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ABSTRACT

These two self-contained units of study will help community college students learn about the history of Latin America. Each unit contains notes to the teachers and student readings. Students are expected to read and discuss the reading selections. In the first unit students are engaged in a comparative historical study of slavery in Brazil and in the United States. In the second unit students study the Texas secession and the Mexican-American War. The units will help students gain valuable insight into the reasons for the continuing friction between the United States and Mexico. Included in the appendices for this unit are profiles of important Mexican personalities and chronologies of the Texas revolution and the Mexican-American War. A bibliography is also included. (Author/RM)

SOCIAL STUDIES

HISTORY

Richard Graham

and

Angela Goldston

LATIN AMERICAN CURRICULUM UNITS FOR JUNIOR AND COMMUNITY COLLEGES

INSTITUTE OF LATIN AMERICAN STUDIES
THE UNIVERSITY OF TEXAS AT AUSTIN

INSTITUTE OF LATIN AMERICAN STUDIES
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Preface

The social science instructional units were developed as part of a project to encourage more, and more accurate, teaching about Latin America in community colleges around the country. One volume deals with history, the other with economics, international relations, and politics. Each unit presents more information about events and conditions in this critically important region, but each also attempts to convey something of the points of view that separate Latin American from Anglo-American understandings of the meaning of those events and conditions. This interpretative dimension, one hardly need add, is the one from which so much misunderstanding has arisen over the years in inter-American affairs.

The primary use of the units will vary: from history (the most richly descriptive of the social sciences) to economics (the one with greatest pretensions to abstraction) and points in between. Specialists in political science or international relations may want to draw on several of the units in discussing how hemispheric relations have come to be so troubled in the last half of the twentieth century. An imaginative economist might find the unit on Brazilian slavery a useful source of illustrations of differing supply/demand relationships in labor markets. Latin American civilization instructors, who are often in the humanities rather than the social sciences, could conceivably draw on all of the units--as befits the broader outlook of humanists.

Each unit was prepared in a provisional version and subsequently revised on the basis of workshop discussions with faculty members from a number of community colleges. We hope that the authors have faithfully caught and utilized the many useful observations that came up in the workshop sessions.

William P. Glade

BRAZILIAN SLAVERY AND AMERICAN HISTORY:

SUGGESTIONS FOR THE COLLEGE TEACHER

by

Richard Graham
The University of Texas at Austin

Black slavery shaped human experience in much of the American continent, and its legacy of racism deeply troubles us still. From its comparative study, students in American history courses can learn not only about specifically divergent or congruent patterns of slavery, but also about the broader dynamics of human society, the forces that operate within it, and the differences that characterize it. I propose they specifically compare Black slavery in Brazil and the American South. From this inquiry they will discover other aspects of these two countries' history that invite comparison. Both societies, for example, relied on exports, producing tropical or semitropical goods for an international capitalist market; both were characterized--at least according to conventional wisdom--by large estates and a single crop. Regional variations within each society in land and labor use require further and detailed comparisons. From such issues students can then be led to even broader questions regarding economic development, social structure, and cultural formation.[1]

Comparative history yields many benefits. Overall similarities of experience allow the student to focus attention on those alleged "causes" that have been taken for granted as operating decisively in one setting, but that remained absent in another, despite similar results. Or, conversely, similar forces present in two societies may lead to different outcomes and thus provoke reexamination of the initially accepted explanations for a given course of events.

Yet comparative history is not an exercise to be undertaken casually. First, no two societies match exactly in all aspects except one, and all the differences must be considered as possibly relevant. Second, it would be rare to find two major processes occurring at the very same time, hence each needs to be understood in its particular world setting, where further changes constantly interact. Finally, students of history must not fall victim to the ahistorical temptation to consider each society as static: they compare not two photographs, but two movies.[2]

Students engaged in comparative historical study will quickly come to realize that the human past is complex. They will, for instance, be led away from a simplistic view that if slavery in Brazil was not as it was in the United States, then it must have been a benign and mild institution. Unfortunately, by reading only books

focused primarily on North American slavery, they may be led to such facile conclusions. Stanley Elkin's book on slavery can easily persuade the reader that in Brazil laws protected the slaves from abuse by the masters, and that the bondsmen could report any violations of such laws to civil authorities through the priests who systematically inspected the plantations. Or, further, they could conclude that in Brazil slave families were not separated, that "slavery had become . . . a contractual arrangement," and that the Brazilian slave could not "be considered as mere property," a difference that "made all the difference in his treatment."[3] None of these assertions is tenable in the light of what we know about Brazilian history, and in these pages I will, therefore, focus more on the Brazilian than on the North American side of the comparative question.[4]

Demographic differences, across time, underpin major contrasts between Brazil and the U.S. South. European traders began to ship Blacks to Brazil from Africa in the sixteenth century as they had shipped them to Portugal even in the fifteenth. As the center of the world sugar production into the mid-seventeenth century, Brazil imported large numbers of Blacks to grow and harvest cane. Slavery was thus fully established in Brazil well before the first Blacks arrived in Virginia. Still more Africans, in the eighteenth century, were captured and shipped to Brazil to work the gold mines of the center-south, where the flow swelled to a torrent in the first half of the nineteenth century as coffee cultivation became predominant.[5] Not until 1888 did Brazil abolish slavery, making it the last Western country to do so.

Not only did the forced migration of slaves to Brazil persist over a longer period, but it also involved about nine times the number shipped to the United States. The best estimates indicate that during the entire period of the slave trade to the United States, until 1808, slavers transported approximately 400,000 human beings from Africa. In contrast, one author estimates the total number of Africans that crossed the Atlantic and entered Brazil, where slave trading lasted until 1852, at 3,600,000.[6] Meanwhile the white population of Brazil increased at a much slower pace than did that of the United States and included fewer European immigrants, thus giving further emphasis to the Black presence. In the 1860s and 1870s the populations of the two areas were in sharp contrast (see table).

Students can be asked to think through for themselves the implications of these differences. They will readily note that through most of the period the proportion of African-born among the slave populations was evidently greater in Brazil. The survival today in Brazil of modified African religious practices may be explained partly by the continuous presence of recently arrived Africans.[7] They will also conclude that the death rate of Brazilian slaves was very high, whereas the U.S. slave population increased by natural means rather than through importation. Because the

Population of Brazil and the U.S. South by Race

	Black and Mulatto Slaves	Free Blacks and Mulattos	Total Blacks and Mulattos	Whites
Brazil (1872)	1,510,810	4,245,428	5,756,238	3,787,289
U.S. South (1860)	3,953,696	261,918	4,215,614	8,097,463

Source: David W. Cohen and Jack P. Greene, eds., Neither Slave nor Free: The Freedman of African Descent in the Slave Societies of the New World (Baltimore: Johns Hopkins University Press, 1972), pp. 314, 339.

slave trade always favored transportation of males, the sex ratio of the Brazilian slave population remained continually unbalanced, which tended to slow reproduction further. Finally, the free Black and mulatto populations are an important factor in the distinct demographic patterns of each society; the Brazilian slave population declined partly because of the frequency of manumission. Finally, the ratio between Blacks and whites differed strikingly. How would that difference affect race relations and cultural mores?[8]

Such questions raise another--and probably the most frequently and intensely debated--issue in the comparative study of slavery: the treatment of the slaves. Was the Brazilian master kinder and more human than the Southern slave owner? One historian, Frank Tannenbaum, concluded from his study of laws and regulations that the Brazilian master was much more limited in his right to abuse his slaves than was his North American counterpart and that Brazilian slaves might appeal to the courts for protection against undue abuse. Brazilian slaves, he believed, also enjoyed the right to buy their freedom, and law protected family members against the pain of forced separation through sale.[9]

The literature on this subject has grown considerably in recent years, and much doubt has been cast on the validity of some early contentions. What travelers reported as being the law has subsequently not been found in any standard legal text, although local custom may have given the force of law to an unwritten practice. Laws passed toward the end of the slavery period were mistakenly thought to have applied much earlier, and the thrust of Portuguese and Brazilian laws has not been found to be so protective of slaves.[10] In short, Brazilian slaves could claim a legal position little more secure than that of fellow slaves in the United States. Furthermore, given the disparity between written law and actual practice, even if more favorable laws had existed, they would not prove that slavery was in fact milder in Brazil than in the United States. Stanley Stein showed convincingly that the actual plight of the slave in Brazil was a sorry one, and that the master spared no effort to get the most work from his human property.[11]

Students will likely feel uncomfortable with the early notion that "treatment" referred simply to legal standing. Eugene Genovese contributed new clarity and direction to debate when he distinguished among several meanings of the term.[12] For instance, how well integrated into the larger fabric of society were slaves? It has been held--and challenged--that Brazilian masters demonstrated more concern than did U.S. slave owners to preserve family life among their slaves. Marriages between slaves were sometimes celebrated by the church with the master's encouragement. Slave children were baptized into the church as were the master's children.[13] Recently Robert Fogel and Stanley Engerman have argued that planters also fostered

the formation of slave families in the American South; Herbert Gutman has countered that it was the slaves who maintained their family ties, not their masters, as is richly revealed in slave letters written during times of separation.[14]

Treatment of slaves, viewed from the perspective of their life experiences and in terms of the larger culture to which both slave and master belonged, casts up other perplexing questions. Did the encouragement of family life strengthen masters' control over slaves? Was it easier--or seen to be easier--to rebel where ties to family were absent? Were ministrations of the church calculated to make the slave more docile? Was his integration into the same life pattern as that of the master designed to identify him with it? On the other hand, we know that planters did consider religion important for themselves as well as for their slaves. It is probably almost as misleading to accuse planters of consciously plotting to control slaves in this way as it would be to attribute to them benevolent and selfless motives. Students can be encouraged to consider whether paternalism provided a means of exercising control and power. Recently Genovese made this point, in his particular way, for paternalism in the slave South.[15] Many are the evidences of planter paternalism in Brazil, of close relationships between slave "mammys" and masters' children, of masters bestowing benefits to house slaves, and of loving (and not so loving) sexual unions between masters and slaves.[16] But, as slaves were never freed from that paternalistic concern, even when freed from slavery, we can conclude that issues of power overlay all these relationships. Does paternalism in other contexts work to the same purpose?

Slaves in the United States were reputedly better fed, better housed, and better cared for physically than in Brazil. A pregnant or nursing slave woman received protections in the South denied Brazilian slaves. Consequently, the Southern slave population grew more rapidly than did the Brazilian slave population.[17] Recently economic historians have pointed out that one possible explanation why little care was expended on slaves in Brazil lies in the relative rate of interest on borrowed capital and the accessibility of new slaves from Africa. In Brazil interest rates were so high and the cost of Africans relatively so low that the expenditure in raising a slave child to age ten, including interest on that amount, was greater than the cost of buying a slave fresh from Africa.[18] Even after the end of the slave trade the supply of slaves remained sufficiently high and the profitability of coffee production sufficiently low to keep the cost of prime field hands at a level where it was cheaper to buy them than to raise an infant to maturity. The comparison of slavery, then, leads into a comparison of the total economic setting and elicits an examination of the reasons for the higher profitability of cotton as against coffee as well as of the greater supply of capital--and consequently lower interest rates--in the American South than in Brazil.

From these observations on the cost of raising slave children, it is not surprising that the practice of manumission was much more widespread in Brazil than in the United States, especially manumission of the newborn. In Brazil many occasions were celebrated by freeing slaves. A religious holiday, safe passage through a difficult time, or a master's birthday often prompted the granting of freedom to one or more slaves. On their deathbeds, slave owners frequently freed favorite slaves for their long and loyal service. This show of paternalistic benevolence was socially valued and seen as very proper behavior. In the United States the opposite meaning prevailed. A master who freed a slave was seen as a menace to the established order. His action threatened other slave owners. A freed slave often had to leave the state or face reenslavement on another plantation.[19]

Students can think about what might account for such sharp differences. Did Brazilian whites so thoroughly exercise social control that Blacks--even if freed--felt their distance and posed no serious threat? Or did the hope of someday being freed keep slaves "in line"? Was the display of bestowing freedom not a further and dramatic statement of just who held final power over whom? Discussion on these matters does more than raise issues of comparative history. It asks students to specify their own values and to identify what they consider important. It fosters careful, logical thinking. It requires them to step outside any setting to consider it critically, that is, at a distance. It cautions them against hasty generalization and alerts them to the complexity of human action.

Another richly provocative comparative question focuses on the abolition of slavery. Is it precisely because slavery was so firmly entrenched in the United States that only a bloody civil war could end it? In Brazil the end of slavery came about very differently, and the forces impelling it have been much argued about. To begin with, the rise of industrial capitalism in England in the eighteenth century changed British views on slavery; whereas at one time they had been the world's leading slavers, by the beginning of the nineteenth century they were heading up the campaign to end the world slave trade. Ironically, much of the initial capital that financed the industrial revolution had been derived from profits earned in the trade or in the slave-worked sugar plantation of the Caribbean.[20] From the British concern to end the slave trade came part of the impulse to cut off the supply of the cheapest source of labor in Brazil.[21]

Similarly, in Brazil after 1850, the very productivity of the slave-based export economy sparked the proliferation of interests, the growth of cities, and the newly acquired prosperity of groups--such as industrialists, railroad builders, merchants, artisans, liberal professionals, and bureaucrats--who did not see their interests tied to slavery. Increasingly, they viewed slavery as a brake on the economic development of their country. Did Northern industrialists and urban groups

in the United States see slavery in the same light? Are humanitarian campaigns generally to be seen as having an ulterior purpose? Or can we say that options open up as a result of social change, but reformers may or may not move in to take advantage of the opportunity, depending on their perceived choices, values, and individual courage? And how are we to weigh the impact of individual action against the impersonal, more encompassing forces of change?[22]

In Brazil some planters themselves, especially those on the labor-scarce frontier, eventually began to feel the inadequacy of slavery and to dream of importing European laborers to work their fields. They believed such plans did not prosper because potential workers objected to working alongside slaves. Some planters began to advocate the end of slavery.

Finally and importantly, slaves themselves acted to force the abolition of slavery in Brazil. Reports of slave revolts mounted; the incidence of sabotage spread while work slowed. Allegedly, slaves murdered or stole from masters more frequently. Certainly, runaways and slave suicides--that ultimate form of protest--increased.[23] One historian has argued that slaves, conscious that the end of slavery would come only from political action, concentrated their revolts against masters who were leaders in local politics, picking their terrorist targets carefully.[24] The pace of revolt quickened. In 1887 and early 1888 large numbers of slaves refused to work and fled plantations en masse. They found refuge in several cities, aided by urban groups committed to ending slavery. The armed forces--also of urban background and seeking a more assertive and influential social role--refused to hunt down runaway slaves. Finally, masters themselves came to recognize that only by freeing slaves would they be able to hire them back to pick the ripening coffee crop. The legislative process of finally granting complete freedom to all slaves then took only fourteen days.[25]

In this way, of course, revolt did not reach full bloom and slaves were denied that experience of working together in a struggle to win their own freedom. Yet, in comparison with slaves in the U.S. South, the Brazilians may be judged to have played a more decisive part in the process. Students may debate what such experience could have meant for the former slaves' self-vision. They may examine the process of defining oneself confronted with an oppressive, violent situation.[26] They may consider the nature of violence and what conditions foster or inhibit it. Was the Civil War any mor violent than the daily violence experienced or witnessed on a plantation? Does paternalism mask more subtle violence against individual dignity and initiative?

What historians do with the past and why they do it come to the fore as important questions in trying to understand abolition. For a long time, Brazilian historians pointed to the supposedly peaceful manner in which slavery ended in Brazil,

contrasted to the American Civil War, as a sign of Brazilian ability to resolve social differences without bitter conflict. Today, however, it is often argued that this viewpoint itself cloaked the ongoing violence of rulers against ruled and provided a further tool to keep Black Brazilians from protesting against their own oppression on the ground that to do so is unBrazilian.[27] What similarly disguised interests have shaped the writing of American history?

From the beginning, in both Brazil and the United States, racism and slavery tightly intertwined. We are familiar with the idea that in the United States defenders of slavery relied on blatantly racist arguments.[28] The enslavement of Blacks was justified, it was said, because Blacks were inferior, because they were subhuman, or because they were lazy and would not work under any other system. Brazilians rarely voiced such arguments. Only with difficulty have modern scholars been able to find racist defenses of slavery in Brazil prior to the last quarter of the nineteenth century. Brazilian slave owners admitted the inhumanity or irrationality of slavery but argued that it was a necessary evil. They conceded that slavery slowed the growth of the Brazilian economy by not encouraging individual initiative and that it sometimes endangered even their own planting success. They said they would prefer to have free workers. But, they complained, there were no free workers to be had.[29] Only slavery could secure for them the predictable labor force essential for production. The nation as a whole would suffer, they warned, if exports fell off from any curtailment in the labor supply. Therefore, they maintained slavery without, on the whole, defending it morally and without appealing to overtly racist rationalizations.[30]

Students might profitably join the continuing debate over possible explanations for these differences in racial attitudes. Differences attributed to culture, especially to religions, once satisfied historians. Catholic insistence, it was argued, that Black souls mattered as much to God as white souls made it impossible for a Catholic culture to dismiss Blacks as innately inferior.[31] But the student may question whether the ideas chosen and emphasized by a particular culture at a particular time do not tell us more about the perceived needs of that society than about the independent power of ideas.

The relative dearth in Brazil of critics of slavery, until its waning moments, provides a more persuasive explanation. There was no "North" in which abolitionists criticized the labor system of one region from behind the wall of their own dependence on factory workers who, perhaps, were burdened and exploited in other ways. Such critics of slavery as there were in Brazil were themselves surrounded by slavery, dependent on it, and much more muted in their attacks. Perhaps the precariousness of any institution is announced by the loudness with which it is defended.

Nor should we forget the racism implicit in the Brazilian planters' argument. If slavery was inhuman but had to be maintained so that a few could live in comfort and so that coffee and sugar could be produced as luxuries for a world market, the resultant choices required that some people be valued more than others. Do we advance similar arguments about the Third World today when we talk, for instance, about "trade-offs" between development and equity, suggesting that repressive governments and a big gap between rich and poor are the necessary price to pay for economic growth, without considering who sacrifices and who gains?

The comparative lack of racist arguments in Brazil meant that free Blacks enjoyed a measure of social mobility denied them in the United States. Foreign travelers to Brazil were always impressed by the fluidity of race relations they thought they saw, especially if they compared Brazil with the American South. At the time when slavery was still strong in Brazil, Blacks and mulattos already figured in Congress, among the ranks of leading poets, novelists, and composers, or held professional positions as doctors, lawyers, journalists, engineers, or professors.[32]

Before students conclude that no purely racial barriers impeded social mobility in Brazil during the days of slavery, they must consider the rarity with which Blacks actually made it to such positions, just as they may ask the same question about Blacks in either country today. Blacks in prominent positions were noticed because they were few. Then as now in both countries, a racist implication underlay the very belief that no obstacles to mobility existed: If Blacks could freely move into any rank of society but did not do so, then that proved their inferiority. The alternative position for the student is to challenge whether equal opportunity, in fact, existed or exists.[33] Students must further probe the social purpose that did allow some Blacks, through mobility, to fill rewarding and influential positions. Is this not yet another form of control? Promise of a place for some in the system, may have kept the mass from destroying the system itself. Does this work today for Blacks--or for whites--in the United States?

Racist views expressed in writing appeared more frequently in Brazil as slavery visibly waned. White Brazilians uneasily sought new means to retain former control. Now, in the face of a social order deeply threatened, they sought to rationalize what before they took for granted. Similarly, Americans passed and enforced Jim Crow laws only after slavery itself was no longer present. The tools by which women and men are controlled can be subject to endless variation.

The evolution of ideas about race in Brazil since that time can help us understand the nature of slavery and the controls it imposed. Under the impact of Social Darwinism and Spencerianism, racist thinking became more pervasive in Brazil toward the end of the nineteenth century, following abolition, and especially in the

early twentieth century. Brazilians were deeply troubled by these doctrines. If societies evolved according to the same laws as did natural species, if survival of the fittest was the operative principle, and if genetic factors determined the fittest, where did Brazilians stand? The argument--at that time charged with the aura of scientific verity and widely accepted throughout the Western world--bore down on Brazil with special force. Their country was predominately Black--at the turn of the century roughly two-thirds of all Brazilians were Black or mulatto--and these doctrines maintained that Blacks and mulattos were inferior and would ever be so. Some Brazilians said Brazil needed to import European immigrants to lessen the proportion of Blacks--to "whiten" society. Some Brazilian intellectuals began to write that Blacks were inferior. Scientific and anthropological journals imported from Europe seemed to back them up. Paradoxically this shift to racist thinking occurred at the very time when several Blacks or mulattos had achieved especially significant positions in Brazilian society. One vice-president, for instance, who then became president at the death of the incumbent, was a mulatto, as were many legislators. Yet numerous authors struggled to deal with what they took as scientific fact, blind to the reality around them.[34]

Ironically, racist explanations of the national experience gained greatest strength in Brazil in the 1920s, at the time when new scientific knowledge regarding biology and anthropology began to reveal these ideas as untenable. Anthropologists were discovering that the experience of growing up, sifted through the mesh of a particular culture, greatly shaped an individual. Insofar as inheritance continues to be important, it is not significantly affected by so-called racial characteristics. An influential North American anthropologist who studied these matters was Franz Boas.

A Brazilian author named Gilbert Freyre wrote in 1933 a now-famous book, The Masters and the Slaves,[35] that greatly shocked Brazilians. Trained in anthropology at Columbia University under Boas, Freyre had then done research into Brazilian history and culture. It was not, he argued, Blacks who had impaired Brazil, nor was it because of racial mixture that Brazil remained economically underdeveloped. The experience of slavery explained these results. A culture of slavery, not race, gave to Blacks the characteristics others condemned them for. Slavery, said Freyre, also weakened the master class. The experience of slavery hung threateningly over Brazil, leaving a mark that could be erased only by informed and conscientious effort. Nevertheless, culture could change--the stain of slavery need not be permanent.

The Masters and the Slaves is an important book on Brazilian race relations, but students should be reminded that it was written in 1933. Freyre made a number of serious errors. Although he judged the institution of slavery guilty for Brazil's failures, he also claimed Brazilian slavery had been more humane than North American

slavery. Much of the book elaborates comparisons between Brazil and the United States now wholly untenable.[36] Even though Freyre wrote imaginatively against racial determinism, he remained a product of his time and frequently slipped into racist explanations, seemingly unaware of how that worked against the main thrust of his argument. So the book, like any work, must be read critically. Yet its view that cultural experience, not genetically fixed characteristics, explains why some individuals and groups survive more successfully than others, can stimulate spirited discussion among undergraduates, discussion that leads them to further reading and a larger vision of social reality as well as a more refined understanding of their own values.

One of the most prominent Brazilian authors engaged in the study of race relations and Black culture is Florestan Fernandes, who wrote The Negro in Brazilian Society.[37] He charges, first, that insofar as Freyre portrayed paternalism as a genuine good on the part of masters during slavery, Freyre misled his public. Fernandes shows how intensely slaves suffered and how Blacks were shaped by the institution of slavery, paternalistic owners not excepted. Second, Fernandes, a sociologist, conducted extensive interviews that document deeply ingrained race prejudice and widely practiced discrimination in Brazil. Here he challenges the view, widely held in Brazil, that his country is free of racism, racial prejudice, and discrimination.[38]

One book brings together many arguments and points of view about Brazilian slavery and race and places them directly in contrast to the North American pattern. I refer to Carl Degler's Neither Black nor White.[39] Out of the broad, bold picture succinctly sketched, Degler identifies the figure of the mulatto as reflecting the essential difference between the two societies. By allowing the mulatto wide-ranging social mobility, Degler argues, whites in Brazil have drained off potential leaders for Black opposition. Students may question why mulattos rather than Blacks themselves are considered the potential leaders; they may also wonder what other social and economic differences account for these results. The book is valuable both for its reliable factual information and as a stimulus to classroom controversy.

In discussing this book, as well as the others that deal with race relations, students may be led to consider the causes of discrimination and prejudice--why people build artificial distinctions between themselves and others. Perhaps they can be led to consider the transience of such distinctions: If they can be built, they can also be torn down. Surely, one purpose of teaching is to raise questions such as these, and the introduction of comparative issues is justified if it helps the teacher do so.

NOTES

1. Since I believe the exchange and exploration of understandings among students is one of the most effective means of teaching, I limit myself in this paper to raising questions for discussion and suggesting bibliographic first steps. My intended audience is made up of teachers of American history in junior and community colleges who wish to introduce their students to some Latin American history. Thanks are due the following participants in a workshop held at the University of Texas in 1978 for their critical reading of an earlier version of this paper: Wilma Felger, Gertrude Fisher Talley, Robert Bridwell, Robert Hodges, Martha Pierce, Mary Lyons, José Castillo, John Buser, Ronald Olson, Joe Hough, Gene Müller, Jere Light, Alexander Pratt, and Leonard Murphy.
Coleader of the workshop and major contributor toward the elaboration of earlier drafts was Sandra Lauderdale.

2. A useful introduction to Brazilian history is Rollie E. Poppino, Brazil: The Land and People (New York: Oxford University Press, 1968). A truly brief account is found in Richard Graham, A Century of Brazilian History since 1865: Issues and Problems (New York: Knopf, 1969), pp. 4-16. For a dated but still useful general assessment of Brazil today, see Charles Wagley, An Introduction to Brazil (New York: Columbia University Press, 1963).

3. Stanley M. Elkins, Slavery: A Problem in American Institutional and Intellectual Life, 2d ed. (Chicago: University of Chicago Press, 1969), pp. 72-80, especially 76-77. Also see Ann J. Lane, ed., The Debate over Slavery: Stanley Elkins and His Critics (Urbana: University of Illinois Press, 1971).

4. I have tried to limit the references, wherever possible, to English language materials. More detailed bibliographic suggestions can be found in Robert Conrad, Brazilian Slavery: An Annotated Reserach Bibliography (Boston: G.K. Hall, 1977).

5. A. J. R. Russell-Wood, "Iberian Expansion and the Issue of Black Slavery: Changing Portuguese Attitudes, 1440-1770," American Historical Review 83:1 (February 1978): 16-42; Philip D. Curtin, The Atlantic Slave Trade: A Census (Madison: University of Wisconsin Press, 1969), especially p. 268.

6. Curtin, Atlantic Slave Trade, pp. 88-89.

7. Roger Bastide, The African Religious of Brazil: Toward a Sociology of the Interpretation of Civilizations, trans. Helen Sebra (Baltimore: Johns Hopkins University Press, 1978); Arthur Ramos, The Negro in Brazil, trans. Richard Pattee (Washington D.C.: Associated Publishers, 1939); Gerard Behague, recorder and ed., "Afro-Brazilian Religious Songs: Cantigas de Candomblé/Cadomble Songs from Salvador, Bahia, Brazil," Lyrichord Stereo LLST 7315.

8. Carl N. Degler, Neither Black Nor White: Slavery and Race Relations in Brazil and the United States (New York: Macmillan, 1971). Some of these demographic factors are explored for South Carolina by Peter H. Wood, Black Majority: Negroes in Colonial South Carolina from 1670 through the Stono Rebellion (New York: Norton, 1974).

9. Frank Tannenbaum, Slave and Citizen: The Negro in the Americas (New York: Knopf, 1946), especially pp. 88-93; similar views were expressed by Mary Wilhelmine Williams, "The Treatment of Negro Slaves in the Brazilian Empire: A Comparison with the United States of America," Journal of Negro History 15 (July 1930): 315-336.

10. David Brion Davis, The Problem of Slavery in Western Culture (Ithaca, N.Y.: Cornell University Press, 1966), pp. 223-261; Suely Robles Reis de Queiroz, Excravidão negra em São Paulo (Um estudo das tensões provocadas pelo escravismo no século XIX), Documentos Brasileiros, 176 (Rio de Janeiro: José Olympio, 1977), pp. 59-109.

11. Stanley J. Stein, Vassouras, A Brazilian Coffee County, 1850-1900 (Cambridge, Mass.: Harvard University Press, 1957), pp. 132-209; Marvin Harris, Patterns of Race in the Americas (New York: Norton, 1964), pp. 65-78.

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13. Tannenbaum, Slave and Citizen, pp. 90-100.

14. Robert William Fogel and Stanley L. Engerman, Time on the Cross: The Economics of American Negro Slavery (Boston: Little, Brown, 1974), pp. 126-144; Herbert G. Gutman, The Black Family in Slavery and Freedom, 1750-1925 (New York: Pantheon, 1976). See also Donald Ramos, "Marriage and the Family in Colonial Vila Rica," Hispanic American Historical Review 55,2 (May 1975): 200-225, and Richard Graham, "Slave Families on a Rural Estate in Colonial Brazil," Journal of Social History 9,3 (March 1976): 382-402.

15. Eugene D. Genovese, Roll, Jordan, Roll: The World the Slaves Made (New York: Pantheon, 1974), pp. 2-7, 661-666, and passim.

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23. Speech by Christiano B. Ottoni, June 9, 1884, in C. F. van Delden Laerne, Brazil and Java: Report on Coffee Culture in America, Asia, and Africa, (London: W. H. Allen, 1885), pp. 96-108; Queiroz, Escravidão negra, pp. 129-199. On an earlier period see Richard Price, ed., Maroon Societies: Rebel Slave Communities in the Americas (Garden City, N.Y.: Anchor Press/Doubleday, 1973), pp. 169-226; José Alípio Goulart, Da fuga ao suicídio (Aspectos de rebeldia do escravo no Brasil), Temas Brasileiros, 13 (Rio de Janeiro: Conquista, 1972); Clovis Moura, Rebeliões da senzala: Quilombos, insurreições, guerrilhas, Temas Brasileiros, 11 (Rio de Janeiro: Conquista, 1972).

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26. Frantz Fanon, The Wretched of the Earth, trans. Constance Farrington (New York: Grove, 1963); cf. Gerald W. Mullin, Flight and Rebellion: Slave Resistance in Eighteenth-Century Virginia (London: Oxford University Press, 1972).

27. Joel Rufino dos Santos et al., História nova do Brasil, 4 vols. (São Paulo: Brasiliense, 1964), IV, pp. 3-45; Richard Graham, "Brazilian Slavery Re-Examined: A Review Article," Journal of Social History 3,4 (Summer 1970): 432; Queiroz, Escravidão negra, pp. 35-45; Beatriz Nascimento Gomes, "Por uma história do homen negro," Vozes: Revista de Cultura 68 (January-February 1974): 41-45.

28. Winthrop D. Jordan, White over Black: American Attitudes toward the Negro, 1550-1812 (Chapel Hill: University of North Carolina Press, 1968); Davis, Problem of Slavery.

29. Of course there were free workers, but few willing to work under the same conditions and for so little as slaves. Little research has been done on free workers in Brazil as yet, although several researchers are not at work on this theme. One published work is Maria Sylvia de Carvalho Franco, Homens livres na ordem escravocrata, Publicações 13 (São Paulo: Instituto de Estudos Brasileiros, 1969).

30. But see Russell-Wood, "Iberian Expansion," cited above, and Thomas Flory, "Race and Social Control in Independent Brazil," Journal of Latin American Studies 9,2 (November 1977): 199-224.

31. Elkins, Slavery, p. 76.

32. Margaret V. Nelson, "The Negro in Brazil as Seen through the Chronicles of Travelers, 1800-1868," Journal of Negro History 30 (1945): 203-218. Some of the most important foreign travelers are mentioned--without much critical acumen--by Charles Granville Hamilton, "English-Speaking Travelers in Brazil, 1851-1887," Hispanic American Historical Review 40,4 (November 1960): 545-547. On the social position of Blacks see Williams, "Treatment of Negro Slaves"; Flory, "Race and Social Control"; and Herbert S. Klein, "Nineteenth-Century Brazil," in Cohen and Green, eds., Neither Slave nor Free, pp. 327-330.

33. Elkins, speaking of Brazil, says, "Such opportunities as were open to any member of the depressed classes who had talent and diligence were open as well to the ex-slave and his descendants" (Slavery, p. 79).

34. Thomas E. Skidmore, Black into White: Race and Nationality in Brazilian Thought (New York: Oxford University Press, 1974).

35. Cited above, note 16.

36. From Freyre, Frank Tannenbaum took up ideas that he used in his book, Slave and Citizen, criticized above; Elkins then relied on Tannenbaum.

37. Florestan Fernandes, The Negro in Brazilian Society, trans. Jacqueline D. Skiles, A. Brunel, and Arthur Rothwell, ed. Phyllis B. Eveleth (New York: Atheneum, 1971).

38. See also Emília Viotti da Costa, Da monarquia à republica: Momentos decisivos (São Paulo: Grijalbo, 1977), pp. 227-242, and contrast Gilberto Freyre, Brazil: An Interpretation (New York: Knopf, 1945). Also see Octavio Ianni, "Research on Race Relations in Brazil," in Magnus Mörner, Race and Class in Latin America (New York: Columbia University Press, 1970), pp. 256-278.

39. Cited above, note 8.

THE OTHER SIDE

THE TEXAS SECESSION AND MEXICAN-AMERICAN WAR

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NOTE TO TEACHERS

This unit is directed to both teachers and students of United States and Latin American history. It assumes a foreknowledge of events and North American views of the Texas Revolution and Mexican American War but little knowledge about the Mexican viewpoint. This two-sided conflict is often presented in U.S. history courses as a one-sided adventure on the part of North Americans.

Although most of the sources used in this unit are available only in Spanish, I ha included a bibliography which indicates books and documents that are available in translation, books and documents that are appropriate for those who can read Spanish, and works by North Americans that give us an idea about what Mexicans were thinking during the Texas Revolution and Mexican American War.

An empathetic reading of this unit and some of the suggested materials will provide valuable insight into the reasons for the continuing friction between the United States and Mexico. There is a persisting fear that the United States will once again swoop down and, with its powerful claws, snatch away some part of Mexico. The recent discovery of rich Mexican oil reserves may have intensified Mexico's fear that its powerful neighbor might threaten Mexican sovereignty.

This unit will also help students understand some of the causes of the divisiveness within both nations that eventually led to simultaneous civil wars (the Reforma and the French intervention). We often view significant events in our own nation's history in isolation. The material in this unit demonstrates that these events are linked to others, past, present, and future, and that they are part of events outside the national sphere.

This unit may be used in conjunction with other materials or alone. I suggest using it with accounts written by North Americans who witnessed the events under study in Texas and Mexico. Such accounts are widely available in both college and public libraries. Using this unit in combination with contemporary reports will give students the opportunity to read and evaluate primary sources and compare their

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> The Mexican Republic, privileged by nature, full of those elements that form a great and happy nation, had among other misfortunes, not as worthy of mention, that of being situated in the vicinity of a strong and enterprising people.
>
> *Apuntes para la historia de la guerra entre México y los Estados Unidos*

Can you imagine losing all United States territory west of the Mississippi River? How would you feel as an individual citizen? How do you think the nation would react if threatened with such a calamity? Certainly with anger and resentment toward the other nation, if not with a show of arms. In February 1848 the Mexican people were angry and resentful--and humiliated--when their leaders signed away (in the Treaty of Guadalupe Hidalgo) one-half of their national territory to the United States. The treaty ended a war in which the Mexicans had fought bravely but could not win. The territory the United States gained included the present states of Texas, New Mexico, Arizona, California, Colorado, Utah, and Nevada, territory destined to become some of the richest states in the Union because of gold and oil discoveries and fertile grazing lands. Mexico received a paltry $15,000,000 as compensation. In 1848 Mexico desperately needed to strike something rich to bolster its lagging economy and pay its fantastic debts, but it was not to share in the returns from the gold strike at Sutter's Fort later that year.

What I intend to explain in these few pages is the attitude of individual Mexicans toward what they saw happening to their country during the 1836 - 1848 period. The discussion sheds light on a situation in which interpersonal and political conflict precluded the unity needed to confront either internal or external threats to Mexico's integrity as a nation-state. The individuals cited include politicians, military leaders, and newspaper editors. Their words reveal distrust and animosity not only toward the citizens, leaders, and military of the United States but toward their own people and leaders as well. When Mexicans reflected upon the development of the Mexican nation after the war, they became disillusioned and frustrated. The war's only benefit was the short-lived display of a unified, nationalistic spirit in the people, evident in their cry against Yankee imperialism and the atrocities committed by United States troops of occupation. This spirit served to fuel intense and persistent xenophobia but not to

sustain the sense of national unity needed to rebuild and stabilize Mexico.

The Texas Revolution

On January 17, 1821 Moses Austin secured a land grant of 200,000 acres from Spain. After his death later that same year, the responsibility to settle the territory fell to his son Stephen. In the meantime Mexico had won its independence from Spain and the new Mexican nation recognized the Spanish grant on February 18, 1823, and even welcomed new settlers for several years. The Mexican government was at that time interested in developing the sparsely settled northern frontier that had long been a buffer between Indians and the more populous interior and was thought to hold tremendous economic potential in land and minerals. The area had failed, however, to attract substantial numbers of permanent settlers. This failure prompted the various northern Mexican states to pass colonization laws to attract foreign colonists throughout the 1820s. These laws were reinforced by a similar one passed by the federal government in 1824.

Texas was at that time part of the state of Coahuila. In March 1825 Coahuila's legislature passed a colonization law which stated that, "in virtue of the general law of August 18, 1824, all the foreigners who so desire may settle in the territory of the state of Coahuila and Texas, are free to do so, and are invited by this law from its verification."[1] Further, land was to be essentially free and settlers were exempted from taxes for ten years.

Several problems arose from the outset. Mexican law had prohibited slavery in 1828, but despite that prohibition American settlers persisted in bringing their slaves into Texas. Mexican law also required Protestant settlers to convert to Catholicism, but some Protestant Americans refused--and some refused to learn Spanish, as required by an 1830 colonization law. Mexico's fear of Protestantism and its stated abhorrence of slavery prompted the passage of a law in 1830 to stop the tide of United States immigrants, but it was not until 1836 that Texas finally left the Mexican union.

A third problem, more directly related to the Texas secession was that of federalism versus centralism. Texans desired separate state status from Coahuila and vehemently opposed the staunchly Catholic, conservative, and highly centralized government in Mexico, led by General Antonio López de Santa Anna. He had overthrown the 1824 federalist constitution in 1835. When Texas rebelled in 1835, two states, Yucatán and Zacatecas, also revolted because they, too, preferred a return to a federalist form of government.

As long as the Santa Anna government remained in power Stephen F. Austin, the recognized leader of the Texans, actively sought separate statehood for Texas within the Mexican Republic. In fact, upon hearing rumors that parts of Texas might be sold to the United States in 1830, Austin had registered his protest with Texas'

official representative in San Antonio, the jefe político (political chief):

> We believe that Texas should have the right to form a state of this federation [Mexico] since it has the necessary elements, and therefore the right to dispose of the public lands of Texas that belong to the state of Texas.
>
> We believe that it is not fitting in any way to pass to the government of the North. . . . We believe that if Mexico sells us without our consent, it would be better to declare ourselves independent of the entire world, before passing to another power without prior guarantees recognizing all the constitutional rights of the people of Texas.[2]

Five years passed before the situation in Mexico became so intolerable that Texas felt it had no choice but to secede. During 1834 and 1835 various exiled Mexican federalists, including the most prominent of these, Lorenzo de Zavala, tried to convince Texas to revolt against Santa Anna's centralist regime. Hostilities broke out in 1835. Mexicans, Texas-Mexicans, and North Americans fought side by side for Texas independence and depended on individuals from the United States to fund and supply them. Reasons for United States support of the revolt varied: some hoped that an independent Texas would open up new territory for settlement; others desired a more hospitable place to which they could bring their slaves.

Santa Anna, naturally, jumped at a chance to display his military prowess. At the threat of revolt he rushed to the North:

> I, as chief executive of the government, zealous in the fulfillment of my duties to my country, declared that I would maintain the territorial integrity whatever the cost. This would make it necessary to initiate a tedious campaign under a capable leader immediately. With the fires of patriotism in my heart and dominated by a noble ambition to save my country, I took pride in being the first to strike in defense of the independence, honor, and rights of my nation. Stimulated by these courageous feelings, I took command of the campain [sic] myself, preferring the uncertainties of war to the easy and much-coveted life of the palace.[3]

He waged a fierce war against the Texas revolutionaries, a war without quarter. He defended his actions by declaring that he was merely complying with an 1835 law that declared the Texas rebels outlaws.[4]

After sound defeats at the Alamo and Goliad, the Texans, under the command of General Sam Houston, regrouped and attacked Santa Anna at San Jacinto in April 1836.

Santa Anna claimed that his force was not at full strength because his second in command, General Vicente Filisola, had failed to send reinforcements. As a result, Santa Anna was captured by Houston's troops. The Mexican defeat, he maintained, was attributable to Filisola's cowardly retreat.

Filisola refuted Santa Anna's charges on the grounds that he could not send troops without adequate supplies:

> I have presented sufficient evidence to destroy the calumnies advanced against me and to prove the rectitude of my intentions. I shall add one more proof to show that necessity and not cowardice or fear was the true motive for my retreat. Ever since my arrival in Goliad, the commanders of the various units manifested to me that the troops could not remain exposed, without food, to the inclemency of the weather during the rainy season in that territory. Nevertheless, since my desire was to await the orders of the supreme government, I began to recondition our headquarters and make the preparations described. While there, an agent of Señor Urrea came and told me that the enemy was approaching with 1800 men to attack me. I immediately ordered General Andrade to demolish the fortifications of the Alamo, useless at all times and under any circumstances, and to spike the guns captured from the enemy, sending everything that he had in Béxar by way of San Patricio, escorted by the cavalry pickets in his command; while he, with the 400 picked cavalry and two pieces of artillery was to march along the left bank of the San Antonio to Goliad, covering that distance in four marches. I set out for the Aranzazu, which is two days' journey, intending that, by counter marching, we should meet on the same day and hour, effecting a juncture with his forces to fall upon the enemy, who counting upon my retreat, would have in turn been surprised and would have been surrounded by our forces on all sides. But since after this operation was begun the commissioners of the enemy, bearing the terms of the armistice, came to me, the report of Escalera and Sánchez was proved groundless. Seeing, furthermore, that the enemy had the Guadalupe between their forces and ours, I pretended that my march was in accord with the request of the President and continued to the Nueces to meet Andrade. Had it not been for this incident, the enemy would have been defeated; but even then, I would have continued the retreat, just as before, for victory does not feed troops without supplies.[5]

The disagreement between Santa Anna and Filisola was only one incident of dissension among Mexican leaders. One historian has noted that dissension and envy were more deadly to the Mexican army than Texan bullets.[6]

Santa Anna signed two treaties, one public and one secret, with the Texans. The treaties recognized Texas' independence and its Rio Grande boundary. The Mexican government, however, did not recognize either the fact of Texas independence or the Rio Grande boundary until it was forced to in 1848, as a result of the war with the United States.

Santa Anna claimed that he had not compromised his nation's honor by signing the treaties, but his secretary, Ramón Martínez Caro, charged that Santa Anna acted solely in the interests of regaining his freedom, without regard to Mexico's interests.[7] Furthermore, Martínez Caro blamed Santa Anna for the abominable cruelty perpetrated against Texans at the battles of Refugio, Goliad, and the Alamo:

> The war with the Texas colonists, undeniably just and under all concepts unavoidable on the part of the Mexican republic, has been, nevertheless, the source of the most painful attacks upon our national honor as a result of the shifting and shameful scenes enacted there, the notorious agent of which is well-known.[8]

We must remember that although Martínez Caro, and many other Mexicans, considered the Texas revolt wrong, they still considered Texans to be fellow countrymen who did not deserve such inhumane treatment at the hands of Santa Anna.[9]

The Mexican-American War

Texas' secession was a prelude to a more disastrous defeat for Mexico, one from which the nation suffered almost irreparable national demoralization and international humiliation: the defeat by the United States. Revisionist historians have blamed the United States for aggression against Mexico.[10] They maintain that intense racism, rampant in the United States during the first half of the nineteenth century, and a lust for more territory were the primary reasons for the existence of various conspiracies aimed at waging war against Mexico. Mexicans feared the United States for these reasons, and today they still refer, sometimes jokingly, to the conflict as the War of Northern Aggression.

When the United States annexed Texas in 1845 as a slave state, Mexicans saw the imperialistic, racist intentions of the United States become a reality that directly affected them, for most Mexicans still held illusions that Texas could be regained. If the annexation was not viewed as an actual violation of Mexican sovereignty, it was perceived as a grave threat to it. The Mexican public, spurred on by a hawkish press, clamored for war. Mexican leaders, who knew that their military was not prepared to fight against United States forces, nevertheless played politics and succumbed to the public's wishes. The troops were mobilized

and the Army of the North, under General Mariano Arista's command, prepared itself for a confrontation.

Rather than describe military maneuvers and battles, this section will examine Mexican opinions of the war itself, the political situation in Mexico, the conduct of North American occupation troops, and the outcome of the war.[11] First, however, an explanation of Mexico's fear of United States expansionism is in order.

The fear that the United States would encroach on Mexican territory was well-founded and had existed even before Mexico declared its independence from Spain in 1821. Early in the nineteenth century, soon after the Louisiana Purchase, the United States had made a vague claim to a part of Texas. This claim was supposedly settled by the Adams-Onis Treaty in 1819; however, from the time the first United States ambassador to Mexico, Joel Poinsett, entered that nation in 1825, he tried to obtain the territory referred to in the 1819 treaty. In fact, in 1829, on instructions from Secretary of State Henry Clay, Poinsett initiated negotiations for the purpose of changing the 1819 boundary from the Sabine River to the Brazos River and for obtaining a reciprocal agreement concerning slaves. As a result of these efforts, Poinsett could not appear in Mexican streets without being scorned, and his efforts engendered intense hostility and suspicion among Mexicans against the U.S. government and U.S. citizens. The struggle for Texas in 1836 exacerbated those feelings.[12] In a report delivered in 1837, Mexico's Secretary of War during the Texas campaign, José María Tornel, accused the United States of having wanted to annex Mexico since the American Revolution:

> For more than fifty years, that is, from the very period of their political infancy, the prevailing thought in the United States of America has been the acquisition of the greater part of the territory that formerly belonged to Spain, particularly that part which to-day belongs to the Mexican nation. Democrats and Federalists, all their political parties, whatever their old or new designations, have been in perfect accord upon one point, their desire to extend the limits of the republic to the north, to the south, and to the west, using for the purpose all the means at their command, guided by cunning, deceit, and bad faith. It has been neither an Alexander nor a Napoleon, desirous of conquest in order to extend his dominions or add to his glory, who has inspired the proud Anglo-Saxon race in its desire, its frenzy to usurp and gain control of that which rightfully belongs to its neighbors; rather it has been the nation itself which, possessed of that roving spirit that moved the barbarous hordes of a former age in a far remote north, has swept away whatever has stood in the way of its aggrandizement. . . .

> To wish, to wait, and to act describe the distinctive character of the government and the people of the United States. No nation in the civilized world can equal them in their boundless ambition. The object of their heart's desire having been determined, they lie in wait for the propitious moment, assuming a disinterested and indifferent attitude in the meanwhile which is foreign to their true feelings, until circumstances favor their design, when they ruthlessly trample everything in the way of their desire. This is a historical truth as clear as the light of day.[13]

In addition to Texas' secession, two later incidents further confirmed Mexico's belief that the United States coveted a large part of its territory. In 1841, a group of Texans invaded the Mexican province of New Mexico to seize control of the lucrative Santa Fe trade. A year later a squadron of United States navy vessels captured California's capital, Monterey. Although the squadron soon withdrew, the damage was done; Mexico knew then that the United States was after more than just Texas.[14]

United States expansionism was not all that Mexico feared. The racism implied in the United States' desire for more territory made clear to Mexicans that anglo North Americans viewed them no differently than blacks or Indians. A Mexican journalist reported in 1827 that North Americans probably thought that Mexicans were inferior, even savage, because they lived differently from Anglo-Saxons. The Mexican press constantly published reports claiming that Americans felt Mexicans were inferior because they could not adequately govern themselves.[15]

Such fears and a somewhat misguided sense of national pride prompted Mexicans to shout for war when the United States finally did annex Texas in 1845. The Mexican press and a few national leaders had made the Texas issue a symbol of national honor and maintained that the permanent loss of Texas would disgrace Mexico. The real reason for their propaganda was to garner public support to further their own political careers. During the first few months of 1845 the press tried to convince the public that Mexico could successfully sustain a war against the United States. One example of such rhetoric was published by a Mexico City newspaper, El Siglo XIX, on April 5, 1845:

> Let us think about the disequilibrium that the addition of a new state whose interests are in conflict [with those of the North] will bring; we think that the United States is not a bellicose nation and that it will be difficult for it to immediately place a respectable army, that we can invoke in our behalf the freedom of the enslaved race, that our army could devastate the camps of Texas, that Europe

> cannot recognize in full the annexation of Texas, and that the simple passage of time is enough to turn these advantageous conditions against us.[16]

Later that same month La Voz del Pueblo declared that Mexico's military was an element in her favor.[17] The press continued this propaganda with avid persistence, but one wonders how much of this rhetoric it actually believed.

Both accounts definitely overestimated Mexican strength and underrated and misjudged the United States. The opinion of the leading newspapers changed slowly as the tide turned against Mexico. The warmongering press continued to be vocal even as Mexico suffered defeats in the North, and its noise caused the government to reject a July 1846 peace offer by the United States. It was not until the press realized that Britain would not offer any assistance that it finally changed its tone.[18]

On the other hand, a few political and military leaders, cognizant of Mexico's financial and military weakness, tried to avoid an armed conflict until they realized that political expediency demanded war. General José Joaquín Herrera, who had replaced Santa Anna as president in December 1844, was acutely aware of the danger of war with the United States but was a victim of his willingness to negotiate. When the United States annexed Texas and Herrera failed to act on General Mariano Paredes y Arrillaga's promise to declare war, Paredes (the man who had placed Herrera in the presidency) ousted Herrera as he had Santa Anna a year earlier and put himself at the head of government.

Underlying the war issue was the ongoing debate over the type of government best suited for Mexico.[19] Constant fighting between and among centralists, federalists, monarchists, conservatives, moderates, liberals, and radicals precluded the national unity needed to defend the republic's territorial integrity.

José Fernando Ramírez, who served the government in various political and administrative capacities, was one of the most astute observers of the Mexican political scene around this time. His diary, begun in late 1845, reveals the frustration expressed by many Mexicans who participated in or witnessed the events of the period. On January 3, 1846, shortly after General Herrera was ousted and when unrest was endemic, Ramírez lamented the fact that Mexican leaders and politicians and the different political parties could not work together in times of need:

> In our country there is what I believe to be a thoroughly regrettable attitude, because I have seen its opposite in the history of all other nations and in concepts which are the products of more rational thinking. In times of political unrest the defeated party does not, and can never hope to, aspire to anything except freedom from persecution of even a

few remnants of the principles for which they have fought, their defeat is not conclusive, and as time goes by they can consider themselves on the way to realizing their hopes. This state of affairs is so natural that there has always been a secret struggle between victors and vanquished to get their candidates into the new administration. It is like a life-and-death contest. In our unusual nation, however, exactly the reverse is true. Here at the very time that the defeated party cries to heaven against the tyranny and intolerance of its opponents, accusing them of having seized all the jobs, it criticizes and expels any of its own candidates who accepts a post from the victors and persecutes him as it would a renegade! I cannot understand the temperament of my people nor can I analyze the motives that prompt them to such actions. If it were not for this type of thinking that governs the country's behavior, I would accept a post in this administration, because the iron-like will and the thorough honesty of General Paredes are characteristics that I would require of any government I happened to serve. I would not take any job without them.[20]

What bothered Ramírez even more was the lack of cohesiveness within the parties themselves. In August 1846 he wrote, "I saw that these men had no plan nor agreement nor anything else and that all those political parties were made up of nothing more than frightful individualists."[21]

Humor was not absent from Ramírez's commentary, however; he did not fail to notice that presidential terms tended to be short-lived:

> A few moments after Paredes was elected President, [General Nicolás] Bravo remarked to him: "Perhaps we shall enjoy peace during the four months that you are President." And Paredes replied: "I shall not be responsible for that, nor for my being kept in office. But you can indeed be certain that a lot of blood will be shed if they try to get me out and that my downfall will not be comical like that of the others." I am quite convinced of the truth of these statements.[22]

But Paredes did not remain in office long. In August 1846 Santa Anna overthrew Paredes and resumed power on September 16 with liberal and federalist support. His account of his return to the presidency and of the ensuing attempt to shore up the defenses of Central Mexico (against the North Americans) reflects a frustration (not unlike Ramírez') at the sad state of affairs, political and military.

Santa Anna recognized that the United States was prepared to wage war against Mexico and fight until it acquired the coveted New Mexico and California territories. He also recognized that Mexico's weakness made it an easy target: Mexico was torn by civil strife; its treasury was depleted; its generals were incompetent; its best regiments had already been defeated or had surrendered; the few remaining troops in Mexico City did not have sufficient supplies to defend the capital; and desertion was a persistent problem.

While Santa Anna despaired over how to make the best of a desperate situation, his federalist supporters met in September 1846, which caused even more confusion. Ramírez described their assembly:

> The preliminary signs are not very consoling. The victorious federalists have determined upon their course of action and have assumed direction of the most hysterical types of transactions. These affairs are the ones given prominent places on the ridiculous pantomimes which the Republicano calls Federalist Society. They are no more than a farce and a parody of the meetings held by the English and the people of the United States. Although the resolutions agreed upon at these assemblies will give you some idea of their nature, . . . it is nevertheless impossible to imagine what kinds of subjects have been discussed in the speechmaking, for you must realize that anyone at all has the right to get up and express his opinions. Indeed, I must tell you that among other matters discussed and given utmost attention were these: First, behead Don Lucas Alamán and all those suspected of being monarchists, even if it meant an expenditure of 200,000 pesos, as the orator declared, adding that 400,000 pesos had been spent to cut off the head of an illustrious man (General Vicente Guerrero).[23]

Although the situation did indeed look grim for Mexico in 1846 and 1847, Mexicans acted patriotically to save their country in the face of almost certain defeat and many gave their lives. A group of young liberal intellectuals cited the heroism of the cadets of the military school housed in Chapultepec castle in their 1848 accounts of the war:

> If actions had been worthy of criticism and even of punishment, as in the attack on Chapultepec as in the retreat, it is impossible to deny that isolated, honorable scenes also occurred, and besides being proved with much blood and valor, manifested in some Mexican hearts the pure patriotism that existed in the first days of independence.[24]

Instead of allowing the North Americans to take them prisoner, the cadets threw themselves from the castle walls (during the battle for the capital in September 1847). Their patriotic gesture spurred Mexico City residents to rally to the capital's defense:

> The Mexican populace in previous days, more than patriotism had shown indolence, . . . The people reunited: They began to form groups, to become enraged at the arrogance of the North Americans; and quickly, scorning the danger, wanting to provoke a bloody fight, let out a shout for war, and the victors, who did not expect to find resistance, were attacked in the plazas and streets with such violent force that it alarmed them.[25]

Although North American commentators often presented their advance into and occupation of Mexico as offering an alternative to the chaos that existed there before the arrival of North American troops, Mexicans viewed their presence differently. Carlos María Bustamante charged that Taylor's troops destroyed everything in their wake:

> It seems that there was a competition over which of the generals, Taylor and Scott, behaved with the greater cruelty in the countries they occupied.
>
> In the Republicano of the 14th of April [1846] it related: "The greater part of the city of Monterrey has been burned. . . .
>
> They have burned all the villages from Marín to near Mier, without leaving more than ruins, and they have done the same from Estancia to Cerralvo. There is no ranch left that they have not destroyed; they burned all the ranches from Reinosa to Matamoros, and the leader of these vandals, upon approaching Urrea, pledged to set fire to all the people. . . . Taylor has published a band that Urrea, Canales, and the troops that follow them, are pirates, and deserve no quarter.[26]

Neither did Mexicans appreciate the presence of North Americans in their capital during the autumn and winter of 1847-1848:

> Open fighting ceased the third day after the city was occupied; but the undercover struggle goes on, and it is assuming a fearful aspect. The enemy's forces are growing weaker day by day because of assassinations, and it is impossible to discover who the assassins are. Anyone who takes a walk through the streets or goes a short

> distance away from the center of the city is a dead man. . . . The plague has begun to show its signs, and the monuments that those filthy soldiers have scattered along the streets of their quarters unmistakably testify to the fact that dysentery is destroying them. I have never before seen such sodden drunkenness, nor any more scandalous or impudent than the drunkenness that holds these men in its grip. Nor have I ever seen more unrestrained appetites. Every hour of the day, except during the evenings, when they are all drunk, one can find them eating everything they see. . . .
>
> I am forwarding to you some documents, two of which I want you to keep as testimony of the iniquitous and shameful rule that the Americans have imposed upon us. The sad thing about all this is that the punishment has been deserved.[27]

This, Ramírez's final observation, mirrored the sentiment of the majority of accounts published in Mexico after the signing of the Treaty of Guadalupe Hidalgo. But no one expressed more poignantly Mexican sentiment in regard to the treaty and outcome of the war than did Mariano Otero, a young intellectual and politician, in a letter to his wife on May 25, 1848:

> Yesterday the discussion [on the treaty] in the Senate began and today it concluded. The last votes that separate from us forever a half of the territory of the Republic were pronounced before three [o'clock] at the three quarters. Despite the fact that the result was easy to see, it produced in me a profound sensation. I believe, my dear, that we have signed the death sentence for our children.[28]

APPENDIX I

PROFILES OF IMPORTANT MEXICAN PERSONALITIES

Lucás Alamán y Escalada

Historian and statesman. Born 1792 in Guanajuato. Traveled to Spain in 1814. Studied in various European countries. Elected as Guanajuato's representative to the Spanish Cortes in 1821. Named to various cabinet positions in the Mexican government following independence. A political conservative who believed that Mexico should be ruled by a monarch or a highly centralized government. Believed that Mexico's experience with liberalism and federalism created, in part, the instability that allowed the 1846-1848 fiasco to happen. Died June 2, 1853.

Mariano Arista

Born 1802 in San Luis Potosí. Enlisted as a cadet in a provincial regiment in 1817 and joined Iturbide's army in 1821. Served in various high posts in the Mexican Army and was named as commander of the Army of the North in 1846, a responsibility he resigned from soon thereafter. Served as president from 1851 to 1853. Died in Europe in 1855.

Valentín Gómez Farías

Born February 14, 1781, in Guadalajara. Studied medicine but became involved in politics in 1807 when he was elected town councilman in Aguascalientes. Served as deputy to the Spanish Cortes. Elected to Mexico's First Constitutional Congress, where he supported the Liberals. Served as Secretary of Foreign Relations under President Gómez Pedraza and as vice-president under Santa Anna in 1833-1834. While in charge of the government during one of Santa Anna's absences, instituted some radical political and social changes: freedom of speech and of the press; abolishment of military and church privileges; suppression of the church-run university and of the monasteries; and centralization of the organization of public schools. In 1834 Santa Anna revoked reforms and sent Gómez Farías into exile. Returned to

Mexico in 1838; exiled again in 1840. Returned in 1845 and served again as vice-president under Santa Anna in 1846-1847. Served in various political capacities--mostly as a deputy--until his death in 1855.

José Joaquín Herrera

Born in Jalapa, Veracruz, in 1792. Entered Spanish army as cadet in 1809. Supported Iturbide's Plan de Iguala. After attaining rank of general, devoted himself to politics. In 1824, 1834, 1836 held post of Mexican Minister of War. In 1836 served as President of the Cabinet. Named interim President of the Republic in September 1844 and was president from December 1844 to December 1845, when ousted by General Paredes. Before 1847 war, advocated peace because Mexican military ill-equipped to fight the United States. Named constitutional president in June 1848 and remained in office until 1851.

Niños Héroes

Group of cadets who were attending the military academy housed in Chapultepec castle when American troops assaulted Mexico City in September 1847. When it became evident that the Americans would take the castle, the cadets threw themselves from the walls. They were the martyrs of the war and served as a symbol of Mexican nationalism thereafter.

Mariano Otero

Born 1817 in Guadalajara. Studied law. Entered politics in 1841 as delegate from Jalisco to the representative Junta of the Departments. In 1842 served as a deputy to the National Constituent Congress, where he opposed its centralist constitution. Was a moderate liberal. Editor of the newspaper El Siglo XIX, in which he published his liberal ideas. 1846-1849 served as deputy and senator. Opposed the peace with the United States in 1848. Died 1850.

Mariano Paredes y Arrillaga

Began career as a cadet during Mexican war for independence. Left Spanish ranks to join Iturbide's Army of the Three Guarantees. Became a general in 1841. Political offices held include Minister of War, senator, and President of the Republic during the war with the United States.

José Fernando Ramírez

Born 1804 in Hidalgo del Parral, Chihuahua. Studied law. Entered politics in 1828 in a state position and then elected several times as deputy to the national congress. Was a centralist. Member of Junta of Notables that formulated the centralist Bases Orgánicas in 1843. Continued to serve in various political

capacities until 1867, when Maximilian's empire fell. Ramírez fled to Europe, where he died in 1871.

Antonio López de Santa Anna

Born in Jalapa, Veracruz, on February 21, 1794. Entered military service at age sixteen. During war for Mexican independence fought on side of Spaniards until he joined Agustín de Iturbide's independence movement. In 1823 helped overthrow Iturbide. In 1829 fought against Spanish invaders at Tampico. Had himself elected president in 1833 after instigating overthrow of President Anastasio Bustamante. In and out of the presidency for next twenty years. Lost a leg fighting the French in Veracruz in 1838 and later, in an ostentatious display, had it interred in an urn on top of a stone pillar in Mexico City cemetery. Perhaps best known for leading Mexican army against Texans in 1836 and against United States army in 1847. Considered both a traitor and a hero by Mexico. Died at age 82, an embittered, fallen man who still held illusions of greatness.

Gabriel Valencia

Born in Mexico, exactly when and where unknown. Began career as a cadet in provincial regiment at Tulancingo in 1810. Served under Spanish during war for independence. Promoted to general in Mexican army in 1833. Before the war with the United States, served as president of the Council of Government. During the war served as second in command and then as Commander of the Army of the North.

APPENDIX II

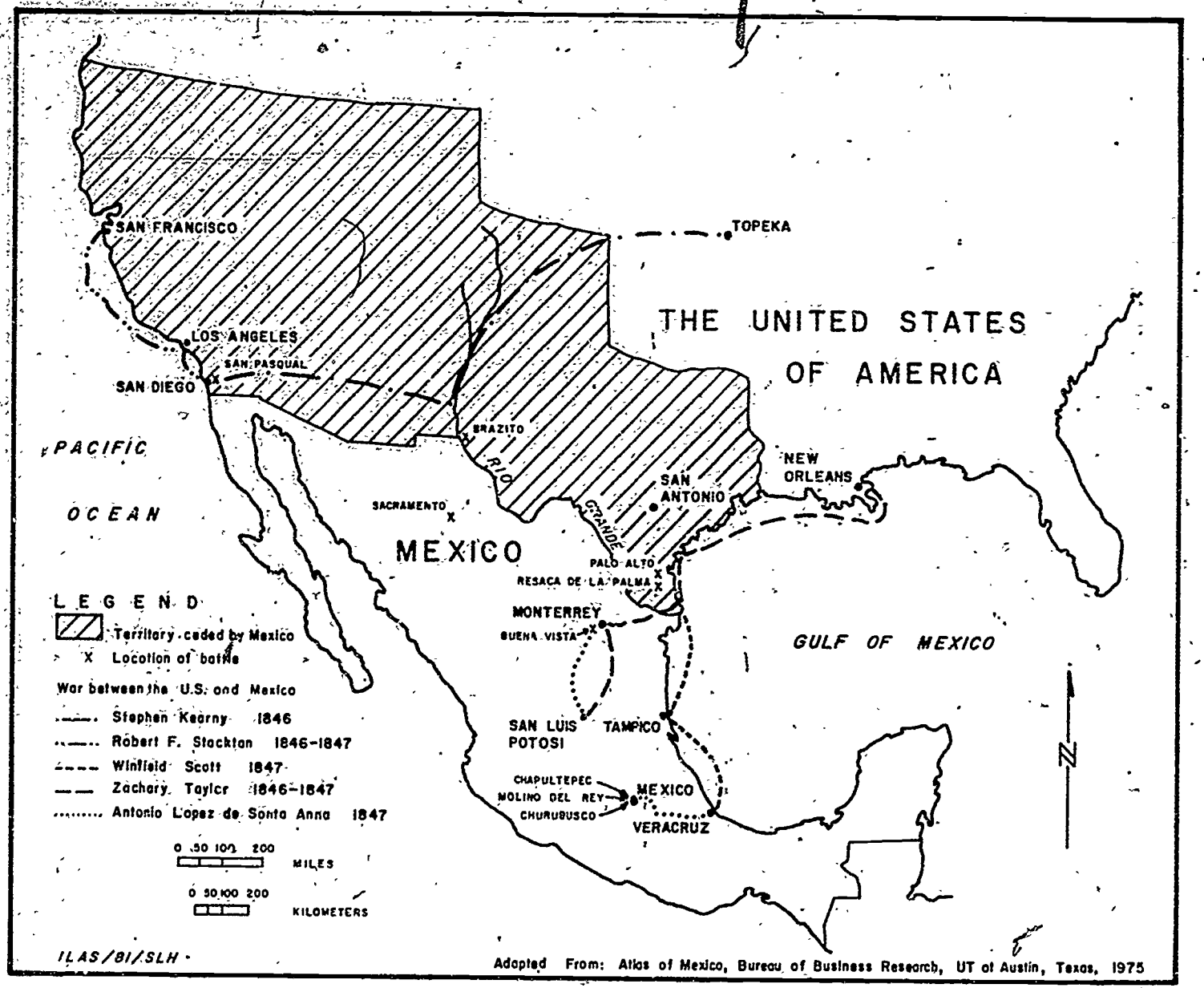
CHRONOLOGY OF TEXAS REVOLUTION

1832	
June 26-29	Fort at Velasco surrounded and taken
October 1	First convention meets at San Felipe
1833	
April 1	Second convention meets at San Felipe
1835	
June 28	Settlers at Columbia protest rebellious acts and declare loyalty to Mexico
June 29	Travis takes fort at Anáhuac
October 2	Fighting begins at Gonzales
November 3	Delegates begin deliberations at San Felipe to support 1824 Mexican Constitution
November 6	Delegates approve establishment of provisional government
November 14	After Austin resigns as commander of the volunteer Army of Texas, Houston is elected commander-in-chief and Henry Smith is elected governor
December 11	Texans defeat General Cos at San Antonio
1836	
January 2	Santa Anna leads army to suppress Texas rebellion
March 2	Delegates to convention declare independence from Mexico
March 6	Battle of the Alamo
March 27	Goliad massacre takes place
April 21	Battle of San Jacinto. Santa Anna defeated and taken prisoner
May 14	Treaties of Velasco are signed (never recognized by Mexican government)
1844	
December 29	United States annexes Texas

APPENDIX III

CHRONOLOGY OF MEXICAN-AMERICAN WAR

1846	
April 24	Hostilities break out near Matamoros
May 17-18	General Arista abandons Matamoros
June 10-July 5	California taken by U.S. forces
September 20-24	Battle of Monterrey, Nuevo Léon, Mexicans routed
1847	
February 22-23	Taylor defeats Santa Anna at Buena Vista
February 21-March 29	Veracruz Expedition
August 24-September 7	Armistice of Tacubaya
September 12-13	Battle of Chapultepec
September 14	Mexico City falls
1848	
February 2	Treaty of Guadalupe Hidalgo



NOTES

1. Gene M. Brack, Mexico Views Manifest Destiny, 1821-1846: An Essay on the Origins of the Mexican War, pp. 14-15.
2. Brack, Mexico Views Manifest Destiny, p. 17.
3. Antonio López de Santa Anna, The Eagle: The Autobiography of Santa Anna, pp. 49-50.
4. Ibid., p. 52.
5. Carlos E. Castañeda, ed., The Mexican Side of the Texas Revolution, p. 208.
6. Ibid., p. vii.
7. Ibid., p. 99.
8. Ibid., p. 162.
9. Students are referred to Santa Anna's autobiography The Eagle, and Oakah Jones's Santa Anna for more information about the controversial Mexican general.
10. Gene Brack's Mexico Views Manifest Destiny and Glenn Price's Origin of the War with Mexico: The Polk-Stockton Intrigue are two examples of this school of thought.
11. For descriptions of military maneuvers and battles, see Justin Smith, The War with Mexico.
12. Brack, Mexico Views Manifest Destiny, pp. 169-170.
13. Castañeda, pp. 295, 302, refers to a report issued in 1837 by José M. Tornel.
14. Gene M. Brack, The Diplomacy of Racism: Manifest Destiny and Mexico, 1821-1848, p. 6.
15. Ibid., p. 7.
16. Jesús Velasco Márquez, La guerra del 47 y la opinión pública (1845-1848), p. 29.
17. Ibid., p. 31.
18. Before this, Mexicans may have been encouraged by the possibility of war between the United States and England over Oregon, and Mexican proponents of war against the United States had asked for an expected European, especially British and Spanish, support. Britain did not come to Mexico's aid and, in fact, conspired

with the United States to partition Oregon and possibly Texas. For a complete discussion of this issue, see David Pletcher, The Diplomacy of Annexation: Texas, Oregon and the Mexican War.

19. See Michael Meyer and William Sherman, The Course of Mexican History, p. 313.
20. José F. Ramírez, Mexico during the War with the United States, p. 55. Although Ramírez served in all the various types of governments, he believed that a more centralized government in which the states had very little power best suited the Mexican temperament.
21. Ibid., p. 70.
22. Ibid., p. 57.
23. Ibid., p. 75.
24. Ramón Alcaraz, ed., Apuntes para la historia de la guerra entre México y los Estados Unidos, p. 318.
25. Ibid., p. 326.
26. Carlos María de Bustamante, El nuevo Bernal Díaz del Castillo o sea la historia de la invasión de los Anglo-americanos en México, 2:268-269.
27. Ramírez, pp. 161-162.
28. Mariano Otero, Obras, p. 609.

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