomacy. The key to resolving such activity was victory in Mexico – of either the French or the Juarists. On the one hand, there was the European military force of some 35,000 – one of the largest expeditionary forces of the nineteenth


century -- at the height of the occupation. In addition, several hundred Sudanese Muslim soldiers served in support roles, mainly in Veracruz. And on the other side, there were local cultures and communities, Hispanic and Indian, that were merely trying to affect the course their government would take, and that fought and died for those things that were apparent – land, space, and identity.

It is important to note in closing the issues involved in these three themes, which run throughout the course of this study. As a preindustrial state for most of the nineteenth century, raw materials and agriculture fueled the Mexican economy, which was still within the “biological old regime.” Great Britain was well into its industrial age, and for that reason it was the leading investor in Mexico. As in much of Latin America, Mexico depended on British manufactured goods, and Mexicans made only small-scale attempts to develop its own internal industries, such as in textiles in Puebla. As an agricultural society, with ideological conflict emanating from Mexico City, the means by which average people subsisted, whether they were Hispanic rural workers or indigenous peasant communities, was land.

During the Reform period (1855-1857), the Lerdo Law sought to either convert Indians to private landholders, or to get communities to sell off their collective properties. However, in Oaxaca, local liberal leaders and those in the state government were able to smooth over inconsistencies between liberalism and corporate land ownership, and it was necessary to do so in a state with overwhelming numbers of indigenous peasant communities. In central Mexico, as described in Chapter 2, the Reform Laws created perceived opportunities for workers and small landholders, who were already benefitting from hacendado bankruptcies. And for the Maya of Chan Santa Cruz, the issue was a homeland, where their own brand of Catholicism was practiced, and where government was run according to a religiously based hierarchy fashioned in the eastern forests of Yucatán. All cases of native resistance on Mexico soil

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242 See Richard Leslie Hill, A Black Corps d’Elite: An Egyptian Sudanese Conscription Battalion With the French Army in Mexico, 1863-1867, and Its Survivors in Subsequent African History (East Lansing: Michigan State University, 1995.)

243 This term was original used by Robert B. Marks.
involved land and relationships to it, which was a powerful motivator in resistance to European hegemony.

Similarly, all groups examined in Chapters 2 through 4 harbored desires to enforce the boundaries of collective political space and still retain cultural preservation, or “identity.” This is obvious in Chapter 4, as documentation exists which records – if fleetingly – sentiments of nationalism, and peasant participation in republican warfare. But even as Mexicanized soldiers for the Republic during the Intervention, such populations were – and in many cases are even today – provincial in custom. The Zapotecs of the Sierra Norte and of Tehuantepec retained distinct ideas of ethnic identity even while conscious of the larger roles they played in warfare against the Europeans. The Battle of Juchitán, for example, is still patriotically commemorated every September by Juchitecos -- in their native Zapotec dialect.

For central Mexico, the culture of ranch life loaned itself to idealized images created in Mexico City, but it was a very real collective identity tied to land relationships. The distinctive dress of ranchero - or chinaco – men and families, and the simple life atop “a good horse” are obvious regional cultural traits. But regional identity and political space for the rural workers of Michoacán and Guanajuato resided in their expectations for republican government, as in the case of Oaxacan Indians. While “becoming Mexican,” their nationalist loyalties were products of negotiated arrangements with Juarist republicans.

At its very basic level, resistance to the French occupation and the Mexican Empire represents a culmination of martial forces arising from very different sources -- Euro-American events, local conditions in central Mexico, Oaxaca, and Yucatán -- which by historic circumstance converged. This convergence just happened to be detrimental to Louis Napoleon, Maximilian, and all of the unfortunate soldiers and guerrilla fighters, on all sides, whose lives were lost. It was a foolhardy undertaking, but no statesman of either Europe or Mexico could know the outcome of such a meeting of the New and Old worlds at the beginning of 1862. No one could yet grasp that Mexico was a world at war.
Postscript

To see the drastic contrast between the worlds of old Europe, and a multi-ethnic Mexico that was lurching into the modern world, one could view a well-known photograph of Benito Juárez, likely taken when he was in his fifties (he died in 1872, at the age of 66). In the photograph, his Zapotec features appear to be in a permanent frown. The hair pomade common to nineteenth century men of the Western world makes his black hair appear straighter than it is. He appears uncomfortable in his bulky frock coat -- the mark of a lawyer -- and uncomfortable in front of a camera. His hands, perhaps to hide their small size, are covered with black leather gloves. His eyes are very large. This Zapotec, all seriousness and sheer will, inspired four years of guerrilla warfare waged by men who mistrusted outsiders of all types. In such a curious mixture of the New and Old worlds -- exemplified in one man -- one gets an impression that Maximilian did not fail at ruling his Empire because of anything he did. It was because no one not native to Mexico could ever demand allegiance from such a volatile populace.
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Gratitude