

GENEALOGY OF RACISM IN MEXICO:  
TECHNOLOGICAL DEVICES OF RACE AND THEIR  
TRANSFORMATION IN MODERN MEXICO

by

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Trying to tell a different history associated with a persistent idea and its transformations has not been easy. Choosing different angles and outlooks from which I could stand, looking at the unfinished past required challenging my own comfort. The main hurdle I ran into was having to adapt to a different philosophy of language. Using a language different from the one my mother taught me became a scary aspect during the writing of this dissertation. Following the Hispanic academic tradition of abstract thinking and expressing such thoughts through long, very long sentences got me against the ropes more than once. How to ask a brain to undo decades of grammar and syntax in my adulthood? My beloved Spanish kept shadowing every sentence I wrote in English. At the end I came to terms with the fact that this is who I am: a person concerned with human rights; worried about racism, discrimination and violence; a person passionate about education; who has an accent while speaking as much as a trace of his *native* language while writing.

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The genealogy of racism in Mexico can be traced to colonial times. This dissertation argues that the framers of the modern Mexican nation-state found useful social practices that I identify as technologies to carry the idea of race throughout the process of construction of the nation and the state. Three main eras defined major changes for the technological devices of race.

One of the major changes occurred in the transitional period of pre-Independence Mexico (1767—1810), when the aspiration of emancipation brought by the European Enlightenment met the needs of a country that had been oppressed for almost two hundred years. Local elites faced the challenge of leaving colonial practices behind in order to face the birth of a republican life. The elite's need of stratification of a diverse society found in the artistic representation of *castas* a valuable ally. Hence, *casta* paintings as a technological device of race carried a message of a social taxonomy for a new socio-economic era.

A second change followed when the idea of race was affected in the post-Independence era by liberalism and its multiple confrontations with conservative parties and thinkers. In a way,

liberalism weaponized the idea of race while creating a homogeneous nation for a modern state. The intersection of political power and language was registered in important nineteenth century documents. Newspapers, edicts, journals, bulletins, and even popular sayings reflect how political power expressed in the public sphere carried a racialized message in which the indigenous people appeared as lesser beings, while the *criollos*, or Spanish descendants, became the model citizen for the nation.

A third period of change for the idea of race and its technological devices occurred with the arrival of liberalism in its positivist version. In a country where most of the population was of Indian descent, the only possible discourse favorable to create a unified nation was a narrative of mestizaje. The discourse of one mixed people, symbolized by the mestizo, took over discourses of progress and order vital for the development of the nation-state. Hence, the technological devices of race had two main functions: to make visible all race markers that defined a person in terms of social and economic status, and to make invisible the indigenous origins of the mestizo. Expressions of art, as in *casta* paintings, or written expressions in the form of journalism, carried clear messages of social classification. From making visible the differences between races to assigning moral value to human groups, and from creating a discourse of a national subject—mestizo—to declaring a war against the Indians of Northern Mexico, this dissertation establishes that the idea of race has been a protagonist in Mexican history, and has transfigured into the perennial and ubiquitous component that fuels the technological devices of race.



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## CHAPTER 1

### INTRODUCTION

I have a *nopal* stuck on my forehead. This expression served as a recent reminder of my own racial markers in Mexico. The nopal (cactus) is a symbol of everything Mexican, but most specifically it is associated with indigenusness, dark skin, Indian facial features, black thick hair, and poverty. My brief personal anecdote can illustrate the case. I recently visited a museum in Puebla, where Mexican nationals traditionally enjoy free entrance. When it was my turn to pay, the museum clerk asked for my Mexican identification. Nowadays, my only official Mexican identification is my passport, which I rarely use since my dual-nationality as American allows me to carry a second passport when I travel abroad. I innocently showed my Texas driver's license, which only made matters worse. A foreign license did not prove my Mexicanness. Given the circumstances, the clerk said that I needed to pay the democratic sum of forty pesos (2.00 USD). As I pulled my wallet out of my pocket, a beloved relative interceded—fast and serious as thunder—and asked the clerk how could he doubt my nationality *if I clearly had a nopal stuck to my forehead*.<sup>1</sup> Racism—intimate and built into family relations—allows people to indicate indigenous origins using the nopal metaphor. The clerk smiled, shrugged, and blushed noticeably—in spite his *dark skin* tone. In the end I had to pay the forty pesos plus a portion of my dignity as a human being, who has listened to the same reproach for more than four decades: you are not racially *white*.

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<sup>1</sup> The actual phrase in Spanish is: *Tienes un nopal en la frente!*

In effect, being white in Mexico is a big deal. Official discourses have tried to promote an ideology of a tacit pigmentocracy<sup>2</sup> expressed through mestizaje<sup>3</sup> and peaceful coexistence among the “races.” But beyond the imagery of policy makers and speech writers, the Mexican reality is radically different. Mexican society still bases its assumptions about people’s character and value based on racial markers. Contemporary racism in Mexico represents a new version of the taxonomical system of castas from the sixteenth century.

Nothing exposes the problem of Mexican racism like the ubiquitous apparatus of publicity. Big cities, small towns, and villages in the high sierra all receive the same images and messages. The language of race permeates publicity practices from the hiring of those who will play the happy characters in television and movies to who will promote all kinds of commercial products in Mexico. The perversity of such language, as usual, starts with euphemisms or technicalities, or *tecnicismos* as one insider calls them.

*Castineros*, or people who organize model and actor castings, employ and promote openly discriminatory language. At the top of the food chain they situate the AAA White profile, or *Aspirational* Latino Profile. AAA types are tall, blue-green eyed blonds, and usually foreigners. Aspirational is the key word that sparks the desire of Argentinians, Chileans and Spaniards to migrate to Mexico, where they easily find a job. Hundreds of models arrive in Mexico City—after putting their airfare on a credit card—only to live in cramped quarters with roommates for a while. But the wait before fortune hits will not be long, since the Aspirational

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<sup>2</sup> An imaginary hierarchy of people based on skin tone.

<sup>3</sup> Theories that propose a pacific coexisting of Mexican nationals due to their common mixed origin. The mixture basically contemplates the biological-cultural between Spaniards and indigenous people.

Profile is the most popular among agencies. It represents the person of success, the executive or businessperson who can blend in with the rest of the competitive developed world.<sup>4</sup>

“Them Russians get all the good jobs (sic)...and they not even speak Spanish, nor they have the FM3 (temporary residence format)” said Monserrat J., a theater actress who is constantly competing against foreign modeling labor. This new type of labor is often illegal, as in much of the immigrant cases but the high demand of AAA White models offsets any tax collection effort or other immigration formalities.<sup>5</sup>

The modeling environment in Mexico can be brutal. The profiles for almost all types of commercials prefer European looking people in a variety of skin tones. Flamboyantly, castineros and models participate in a categorization ritual, which separates human groups into multiple scales of white. Hence, the International Latino Profile, the most hired profile for Mexican publicity, consist of persons who have fair skin, light eyes, and all shades of red and hazelnut hair without reaching blondness. The Latino Profile, a different category, requires its members to have white skin with dark or light eyes, but they are allowed to have dark brown or black hair. Contrary to what common sense would dictate, the Mexican Latino Profile is not the most popular and permissive. This profile requires slightly tanned skin, but still European facial features. The next profile refers to Afro-Americans who in reality are mixed, and must show extraordinary similarities with the European profiles’ physiognomies.<sup>6</sup>

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<sup>4</sup> Nazareth Balbas, “Nacos, gueros y mestizos: ¿Cómo opera el racismo en México?” *RT en Español*, 2017, accessed July 30, 2019, <https://actualidad.rt.com/actualidad/258278-nacos-gueros-mestizos-opera-racismo>

<sup>5</sup> Nazareth Balbas, “Nacos, güeros y mestizos.”

<sup>6</sup> Daniel Victor Munoz, “Haz que te llamen para un casting,” *Alegra Model Agency*, 2014, accessed July 30, 2019, <http://allegramodels.com.mx/haz-que-te-llamen-para-un-casting/>

Daniela, who recently arrived in Mexico from Chile, is thankful for the many opportunities that her blue eyes, blond hair, and white skin have provided in the Mexican model market. While Julio Escalero, the “man with the one hundred castings,” brags about his luck. He, as the Mexican Profile, has been awarded many roles as thief, peasant, policeman, driver, clerk, and cook. As Julio states: “I have not been in any commercial as lawyer; in the publicity world there are no doctors, engineers or lawyers who are *morenos* [dark skinned].” According to him, models see that the most common agency request is for AAA type people “who are not fat, not short, and not dark skinned.” But, Julio’s preoccupations are not related to race. He thinks that the day he becomes tall, slim, and white he will be out of work. His concern is age. Even for models playing a senior citizen role, the publicity machinery only hires what people demand: old people with white hair, white skin, and rosy cheeks.<sup>7</sup>

Race, or better put, the idea of race, manifests itself as a rooted phantasmagoria, which is utterly and unquestionably accepted by most Mexicans. ENADIS,<sup>8</sup> in its most recent survey confirms what has been true for Mexico since its inception: discrimination is another dimension of its reality. A little over one half of the Mexican society (56%) has experienced discrimination on the basis of personal conditions such as skin color, accent (phonetics and intonation), and height.<sup>9</sup>

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<sup>7</sup> Cinthya Sanchez, “Los pedimos mexicanos, pero no tanto,” *El Mexicano*, April 13, 2014, 5C.

<sup>8</sup> Encuesta Nacional sobre la Discriminación (ENADIS) is a federal multi-agency effort that involves the National University and the National Geography and Statistics Institute.

<sup>9</sup> Instituto Nacional de Estadística, Geografía e Informática, “Encuesta Nacional sobre Discriminación 2017,” accessed July 29, 2019, [https://www.inegi.org.mx/contenidos/saladeprensa/boletines/2018/EstSociodemo/ENADIS2017\\_08.pdf](https://www.inegi.org.mx/contenidos/saladeprensa/boletines/2018/EstSociodemo/ENADIS2017_08.pdf)

Race among human beings does not biologically exist. A series of genetic traits make people look physically different, but historically those differences have problematically been associated with certain qualities, morals, and personal value. Therefore, race is a classificatory idea that works through its own system of ascription and determination. Race has prevailed over the centuries because it has been able to operate in a chameleonic and parasitic way throughout the centuries.

Race operates through the implementation and innovation of instruments or technologies. A technology within the frame of this dissertation means a series of social practices that become so frequent, widely used, and effective that they become self-evident and normalized. Thus, human socialization or the construction of relations illuminated by the idea of race constitute racism. And the dependence on the *ad hoc* results of racism always seem to rely on the renovation and transmutation of racializing technologies or technological devices of race, which facilitate the categorization of people into hierarchies of any given society.

Race and its technological expressions are never isolated, and there is always an imperialistic component in all racial expressions. Imperialism must not be only understood in the classic connotation of international conquest and imposition of one civilization over another. It is also the attempt of usurpation of the other's sovereignty. Imperialism encompasses a desire to create a definition of the other and therefore to prefabricate an ascriptive/deterministic fate. Such prefabricated fate is usually expressed via networks of nodes in a complex hegemonic epistemological universe. Such varied space of knowledge depends of local or vernacular actions, which in the end entail the gears and wires of a global technology that can be comparable to a political economy—comprised of subsystems and subjects.

The Mexican modeling industry as described above provides a glimpse of racial technologies at work. The case of model Mari Carmen Barajas underscores the success and entropy of the system. At forty plus years of age she has always played the role of a teacher or a mom. Mari has sold anything from butter to soap, and has been the star of governmental vaccination campaigns. She is happy with her International Latina looks and sees nothing wrong with the castineros language. For her, a model is responsible for her own discrimination: “One must be really aware of how you sell yourself; there are roles that are not for you and others that are simply not for your profile, that is why you should not go to the casting, do not expose yourself to be told that you don’t work for the character”.<sup>10</sup> As a mirror of Mexican society that seldom complains about the true representation of its population, the world of publicity indicates that everything is alright in the pigmentocracy. Daniela, the successful blonde executive, Julio the *moreno* tradesman, and Mari Carmen the caring Latina mother not only reproduce the mechanisms of a political economy of race, but they also send a message that mitigates any discomfort. They insist that this is normality and a reality. You must find your niche, but always aspire to be different according to the publicity scale of beauty and personal value. The normalization of racism and the assignment of people to a certain socio-economic niche is nothing but a new version of the taxonomical system of castas from the sixteenth century.

In a country where seventy percent of the population acknowledges itself as “moreno/a” [brown or dark skin], and where ninety percent of manual laborers are *morenos* as well, the effects of racializing mechanisms become overwhelming. The field of Mexican publicity can

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<sup>10</sup> Sánchez, “Los pedimos mexicanos.”



illustrate the transversality of the matter. Gabriel, another castinero notes that in the 1980s most commercials used a client's children or wife as actors due to the cost of paying professional actors.<sup>11</sup> Those who remember such television advertisements know that almost all products at the time were sold using the eyes and smiles that fit the AAA and International Latino profile models.

That said, this dissertation is not a work on history, a sequential narrative of places, persons, dates, and associated descriptions. This is the history of an idea, a genealogy sustained by a series of theories which found echoes in the archives, books, and journals of an epoch. As such, philosophy and political theory provide an important exoskeleton for the arguments elaborated around the archival findings.

I argue that to talk about race in nineteenth-century Mexico, any scholar must take into account the fact that the components of the most modern racial technologies date from colonial times and even from pre-conquest, Euro-centered ideas. An analogy comes handy to explain that the main elements in the political economy of race have not changed much in the past five hundred years. The wheel was the most visible and obvious part of a horse carriage. It was also the mechanical device that supported a weight and allowed the transmission of a kinetic force that fought against the friction of pulling a cargo over a certain type of soil or pavement. Large, exposed wheels with wooden spokes worked the same in a single-mule mining cart in Zacatecas, Mexico, as they did while carrying the luxuriously engraved carriage which transported Maximilian of Hapsburg to his majestic vacation home in Cuernavaca, Mexico.

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<sup>11</sup> Sánchez, "Los pedimos mexicanos."

It was the wheel, as principle and means to carry a load with minimum friction, that also helped displace hundreds of tons of steel cast in the chassis, body, and thousands of pressurized pipes that comprised the modern and sophisticated steam locomotives during the Porfirian era. A vehicle on wheels pulled by horses, or a set of wheels attached to a complex system of gears and pistons moved by a differential of gas pressure all served the same purpose: to move a load from one point to another.

Thus, the idea of race at its core with the purpose of constructing the other and assigning certain moral characteristics associated with religion, cultural heritage or physical features has been virtually the same since its inception or reception in the New Spain of the sixteenth century. Creating categories, testing loyalties, probing the faith, or inventing socio-economic niches the idea of race and its exercise via technological devices—racism—have suffered multiple transformations in its form and ways of transmission. Race has even suffered a process of serious weaponization when it found an ally in science and philosophy. Because it has been parasitic, it learned to self-improve and to maintain symbiosis with global political and economic discourses.

The idea of race distinguishes itself for being tenacious and ubiquitous. These two qualities force my research to function as some sort of Panopticon. As such, the chapters of this dissertation examine the idea of race from different angles that sometimes overlap going over contemporaneous and parallel events. Race, like an atomic nucleus, becomes the center of analysis in this non-linear observation, made from a varied topography. For this reason I decided to go to Puebla to gather the majority of the archival materials employed in this research. In order to demonstrate that race was understood—and had similar effects—throughout the country,

I collected information in a place of historic and strategic importance for Mexico, other than the capital city.

A colleague at the University of Puebla advised me to take a tour of all Puebla's small-town archives, the Municipal archives and Lafragua Library. Seasoned scholars know that conducting research in Mexico City and dealing with the difficult bureaucratic processes to obtain materials in large archives can be expensive and overwhelming. So, I decided to follow my colleague's advice for two reasons. One, my limited research funds would not allow me to go to large archives in Mexico City. And two, the idea of doing research in the state that is home to my mother's family was very appealing. I ultimately had the opportunity to work at two main repositories.

Puebla, and the sampling of its most significant bibliographic reservoirs, provided an immediate sense of why and how the language of race spread so efficiently over quotidian activities in the periods of my interest. The Municipal Archives (Archivo del Ayuntamiento) provided nineteenth-century *actas* [depositions and legal recordings] which had absorbed multiple discourses common to the time. In a city located between the sea port of Veracruz and Mexico City, the importance of local legal procedures revealed the normalcy of race language, the tone of the political environment, and even the local aspiration of becoming part of national projects marked by international trends.

The library of the Emeritus and Autonomous University of Puebla (BUAP), founded officially under the name of one of its more important librarians and donors, José María Lafragua, contains a rich collection of almost 90,000 volumes. Sixty-five percent of those belong to the "ancient" fund (XVI and XVII centuries). The library also boasts a wide collection of

nineteenth-century prints. The latter includes a hemerographic collection of regional and national transcendence. However, and according to the library's website "the nineteenth century collection was particularly important due to the acquisition of materials of great thematic diversity and formal richness."<sup>12</sup> To be sure, the pride of the library is divided between the various Indian<sup>13</sup> Codices of the sixteen century, and the vast collection of scientific illustrated works.<sup>14</sup> Additionally, the library houses a monumental set of large format books encompassing the results of the *Scientific Commission* that accompanied Napoleon's army during his invasion to Egypt."<sup>15</sup> For this reason, it is important to say that works of scientific nature, whether national or foreign, are at the core of a collection that puts emphasis on illustrations of flora and fauna, geographical surveys, and ancient world hieroglyphs and iconography. Thus, one of the most used collections for this dissertation was the *Bulletin of the National Society of Geography*, which for the year 1865 featured the *Sonora Survey*: a complete treaty on the geographic, natural and ethnographic conditions of the Northern Mexican frontier. The importance of analyzing the situation in nineteenth-century Sonora lies in two main reasons. First, the Survey was part of a large and important collection of national and international scholarly works available for Poblanos in the late nineteenth century. Intellectuals and politicians such as Lafragua owned and

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<sup>12</sup> "¿Qué es la biblioteca histórica Lafragua?", accessed July 15, 2019  
[http://cmas.siu.buap.mx/portal\\_pprd/wb/lafragua/que\\_es\\_la\\_biblioteca](http://cmas.siu.buap.mx/portal_pprd/wb/lafragua/que_es_la_biblioteca).

<sup>13</sup> The word Indian throughout this dissertation refers exclusively to the various indigenous groups of New Spain/Mexico. Although the term is highly contested due its homogenization properties I decided to employ it as illustration of the language that still permeates everyday cultural practices that tend to make race visible but make racism invisible. To say or call someone Indian is to appeal to an abstraction that ignores diversity. Indian eliminates the effort to comprehend a singular past i.e. Yaqui, Ceri, Otomi, Zapoteca, Raramuri, and many other civilizations.

<sup>14</sup> Some of the works are: The first edition of the *Grammaire Egyptien* by Jean Francois Champollion; the *Orchidaceae of Mexico and Guatemala* by James Bateman; and the *Antiques of Mexico* by Lord Kingsborough.

<sup>15</sup> "¿Qué es la biblioteca histórica Lafragua?"

read books and journals similar to the Survey. Second, the Survey is a rich source of evidence that reflects the political, scientific, and positivistic thought of the Mexican intellectual elite during the epoch of the Maximilian Intervention 1864-67.

Furthermore, archival documents have much to say about Puebla as the symbolic *epicenter* of the French intervention, and the place of national glory at the time of temporary defeat of the French forces. Indeed, no other Mexican state shows the pride, self-confidence, and real evidence of its greatness. Puebla and Poblanos can show an extraordinary array of cultural inheritances still alive in its architecture, its cuisine, and its multinational population (Indigenous, European, and Mexican). For Mexicans it is common to hear jokes about Poblano pride, simply because the central state can be a country of its own. The territory, economy, culture, geographic location, weather, and history sustain that regional—and already internalized—aspiration. In this dissertation, Puebla works as an outlook from which one can have a glimpse of the nineteenth-century intellectual path of the Mexican elite, and a sense of areas away from Puebla.

Puebla and Poblanos enjoy a heritage that is currently alive, tangible, and easily identifiable while talking to its people, visiting its towns, eating its cuisine, or just walking its plazas. For many other states in the Mexican Republic such experiences may fall into the category of mere clichés or historic fantasies engendered by stale nationalisms. By the same token racial tensions prevail among Puebla's populations. The recent problem of *Huachicoleo*, or illegal extraction of gasoline and oil products from pipelines, is an example. The population demanded iron fisted policies against the bands engaging in such practices. But race permeated the language of the average person referring to this problem. The pipes tend to be located in low

income and indigenous areas. And ironically, analysts and scholars have exposed a network inside Pemex<sup>16</sup> associated with organized crime as main culprit in the Huachicol operations. Yet knowing that bureaucratic corruption is behind much of the theft has not stopped people from making racist accusations. Social media and the comments section of digital news are the two great outlets to observe such conduct. In January 2019 participants in a carnival celebration in a neighboring state designed grim looking costumes which resembled the burned bodies of Huachicoleros who died in a massive explosion related to illegal gasoline extraction. The common consensus was that the fuel thieves got what they deserved for being *nacos*<sup>17</sup> and stupid.<sup>18</sup>

Mexican readers' automated response to digital news reminds that there are technological devices of race at work in the background. Recent scholarship has shown that algorithms linked to search engines contribute to the misrepresentation and conceptualization of people on the web. Systems that should be race-proof end up forming part of a larger network in the political economy of race. For example, Black, Jewish, and Roma people have been misrepresented by the Library of Congress Subject Headings in ways that can be quite insulting.<sup>19</sup> An example can be the case of the Indians. The main subject heading for Indians encompass "aboriginal" peoples of the Western Hemisphere from Alaska to Tierra del Fuego. The subdivision of such broad

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<sup>16</sup> Petroleos Mexicanos (Pemex) is a state operated Mexican oil company.

<sup>17</sup> *Naco* is a derogatory term used to identify people who has indigenous physical features. It is also common to use the term to indicate ignorance, ill-manners, stubbornness, and lack of sympathy for others. *Naco* embraces all qualities associated with the indigenous people of Mexico.

<sup>18</sup> Kathia Borbolla, "Se disfrazan de Huachicoleros en carnaval de Oaxaca," *Debate*, January 29, 2019, accessed July 20, 2019 <https://www.debate.com.mx/trending/Se-disfrazan-de-huachicoleros-quemados-en-Carnaval-de-Oaxaca-20190128-0110.html>.

<sup>19</sup> Safiya Umoja Noble, *Algorithms of Oppression. How Search Engines Reinforce Racism* (New York: New York University Press, 2018), 24.

heading only considers five regions generalizing cultures and languages.<sup>20</sup> Both, search engines and systems of bibliographic information become normative of our quotidian experiences and lead users to think about the other in limited or corrupted terms.<sup>21</sup>

The main goal of my dissertation is to underline a common thread between the structural elements that support a racialized thought. This common thread can be found in the technological devices of race which are part of a political economy of race. Such devices evolved and improved over time until becoming almost imperceptible. Language, in its most varied expressions, has been a key component of racial thought. Visual language connects a hierarchy imposed by the casta paintings to the present. Such paintings were artistic portraits or representations of multiple possible marriage unions among the diverse population living in New Spain. The casta paintings convey a strong race message as much as a similar language fuels the contemporary Mexican modeling industry. Written language links the Municipal actas written by a local scribe in Puebla with the great scientific work of high-level officials surveying the northern part of Mexico in the nineteenth century. And, language is the common instrument present in the mid-nineteenth-century discourses on the need to eradicate the barbarous tribes of Sonora as much as it is the vehicle of the hate against the undesirable Huachicoleros of Puebla and Michoacán, Mexico. Technological devices of race make race visible, tangible, and classifiable. Such mechanisms succeed when the social practices of racism become invisible. By studying the ways in which technological devices of race operate I make racism visible under the

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<sup>20</sup> Jeffrey Beal, "Ethnic Groups and Library of Congress Headings," *Colorado Libraries*, V. 32, No. 4 (2006): 39.

<sup>21</sup> As Noble notes, a web search of the words "black girls" will yield thousands of pages related to pornography, over-sexualized content, and negative portrayals of black women. On the contrary, a search for the concept of "beauty" will lead to thousands of white women pictures. Noble, 19-22.

light of history and its records. Hence, the three dominant research components supporting the chapters of this desperation are casta paintings, the documents from the Puebla Municipal Archive, and the *Bulletin of the National Society of Geography*. It is crucial to note that even when the *Bulletin* has many contributions and articles, the most frequently cited throughout this work are those of José Francisco Velasco. I focused on Velasco's thought not only due to his paradigmatic liberal discourse, but because his bureaucratic career makes him an iconic representative of the Enlightened elite that ruled Mexico during the second half of the nineteenth century.<sup>22</sup>

Chapter 1 navigates through the currents of a range of ideas that comprised the construction of the other in colonial times. The importance of such construct resides in the fact that the reference of other human beings as an abstraction endures a test of time: It can be found in Columbus's letters, but also in nineteenth-century newspapers and in Puebla's public records. The vicissitudes inherent in the encounter between two civilizations during the arrival of the Spaniards in New Spain and the subsequent process of conquest caused a commotion in the European mind. The complexity and diversity of the human groups which inhabited the territory of New Spain required a Crown sanctioned system of organization. The answer lied in the old idea of human taxonomy by castas. However, the origins of the casta system can be traceable to religious ideas and practices. The implant of the casta system in New Spain worked fine until the moment of political turmoil in which an emerging elite toiled with the idea of emancipation from

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<sup>22</sup> José Francisco Velasco was the presenter and compiler of the *Sonora Survey*. In his work he included a very important epistolary exchange with D. Thomas Spence, a Scottish born explorer who participated in the Tiburon Island colonization. Spence remained in Sonora, formed a family, and died away from his homeland.



the Metropolis. The first great technological device had to be invented in order to endure the transitional moment of political and economic independence. Chapter 1 analyzes racial colonial elements which played key roles in the transitional moment of late eighteenth and early nineteenth century New Spain. Casta paintings symbolized a new order that accommodated new socio-economic actors. All racial groups became part of a hierarchy in which social status and wealth had been preassigned. The visual as racializing technology created the necessary boundaries inherent in a racialized class system. Having a new organization of races for the new socio-political regime in the post-Independence era provided a transitional certainty for the emancipated elites. The transformations in the casta system allowed a smoother transition from the colonial regime to a republican system which showed all symptoms of proto-capitalism including the need to control wealth internally. The new administrators, intellectuals, and political elites positioned themselves at the top of the new republican public and private positions thanks to the utilitarian properties of racializing technologies. The comparison between a visual language and the written language of several public documents points in the direction of a racializing technology capable of enduring the test of time.

A technology of race is also a mechanism of power. Put in simple words racializing devices amplify and promote certain power relations beneficial for a particular group. Chapter 2 examines the components and theoretical elements involved in the power relations of race. The description of the indigenous bodies and their representation through visual means comprise a complex series of power forces. To better understand such mechanisms, I use an example provided by Gilles Deleuze when he proposed *Las Meninas* by Velazquez as the portrayal of a scheme of power forces that represented the Crown's relation with the courtesan painter. Casta

paintings for me are nothing more than the expression of similar power relations. In casta paintings the racialization of the indigenous bodies and all its possible biological combinations correspond to an imposition of sovereignty over the other. The analysis of two casta painting indicates how a colonial and pre-capitalistic society prepared for the creation of new figures: citizens of a new republic in lieu of colonial subjects. Casta paintings as technological devices to transmit the message of hierarchy broadcasted a language easily translatable into written language and quotidian social practices. In this chapter, I also propose the introduction of liberal ideas and practices as crucial instruments in the gearbox of racializing technologies. The formal establishment of Mexican political parties divided by liberal and conservative ideologies did not occur until the mid-nineteenth century. However, liberalism influenced dramatically the process of pre-Independence and post-Independence. Such ideas were crucial to the language of race since liberalism in its quest for a modern nation and ad hoc state privileged a homogeneous society over a diverse one.

Chapter 3 explains the socio-political implications that can be directly connected with the political economy of race in regards of the new definition of a world region. The birth of Latin America as a region and concept represents a major racializing technology of the nineteenth century. The idea of the “Latin” seen as a race generated complicated and problematic discourses in the Americas. The invention of Latin Americans as a group of people turns out to be deeply racist while illuminated under the concept of a confrontation among races. The importation of the European theory of a natural separation between the southern and northern races became a watershed moment in the American continent. Mexicans inherited many cultural riches, among them the Spanish culture. The link with people considered Latins provided an

incentive for Mexican to create a complex network of racial connections in which ancestry and cultural heritage defined allies and foes. Language once more acted as the direct link to a European superiority. To speak Spanish meant to be the citizen of a modern republic, while to speak French signified a brotherhood among proud and civilized nations. Race as politics shows that politics in its most primal connotation<sup>23</sup> became another instrument of race while Latin America faced the need for self-definition. Mexicans as Latins acquired a sense of being modern and innovative unlike their Old World cousins in Spain or even France who kept their love for monarchies alive and well. To be Latin implied to be against US imperialism as well. To be Latin signified a love for liberalism and the unification of all the country's inhabitants under one identity. However in this formula the barbarous and the unproductive savages according to the new republic's requirements had to be excluded or eliminated from the national project. This Chapter focuses on a technology of race that forced people into antagonist groups. From its inception, this device used difference associated with lineage in order to exclude and, in Mexico, acquired the tones of liberal segregation. The perfect apparatus for the construction of an internal enemy defeatable only by war. Historically such a war was fought in Europe among kingdoms of different race or lineage. In European modernity the war among races evolved into an internal battle between rebel-revolutionaries and conservative-aristocrats. Mexico absorbed both war fashions when its internal politics and ruling elites created discourses against the interventionism of non-Latin countries, namely US. But the same discourse applied for an internal enemy—the untamable Indian.

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<sup>23</sup> Politics as the most basic manner of human organization in which the resolution of conflict and public welfare become the goal.

In the second half of the nineteenth century, and after a period of severe political unrest and carnage, a formal modern nation-state began to take shape in Mexico. In the Constitution of 1857, the country openly showed its inclination for liberalism. Chapter 4 presents the theory behind nation-state construction, but it also shows one of the state's darkest sides—the desire for a homogeneous body politic. By analyzing the parts and functions of the modern state I argue that one of the most important tasks of the Mexican state in the late nineteenth century was the vanishing or concealment of the Indian enemy. I use the case of the Yaqui and Ceris in the Department of Sonora for two reasons. First, the Bulletin of the National Society of Geography contained in the Survey of Sonora was readily available for Poblano readers. My research in Puebla offered me a glimpse of the readings and language at the disposal of intellectuals, public servants, and high-level politicians in the City of Puebla. Second, the case of the real armed war against Ceris and Yaquis illustrates the aspirations of a modern nation to vanish the people within its territory considered undesirable and non-assimilable. This type of war implied engaging in battles and killing indigenous people on the spot in addition to deportations and enslavement in remote places of the country. Throughout this chapter I use the concept of *vanishing discourse* as an analytical tool to identify those instances in which hegemonic thought and culture adopted a pseudo-genocidal attitude. Indeed, the vanishing discourse assumed *a priori* that uncivilized peoples were doomed to either destruction among themselves due to their inherent barbarism, or to disappear once Western civilization naturally made them vanish via acculturation or violent confrontation. Vanishing undesirable peoples became yet another of the technological devices of race in those cases in which racism necessarily turned into violent actions. In this chapter I also note the importance of language as an instrument of race. By using

dichos, or popular aphorisms, I show how negative traits became part of popular descriptions of indigenous people. Mestizaje emerged from the negative image adjudicated to Indians and the open armed or verbal conflicts caused by such confrontations. This concept proposed virtually mixing people in historical, cultural and biological planes, which became another strategy in the act of vanishing. Mestizaje would erase the indigenous person in every single Mexican without physically killing him/her.

The last significant change performed on the technologies of race took place when biology and science weaponized the language of race. The debate in Mexican political and journalistic circles became dominated by arguments favoring or opposing different shades of liberal thought. Chapter V focuses on the influence of positivism and scientific language employed during the last four decades of the nineteenth century, which include the early Porfirian era. The language of race had absorbed a vocabulary natural to bourgeois development. Terms denoting capacity to work, learn, and be publicly useful suffered a transformation. Upgraded language incorporated the influence of biology to condemn undesirable races. People were catalogued according to human development and their capacity for reason based on analysis of their physiognomy. Doctors, explorers, and politicians produced value judgments about indigenous peoples using pseudo-scientific terms. Qualities associated with indigenous peoples, or lack thereof, became the subject of questioning. The fear of atavisms passed to other generations through mestizaje became the basis of the efforts to vanish the Indian inside most Mexicans. Thus, education, progress, and development acquired great importance during the Porfirian era. However, under the justification of biological impediments not all people could be integrated to the modern society. Under the Positivistic view, the upper classes maintained their

status nearly untouched as an inheritance of the colonial casta system. The technological devices of race kept the racial hierarchy alive and well, coexisting with a modern class hierarchy. New proposals of mestizaje contemplated the eradication of Indian traits after a certain number of generations. The positivist promises of development in the style of European nations made the perfect breeding grounds for a new form of Mexican identity: the mestizo as national unifier. Mestizaje no longer meant the union of Spaniard and India, but a new national Being. Such national Being would be the sum of two civilizations, two heritages, and two identities. The official promotion of the Mestizo would be a task for post-Revolutionary governments during the first half of the twentieth century.

The success of the technological devices of race is evident in the continuous preservation of privileges for those who can be associated with the original upper castas. Throughout the centuries, a socio-political hierarchy based on skin color has prevailed despite frequent and strong questioning. Automated responses to racialized practices are still common in Mexico and, unfortunately, they are the rule. The association of the AAA profile with absolute beauty is one example. And the opposite is also true: ugliness is still represented by those who appear Indigenous, dark skinned, or non-European. But beauty and its models are not the only problems. Access to justice, jobs, education and even health care are still biased according to race. The discourse of mestizaje has done more harm than good, and the wounds caused by the rejection of indigenous cultures and heritages in all aspects of Mexican life are still open. Mexico is in need of reconciliation and respect among its multinational composition. The Indian, African, Chinese, Spaniard, and French in many Mexicans is not going away despite the prediction of mestizaje theories. The pigmentocracy ended up not being peaceful, and the democracy of *Mocha* skin tone

is the only thing that vanished in the Mexican and Latin American air. Those who carry a nopal on the forehead should not be diminished, and racism should not be intimate and invisible. Nevertheless, without the proper documentation, one needs to pay for his museum admission no matter how obvious his Mexican looks.

## CHAPTER 2

### CASTAS, THE SECRET LIVES OF RACE: THE TRANSITION AS A FOUNDATION

“What else can be said when we all are witnesses of a ten year period in which over two thousand victims have immolated themselves to the ferocity of these barbarians? God only knows how many widows, orphans, innocent people cry rivers of tears for the horrible murders perpetrated by those horrible ‘caribes.’”

José Francisco Velasco<sup>24</sup>

Local hustlers, indigenous people, Afro-Americans and Europeans from all walks of life lived in a multilingual, vibrant, but conflicted Mexico City during the last decade of the eighteenth century. Film director Francisco Athié knew that, but had no intentions of making a history movie. Instead he engaged in a two-year research phase that led him to find the right information to create—or recreate—the archetypical characters for his 2010 film *El Baile de San Juan*. In this way, Athié’s intention became the production of a “documentary” in which archetypal characters are strictly affected by fictional elements only.<sup>25</sup>

The movie presents the viewer with a different perspective of the socio-political turmoil previous to the Mexican Independence movement. In the foreground, a romance between two “quality”<sup>26</sup> persons: Pedro Giovanni Marani, a dancer and actor, son of the Court’s choreographer—an Italian artist Jeronimo Marani—falls in love with Victoria, a marquis whose father is a key player in the Spanish government. In the background, race conflicts, power

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<sup>24</sup> José F. Velasco, “Nota Primera. Continuación De La Estadística De Sonora Por El Señor José F. Velasco,” *Boletín de la Sociedad Mexicana de Geografía y Estadística*, XI (1865): 84

<sup>25</sup> Sala A, “El baile de San Juan,” Interview with Francisco Athié and Cassandra Ciangherotti, TeleSUR, December 31, 2011. <https://www.youtube.com/watch?v=LCg2I9QhIYY>

<sup>26</sup> At the time, *quality* meant belonging to a good family, as in “familia de abolengo.” In Spanish *abolengo* indicates virtuosity as opposed to the backwardness and low value attributed to indigenous and Afro-American peoples.



struggles, and religious battles emerge as part of the everyday life of the three main groups represented: the white European aristocrats and local *criollos* (Mexican born Spaniards), the indigenous and mestizos, and the Afro-Mexican people.

Giovanni and Victoria love each other amid a storm of courtesan intrigues, viceregal dogmas, Inquisition accusations, and plain bad luck. While the indigenous and Afro-Mexican groups rave about the miracles performed by a new saint, San Gonzalo, the cult establishes a communal dance as the main form of worship, giving birth to the *Baile de San Juan*.

Representing a fusion of Catholic beliefs, indigenous culture and African rituals, the cult is powerful and attracts important customers—for example high clergy members and the Viceroy himself—who arrives with the hope of a cure for grave ailments such as...impotency. The romance of Giovanni and Victoria at some point becomes tortuous. First, she becomes pregnant—a fact that requires an instant wedding plan. Second, Giovanni's rivalry with another dancer triggers an investigation into his family lineage.

After a brief but effective inquiry, Victoria's father discovers that Pedro Giovanni is the son of Guadalupe Tepochtca, an indigenous woman. This is a personal catastrophe for Pedro, his father, Jeronimo, and Victoria, who find themselves linked to a lower *casta* unexpectedly. Before the family stain became known, Pedro was a sought-after bachelor who played the role of an indigenous king in a majestic play that resembled Vivaldi's *Montezuma* or any of the seventeenth-century *Inca Operatica* movement. With his Italian physiognomy, and performing talent, Pedro was nothing but a success. However, Victoria and her family decided to cut ties with him immediately after learning of his indigenous lineage, and they, of course, find a remedy for the unwanted pregnancy visiting a healer from the new cult to San Gonzalo. Pedro eventually

dies at the hands of the Inquisition on charges of denying the Holy Trinity, although the accusation stemmed from a misinterpretation of an idea that emerged from a conversation with his mother. Nevertheless, the Viceroy finds himself cured of his impotency and seeks to test his condition in consummation of an act that epitomizes the last sterility of an expiring colonial New Spain: to redeem the family, Victoria's mother arranges an encounter with the Viceroy. The explicit sexual scene embodies the desire of an alliance between the Old World and the criollos, but it also introduces the indigenous and Afro-Mexican elements that are already part of the context and all political, cultural and religious interactions.

Cassandra Ciangherotti, who plays Victoria in the film, summarizes: everything goes well for these two, high positioned persons, she is an aristocrat from a rich family, he is an actor of "certain rank" [prestige, according to the racial classification] because he is "apparently not a mestizo" and has no problems "until he realizes about it, and everybody finds out he is a mestizo... their love gets shattered by these nefarious moral issues." As Cassandra suggest, at the time there was no "psychoanalysis [to find relief from grieving a lost love] and there was no chance to question the social norms," a woman only did what she had to do stoically, and a rich prestigious *criolla* could not go downward in the racial hierarchy.<sup>27</sup>

The accurate portrayal of Mexican society in the eighteen century, as shown in the *Baile de San Juan*, provides the initial thrust to analyze a transitional period. To be sure, such a period represents an intense conflict among emerging political factions, economic actors, but above all a confrontation between *castas*. The film accurately depicts a confrontation among races and the

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<sup>27</sup> Sala A, "El baile."

Spanish obsession with lineage, a combination that would prepare the road to the positivistic and pseudoscientific racial thought that dominated the sociopolitical relations during the second half of the nineteenth century. This transitional historical segment, difficult to define with geographic and temporal borders, marks the difference between a colonial attitude of hierarchies symbolized by difference, and the liberal dreams of one nation capable of integration through homogenization. Such is the essence of racial ideologies: to contribute to the emergence of dichotomies, paradoxically, based on hierarchy or homogenization. This chapter will examine such transitional period in terms of the genealogy of its racializing instruments, and the way in which power relations were channeled to conform to new socio-political exigencies. By tracing and describing the components of a technology of race<sup>28</sup> one can be aware of the dispositive[s] employed as currency within a greater scheme of what I call a *political economy of race*, in which the nodal relations among the global and the local create *sui generis* perspectives of the idea of race.

The process of identity construction, in Mexico and Latin America, had not only local roots, but also a transatlantic component. A complex process of cultural antagonism derived from differences between the northern and southern European peoples defined not only a continental view of Europe<sup>29</sup> but a transatlantic affiliation in America.<sup>30</sup> In the same terms, it is

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<sup>28</sup> The word technology throughout this work must be associated with a series of social practices clearly registered either by the epoch's primary sources or recent scholarship. A racial technology works as a constant movement machine fulfilling the main purpose of its creation: to locate, classify and fix people into specific socio-cultural niches according to a set of *ad hoc*/rigid norms that may be inspired on religion, culture, aesthetics, science, or recently, on genetics.

<sup>29</sup> Chapter 3 will examine the way in which a European race-lineage historical conflict shaped the Latin American perception of itself.

<sup>30</sup> America in the context of this work will refer exclusively to the entire Continent, and not only to the United States of America. The Continental antagonism, Von Ranke's theory, and its effects upon Latin American thinkers will be explained in Chapter 2.

important to look at the dynamics of political regime change beyond the indicators of elite ideology and policy. Racial categorization and nation building imply the imposition of technological instruments that affect the perception of abstractions such as castas; however, the way in which historical actors maneuver using those artifacts of racialization is also crucial since it represents negotiations among all the involved groups i.e. elites and popular classes or subalterns.

It would be difficult to talk about late nineteenth-century Mexican scientific race thought without first looking at the colonial precedents of nation building. In order to understand the discourses about the axiology inherent to the components of a “Mexican race” and its significance as pillar of the modern nation of pre-Revolution times, it is necessary to consider the political regime change—from monarchy to republic—and the associated changes in the political economy. These changes racialized multiple dimensions of social life through visual technological devices and the overall process set the scenario for negotiations between actors.

After the War of Independence the electoral frenzy observed in Mexico City can be perhaps associated with the identification of the people with an abstraction. To be a citizen in a new republic implied some rights, but this exercise produced a byproduct: fear among the elites. A recurrent topic of discussion in Mexican newspapers informs of the dangers represented by the absence of common bonds among the “varied races of Mexico.” Such races were identifiable by their unique physiognomies, languages and customs. Thus, intellectual elites constantly presented the case of spreading the idea of sovereignty in order to reinforce democracy. As one commentator argued: “The sovereignty of the Mexican nation lays upon eight million citizens,

while the sovereignty of the state of Puebla lays within its eight hundred inhabitants.”<sup>31</sup>

Cohesion among the republic’s citizens and its states guaranteed that no loose factions would engage in rebellious activities. Loyalty to a nation became priceless in a territory in which an order based on a political-religious order ceased to exist.<sup>32</sup>

Indeed, the idea of a “we-ness” fundamental in the abstract construction of citizenship would slowly wedge Mexican mentalities away from religious and/or colonial norms in the midst of a new post-Independence era beginning in 1821. A double-edged sword, it became an instant tool for demanding rights. Paradoxically, the demand for rights did not come with an inclusive perspective, but the opposite. Such demand and exclusionary attitude became resilient to the test of time, and remained in the Mexican intellectual minds for decades. As an example of mid nineteenth-century thought, Jose Francisco Velasco, a prominent liberal politician and intellectual, who worked for the state government of Sonora, proved that even in the most remote territories of the “great nation,” to which the state of Sonora belonged, a feeling of abandonment existed that required the full intervention of the government. In his second contribution to the *Estadística de Sonora* [Sonora Statistics Survey], Velasco claimed that “Sonorans became victims of the barbarians and begged for intervention.” Citing the modernity of a liberal government, and the “actual recognition of citizens’ rights,” Velasco published that Sonorans did

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<sup>31</sup> *Siglo Diez y Nueve* (Mexico City: Unidentified) October 9, 1842: 1. Readex: Latin American Newspapers <https://infoweb.newsbank.com/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-1333AE459C85BA30@2394118-133217E6AEB50800@1-133217E6AEB50800@>

<sup>32</sup> Thomas Holt argues in similar terms that “the separation from king and country required a new consciousness of ‘we-ness’ — one promised quite literally on novel criteria: not ancient lineage and not obeisance and fealty to an aristocratic polity. The people must now picture themselves as part of a physical and conceptual abstraction, their loyalties, allegiances, and social ties meditated not in face-to-face interactions or embedded in a political-religious hierarchical order.” See Thomas Holt, ed. *Race and Nation in Modern Latin America* (US: The University of North Carolina Press, 2003), viii.

not comprehend why they were relegated to oblivion by the central government in the middle of the nineteenth century, a time in which men were “very near the perfection of their inalienable rights guaranteed by the best of governments.”<sup>33</sup> Clearly, the abstraction of citizenship had endured the geographic displacement from Mexico City to Sonora—in the Northwest corner of Mexico—and the aging process from 1821 to 1865 when the Survey was published (although Velasco’s contribution dates to 1844<sup>34</sup>). However, citizenship as an idea of liberal coinage almost immediately signified exclusion. In this case, the indigenous peoples of Sonora, the Ceris, Yaquis, and many other groups considered barbarous became the undesirable other. And because they were also considered identity-less all them were agglutinated in the terms “indiada” o “apacheria”.

The break with past imaginings became facilitated by the promotion of the new administration and its commercial policies. In effect, simple retail activity that implied officials setting prices and organizing merchandise distribution, in conjunction with printed media production—such as gazettes—normalized and thoroughly spread a feeling of sharing a common space and social interest. Through books and newspapers the ascending elite found a technical means of representation of the nation.<sup>35</sup> Thus, the key elements in the transition can be identified, on one hand, as the evolution of the criollo<sup>36</sup> and its brand of nationalism, and on the other, the

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<sup>33</sup> Velasco, *Nota Primera*, ” 84.

<sup>34</sup> It is important to note that in the *Nota Primera* Velasco included an epistolary exchange with D. Thomas Spence. The ideas presented in the Sonora Survey therefore are the result of the intense conversations among two liberal minds, and reflected the ideology of those in charge of state operations.

<sup>35</sup> Thomas Holt, ed. *Race and Nation in Modern Latin America* (US: The University of North Carolina Press, 2003), viii.

<sup>36</sup> The term *criollo* throughout this work will refer to a non-mixed, Mexican born Spanish person.

transformation in technologies of identity construction. Newspapers such as *Siglo Diez y Nueve* constantly published “Oraciones Cívicas” [civil orations] in which the rhetoric of nation building embraced the comparison between Greco-Roman mythology characters such as Aeneas, and Mexican Independence heroes such as Agustín de Iturbide. As a product of a high-rank official’s mind, this argument contemplated that perfection was a divinity trait, so humans such as Iturbide had the right to make errors—like self-proclamation as Emperor, and youthful diatribes against the fathers of the Independence—without leaving the path of righteousness and patriotism. Such heroes—and consequently, their spokesmen—were demanded by a newborn nation in need of strong leadership, capable of repudiating the old colonial regime and its forms.<sup>37</sup>

By the onset of the Mexican Independence War in 1810, the criollo—soon to become bourgeois—collective imaginary had been simmering in a difficult coexistence with mestizo, indigenous and Afro-Mexican peoples. The *initial contact* between the Old and the New World had laid the foundation for that collective imaginary. Thus, representation and appropriation of the indigenous traits and culture marked, throughout three centuries of colonialism, a series of indelible ontological categories that survived changes in the law, in the state, and above all, in the mind of the Mexican people.

The act of appropriation is a central part of colonialism. But, appropriation was also a component of the postcolonialism<sup>38</sup> that became a trademark noticeable in the racial ideologies

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<sup>37</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), November 17, 1841: 2. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-1333BD931E8BFA10@2393792-13320878CD1CD3A8@1>.

<sup>38</sup> Postcolonialism here is understood according to Jonathan Hart’s commentary: the moment of political independence achieved mostly during the nineteenth century by most European colonies in America. See Hart, *Columbus*, 149-50.

popular in the nineteenth century. The purpose of appropriation is to make what belongs to a different people or nation into the property of another group or individual. “The appropriation can be achieved through ventriloquy [sic], translation or the dispossession of lands and other property.”<sup>39</sup> Initially it can be argued that an exchange between cultures is beneficial and completely normal, but when a majority or hegemonic view represents minorities or less-influential cultures, assigning identities and lesser human value, the exchange is problematized and acquires an epistemological and/or ontological dimension.

In this tenor, writers during the colonial era appropriated texts from the imperial center, which simultaneously served as an interpretation of what travelers and authors had witnessed in the New World. The main problem with such practice resided in the adaptation of an extant system of beliefs that vastly rejected the lifestyle and values of the inhabitants of the New World. The elaboration of a complex conglomerate of symbols to represent the New World started with Columbus’ Navigation Books. Scarcely a month after his arrival in America, on November 4, 1492, the discoverer recorded that he “learned also that far from the place there were men with one eye and others with dog’s muzzles, who ate human beings.”<sup>40</sup> Later on 23 November his entry noted that in Haiti there were people who had only one eye, “and others called cannibals, of whom they [the island’s inhabitants] seem to be very afraid. On December 11 he noted ‘that caniba [sic] refers in fact to the people of the Gran Can,’ which explains the deformation

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<sup>39</sup> Jonathan Hart, *Columbus, Shakespeare and the Interpretation of the New World* (New York: Palgrave, 2003), 151.

<sup>40</sup> Roberto Fernandez Retamar, *Caliban and Other Essays*, Trans. Edward Baker (Minneapolis: University of Minnesota Press, 1989), 6.



undergone by the name *carib*.”<sup>41</sup> Such interpretation created archetypes and the bewilderment expressed in Columbus’ narratives remained common in the nineteenth century, even in scientific journals such as the *Boletín de la Sociedad Mexicana de Geografía* [Mexican Geographic and Statistic Bulletin].<sup>42</sup>

In alternative entries Columbus acknowledged that although he had not found such monsters, people on the islands regarded the “other” inhabitants of the islands as very ferocious and anthropophagous. Such entries contradict his first accounts. “They brought us parrots and balls of cotton,” he noted in his record the day of discovery, “which they exchanged for the glass beads and hawk bells. They willingly traded everything they owned... They are well built, with beautiful bodies and handsome features... they are not black or white, but the color of canaries... they would make good servants... and I think they would easily become Christians since I perceived no religious affiliations.”<sup>43</sup>

One of the main problems Europeans had while attempting to understand the way of life in America related to hospitality or willingness to share personal property. As the first persons Columbus and his crews saw when they arrived to the Bahamas on October 12, 1492, the Europeans noted the Arawak Indians’ generosity. By running to greet the foreigners and offering them food, water and presents, the natives basically signed their own death sentence. This anecdote illustrates the start of a long chain of misunderstandings that worked to the advantage

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<sup>41</sup> Retamar, *Caliban*, 6.

<sup>42</sup> *Boletín de la Sociedad Mexicana de Geografía y Estadística*, XI. México (1865).

<sup>43</sup> Cristóbal Colon, *Los cuatro viajes del almirante y su testamento*, Diary entry of October 11, 1492. (Biblioteca Virtual Universal) Accessed June 2, 2019. <http://www.biblioteca.org.ar/libros/131757.pdf>

of the *conquistadores*. Such a rare cultural configuration, such an unprecedented difference in language and customs were outside the Spanish semiotic matrix and led them to think that the natives belonged to a different species.<sup>44</sup>

Thus, two initial images of the Indians were present in Columbus' writings: The carib/cannibal, a bestial man who must be eradicated (the same who Velasco urges to exterminate in nineteenth-century Sonora), and the timorous and cowardly Arawak who became the inhabitant of a pure and paradisiacal world. These two versions circulated "vertiginously" throughout Europe. The first, which implied the American man's bestiality, required an act of extermination; and even though the second version suggested a more beneficent attitude, the answer of the colonizers was equally deadly.<sup>45</sup>

At the time of contact, Mexico had several million people living around its major cities. The Aztec metropolis was at least five times the size of London, with zoos containing caged jaguars and blue-green feathered quetzals. The extent of trade impressed the Spanish conquerors, not only for the exuberance implicit in such an exotic city but because of the hegemony reflected by the presence of items brought from hundreds of miles away. They recognized that urban living was "already an ancient way of life in Mexico."<sup>46</sup>

But no matter how fabulous the New World cities were, the "contradictory voice of cultural appropriation" which creates a dividing line between "us" and "them," provided the necessary arguments to consider America's discovery as *marvelous* but very distant from any

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<sup>44</sup> Tzvetan Todorov, *The Conquest of America. The Question of the Other* (Norman: University of Oklahoma Press 1999), 3.

<sup>45</sup> Retamar, *Caliban*, 7.

<sup>46</sup> Richard J Perry, *From Time Immemorial. Indigenous People and State Systems* (Austin: University of Texas Press, 1996), 47.

original indigenous perspective. In the account of Hart: “The discovery of otherness is a matter of heroism and wonder, which evokes the traditions of natural history (Pliny), history (Herodotus) epic (Homer, Virgil) and travel literature (Marco Polo).”<sup>47</sup>

As noted earlier, Columbus had divided the natives into categories of “bad” and “good,” depending on their level of docility and cooperation with the Spaniards. “He subdivided [in his first voyage] the bad natives into Amazons [as the mythical women from the Iliad] and cannibals.”<sup>48</sup> However, the notion of existence of Amazons has different aspects that responded to the need of fitting the indigenous people and their lands into a European *melting pot* of epistemological experience. Amazons represented the *gendered aspect* of the New World, the “sexing of America” as Hart calls it. The discourse about women who would be men or who could metaphorically—and literally—devour them is strongly related to the “anxiety, voyeurism, attraction and repulsion” expressed in the texts that recorded the vicissitudes of the encounter between Europeans and the Indians.<sup>49</sup> This particular kind of thinking created the construct that would turn a whole Continent into a woman ready to be “ploughed and cropped,” literally, to be *raped*.<sup>50</sup>

Although the language of Amazons, sodomites and cannibals dominated the written discourse for the following 100 hundred years after Columbus’ landfall, the origins of the Amazons myth in fact derived from classical antiquity. The *Iliad* and Herodotus’ *Histories*

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<sup>47</sup> Hart, *Columbus*, 162.

<sup>48</sup> Hart, *Columbus*, 162.

<sup>49</sup> Hart, *Columbus*, 81.

<sup>50</sup> Hart, *Columbus*, 82.

described these fierce women's behaviors, which would impregnate the conqueror's mind with fears of being attacked, but at the same time would encourage erotic sentiments and dreams of domination.<sup>51</sup>

Pedro Giovanni's indigenous mother communicated to him an idea similar to the European notion of immanence, which led an Inquisition tribunal to charge him with heresy due to negation of the Trinity. "Pedro Giovanni Marani Tepochteca" said the Inquisition official, "has confessed to the reverend friar Eusebio Fontebona, the adoration of a stone, sculpted and painted on the ancient style, and which represents at the same time God the father and the Holy Virgin, thus negating the true assistance and intervention of the divine mystery of the Holy Trinity. Let the accused to tell if this is false or true." Bleeding from mouth and nose, with several bones broken, Pedro answered: "The stone generates all times, it is my mother, and my father, who left me. Everything is two. The Spirit is a rhythm. The Rhythm is in the trees, stones, and bodies. Everything is two. That is the only reality."<sup>52</sup> Such a statement confirmed the verdict, he was found guilty, and the officials charged him with idolatry due to negation of the Holy Spirit. An interpretation in Western terms sent Pedro Giovanni to be killed by burning at the stake. However, another common interpretation condemned Indians for worshiping the devil. Current scholarship argues that the accusation of devil adoration had a key role in the colonization of the American indigenous people.<sup>53</sup> In the same way, witch hunting constituted a

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<sup>51</sup> Hart, *Columbus*, 82.

<sup>52</sup> Pedro Giovanni Marani, fictional character in *El Espíritu. El Baile de San Juan*. Francisco Athie, (2012), DVD.

<sup>53</sup> Silvia Federici, *Calibán y la bruja. Mujeres Cuerpo y Acumulación Primitiva*. Trans. Verónica Hendel and Leopoldo S. Touza (Madrid: Traficantes de sueños, 2004), 289.

deliberated strategy employed by the authorities in order to spread terror, hence destroying the collective resistance and silencing entire communities. Such hunting also represented a way to corner and dominate *the* land, persons and social relations. Furthermore, just as in Europe, witch hunting became a means of dehumanization and “as such, became the paradigmatic way of repression that justified enslavement and genocide.”<sup>54</sup>

As in the case of Giovanni, accusations of devil pacts represented some sort of warfare to discredit political enemies and entire populations, similar to the case of Muslims and Jews during the late 1400s Spain. European expansion found an invaluable ally in militarism and Christian intolerance that considered the “other” a justifiable target for aggression. It is not surprising, then, that the “cannibal, the unfaithful wife, the barbarian, the monstrous races and the devil worshipers” became the favorite ethnographic models upon which a *fair* war should be unleashed; hiding the fact that the Conquest was more than anything a “voracious search for gold and silver.”<sup>55</sup>

The “ventriloquism”<sup>56</sup> that made Pedro Giovanni a victim of the Inquisition in 1790 was in reality an echo from the argument that promoted the so called *justified war* against the Indians. In what is known as the Valladolid confrontation, Juan Gines de Sepúlveda sternly refuted Bartolomé de las Casas’ defense of the Indians as subjects of evangelization. De Sepúlveda appropriated the Aristotelian thesis on the “natural servitude” supported by the “cultural

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<sup>54</sup> Federici, *Caliban*, 289

<sup>55</sup> Federici, *Caliban*, 290.

<sup>56</sup> Jonathan Hart describes “ventriloquy” as the act of speaking for others regardless of the level of awareness of the speaker. It can also be the displacement of someone else’s voice.

superiority” of the Europeans, thereby according them the right to dominate the imperfect (“beasts,” “little men” or “monkeys,” as De Sepúlveda used to call the Indians). Another element of his justification relied on the lack of Indian observance of the “natural law,” which implied the acceptance of the religious preaching even if it was forceful. For these reasons he believed that the war against the Indians was fair; and by all means De Sepúlveda denied the King’s responsibility in any violent acts committed by the Spanish troops.<sup>57</sup>

The fundamentals of Bartolomé de las Casas, even when theological, confronted the ideas of the conquerors and colonizers of his time. Before he became a professional theologian, de Las Casas was a great missionary and one of the first to arrive in 1502 to establish the evangelical enterprise. His experience among the so-called “infidels of the third category” moved him to declare that the war against those who did not know anything about the Christian faith and its church was in fact unjust. His arguments also appealed to the natural law considered a matter of *ancilla theologiae* (philosophy as the handmade of theology); but this did not have the negative connotations it does today; on the contrary, it meant that all men had been called by God to receive the faith for their own benefit, and if they had been called by the Almighty, it is only because they possess the intelligence to accept Him. De Las Casas presented as evidence the Indian’s abilities in the mechanical and liberal arts, and with this type of arguments he majestically resolved the metaphysical problem: the Indians are intelligent; therefore they are not beasts or monkeys and can indeed respond to the call of God.<sup>58</sup> After this, de Las Casas proposed

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<sup>57</sup> Luis Gonzalo Ferreyra, “Sobre la justa o injusta Guerra ‘a los infieles de la tercera categoría’ o a ‘las gentes bárbaras’ comúnmente llamados indios” in *Amerika. Mémoires, identités, territoires*. no.8, June 2013, <http://amerika.revues.org/3834>

<sup>58</sup> Ferreyra, “Sobre la justa.”

the solution for the pastoral problem, which he resolved by arguing that the evangelization should “be by the natural way of moving and taking men towards the true faith and religion, it must be a way which persuades with reason the understanding, and that attracts, moves, and exhorts, kindly, the will...because faith is an act of understanding...under the tutelage of the will.”<sup>59</sup>

The defense presented by de Las Casas had in common a theocentric view shared by De Sepúlveda, but considered that the war against the Indians was against the natural, divine and human laws. In these terms, both views were part of the hegemonic school of thought now considered to be European universalism. Nevertheless, de Las Casas thought that all those making war upon the Indians were obligated to pay retributions and deserved punishment. For him the Indians were exceptional barbarians due to their customs but in no way due to ontological status. De Las Casas employed theological argumentations to make clear that abuse and slavery forced upon the Indigenous peoples was wrong, simply because “even in the case that [the Indians] are barbarians of the highest rank, they have been created in the image of God, and they are not abandoned by the divine providence and incapable of becoming brothers in the Kingdom of Christ, they also have been redeemed by the precious blood of Christ, not less than the most powerful and wisest in the entire world.”<sup>60</sup> These considerations were revolutionary and very critical for this time, and, as a matter of fact, they influenced and then embodied Paul III’s Papal Bull of 1537, *Sublimis Deaus*, and later they affected the elaboration of the New Laws of

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<sup>59</sup> Bartolomé de Las Casas, *Del único modo de atraer a los pueblos a la verdadera religión* (México, Fondo de Cultura Económica, 1992), 328.

<sup>60</sup> Bartolomé de Las Casas, *Apología* (Salamanca, Junta de Castilla y León, 2000). 28.

1452. For various reasons, including the loss of the Church's influence and the resistance of the Indian's masters in plantations, the laws were amply ignored.<sup>61</sup>

Even when de Las Casas adamantly defended his views on the Indians, his was an act of *ventriloquism* that lent a voice to the Indigenous people by imposing certain types of power that made any kind of identity expression very difficult. After all, the Spanish King was never considered accountable for his participation in the assembling of an ideological and military machine that justified genocide under the premises of "inferiority," "satanism," and all forms of "abominations" like sodomy, cannibalism, incest, and transvestitism due to the Indian's lack of religious education.

Despite the sense of sanctimoniousness displayed by the conquerors and colonizers, they seemed unaffected by their own atrocities. The Spanish used the card of Aztec human sacrifice to establish the demonic nature of the Indians, but they show no remorse for acts like Cortes' massacre in Tenochtitlan, in 1521, when over 100,000 people were killed in the name of God and gold.<sup>62</sup> Not surprisingly, de Las Casas had an argument in this regard that departed from the univocal ways of the Spaniards and landed in the equivocal of a different system of knowledge—indigenous—hence performing a drill on analogical hermeneutics: "the principal way of worshipping God is to offer a sacrifice...nature teaches that the most just (sic) is to offer him the most valuable in our possessions...there is nothing more valuable than men and a man's life...Therefore, it is nature which dictates and teaches to all those who lack of *the* faith, of

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<sup>61</sup> Ferreyra, "Sobre la justa."

<sup>62</sup> Federici, *Caliban*, 293.



grace...and who live within the limits of the reason of natural law that they must also sacrifice human lives.”<sup>63</sup>

Ontological arguments seem to have extraordinary resilience. The nineteenth-century rhetoric found in magazines and scientific journals still shows strong traces of the initial Indian descriptions that emanated from the first encounters. As an example, a desperate letter—originally published in the national newspaper *Siglo XIX*—became part of the Geographic and Statistical Survey of Sonora. Its content, regarding the “sad situation” in which the state of Sonora found itself—together with the rest of the country—argues that the government must make a justified war against the “barbarous tribes of the north.” The intention of the letter was to create awareness of three main points: One, the vast gold and silver riches of Sonora; two, the possibility of aggression by the United States—lured by the resources; and three, the unbearable situation of insecurity caused by the barbarians of the region. In his missive, the author praises the enterprising spirit that led England to provide a massive army in order to colonize India—a country of 30 million inhabitants—to extract unimaginable riches. For him in comparison, the same occurred when Fernando and Isabel supported the visionary Columbus; in the same way the Sonoran government should have made an effort to protect those who sought the opportunity to explore and exploit the gold mines in the region. For the author, the government should have acted and provided protection for entrepreneurs before the United States set an eye again, on the Mexican territory “making any excuse to invade.”<sup>64</sup>

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<sup>63</sup> Las Casas, *Apología*, 234.

<sup>64</sup> “Triste situación de México. Apatía de los gobiernos. Falta de protección. Riquezas de Sonora.” Anonymous in “Sonora. Placeres de Oro y Plata.” *Boletín de la Sociedad Mexicana de Geografía y Estadística*, XI (1865): 141.

Old tropes about the nature of the Indian go hand in hand with a justifiable war against those opposing the true religion and the civilizing effort of the modern man. However, above all, one myth accompanies historic actors throughout the varied epochs in the development of the Mexican nation-state: the image of the country-cornucopia. Emotionally, the contributor accuses: "The heart becomes sad and the imagination scared when one thinks that one of the poorest countries in the world has one of the richest portions of land... and yet to blame is the public administration, the ignorance and stupidity of the Spanish conquerors, and the clueless and greedy attitude and politics of the Independence governments."<sup>65</sup> This statement synthesizes what would be the cause of wars in Mexico for most of the nineteenth century: the fight against the colonial inheritance and the admiration for Liberal thought.

The categorization of the Indians into lesser diabolical beings allowed the Europeans to become the carriers of a civilizing mission. Which makes obvious that the construction of a "binary opposition between colonizer and colonized is not easily reversed"<sup>66</sup> Such binary opposition represents the seed of colonialism as a moral obligation to spread Western civilization, which would become highly developed and notorious during the late nineteenth-century's *self-conscious* phase of imperialism (1870).<sup>67</sup>

The implication of "inferiority" in consideration of the Indians did not come only from theological debates or from projections of some of the gruesome European practices that

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<sup>65</sup> "Triste situación de México," 140.

<sup>66</sup> Jenny Sharpe, "Figures of Colonial Resistance," Bill Ashcroft, et al, *The Post-Colonial Studies Reader* (New York: Routledge, 2001), 101.

<sup>67</sup> Jenny Sharpe, "Figures," 100.

involved massacres, cannibalism, and torture. Representations of the New World often evoked the trope of *traslatio imperii* (Transfer of empire). This transfer/translation implied the semantic change of the word *barbarian* throughout time and different geographic points. For the Greeks, as Aristotle discussed, *barbarian* meant mainly foreignness, but with a certain implication of inferiority. Thus, “barbarian” was applied to Berbers, Turks, Sythians, Ethiopians and Irish; the term also included Egyptians, who were respected by Greeks around the seventh and sixth century B.C. when the term was coined. But during the fourth century B.C., the term had mutated, now implying “someone of cultural and mental inferiority...a babbler who could not speak Greek, someone devoid of *logos*, of speech and reason. The barbarian lacked *civis* and *polis*, the civil society of the Greek family of humankind.”<sup>68</sup>

The translation of *the* empire therefore required a sense of belonging to a civilized world and a feeling of living in *logos* as some sort of chosen people.<sup>69</sup> In other words, the imperial theme that required translation also embraced movement. In the case of the original reference the genealogy of the imperial theme borrows from the transition from Athens to Rome. But in the subsequent encounter between the Europeans and the indigenous people of America such translation implied a forceful assimilation of people about whom nothing was known and who lived in a state of nature due to the absence of civilization and urbanity. Such perception was nothing but a paradoxical mirage. The admiration that most Spaniards felt while admiring several

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<sup>68</sup> Hart, *Columbus*, 158.

<sup>69</sup> Hart, *Columbus*, 159.

indigenous metropolis states the contrary: civilization and urbanity defined indigenous settlements.

Translation of empire thus acquires teleological dimensions, and language and communication in its different manners are the key components in the process of the re-interpretation of the New World. It is important to note that while the Spaniards were superior in communication on an interpersonal level (as in the letters where Columbus and Cortés describe to the Crown their journeys and details), the Indians maintained communication with the cosmos. They believed in the needs of the earth, the stars, the animals and the plants.<sup>70</sup>

Many of the practices attributed to the Indians were either invented or distorted by means of filtering through a radically different system of values. This is no anachronism. Such is the reason why the Indian in de Las Casas' thought is an Indian deprived from land, family and government, who does not need to be invented or translated, but allowed to present him/herself as a human capable of exercising full universal rights, and therefore to be a free subject of Christian faith and the Spanish Crown. Thus, the ontological redefinition of the Indian and the argumentation of slavery as historical eventuality—versus a natural trait—questioned the legitimacy of a Eurocentric, brutal invasion that denied the autonomous existence of the pre-Columbian subject. Thus, this type of thought made of de Las Casas the first philosopher to challenge the philosophical basis of imperialism.

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<sup>70</sup> Todorov, *The Conquest*, 106. It is a common error to think about the indigenous as being polytheistic; Huitzilopochtli, their god, had different names, meaning that every name had a function within nature: rain, sun, moon, war, agriculture, etc. The relations with the natural world were personified, and acceptance of new deities was allowed (including the possibility of a returning Quetzalcoatl, the mythical departed god who promised to return). Motecuhzoma—the last ruler of the Aztec empire--ordered the construction of the “Temple of the Diverse Gods or Coatescalli” to house all gods from all provinces and lands.

A de Las Casas notion would strongly contradict the idea of *Indianess* during the nineteenth century when anything indigenous represented atavism. Colonial DNA, to use the biological terms so popular within racial lingo, used hierarchy as main vehicle through the centuries. Using construction blocks—the binary opposition invested in the formula colonizer/colonized—the Spanish immigrants reproduced their own society in colonial Mexico. By means of ventriloquism and translation of Imperial forms, they achieved success in building on central organizing principles such as an “estate hierarchy, patriarchy, honor and legitimacy, and devotion to the Catholic faith.” A similar transmutation occurred with the socio-economic hierarchy from the early modern Spain. However, New Spain always seemed to have a reshaping power in which new practices and categories emerged promptly. Therefore, at the center of the military aspirations that brought the conquest of the indigenous peoples of Mexico, the Spanish crown based its government model upon a fantasy. Early Spanish settlement policies in the sixteenth century were the result of the belief on two separate colonial polities—the *republica de indios* (Indian republic) and the *republica de españoles* (Spanish republic). But, “the dislocation caused by catastrophic decline of the indigenous peoples and the labor demands made upon them by the Spanish settlers, however, made any rigid separation impossible.”<sup>71</sup> The initial binary formula of colonizer/colonized, implied a vast internal polar diversity that promptly surpassed the Old World reminiscences of racial categorization. New Spain proved to be more complex and required a solution greater than a dual republic partition.

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<sup>71</sup> Susan Dean-Smith and Illona Katzew, “The Alchemy of Race in Mexican America” in Katzew, Illona and Susan Deans-Smith, *Race and Classification. The Case of Mexican America* (Stanford: Stanford University Press, 2009), 6-7.

Thus, the interpretation of the New World complemented smoothly the ample Spanish experience of social and cultural heterogeneity. After all, coexisting with Jewish and Islamic communities in the past provided valuable elements to a new relationship, in which the novelty would reside in the racialization of a socioeconomic hierarchy even richer in physical and ethnic differences. “While rank, privilege, power, and wealth were concentrated in the hands of the Spanish white settlers, their American-born descendants or [criollos] acquired a distinct status of being-the-same-but-not-quite as their peninsular progenitors based on European belief that to be born in America resulted in inferior capabilities and qualities.”<sup>72</sup> Castas became the answer to the implementation of a hierarchical classification to organize everyone in the colony. The lexicon of racial consciousness, extrapolated from the Iberian society, found in the castas system a way of proliferation of discriminatory aspects, even for criollos in the New Spain.

Castas operated differently from the later concept of race. The essential aspect of a casta resided in the *pureza de sangre* (purity of blood), and without basic understanding of such an idea the system of castas does not make any sense. During the fifteenth century, and for the following one hundred years, Spanish institutions adopted a series of measurements inspired by the assumption of religious non-commitment on the part of Jews recently converted to Catholicism. The assumed lack of faith made ancestral and “pure” Christianity an indispensable requirement for many ecclesiastic and public positions. In the New World, the Holy Office from the Inquisition took charge of investigating the cases in which purity of blood had to be demonstrated through lengthy legal and archival research. Thus, the Spanish Inquisition was a

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<sup>72</sup> Smith and Katzew, “The Alchemy,” 7.

tribunal organized to investigate heresy charges among Christians and particularly among converts. However two categories of “impurity” dominated the denial of access to public office: descending from condemned heretics, and descending from a Jew or Muslim family.<sup>73</sup>

Those who had Jewish or Muslim roots were considered “stained,” and as such also potential heretics since they had not reached authentic Catholicism. Even when most of the institutions followed the law on heresy to inquire only two generations back into the ancestry of a candidate or suspect, by mid-sixteen century most religious and secular corporations did not restrict how far the “stain” research should go back in time looking for Jewish, Muslim and heretic ancestry. “In this way, what initially started as a temporal tool to ensure blood purity within the century, became a mechanism to develop a hierarchical socio-political order based exclusively on blood and the categories of old and new Christians.”<sup>74</sup>

The term “raza” [race] became widely used in reference to new converts and their descendants, making the “cleanliness” concept a more essential term, which was used among the few old Christians to identify all those that had Jewish, Muslim and even Protestant backgrounds. The obsession with clean blood produced a discourse, which amalgamated religion, blood, and race; and it became the parameter used by institutions to discern between the newly created social subjects.<sup>75</sup> Thus, the way in which power relationships acted upon the

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<sup>73</sup> Rodrigo A Núñez, “Interrogando las líneas de sangre: ‘Pureza de sangre, Inquisición y categorías de casta,’” *Dialogo Andino, Revista de Historia, Geografía y Cultura Andina*, No. 43, (June, 2014): 101.

<sup>74</sup> Núñez, “Interrogando.” 102

<sup>75</sup> Núñez, “Interrogando.” 103

process of social differentiation expressed not only the need of sustained racialization, but a special capacity to create instruments capable of categorizing people.

The efforts to strengthen the Catholic orthodoxy in the New Spain included aggressive policies to avoid the spread of heresy and the return to idolatry. The case of Pedro Giovanni Marani Tepochteca, as depicted by Athié, illustrates the preoccupation about pagan recidivism by the Indians. Such uncertainty induced the civil and spiritual colonial governments to trust only the old Christians for relevant positions. But the Inquisition, being a transatlantic institution—which searched for proof of purity in Spain too—together with the lack of genealogic books in the American cities funded by the Conquistadors, only complicated things for the high number of criollos who solicited office and titles (of purity) during the early seventeenth century.<sup>76</sup>

The Spanish Crown and the church never declared the Indigenous people as impure, but their status as new converts did not allow them to be accepted in positions that required proof of ancient Christian blood. Religious authorities doubted more about the sincerity of native conversions since they constantly encountered physical evidence of previous “idolatry” in native daily life. By 1530 many natives had already been judged for idolatry and heresy, and had been forced to wear *sambenitos* [sanbenito].<sup>77</sup> Hence, the finding of indigenous ancestry was not explicitly considered as “impure,” but the religious status of the Indians became an excuse for the Spanish to exclude them and deny them access to certain positions and trades. Several

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<sup>76</sup> Núñez, “Interrogando,” 106

<sup>77</sup> Sambenitos were garments, usually a combination of conic hat and jacket, which indicated that the person wearing it had committed a heresy.



corporations including the *audiencias* [courts], city councils, and religious orders gradually adopted requirements similar to the Inquisition's purity of blood burden. Together such institutions would help to construct the *castas* system, which determined a person's access to privileges institutions, positions of hierarchy based exclusively on origin and proportion of blood mixture—Spanish, Indigenous, African.<sup>78</sup>

Thus, the idea of *limpieza de sangre* had an altogether different application in the New Spain. Purity of blood emphasized descent based on African, Amerindian, and European ancestry. Such emphasis determined the creation of difference and status attached to the evolution of the *casta* system. The concern about African blood contamination *yielded* before the possibility of whitening Spanish blood by miscegenation. In other words, indigenous blood in Spanish-Indian unions was not hopelessly deemed to live forever, and after a few generations descendants were expected to be as white as the peninsular people once were.<sup>79</sup> Regarding African blood, the opposite was true: "To those contaminated with the Negro strain we may give over-all, the name of *mulatos*, without specifying the degree or the distance direct or indirect from the Negro root or stock, since...be it the first union with and Indian or Spaniard or a mixture of theses, that it always results in some kind of *mulato* mixture, which even the most effective chemistry cannot purify."<sup>80</sup> Indians after all had nobility and lineage, they could

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<sup>78</sup> Núñez, "Interrogando," 109-111

<sup>79</sup> Smith and Katzew, "The Alchemy," 9.

<sup>80</sup> Pedro O'Coruley, Pedro Alonso as cited by Susan Dean-Smith and Illona Katzew, "The Alchemy of Race in Mexican America," 1.

become good Christians and vassals for the Crown. Whereas Africans, less in number, were considered absolutely foreign and agents of contamination for the European blood.

Modernity and the evolution of economic flows affected the treatment on the “Spanish obsession with genealogy.” Thus, by the end of the seventeenth century the byproducts of *limpieza de sangre*, *linaje* (lineage), *casta*, and *raza* (race) had to be transformed and updated simultaneously. The imminent expansion of mercantile capitalism produced instability, hence affecting the socio-racial hierarchies. The lexicon of blood effortlessly found accommodation within the incipient semantic expressions of class. The new mixture manifested in such categories as *calidad* (quality), *condición* (condition), and *clase* (class), “while understandings of race and purity became secularized and increasingly separated from religion and lineage.”<sup>81</sup>

The need for naming (as in the first encounters), classifying (as with the purity of blood), and imagining (as in the transitional conceptions of race in the eighteenth century) gave way to the implementation of new technologies to express racial thinking in Mexico. *Casta* paintings became a pictorial means, in Spain and the New Spain, popular in the broadcasting of ideas which tended to be more secular than religious in the environment of capitalist expansion throughout America. *Casta* paintings show the evolution of ideas of race and blood linked to religious lineage (placing a premium on ‘old’ Christian ancestry), traversing to a secular and biological conception. On one hand, priests, churches, and devotional culture no longer had a

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<sup>81</sup> Pedro O’Coruley, “The Alchemy,” 1.

privileged place in this type of art, while on the other hand “the classifying predilections of Enlightenment natural history and applied science are fully present.”<sup>82</sup>

The typical forms of racial division in eighteenth-century Mexico became amplified in casta paintings, but paradoxically they also became obsolete. The impressive number of racial combinations depicted in this pictorial genre shattered the usual legal fiction established by the notion two republics—one for Spaniards and another one for Indians. The paintings openly recognized racial mixture in many ways, and they emphasized the existence of free Afro-American people. However, even when some casta paintings constituted “stunning portraits of gorgeous people in all the hypothetical racial combinations, they are not a celebration of race mixture” or remotely “harbingers” of the late nineteenth-century discursive worship of racial synthesis. Casta paintings categorized people into racial strata, attempting to create order on unsanctioned mixing which appeared out of control and beyond any type of regulation. “Like the early history of race in the United States, the castas validated white superiority in their own way.”<sup>83</sup>

Created in 1763, *Castas de Mexico* [Castes of Mexico], an illustration by Joaquín Antonio de Basarás found in his manuscript *Origen, costumbres y estado presente de mexicanos y filipinos* [Origins, customs, and present state of Mexicans and Filipinos] already shows signs of neoclassical style: the illustration presents a white background, blue and golden ornaments that separate the characters portrayed, and above all, it manifests certain classificatory clarity proper

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<sup>82</sup> Illona Katzew and Susan Deans-Smith. *Race and Classification. The Case of Mexican America* (Stanford: Stanford University Press, 2009), X.

<sup>83</sup> Katzew and Susan Deans-Smith, *Race and Classification*, X.

to the late stages of the Enlightenment. More than physiognomy, the painter uses garments and other cultural elements to depict a hierarchy among his human models. At the top of the nine-figure scale are the Indians. White skin, refined poses, and childish facial expressions define these Indians who seem to be also dressed with mantillas, head covers and handkerchiefs on the common European style. The female Indian, especially, complies with attire required for any decent woman married to a well-to-do trading agent. The male Indian wears a stylized cape, what appears to be a white wig, and even when he does not have shoes, in his hands he carries a black hat. In the middle of the painting, the classification has a mulata and a mulato. The female wears a typical Valencian attire, and her facial features are truly undistinguishable from her Indian counterpart. The mulato seems to be dressed as a musketeer. He wears red baggy pants, blue long coat, and thigh-high black boots. In charge of providing the entire context, a whip can be seen in his hand.

At the bottom of the matrix are a couple of Indians—male and female—with a child. There is no change in skin tone or physiognomy. The only difference with the other racial depictions is the lack of clothing. While the woman only wears a manta fabric wrapped around her waist, the child goes totally naked, and the male covers his humanity with tightly a fitting loincloth. Besides the fact that Basarás used the word “Meca” to identify the Indian couple, the observer gets a direct and complex message that goes beyond the obvious absence of Europeanization tied to the lowest members of the classification. To be sure, Mecas, associated with nakedness, the use of feathers, and more than anything, the possession of weapons—a bow and arrows—complement the central idea of an axiological turn: Indians, as a concept and product of the Colonial order have become subjects of the kingdom—with political rights and

economical burdens—while the Mecas<sup>84</sup> are the barbarian individuals outside civilization (See Figure 1).<sup>85</sup>



Figure 1: Joaquín de Basarás. Origen, costumbre y estado presente de mexicanos. [Mexico], 1763. Vol. 2, Estampa 1. Watercolor on paper.

The Indian, as a construct, emerged from the asymmetrical power relations during the colonial period in the New Spain. As seen previously, the notion of the first encounters yielded a transmutation in which the Indian became a problematic subject in terms of his/her conceptual definition and association with a *casta*, or race, or a combination of both ideas.

<sup>84</sup> Meca/o seems to be used by the painter as short for Chichimeca/o. The Chichimeca nomad tribes lived in the Bajío region, north of Mexico City and carried the reputation of being barbarous and untamable.

<sup>85</sup> Image from *Colonia/Colonia*. The Newsletter of the Colonial Section of the Latin American Studies Association (LASA). Issues 1:1; February 2013, accessed on May 27, 2019. [https://www.unf.edu/~clayton.mccarl/lc/Colonia\\_1-1.pdf](https://www.unf.edu/~clayton.mccarl/lc/Colonia_1-1.pdf)

Thus, the portrayal of a rebellious Meca, at the bottom of a hierarchy, reinforced the conditional acceptance of the Indian in a Colonial society that required economically active subjects united under common beliefs of difference. Hence, Indians appear to be typical merchants, domestic workers or tradesmen, while Mulatos seem to be hacienda workers such as foremen, horse keepers, cooks, female personal assistants or nannies.

The technological device of casta painting obeys what is known as a visual economy, which took elements from the Enlightenment and Renaissance. The visual, became probably the most important currency within the greater *political economy of race*. The transformation of a binary social organization with religious hues into a visual instrument required a domain of vision constructed around the “production and circulation of interchangeable or serialized image objects and visual experiences.”<sup>86</sup> Thus, the subject acquires a capacity of perception that functioned even under circumstances of very fluid fields of vision. Concepts that correlated to the action of observation, vision, and the visual image emerged within a European context of politico-economical change headed to capitalist consolidation. Vision at the end of the eighteenth century became—as Beborah Poole argues in terms of the Peruvian Indian photography—a problem of social actors and societies. In the example of casta paintings, a problem of the criollo elite found an escape and means of expression via its painter guild. Such solution to the criollo elite utilized the Indian society as background and context.<sup>87</sup>

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<sup>86</sup> Deborah Poole, *Vision, Race and Modernity. A Visual Economy of the Andean Image World* (Princeton: Princeton University Press, 1997), 9.

<sup>87</sup> Poole, *Vision, Race and Modernity*, 9.

Practicality versus abstract discourse marked a transitional period in which the European philosophical notions of representation, vision, and truth were the main components in the instruments used by those who concentrated political and economic power, as well as those who resisted, negotiated, and conformed to their rule. A natural movement in the American colonies that went from intense mercantilism to capitalism, engendered conflicts and new challenges. The demands in the dramatic world changes implied mechanisms for coping with external forces while dealing with internal resistances. Modernity and its associated humanism forged a particular way of coexisting in New Spain: social goals, aspirations and the spirit of the time became embedded in its own *ethos*, a *baroque ethos*.<sup>88</sup>

The baroque ethos is about contradiction, it takes its name from the characteristics of the baroque art: the capacity of combining and mixing elements that from a serious point of view could not be together, combined, or mixed. This mixture is chaotic and a transgression to the aesthetic rules already established, however is the only art form that could include indigenous aesthetic elements in the New Spain. “The elements do not understand each other but they allow themselves to live mutually. They do not know each other in the Hegelian sense but they do not exclude each other aggressively.”<sup>89</sup>

The baroque ethos presents itself as the perfect buffer and breeding ground in which the visual economy thrived, hence navigating to a state of practicality. The success of the baroque in

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<sup>88</sup> If modernity is understood as a civilizing totality and humanism as the tendency of human beings to consider themselves the measure of all things, then an ethos or way of living is necessary to confront the contradictions of capitalism during different stages. In the case of the New Spain, such ethos is the baroque ethos, one that opposes the idea of a protestant ethics as fundament of capitalistic life, and one capable of dealing with the revolutions of productive forces, which after all are a reality.

<sup>89</sup> Stefan Gandler, “Mestizaje cultural y ethos barroco. Una reflexión intercultural a partir de Bolívar Echeverría.” *Signos Filosóficos*, Vol. 1, No. 3 (June 2000): 58.

New Spain allowed a European art school to become a lifestyle and coping mechanism that allowed the implementation of new racial technologies based upon the most important element of the baroque: the symbol made image.

As Maria Elena Martinez argues, the origin of the word “race” in Castilian is uncertain, although its use became prominent in the 1500s, and it mostly can be related to lineage, or the essence of nobility transmitted by blood. Thus, the word became tied to the dividing wall between commoners and nobles, which in fact never contradicted the doctrine of a common creation. A similar view was invested in the binary meaning of the encounter among Spaniards and Indigenous people in the New World. Nevertheless, during the sixteenth century the concept suffered a mutation, and went from a tool to differentiate between those who had blood mixtures affecting their nobility to indicate descent from religious categories. Hence the term expressed the Spanish anxieties over the “true religious commitments of the Jews who had converted to Christianity, the conversos...” as well as those of Muslims, or moriscos, whose presence threatened the Old Christians living in a world of Ottoman Empire expansion, Protestantism, and Counter-Reformation.<sup>90</sup>

The term *casta*, which derived from a zoological idea of classification ruled by purity, especially in horse breeding terminology, represented a good alternative to race in the terms of classifying people. In effect, when the term *casta* was applied to all those whose purity was in doubt due to a possible mixture in ancestry, the term acquired a negative meaning. However,

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<sup>90</sup> Maria Elena Martinez, “The Language, Genealogy, and Classification of ‘Race’ in Colonial Mexico” in Katzew, Illona and Susan Deans-Smith, *Race and Classification. The Case of Mexican America* (Stanford: Stanford University Press, 2009), 26-27.



casta remained different and, socially, less harmful than the concept of *raza* [race] which was intrinsically tied to Jewish and Muslim descent. “Hence, mestizos, mulattoes, and in a general sense also Spaniards and Indians, were considered ‘castes’ lineages, not necessarily races.” In other words, the Spanish language of exclusion in terms of religion had been exported to America in a more inclusionary way, allowing “symbolic kinship ties (which only contributed to the instability of categories).”<sup>91</sup>

The struggle for domination continued in New Spain long after the Fall of Tenochtitlan—Mexico City—in 1521. The second half of the sixteenth century witnessed the expansion of a population made overwhelmingly of those the Spanish considered illegitimate mixed ancestry. The *Sistema de castas*, and its dual-descent mode of categorization, became a response to the need to implement restrictions to all those persons claiming access to political and economic positions but who did not enjoy a solid Spanish purity. Such was the system’s initial preoccupation when its first categories focused on exclusion. Subsequently, as Maria Martinez argues: The classifications were part of the politics and ideological mechanisms intended to reproduce colonial hierarchies. Influenced by political and economic factors, the colonial ambitions were focused on the creation of free wage-labor capable of ameliorating the crisis generated by the decline of the native population. The plasticity traits acquired by the idea of race after all had the purpose of supplying labor for the “urban economies and hacienda and mining complexes.”<sup>92</sup>

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<sup>91</sup> Martinez, “The Language,” 30.

<sup>92</sup> Martinez, “The Language,” 31.



Figure 2: Book of “Actas” Early 1800’s. Archivo Municipal de Puebla

The importance of lineage records grew as did the influence of parishes, which enforced the Spanish colonial project. Such influence was a cornerstone in the creation of identities, rights and privileges. Colonial institutions requiring *limpieza* investigations increased in number, and confirmed that the state and the church partnered in the construction of an archival effort to construct and reproduce castas. This partnership gave birth to an articulated ethnographic state and new archival technologies of power. For example, a *Real cédula* [legal proceedings] sent to the governor and justices of the City of Merida in 1629, requested complete lineage information about the parents and grandparents Diego de Becerra. As the former owner of Indians, Becerra

lost the privilege of his *Encomienda* [ownership of a group of Indians] until he could produce the accreditation of his *limpieza de sangre* before *Consejo de Indias*. Becerra in this way had to demonstrate to the President and Auditors of the *Audiencia de México* that the accusation made against him as “one of those who cannot cross into the Indies” was false.<sup>93</sup> State and archives, both were tied to a colonial epistemological practice that was based on royal and ecclesiastical decrees that ordered parishes to maintain separate birth, marriage, and death records for Spaniards, Indians, and castas.<sup>94</sup>

Language in New Spain absorbed the anxiety of *limpieza* and categorization, an example can be observed in the late eighteenth-century archives of the City of Puebla. Municipal records show that complaints and legal controversies, as late as 1710 still refer to either counterpart as “Indio natural” [natural Indian], according to the case (See Fig. 2).<sup>95</sup> In a complaint about the right to exploit natural resources—access to obtain stone from a quarry—dated May 1829, the scribe emphasizes several times that locals on the municipality have no right to extract stone, referring specifically to “señores” by name, or owners of established businesses, and also “Indigenous persons” who, despite the fact of being sometimes called by their name, still required to be catalogued as indigenous, or simply non-Spanish.<sup>96</sup>

The nature of the complaints placed before the authorities had no effects on the language employed to describe the affected parties. The composition of legal documents in the City of

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<sup>93</sup> Archivo General de Indias, “Cedula a la Audiencia de México,” (Mérida, 1629).

<sup>94</sup> Marínez, “The Language,” 34.

<sup>95</sup> Archivo de Actas. Municipio de la Ciudad de Puebla de los Ángeles. Vol: 2, No. 16, Pages: 67-70, July 17, 1710.

<sup>96</sup> Archivo de Actas. Municipio de la Ciudad de Puebla de los Ángeles. Vol: 128, Pages: 104-135, May 6, 1829.

Puebla and nearby towns showed clear consistencies throughout the decades. In the case of a complaint generated by the Indians of Cholula, in the Department of Puebla, the *Audiencia de la Nueva España* (New Spain Tribunal) read the following: “Spaniards and Mestizos have opened various bars and bodegas [town stores] where they exhibit bad behavior,” hence affecting negatively the behavior of other Indians.<sup>97</sup> The complaint refers to the inconvenience of dealing with people who consumed alcoholic beverages in excess, setting a bad example for the Indians. However, the need to describe the parts in legal document in terms of race denotes the importance of being a Spanish or mestizo business owner versus a consumer and malleable Indian.

The language of *limpieza* survived in colonial New Spain thanks to the criollo discourses of blood, but the development of mercantile capitalism and the possibilities of social mobility “together with the acceptance of individual achievement and other principles of rationalism (especially popular among the Jesuits) increasingly peppered the language of purity of blood with concepts related to ‘class’ or social status (such as *calidad*, *condición*, and *clase*).” In other words, New Spain was experiencing yet another transformation in the language associated with racial thinking while observing the incorporation of “bourgeois concept of diligence, work, integrity, education, and utility to public good.”<sup>98</sup>

The *baroque* mixture of the language of blood and the stratification into classes represented at the end of the eighteenth century became the living proof of the *casta* system. Its

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<sup>97</sup> Consejo de Indias, “Real Cédula a La Audiencia De Nueva España,” (San Lorenzo 1579)

<sup>98</sup> Marinez, “The Language,” 37.

main novelty consisted of the use of the Indian body as some sort of text. The mixture also signified the *casta* system's prominence in the decades prior to the War of Independence. *Casta* paintings depict a racial classification in composite zoological names, which departed from the three main categories of "Spaniard," "Indian," and "black." The racial combinations usually show a couple and their child, all wearing the typical attire related to the trade or work assigned—or imagined to be the proper representation—according to race: *mestizo* (mixed Spanish-Indian), *mulato* (Spanish-Afro-Mexican), *morisco*, and *zambiago*. And the new eighteenth century additions in the New Spain consisted of combinations that indicated degeneration, or a jump backwards in the scale of racial contamination with black blood: *lobo*, *coyote*, *pardo*, *moreno*, and rarely *chino*. This classification, which in official records followed certain genealogical rules was in reality not systematic, however, "the body was thus read as a system of signs, external appearances taken to reflect moral and ethical inclinations..." which in combination with the emergence of natural explanations at the time gave capital importance to the environment—over theological reasons—hence making "the colonial body [...] the main text through which the issue of purity of blood was framed."<sup>99</sup> The *casta* paintings, and their depiction of people in what seems to be natural history context—with plants and animals—became a dosification instrument for a secularization process that would find its highest point in the nineteenth century and its scientific approaches to human difference.

The anxiety about social status and New Spain experiencing the turmoil of unknown socio-economic vectors led to strategies of differentiation and protection of such status. Such

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<sup>99</sup> Marinez, Maria Elena, "The Language," 39.

strategies operated by means of the creation of visual technologies that could transfer the idea of purity to other realms of social life. One of the ways of creating a *limpieza de oficios* (purity of tradesmanship) consisted in the emergence of a movement to require certificates of admission in the academy of arts in order to guarantee that, an institution which did not require blood purity documents, could become exclusive of those who had practiced only noble trades for generations. “Academia” painters had to compete with the illicit production of artwork by untrained *artesanos* [craftsmen]. Such competition forced the painters of the *casta corpus* to distance themselves from the racialized other, who did not enjoy the benefits of prestige inherent to the liberal art, but clearly threatened the status of those considered “noble.”<sup>100</sup> Thus, the *casta* paintings as vehicle of race, encompassed more than the original binary classification between noblemen/commoner, and more than the colonizer/colonized categories. They in fact became the instrument of transmission of a pre-modern and religious racial perspective in to a new socio-political and economic arena, which promptly demanded a classificatory and exclusionary system, as efficient as the one used by the painters guild in the eve of the Mexican Independence War of 1810. *Casta* paintings did not prevent the fiasco between couples such as Pedro Giovanni and Victoria; after all they depicted beautiful people in natural landscapes. However, they transmitted the idea—and horror—of race understood as an ontological stain, which, even when visible most of the time, it could be also the undesirable subcutaneous manifestation of a persistent context inherent to the New World: the other, whether Jew, Moor, African or Indian. Thus, the latent threat of otherness, whether visible or not, produced categorizations in which the

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<sup>100</sup> Susan Dean-Smith, “The (Racial) Politics of Painting” in Katzew, Illona and Susan Deans-Smith, *Race and Classification. The Case of Mexican America* (Stanford: Stanford University Press, 2009), 71.

Meca—as represented in the casta paintings—was not only at the bottom of a human hierarchy, but had become the ultimate foe. The just and necessary war could be the one from the Selpulveda-de Las Casas controversy or the one between the central Mexican government and the barbarous (Mecas) Ceris of Sonora in the midst of a modernization wave during the nineteenth century. The schemes of power, manipulated to sustain inequality for the lower castas, and advantages for those who had a voice in the construction of a nation, would find a comfortable place within the political economy of race, and its language of liberal thought throughout the rest of the nineteenth century.

### CHAPTER 3

#### RACE AND THE MECHANICS OF POWER: A SAIL ROUTE FOR PROGRESS AND WAR

“An Indian is much more than the sum of her fathers and feathers.”<sup>101</sup>

"As a consequence of the last episode with the Ceris, the political leader in Guaymas, D. Cayetano Navarro, went out in a [war] campaign. Having returned with 12 female Indians and 16 minors: plus 2 young ones and one old man—he killed 9 among who no leaders were found. He was in Tiburon Island: many Indians escaped, and it is believed that they are in Tepoxoc. Such has been the result."<sup>102</sup>

José Francisco Velasco was born in the Department of Sonora, Mexico, in 1790. His fructiferous career began as employee of the colonial government, work experience useful in a subsequent transition into his second work tenure, this time during the republican administration. Velasco was a lieutenant general at the mine conglomerate of San Francisco, and secretary of the General Command for the Internal Provinces. After the War for Independence in 1821, he became the president of the first *Ayuntamiento* of Hermosillo [Capital City of Sonora]; by 1845 his meteoric career had included positions such as congressman, customs officer, judge, and other high-ranking offices in the Sonoran government. Nevertheless, his name became a part of

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<sup>101</sup> Eduardo de Jesus Douglas, “Our Fathers, our Mothers: Painting and Indian Genealogy in New Spain,” in Ilona Katzew, *Contested Visions in the Colonial Spanish World* (New Haven: Yale University Press, 2012), 131.

<sup>102</sup> Clarification note at the end of the “Apéndice to the Continuación de la Estadística de Sonora por el señor José F. Velasco” in *Boletín de la Sociedad Mexicana de Geografía y Estadística*, Vol. XI, (1865): 125.



history, above all, due to his membership in the *Sociedad Mexicana de Geografía y Estadística* (SMGyE) [Mexican Society of Geography and Statistics].<sup>103</sup>

In the fourth decade of the nineteenth century Mexican officials claimed that facilitating communication between the Sonoran City of Guaymas and the port of Angeles was the motive behind the idea of founding a presidio at Tiburon Island, which became central for the exploration—and exploitation—of the region. The task was in reality to displace all the "barbarian Indians so called Ceris," who inhabited such island.<sup>104</sup>

The Department of Sonora, as big as it was, needed a second *puerto de cabotaje* [shipping port] in addition to Guaymas to support its commerce with Alta California. The location of Tiburon Island became privileged as the best route located outside of the territory of the Yaquis and Mayos, tribes known to attack and rob diligences in transit. Surveyors and officials sought to improve the commerce of the Department and to intensify the communication between the Californias, which at the time were as "exposed" [unprotected] as Tejas.<sup>105</sup>

The Mexican government, acknowledging the importance of the trade routes crossing Sonora, and the risk of attack by the multiple "revolutions" incited by the barbarian Indians, commissioned "explorers" who could describe, survey, and pacify the region, one location at a time. José Francisco Velasco included in his narrative one of the explorers named D. Thomas Spence. Assigned to explore Tiburon Island with 15 men, from August 10 to September 4,

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<sup>103</sup> Selene Quiroz Moreno and Zulema Trejo, "Liberalismo y pretensiones científicas en Noticias estadísticas del estado de Sonora" *Relaciones Estudios de Historia y Sociedad*, Vol. 38 No. 151 (August 27 2017).

<sup>104</sup> José F. Velasco, "Nota Primera, Continuación de la Estadística de Sonora por el señor José F. Velasco" in *Boletín de la Sociedad Mexicana de Geografía y Estadística*, Vol. XI, (México 1865): 35.

<sup>105</sup> Velasco, "Nota Primera," 36.

1844—in less than a month—Spence had accomplished the task of taking the island via an "expedition." Without remorse Spence narrates hostile and non-violent encounters. On one occasion he ran into a Ceris couple, whom he retained as hostages. They did not speak a "word of Castilian" so using sign language he demanded water. Spence, smart as he was, sent the husband away with a small barrel so he could bring back water, but the woman and child remained as hostages. Around 8 p.m. the Indian returned with 30 Ceris who wanted to "make peace." Spence first made them sleep on the beach, and then demanded they all provide him water, after which he would grant the peace promise. The explorer also narrates that he sent away some of the "meanest" leaders who had committed some murders. In total, Spence states, he *removed*<sup>106</sup> about 330 Ceris from the island, without remorse, in less than a month. Often, he refers to the Ceris as the "indiada," a derogative term that implies that they were a band or group of something, but less than human.<sup>107</sup>

This chapter will utilize a theoretical scaffolding, popular in the study of political power relations, in order to explain the mechanisms of hierarchy construction inherent to the consolidation of cultural hegemony. Particularly important for the chapter will be the relation between a theoretical scheme of power relations and liberal thought. The analysis of the way in which liberal thought expressed its unique form to access and accumulate power will produce a double benefit. On one hand, the analysis reveals how visual racializing instruments translated as classificatory efforts. On the other hand, the analysis shows how the mid-century printed press

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<sup>106</sup> Removed is a euphemism for eviction and in some cases killing.

<sup>107</sup> Velasco, "Nota Primera," 33.

materials absorbed ideas of race efficiently, exposing the normalcy of race thought and guaranteeing its longevity. Just like in the Basarás painting, transitional periods such as the one under study aim at the production of epistemological changes, significant enough to alter the perception that people have about each other. Revolutionary periods, whether armed or epistemological, require certain alterations pertaining to the power relations affecting social hierarchies. In the case of New Spain, ripples of liberal thought set the historical context in which the pre-Independence/pre-capitalistic ethos became the landscape for forging social class. Hence the need to analyze the idea of race as a vector of power that penetrates the visual as much as it does language. Both, the visual and language, became instruments useful across time and space as technological devices of bodily regulation. They encompassed a human fate of categorization, punishment, and elimination.

The implementation of a visual technology, which finds its culmination in the casta paintings, represents also the beginning of the bourgeois contribution to the transformation of the race discourse. The *war among races*, at times as feeling and other times as genuine open confrontation among human groups categorized in the fashion of castas, found a synthesis in the visual realm. Such synthesis ameliorated the racial tensions produced by the socio-political hierarchy emerged with the casta system. Knowing one's place in the hierarchy acted as buffer preventing major and physical internal confrontations. Casta paintings signified the paving of the way to the transfiguration of class struggle. The intervention of bourgeois interests into the state's power structures represented a sort of racial confrontation as well.<sup>108</sup> In this case lineage

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<sup>108</sup> Jorge G. Izquierdo argues that with the colonization of the state's power by bourgeois forces "the old discourse of a **war between races** that had articulated many battles against the absolute monarchy, mutated into pure racism, and as such, it

was the factor that separated races, the commoners confronted openly and violently the nobility embodied in monarchy. It would not be long before said confrontation turned into pure racism.<sup>109</sup> Such antagonism, in the midst of a transformation in the political regime, exposed the need of “the necessity of cleansing the body politic, ridding it from a divide between two racial antagonist fields.” Instead, the idea of a single race incarnating the social body that has no internal racial divides became hegemonic at the expense of producing a bigger conceptual threat: the creation of a *sub-race*, a constant danger that can degenerate the biological inheritance of the entire society.<sup>110</sup>

The importance of the new visual technologies cannot be appreciated in full without a brief account of the power relations implied in the transformation of the war between races. The transformation of Mexican colonial society, and its complex stratification systems, into a modern bourgeois nation-state required the assembly of new methods of naming and constructing racial identities.

Gillez Deleuze offers an explanation of how power works. Departing from Michele Foucault’s theoretical proposal, power, he argues, is as simple as relations between forces. A force is never alone, and it can only exist in the presence of other forces. To be sure, forces are

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would become part of the strategies for internal control as much as the European plans of colonization overseas. See Jorge Gómez Izquierdo, “La conceptualización del racismo en Michel Foucault.” *Interdisciplina* 2, No. 4 (2014): 128.

<sup>109</sup> This event can also be considered as the foundation of a transmutation into biological terms inherent to the scientific views in the nineteenth century. The framing of a theory against other races would take a dramatic turn with the introduction of evolutionism and a constant fight for survival.

<sup>110</sup> Izquierdo, “La conceptualización,” 128.

vectors that can only act up on other forces, thus having the exclusive object of acting over relations. In this way, violence *per se* would not be a goal of power.<sup>111</sup>

However, power relations are also linked to the mode of thinking prevalent in Western thought since antiquity. The consideration of the indigenous peoples by the Spaniards, basically as aliens or abstractions that could be named and then appropriated derives from an obsession with autonomy. To see humanity in abstract terms erases concrete individuals, people become “faceless members of a species.”<sup>112</sup> People become expendable, no more and no less, when humanity is thought in terms of essence, when subjectivity becomes sameness. This is the result of a thinking that discards the physical “bond of flesh and blood” eliminating a metaphysical binding. *Par excellence*, this is the activity of the rational being in philosophy, and the salvation seeking sinner of religion.<sup>113</sup>

Emmanuel Lévinas, a Jewish thinker whose vast work deals with the problem of Western thought and its obsession to consider the human as an abstraction, shows concern about the tyranny of the “I” and knowledge. For Lévinas, knowledge in its general connotation can be understood as assimilation of the other. “There is in knowledge, in the final account, an impossibility of escaping the self; hence sociability cannot have the same structure as knowledge.”<sup>114</sup> Nothing illustrates such assimilation better than Sepúlveda’s arguments in

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<sup>111</sup> According to Deleuze: “force has no other object or subject than force... Violence acts on specific bodies, objects or beings whose form it destroys or changes, while force has no other object than that of other forces, and no being other than that of relation: it is ‘an action upon action, on existing actions... [such actions express themselves in actions]: to incite, to induce, to seduce, to make easy or difficult, to enlarge or limit, to make more or less probable.” Gilles Deleuze, *Foucault* (Minneapolis: University of Minnesota Press, 1986), 71.

<sup>112</sup> David Patterson, *Genocide in Jewish Thought*. PDF Excerpt (Cambridge University Press, [www.cambridge.org](http://www.cambridge.org)), 1-2.

<sup>113</sup> David Patterson, *Genocide*, 4.

<sup>114</sup> Emmanuel Lévinas, *Ethics and Infinity. Conversations with Philippe Nemo* (Pittsburgh: Duquesne University Press, 1985), 60.

relation to the Indians as seen in Chapter 1. The epistemological constructions that position the correlation of forces prioritizing an autonomous perspective act in detriment of the human relationship. They do so by exercising certain appropriation of the other, which produces a violent reaction comparable to an allergy. An allergy to the human.<sup>115</sup> The allergy can be illustrated by the Spanish “I,” the self that seeks to appropriate the Indian through a preconceived semiotic system. The allergy to the human produces intense isolation. Work is the key in surpassing the isolation. An effort that implies movement towards the other is a Levinasean primacy, and the only way to help the ego escape the “there is” (emptiness of a relation-less world) in order to undo itself and overcome the allergy. In other words, the “I” needs to make a deposition, or a renunciation of his desire to conquer the other either by violence or by the assimilation engendered by knowledge.”<sup>116</sup> This is important in terms of “allergic reactions” to the other, in Levinasean terms, simply because the relationship is the main target of power. In a scenario in which the other is not a representation, an idea, a casta member or an enemy race, the other is a human being in a position of height to whom one answers and aids by means of a relationship, which implies no appropriation, categorization or violence of any sort.

To be precise, throughout the eighteenth century the relation between forces assumed values in the “distribution of space (which took concrete form in enclosing, controlling,

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<sup>115</sup> Lévinas argues that the allergic reaction caused by the assumption of Being as the same in a Totality, or an Absolute, has two modes: one, the self can remain subjugated to the sovereignty of the ego and live in the solitary confinement of the “there is;” and two, the deprivation of sociality impedes the fulfillment of a pre-originary commandment. See: Lévinas, *Ethics*, 52.

<sup>116</sup> In the words of Lévinas: “This deposition of the sovereignty by the ego is the social relationship with the Other, the disinterested relation.” By undoing itself, the ego stops the allergy in both ways, endogenously and exogenously, and begins the exercise of responsibility, infinite in nature. This action means “being-for-the-Other” and simultaneously “stops the anonymous and senseless rumbling of being. Lévinas, *Ethics*, 52.

arranging, placing in series...), ordering in time (subdividing time, programming an action, decomposing a gesture...), composition in space-time (the various ways of 'constituting a productive force whose effect whose effect had to be superior to the sum of elementary forces that composed it')."<sup>117</sup> Thus power is always exercised before it is possessed and it is not essentially repressive. However, power in the absence of ethics turns into violence. The construction of a technology to identify the Indian sub-race, as Meco/Meca (see Chapter 1), violent, retrograde, and inferior, is imprinted in the casta paintings. Such categorization constitutes also a sign of a system of oppression on the brink of extinction. A desperate move to make visually perceptible what had been a social practice for centuries indicates the desire to keep such system alive.

At analyzing the visual, the difference between power and knowledge becomes crucial. Power only affects forces, and because of this, it only passes through forms which associate with knowledge. Thus, knowledge concerns formed matter and formalized functions. To be sure, knowledge implies an ontological exercise of division, classification, and assignment of functions and values associated with things or the state of things. Power on the other hand is diagrammatic: it mobilizes non-stratified matter and functions.<sup>118</sup> Deleuze explains that this is what constitutes the micro-physics of power, the mobility and non-localness, which motivates instability. Thus, power relations do not have a central point and they do not emerge from a single sovereignty source. They, as molecules in a gas, move from one point to another creating

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<sup>117</sup> Deleuze, *Foucault*, 71

<sup>118</sup> Deleuze, *Foucault*, 73.

a “field of forces, marking inflections, resistances, twists and turns, when one changes direction or retraces one’s steps.”<sup>119</sup> A transfiguration in power relations allowed the message and visual language of the casta paintings to outlive a transformation pertaining the politico-economical system—from colonial to republican—through the penetration of a “practical” knowledge. Such knowledge can be perceived in the blatant assumptions José Francisco Velasco made in relation to the Ceris and the rest of the “indiada:” a Ceris is always a Meco, outside civilization, a contaminant of the modern Mexican body politic. The Ceris and other tribes of the “indiada” constitute the other, a category, a concept (always negative), which causes the allergic reaction. Velasco’s language, enhanced by the ornaments of science (he was an explorer sponsored by the Mexican Society of Geography and Statistics) paints—or repaints—an image of the typical sub-race, the timeless enemy of progress, the non-assimilated Indian. An Indian who did not wear the outfits of the multiple economic positions offered by the incipient capitalistic order such as miner, hacienda worker, peon, railroad worker, and republican soldier.

What makes power and knowledge different does not prevent mutual presupposition or some kind of mutual immanence. Science in this way becomes somehow dependent on power relations that result in forms of knowledge [*saviors*]. But knowledge can go over epistemological thresholds hence producing practical knowledge [*connaissance*]. The latter, practical knowledge is never about a subject free from any diagram of forces, a visualization of power. As a matter of

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<sup>119</sup> Deleuze, Foucault, 73.



fact, practical knowledge is not free in relation to the forces of knowledge [saviors] which actualize it.<sup>120</sup>

Antonio de Basarás, the painter as a repository of knowledge reflecting the need of the Crown, created a matrix of subjects—departing from a single model—in which the value of the Indian was determined not only for his original savage status, but from a new diagram of forces acting upon both, painter and model. The new concept of Indian required the visualization of an epistemology that assumed social positions beyond race, going as far as making institutional the social roles of *casta* members. Like in a Cartesian plane, the abstraction of the other, was determined by positioning coordinates of race and social status.

The result in the relation between forces is a complex of power in which the differential relation determines affects.<sup>121</sup> Furthermore, despite the possibility of tracing a line of general force, which has a tendency to homogenize features by organization in series and then making them converge, there is no immediate integration in global terms. Instead, forces constitute a sea of local and partial integrations that go beyond large institutional expressions. The family, commercial relations, beliefs, art and morality become part of the stratification of power.<sup>122</sup>

The complexity of the local and partial integrations, reaching institutions and bureaucratic language, can be appreciated better when the state suffers abrupt and radical changes in its composition. The French Intervention in Mexico of 1862 illustrates such radical

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<sup>120</sup> Deleuze, *Foucault*, 75.

<sup>121</sup> Deleuze, *Foucault*, 76.

<sup>122</sup> “There is, rather, a multiplicity of local and partial integrations, each one entering an affinity with certain relations or particular points. The integrating factors or agents of stratification make up institutions: not just the State, but also the Family, Religion, Production, the Marketplace, Art itself, Morality, and so on.” Deleuze, *Foucault*, 76.

transformations. In a public edict dated July 3, 1863, Juan E. de Uriarte, municipal political leader of Puebla City, launched a message celebrating and announcing the “installation of the national Government at the nation’s capital, in compliance with the sacred word of the S. M. emperor of the French people, who executed the generous intervention, which so happily begins our political regeneration.”<sup>123</sup> The specific demand has seven articles in which the day of July the 5<sup>th</sup> will be dedicated to celebrate the French intervention as an improvement of the Mexican political regime and body politic. Military honors, a joint entourage of secular and religious authorities of the highest ranks, entertainment for the populace, music, and ornaments at all public and private buildings would be part of the “citizen’s patriotism” from 4 a.m. to sundown—all in celebration of the French intervention.<sup>124</sup> The enthusiasm in Uriarte’s announcement is obvious, but there is a precedent for it. Dated June 27, 1863, another edict mandated the forced hosting of French Army officers for all house owners in Puebla City. A five article edict ordered homeowners to provide a furnished room for a “sub-Lieutenant, Lieutenant or Captain: two bedrooms for any Commander: three for any major official and four rooms for a general (including cabinets and horse quarters).” All those in no condition to provide the required lodging should have paid a “fee” to be used for such purposes anywhere else. All violators of the lodging edict would be prosecuted, without any more “process” than the report from the *Excelentísimo Ayuntamiento* (Uriarte’s Municipal Government) or the Supreme

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<sup>123</sup> Juan E. de Uriarte, “Edicto Público,” Archivo Municipal de la Ciudad de Puebla de los Ángeles. Vol. 25, Page: 138 (July 3 1863).

<sup>124</sup> Uriarte, “Edicto Público.”

[French] Command, which shall impose as punishment the indefinite lodging of an undefined number of foot soldiers at the offender's home.<sup>125</sup>

As a corollary to the rapid changes in power scheme configuration, and only six years after the edicts published under French pressure/control,<sup>126</sup> another edict dated May 4, 1869, detailed an extensive program—which for the most part included military and funeral honors for the “citizens who resisted in the glorious battle”—institutionalizing the commemoration of May the 5<sup>th</sup>, or the Battle of Puebla. In addition to all the music and building ornaments for the enjoyment of the populace, the edict, in its fourth article establishes that the Portal situated at Hidalgo Avenue and Guevara Street, formerly “Portería de la Santísima,” now shall be named “Porfirio Díaz” and will be marked by a plate inaugurated by the *padrinos* [godparents] previously named for the event.<sup>127</sup> The name changing of public spaces not only obeys a rearrangement in power relations but a new rhetoric of hero worshiping,<sup>128</sup> and above all a distancing from the old Church nomenclature, which would be repudiated by the new liberal status quo. The new diagram of forces bent according to the needs of the new state required to slowly bury in the past all reminiscences of the colonial past associated with religious practices. Liberal politicians and intellectuals did not desire an atheist Mexico, but a clear division between state and Church.

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<sup>125</sup> Coronel Comandante Brincourt, “Edicto Público,” Archivo Municipal de la Ciudad de Puebla de los Ángeles. Vol.25, Page: 136 (June 27, 1863).

<sup>126</sup> The French Intervention ended on July 1967.

<sup>127</sup> Junta Patriótica, “*Programa del 5 de mayo de 1862*,” Archivo Municipal de la Ciudad de Puebla de los Ángeles. Vol.30, Page: 59 (May 4, 1869).

<sup>128</sup> Porfirio Díaz was one of the most popular heroes at the campaign for the defense of Puebla from the attack of the French army.

Following Deleuze, there is no State, only state control. State control depends on the manipulation of power relations originated in the pedagogical, juridical, economic, familial and sexual domains which promotes global integration. For this reason, institutions rely always on two poles: apparatuses and rules, which facilitate the organization in “fields of visibility.” The integration of force relations, made possible by actualizations, operates by creating “divergent” ways of actualizing. In these terms casta paintings, as one example, became an actualization of a formalized system. Formed substances, or referents that people know already, are revealed by visibility, while formalized or finalized functions are revealed by statement, or simply put, by language.<sup>129</sup>

The Municipal Archive of Puebla City has abundant evidence of the institutional language forged in a diagram of forces adverse to lower castas. Documents following multiple juridical procedures show that throughout the eighteenth century, the *Poblano* legal scribes used the words “Indian,” and “natural Indian” to differentiate a sector of the population from another. Dated July 17, 1710, an *acta* [recorded legal instrument] states that Miguel Roque, “natural Indian” from San Pablo del Monte will start the lease of half of a *cavalry of land* (about 45 acres) for a period of nine years, at the rate of 25 pesos per year.<sup>130</sup> On a separate instrument, recorded on May 1741, the scribe narrates the problems which originated legal action due to differences among land owners and the “Indians from San Miguel Canoa” who were involved in litigious actions regarding the two *cavalries of land* they leased and occupied.<sup>131</sup> In both examples, one

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<sup>129</sup> Deleuze, *Foucault*, 76-77.

<sup>130</sup> Archivo Municipal de Puebla, *Memoria Urbana 1591-1910*, Vol. 2, (1710): 67-70.

<sup>131</sup> Archivo Municipal de Puebla, *Memoria Urbana 1591-1910*, Vol. 2, (1741): 172-179.

can notice that the statement is not at all defined by what it designates or signifies. The statement as expression of power resembles a curved line joining multiple points: in this case words that accumulate certain semantic power, namely Indian and the idea of land ownership behind units indicating plot size. Those points represent bodies as Deleuze calls them, or referents and their associated relations between forces, however altogether points and forces do not constitute a statement. They both dwell outside of the statement. The problem of such mechanism is that in terms of race a confusion emerges on purpose: “the statement may strongly resemble [the points and forces] to the [extent] of being virtually identical.”<sup>132</sup>

The clear differentiation between Indians and señores constitutes a series of force points which only makes sense in the context of a statement. The trend can be perceived a decade after the recording of last example. Juan Cano described as a “pulquero Indian” had been accused of invading a parcel of land to grow a personal vegetable patch. It is not clear if Juan produced *pulque*<sup>133</sup> for sale or consumed a lot of *pulque*, hence the adjective that in any case qualified him as public drunk. The scribe in this *acta*, narrates the events, but also refers to the noble lineage of the owner of the *cavalry of land*. At the moment the plot was leased by Antonio Basilo de Arteaga y Solorzano to Miguel José Rubin for 50 pesos per year. Landowner and tenant never required a racial categorization. Their names alone implied *nobility*. Fame probably preceded these two characters who were most likely well known criollos or wealthy mestizos. Juan Cano should have not dared to grow produce in Arteaga’s land: the latter at the time was not only the

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<sup>132</sup> Deleuze, *Foucault*, 79.

<sup>133</sup> Pulque is a fermented beverage obtained from processing maguey nectar. Maguey is similar to agave, the plant from which Tequila is distilled.

oldest owner of the *cavalry* per a royal concession, but the current *Procurador Mayor* [equivalent to Attorney General] in the city.<sup>134</sup>

The complex topography in which forces interact helps understand how *casta* paintings created visibilities under the light of historical events. Visibilities generate “scenes” which are to the visual element what a “statement is to the sayable or readable.” From the outlook of the description-scenes, Deleuze argues, a painting can in fact become the media or vehicle of certain cycles of representation.<sup>135</sup> The capacity of description here overlaps with the linguistic. Statements can be considered curves, trajectories, before they turn into phrases or propositions indicating power. Analogically, scenes are lines of light before they become contours and colors. Scenes become a “poem of receptivity” capable of exposing particular features of a relation between forces. In other words, a painting makes visible the relation between painter and sovereign “such as they alternate in a never ending flicker.” That is to say that the diagram of forces is always realized both in description-scenes (for the visual) and statements-curves (for the linguistic).<sup>136</sup>

In order to understand how the description-scenes and statement-curves function an example of each, taken from the reservoir of world masterworks, can be useful. Illustrating the way in which light can become a message *Las Meninas* by Velazquez is priceless. This famous painting expresses a correlation of forces acting upon each other in terms of a painter-sovereign

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<sup>134</sup> Archivo Municipal de Puebla, *Memoria Urbana* 1591-1910, Vol. 4, (1751): 195-212.

<sup>135</sup> “the path of light [that] forms a ‘spiral shell’ that makes the particular features visible and turns them into a series of flashes and reflections of light within a complete ‘cycle’ of representation.” Deleuze, *Foucault*, 80.

<sup>136</sup> Deleuze, *Foucault*, 81.

relationship. In a similar way the literary work of William Faulkner, exhibits fantastic statement-curves. His narrative illuminates centers of power that can be unseen, such as the family of the American Deep South.<sup>137</sup> That is to say that the portraits of castas used to describe the allocation of hierarchy in the last decades of the eighteenth century not only suggested a last attempt to reestablish/confirm a group's supremacy in terms of race, but represented the diagram of forces already interacting in a transitional fashion. This diagram manifested old statements—from the consideration of blood cleanness to purity of noble trade membership—and simultaneously confirmed a change in the hands aspiring to the visible centers of power: the incipient Mexican bourgeoisie.

The micro-physics of power, to use Foucault terms, defined the way in which New Spain confronted the emerging socio-political situation. In effect, the Bourbon reforms—launched from the Peninsula—became the most important part of the scaffolding associated with the transformation of the colonial system. Considered in twentieth-century scholarship as an analytical category more than a concise historical event, the Bourbon reforms can be located during the span of a century, from 1700 to 1808. For the consideration of this chapter Bourbon reformism can be summarized as the manifestation of a political program (Enlightened despotism); the protagonist role Charles III as a monarch—among others—who gave Spain a taste of political modernity and economic well-being; and the effects of the reforms as generators of tension and contradictions that had the colonies on the edge of social revolt.<sup>138</sup> However, the

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<sup>137</sup> Deleuze, *Foucault*, 81

<sup>138</sup> Ernest Sánchez Santiro, “Las reformas borbónicas como categoría de análisis en la historiografía económica y fiscal sobre Nueva España: orígenes, implantación y expansión,” *Historia Caribe*. Vol. XI. No. 29 (2016): 33.

temporality agreed, at least by Mexican historiographic consensus, is that the cycle of growth and actual reformism of the Bourbons begun in the decade of 1740. According to Enrique Florescano, in mid eighteenth century Charles III and his enlightened ministers decided to act under the threat of English expansion. In political terms the reforms aimed to recover the old rights and benefits that the Hapsburg had delegated on corporations such as the merchants Consulates, the Church, and hacienda owners. Administratively speaking the reforms aspired to create a modern state via a more efficient and professional group of functionaries who would answer to improved institutions. In economic terms, the reforms aimed at the recovery of the decaying Spanish economy by making the American colonies the main financial pillar of the metropolitan economy.<sup>139</sup> As a conglomerate of reforms they primed the path for the transformation of the economic system. To speak of a world context, the themes of conquest, exploitation, and subjugation had a strong presence during the late eighteenth century. The new trend, one that would affect the New Spain profoundly was related to the Europe of the Enlightenment, of the development of liberalism, of the French Revolution. Europe's development and transformation was taking place "against increasingly powerful claims in the late eighteenth-century political discourse to universal principles as the basis for organizing a polity."<sup>140</sup> Such claims would find internal resistance and raise questions about the nature of the groups to be included in the body politic. Ruling elites in Spain, as well as criollos at the New Spain had to deal with problems of proto-citizenship and social inclusiveness at the time in

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<sup>139</sup> Enrique Flores Cano, "Advertencia." *Controversia sobre la libertad de comercio en Nueva España 1776-1818* (México: Instituto de Comercio Exterior, 1975), 13-21.

<sup>140</sup> Frederick Cooper and Ann Laura Stoler, *Tensions of Empire. Colonial Cultures in a Bourgeois World* (Berkeley: University of California Press, 1997), 1.



which their territories were turning into nation-states. The colonial discourse took advantage of the Manichean view in which Europeans claimed superiority. Such was the purpose of a “grammar of difference” that allowed surveillance and categorization. However, the challenge for current scholarship should be to escape the tunnel view of such Manicheism and go deeper. After all, colonial regimes were neither immutable nor omnipotent. As the observation of casta paintings reveals, there were competing agendas for using power, “competing strategies for maintaining control, and doubts about the legitimacy of the venture.”<sup>141</sup>

The implementation of social taxonomies permitted selective forms of violence at certain periods. The label pinned to a person not only signified a category, but implied the type of respect and/or access to legal defense, in open differentiation with others. “It could open or close down the possibilities for marriage, housing, education, or pensions. At the same time, the criteria used to determine who belonged where underscored the permeability of boundaries, opening possibilities for assertion among interstitial groups of ‘mix-bloods’ [Mestizos] and poor whites...”<sup>142</sup> The otherness and subjectivity of the colonized was in constant change—a transformation that required new definitions and maintaining a dividing wall to keep difference alive and well.

The process of transplanting ideas such as *limpieza de sangre* in the New Spain illustrates the foundation of many discursive contradictions. The castas taxonomical language that lingered for centuries before its plastic representation—at the right time—by criollo painters represents,

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<sup>141</sup> Cooper and Stoler, *Tensions*, 6.

<sup>142</sup> Cooper and Stoler, *Tensions*, 6.

on one hand, the colonizer's demand for "identity and stasis," and on the other, a need for the categorization of change and difference. Homi Bhabha calls such irony: mimicry, nothing less than a "formulation of the marginalizing vision of castration, then the colonial mimicry is the desire for a reformed recognizable Other." Mimicry produces a subject of a difference that is almost the same, but not quite. A mere representation of a human being. Such discourse of mimicry depends on a paradox in order to be functional. It must produce "slippage, its excess, its difference." In such context difference is not appreciated as a unique aspect of alterity but a process of disavowal. Mimicry therefore can adopt the shape of reform strategy, and disciplinary set of measures, "which 'appropriates' the Other as it visualizes power."<sup>143</sup>

The visualization of power and the appropriation of the other in terms of knowledge can be found in the casta paintings produced by the circle of Juan Rodríguez Juárez. The circle's work presents another example of conceptualization, which transfigured from the non-acceptance of the Indian as savage, and dubious candidate for evangelization. The Indian appears as a fixed category in the production of a necessary subject of the Crown, intimately linked to the tutelage of a white male. In *De español e india produce mestizo*, the viewer can identify the blunt presence of a white Spaniard who reaches out to his family—perhaps 24 inches away from him—who poses agglutinated at the left hand side of the portrait. He has long, curly, light brown hair, aristocratic attire with a velvet coat, golden embroidery vest, white silk scarf, and a sword at his belt. The mother, a very stylized India—with dark brown skin—wears a variation of an embroidered *huipil*, gold and pearls jewelry, and hair cover in the style of Oaxacan women. Two

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<sup>143</sup> Homi Bhabha, "Mimicry and Man. The Ambivalence of Colonial Discourse" in Cooper, Frederick and Ann Laura Stoler, *Tensions of Empire. Colonial Cultures in a Bourgeois World* (Berkeley: University of California Press, 1997), 153.

children appear in the picture. An older one, who has dark skin, black thick straight hair, and the typical Indigenous attire of white manta pants, shirt and green wool poncho, carries on his back a younger brother. The viewer must center his/her gaze and focus on the most illuminated quadrant within the entire portrait: The young toddler on the back of his older sibling glimmers as the result of the purifying union of a Spaniard and an Indian woman. The baby wears a white *ropón*—a Spanish infant's garment—with discrete Indigenous embroideries in several colors; his face seems to be as white as his father's, and his hair black, but wavy, not coarse as his brother's (Figure 3). Power forces create a clear statement of light, which points at the youngest member of the family as the epitome of the racial union between two continents, and civilizations.



Figure 3: Attributed to the circle of Juan Rodríguez Juárez, Spaniard and Indian Produce a Mestizo, c. 1725; oil on canvas; 40 ½ x 56 7/8 in. Collection Perez Simon, Mexico City<sup>144</sup>

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<sup>144</sup> Image from Ilona Katzew, *Contested Visions*, 129.

However, the paint tells more about the epoch in which it was elaborated than it does about the real mestizo families in the making. Thus, the Baroque elements become overwhelming, almost discrediting the original intention of the painting. The dramatic chiaroscuro, the self-illuminated faces, the humanly impossible poses, contortions, and gazes of the characters portrayed, make out of this painting a typical expression of the art period, in which New Spain just happened to become a lifestyle. The mixing of elements, movement, and other traits inherent to the Baroque become a witness—and reproduction—of the ways in which power relations would integrate a standard of relationality, not only among races, but among the future social classes in reference to the creation of a modern nation-state and its associated political economy.

As a part of a technological device of race, mimicry modified the authority of colonial discourse in a profound manner. While mimicry normalized the colonial state or subject, it also corrupted the language of liberty emerged in the post-Enlightenment era. To use the vocabulary of power relations, mimicry produced another knowledge of liberal norms.<sup>145</sup> Beyond the artistic background of the casta paintings the language and knowledge in which such norms were produced implied an environment of liberal thought. The human classification through racializing technologies did not occur in a vacuum. If fact, the breeding grounds of a political economy of race utilized massive amounts of one fertilizer: liberalism. However, such intellectual ingredient was not exempt of *ad hoc* contradictions. A clear example would be the ambivalence in liberalism and its double standard/use of language such as in the problem of the

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<sup>145</sup> Bhabha, "Mimicry and Man," 153

concept of “slave” and the justification of legitimate ownership of people. Or, the slow absorption of races into castas, and castas into social classes.

Power relations visualized within the limits embracing “mimicry and mockery,” established the reforming civilizing mission of a superior casta, but simultaneously such goal was “threatened by the displacing gaze of its disciplinary double.” According to Bhabhas, the excess in slippage, the “almost the same but not quite” engenders uncertainty and presents the colonial subject inalterably as an incomplete presence. In other words, an incomplete and/or virtual subject, in which the “colonial” depends on the limits of authoritative discourse for its representation. Which is to say that the self-preservation of a colonial process of creating the otherness becomes conditioned to its capacity to produce objects perceivable as inappropriate. Such capacity carries a built-in strategy to ensure failure. “So that mimicry is at once resemblance and menace.”<sup>146</sup>

The Inca operatica, as well as the play in which fictional character Pedro Giovanni (as seen in Chapter 1) stars, become links in the chain of command as “authorized versions of otherness.” However, the incompleteness of Giovanni’s colonial persona makes him a metonymy of colonial desire. As such, the desire of mimicry turns the other into an impossibility which repeatedly resist signification. The desire of colonial mimicry as part of a scheme of forces of power may not have an object, but it has strategic objectives. Altogether, desire and strategy comprise a metonym of presence.<sup>147</sup>

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<sup>146</sup> Bhabha, “Mimicry and Man,” 154.

<sup>147</sup> Bhabha, “Mimicry and Man,” 156.

Metonyms of presence are “inappropriate signifiers of colonial discourse,” and as such they represent the difference between the original and the subject represented. The difference between peninsular and criollo—affected already by the climate and terroir—constitutes a solid example. But perhaps the ignorant, stoic and taciturn Indigenous crouched man can be added to Bhabha's list of “discriminatory identities constructed across traditional cultural norms and classifications, [together with] the Simian Black, the Lying Asiatic...” because they all are metonymies of presence: almost the same but not white.<sup>148</sup> To be sure, domesticated Indians of the late casta paintings (already depicted as part of a proto-capitalistic, mercantile, society) conform the perfect example of a metonymic presence when contraposed to the original peninsular or its facsimile, the criollo. Such racial matrix left out of the painting an enemy, the other, the abominable and barbarous Meca/o.

The analysis of the implementation of technological devices of race reinforces the premise of racial thinking as an organizing principle and a “powerful rhetorical theme,” but in the different and not always blatant ways of scientific racism of the nineteenth century. As Frederick Cooper and Ann Stoler argue, the term race was inconsistently applied. That is not to say that the term vanish from the official discourse once a change in rhetoric began to take place by rejecting, at least on the surface, racist notions.<sup>149</sup> From purity of blood to its representation in casta paintings, the use and evolution of the idea of race went through a series of transmutations, which obeyed a specific socio-political and economic climate. At the end of the eighteenth

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<sup>148</sup> Bhabha, “Mimicry and Man,” 157.

<sup>149</sup> Cooper and Stoler, *Tensions*, 10.

century the colonial environment had already been affected by the world trend of liberalism and its claims of universality, furthermore the abandonment of the monarchical system required new ways of visualization, classification, and the creation of new national identities. Liberalism and science would provide ample knowledge in the task of developing a new chameleonic way for racial thinking to adapt.

Liberalism has found a great and continuous echo in the narratives of liberty, progress, and nation-state building, particularly in the mainstream historiography and official discourse in post-Independence Mexico. The usual rhetoric indicates that an epic struggle between *liberales* (followers of the liberal doctrine) and *conservadores* (conservatives who sympathized with the corporate colonial order) gave birth to the Mexican nation in which Enlightenment values prevailed. According to the same narrative the nation was born despite the lack of nationalism, the excess of treachery, and the tendency to promote repressive colonial ways of *conservadores*, who for the most part, wanted to give the country either to foreign monarchies, the church, or transnational financial interests. Even when history shows that there is some truth in the stereotypical ways of *liberales* and *conservadores*, the dichotomy obscures, more than it can explain. To see the complexity of forces, ideas and intentions at play during the years of transition from a colonial-monarchical system to a republic, is necessary to surpass the dichotomy.

A survey of the changes affecting the constant transmutations of the idea of race and the technology of racism in Mexico could not be complete without the examination of the influence of liberalism as the engine of an ideology that operated in terms of an exclusionary universalism, namely the liberal capacity of selecting who could enjoy its benefits. In general terms,

liberalism—in its theoretical vision from the seventeenth century to the present—has prided itself in on its universality and politically inclusionary character. However, as Uday Metha points out: “the period of liberal history is unmistakably marked by the systematic and sustained political exclusion of various groups and ‘types’ of people.”<sup>150</sup>

That liberalism has been exclusionary at its theoretical core does not mean that liberalism has not had a “doctrinal commitment to freedom [that] is merely a ruse.” The problem, according to Uday Metha, derives from the anthropological basis of its universalistic claims. Liberalism’s ideals are not concretely impractical. The problem in liberal practices, just as much as in racial thinking, resides in the ascription of predominant human capacities that reduce more important differences into invisibility. Liberalism assigns political significance to human nature. That is why “being born equal, free, and rational” traduces birth as “the moment of an assured political identity.”<sup>151</sup>

Liberal universalism finds a way to identify a human common denominator departing from the assumption that everyone is naturally free. For example, thinkers such as John Locke adopted a position against absolutism by proposing a theory that allows the flow of sovereignty, not from the divine via a king, but from the people. However, the pre-condition to such capacity implied birth within a “State of perfect Nature.” Freedom, equality, and rationality encompassed an anthropological minimum.<sup>152</sup> The main struggle in the post-Independence era during the first

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<sup>150</sup> Uday S. Metha, “Liberal Strategies of Exclusion.” in Cooper, Frederick and Ann Laura Stoler, *Tensions of Empire. Colonial Cultures in a Bourgeois World* (Berkeley: University of California Press, 1997), 59.

<sup>151</sup> Metha, “Liberal Strategies” 59.

<sup>152</sup> John Locke and Peter Laslett, *Two Treatises of Government*, 2nd ed. (London: Cambridge U.P., 1967), II par. 4.



half of the Mexican nineteenth century was highly tied to Locke's notion of a human common denominator: The elimination of a colonial system and its power relations/ discourses versus the implementation of a new republic with liberal values, and therefore a unified—reasoning—body politic.

Locke appealed to the State of perfect Freedom, in which people administer their lives within the boundaries of Natural Law, not depending on anyone else's will: hence birth gives all humanity the natural right to freedom. Such a theoretical proposal generates an immediate concern with the possibility of anarchical libertinage. For Locke, natural law implied the assignment of specific obligations which paradoxically limited natural freedom.

Thus, the state of natural freedom is always subject to the obligations imposed by the divisions and exclusions of an imagined social world. In Locke's mind, those who did not have the capacity of reasoning—children, and lunatics for example—were excluded from the “consensual politics” as presented in one of his greatest works on political philosophy: the Second Treatise. That is to say that those groups in society unable to express consent lack the capacity of reason and can reasonably be excluded from the political constituency. They must be governed without their consent. Locke associated reason with “paternal power” or the right to impose the law over others. Such right implied an innate estate in which one can “know that law... [limits] actions within the bounds of it.”<sup>153</sup> In these terms, reason is the gateway to political inclusion and the natural credential granting access to the state of freedom.

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<sup>153</sup> Locke and Laslett, *Two Treatises*, par. 57, 59.

When José Francisco Velasco wrote dozens of pages describing his “exploring” adventure into the Sonoran Department he admired the desire of the Ceris and other indigenous peoples of the region to fight for their liberty. The multinational character of the territory was acknowledged not without resentment. There was a “perception of internal nations of belligerent nature who even when defending their freedom with heroic will, should be subject to suffer consequences, logical and natural by the principles inherent to those disgraced establishments.”<sup>154</sup> However, the freedom referenced by Velasco is always a lack of legal restrictions inherent to life in a natural environment and not the reasoning associated, in Levinasean terms, with a cult of the Self. Soon after declaring admiration for the Ceris’s love of freedom—in the wild—he notes that the “lack of freedom” among Indigenous peoples of Sonora responds to a lack of interest in the art of politics and war (the old idea of no *logos* for the Indians). Their almost animal virtues made them endure the hardship of the extreme weather and all other types of misfortunes associated with living without protection in nature. Such was, according to Velasco, the reason for a separate living, and for their eventual extinction: They had to be ruined within their “advantages provided by enduring nature, their weak character, and their tendency to be dispersed in society.”<sup>155</sup>

As another example, in his florid and multi-thematic *Thoughts Concerning Education*, Locke provided details and instructions regarding what he believed to be the purpose of education: to teach how to reason. To be sure, Locke’s *Thoughts* is a manual overflowing with

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<sup>154</sup> Velasco, “Nota Primera,” 86.

<sup>155</sup> Velasco, “Nota Primera,” 87

recommendations against excess, and explanations about the principles of virtue attained at the expense of suppressing desires. Education—and reasoning—through the immersion in “good Company” translates as comprehending an environment of social and hierarchical distinctions. In *Thoughts*, Locke developed his views about a concern with toilet training;<sup>156</sup> the imprudence of wearing tight-fitting bodices;<sup>157</sup> the appropriate foods to be consumed at breakfast;<sup>158</sup> the importance of knowing how to dance, fence, and ride;<sup>159</sup> and the appropriate way to punish or reward children.<sup>160</sup>

In *Thoughts*, it becomes clear that the main goal of education is to initiate children into a historical and geographical classification of status. As he argued: “...a Prince, a Nobleman and an ordinary Gentleman’s son, should have different ways of breeding.”<sup>161</sup> For Locke children were naturally free and perhaps, just as in the *Second Treatise* explains, “children can become really free” when [they] understand the law of England...at the age of twenty one...and when they learn discretion.”<sup>162</sup>

The main components of liberalism’s ideology resonated in nineteenth-century Mexico in a *Lockean* manner, even to the extent of showing transcendence from a purely social class divide to a gender role positioning. Liberty in a modern bourgeois setting, governed by reason, should

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<sup>156</sup> John Locke, *The Works of John Locke in Nine Volumes* (London: Rivington, 1824 12th ed.). Vol. 8. [Online] available from [https://oll.libertyfund.org/titles/1444#Locke\\_0128-08\\_43](https://oll.libertyfund.org/titles/1444#Locke_0128-08_43); accessed 7/25/2019; Internet. Sec. 23

<sup>157</sup> John Locke, *The Works*, Sec 11

<sup>158</sup> Locke, *The Works*, Sec 13.

<sup>159</sup> Locke, *The Works*. Sec 67.

<sup>160</sup> Locke, *The Works*, Sec 47-52.

<sup>161</sup> Locke, *The Works*, Sec 94.

<sup>162</sup> Locke and Laslett, *Two Treatises*, 358.

not become macerated by the unauthorized exchange of pre-established family functions. One example from Mexico illustrates the way in which a liberal introduction to a world of social hierarchies and distinctions rejects changes in racialized gender roles. In effect, a desperate letter from a “reasoning” woman (code for non-Indian) named Raquel, tried to create awareness of the inferno she lived in being caught in a “degenerate” marriage. *El Federalista, Edición literaria semanal*, a weekly literary supplement, published Raquel’s denunciation of a nightmare consisting of her husband becoming a “man-woman.” Bitterly, Raquel explained how her dream about marrying a true man, one “with dignity, grandeur, valor, generosity and all those qualities proper of the strong sex,” became tainted by her husband’s tendency to be a *mariquita* [pusillanimous-effeminate]. The letter, probably the result of a male ghost-writer, emphasizes how men should play the role of providers and protectors, but never as administrators of the household’s economy, and much less organizers of the kitchen’s provisions. Those men “who only carry the name of man” are nothing but “ridiculous” housekeepers concerned more about organizing the “*criadas* [domestic help] and the grocery’s budget.”<sup>163</sup> Such men become usurpers of the women’s rights to administrate their home, and they “stick their noses in every small quotidian issue [reserved to the women].” A modern woman should not be relegated to do the old-fashioned female tasks enforced by nuns such as “praying and singing;” on the contrary a woman should know how to “cook poultry, fix a sock, but above all to have the judgement to organize the economy of a house.”<sup>164</sup>

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<sup>163</sup> *El Federalista*, Sección Literaria, “Letter from Raquel,” in Boletín Municipal, 250.

<sup>164</sup> *El Federalista*, “Letter,” 251.

The dynamic of power as expressed in Raquel's letter positioned men in the liberal role of a providing citizen, an important piece of the economic machinery. Almost invisibly, as a nodal point in the political economy of race, the letter contains statements of race. The veil covering the candid description of Raquel's marriage makes the main message somehow indirect: The only type of family capable—economically—of having multiple servants, a large house, and even a budget for custom made clothing had to be an upper middle/or high class family. In the racial translation of the new scheme of races living in Mexico the referenced family had to be a criollo or mestizo. To be sure, the article talks about the correct positioning of each member of a well-to-do family, and provides a discrete racial background implied—Lockean style—in the labyrinth of social rule compliance inherent to a thriving bourgeois class formerly known as criollos and mestizos. The power scheme as reflected in the media's ideology at the time can be perceived in the form of Foucauldian statements; analogical to what in casta painting would have been rays of light, vehicles of a visual codification. Additionally, the detail in *El Federalista* letter also shows another component in the political economy of race: opposition between city and countryside.

Birth associated with geography and status became a central—and problematic—premise in liberal thinking. Domenico Lasurdo argues that liberty had a *pathos*; it created a certain unease about the abuse committed against others.<sup>165</sup> However, in the transitional moment of politics and economy some novel justifications emerged. One of the first thinkers to identify the problem was Montesquieu. Realizing that the juridical justification of slavery was not sensible enough,

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<sup>165</sup> Domenico Lasurdo, *Liberalism* (London: Verso, 2011), 44.

Montesquieu engaged in an ambiguous discourse composed two key words that would resonate for the life of enlightened thought: weather and reason—both widely influential in the justifications to make the war against the remaining Mexican barbarians.

Indeed, Montesquieu explained the reason for African slavery based on the fact that “the peoples of Europe, having exterminated those of America, had to make slaves of those of Africa in order to use them to clear so much land.” Yet his arguments morphed by the addition of natural history language popular at the time: “There are countries where the heat enervates the body and weakens the courage so much that men come to perform an arduous duty only for fear of chastisement: slavery there runs less counter to reason.” Hence, slavery not conforming to abstract reason, would definitely find accord with “natural reason (*raison naturelle*), which took account of climate and concrete circumstances.”<sup>166</sup>

Whereas in Locke’s thought, as expressed in *Thoughts*, the capacity of reasoning created division among the body politic within the boundaries of a geographic space, in Montesquieu such divisions are given in national terms dependent upon meteorological standards. Since in Europe the weather has naturally contributed to the abolition of slavery—among Europeans—natural slavery (*servitude naturelle*) must be reserved for only some countries of the world. On the one hand, Montesquieu endlessly stressed that freedom is an attribute of Nordic peoples, while on the other, slavery has been “naturalized among the southern peoples.” A general law could be formulated. “One must not be surprised that the cowardice of the peoples of hot

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<sup>166</sup> Charles de Secondat Montesquieu et al., *The Spirit of the Laws, Cambridge Texts in the History of Political Thought* (New York: Cambridge University Press, 1989), 252.

climates has almost always made them slaves and that the courage of those peoples of cold climates has kept them free. This is an effect that derives from its natural cause.”<sup>167</sup>

Don José Francisco Velasco, considered a bastion of Mexican northwest liberal thinking, continued, after nearly one hundred pages of the volume XI from the *Estadística de Sonora*, with yet another ethnographic description of the “dismal existence” of the people of the region, this time the Apaches. Arguing the peril that the Apaches represent for the Department of Sonora, Velasco attempts to make clear “for our readers” that the country must “pursue” the savages through war of “desolation and extermination.”<sup>168</sup> The main goal is to expose the uncivilized lifestyle of the barbarous tribes, who for the most part are nomads. Citing several other statistical reports, Velasco conveys that the troops chasing the Apaches and other tribes were baffled by the “furor of the barbarians, who were in general an undisciplined group who lacked military training, the fields where the barbarian ran without opposition, were horrendous, and in one word there was no agriculture, no cattle raising, no commerce, nothing but blood and horror in those disgraced territories.”<sup>169</sup>

According to the second part of the report presented by Velasco, the customs of the savage tribes had been described by the irrefutable work of several authors throughout two centuries of explorations, and they all point out to the “ferocious character” of the Indians. Due to their character Indians are irreducible to a Christian and civil life; and that their natural

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<sup>167</sup> Charles de Secondat Montesquieu et al., *The Spirit of the Laws*, 252.

<sup>168</sup> José F. Velasco, “Continuación de la Estadística de Sonora por el señor José F. Velasco” in *Boletín de la Sociedad Mexicana de Geografía y Estadística*. Vol. XI, (México 1865): 81.

<sup>169</sup> Velasco, “Continuación,” 88.

"tendency, system and goal" (sic) is the extermination of the Sonoran population and therefore of a very single white man.<sup>170</sup> The controversies inherent to liberal thought become clear, beyond the theoretical arguments of Lasurdo and Montesquieu, through the magnifying glass of the elaborated diatribe presented by Velasco and other authors in the Sonoran Statistic Survey. On one hand the demand for security and right to exploit the territory by intellectuals, politicians, and explorers was made in the name of civil order and freedom. On the other, the supposed lack of reasoning of the Indians turned them into barbarous deprived from the capacity of self-government.

However, the connection in the chart of a political economy of race is given by a correlation—Europe and Mexico—of the dogmatic belief in the determination of character by climatic elements. In effect, several times through the Statistic Survey the Indian problem becomes reduced to an issue of weather and hardships associated with the semi-desert conditions in which the Ceris and all other “Apaches” live. In the words of Velasco: “Within these barbarians, unlike civilized races, age makes them despicable. They only seem to respect the ruggedness that youth can bring, so when they age and strength is lost, the respect disappears according to physical appearance, and since they are tolerant of hot weather one can see lots of old age people who live to be 70-80 years old.” Physical appearance linked to moral character, and these two determined by climate is a constant argument present in the hundreds of pages written about the geography and population of nineteenth-century Sonora.

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<sup>170</sup> Velasco, “Continuación,” 89.



The rebellions and social unrest which Velasco refers to did occur. Ceris, Yaquis, and many other ethnic groups fought the attempts of the general government to “explore” (and occupy) their lands. Such almost instant confrontation challenged the language of political freedom, liberty, prosperity, and above all the federal republicanism associated with the Mexican Constitution of 1824.<sup>171</sup> Thus, a quality of liberal thinking resides in the ripple effects it creates and some sort of dialectic of revolution. In the case of France, the initial liberal thrust in the metropolis associated with the 1789 Revolution had an immediate ripple effect. It caused a subsequent peasant revolt. Afterward it continued with an effective spreading throughout the urban popular masses. A second liberal inception had the task of devoting self-government by the slave-owners, which ended up engendering the revolution of the slaves themselves. Simply stated, bourgeoisie uprisings incited the masses to follow.

In a similar fashion, the Bourbon reforms created reactions against the Spanish crown. In a modernizing effort, the colonial idea of the two republics had to be replaced by integrationist policies—which had a strong component of mimicry. Criollos, reacted with hostility to the crown’s urge for the assimilation of the Indians through the Spanish language and even dressing style. Enthusiastically professing a liberal creed, the criollo elite read and cited Locke, Montesquieu and Adam Smith. As some of the sources used for this dissertation, intellectuals referred and appealed to American personalities such as Jefferson and his praise of democracy as

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<sup>171</sup> Constitución Mexicana de 1824. [http://www.diputados.gob.mx/biblioteca/bibdig/const\\_mex/const\\_1824.pdf](http://www.diputados.gob.mx/biblioteca/bibdig/const_mex/const_1824.pdf)

well as his critique of government interference and the obstacles it placed in the way of developing local industry.<sup>172</sup>

To be sure, in the Mexican case there are two partial interpretations of the War for Independence. Such interpretations are relevant to the discussion since they derive from the two main political optics involved in most of the intellectual and political arguments/confrontations developed throughout Mexican history in the post-Independence era. They both oscillate between two univocal and opposed views. On one hand, there is a traditionalist reaction against the liberal innovations in Spain. On the other, the Independence appears as a manifestation of the universal commotion caused by the Enlightenment and the “revolution—democratic and bourgeois—in France.”<sup>173</sup>

A common agreement in the historiography of the independence era argues that in the second half of the eighteenth-century New Spain thrived. It was the time of the apogee of the mines in Guanajuato and Zacatecas; new precious metal deposits were discovered and soon cities with rich churches and lush homes became a norm in the proximities of the mines. The impressive splendor of criollo nobility became visible throughout the amounts of gold sent to the metropolis. A fact corroborated by the stylish “churriguera retablos” that were sent back together with fine silk. Commerce in the ports of Veracruz and Acapulco reflected the economic expansion of New Spain’s gross production, which grew from three million pesos in 1712 to 21

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<sup>172</sup> European and American intellectuals were constantly discussed in the pages of Mexican newspapers. A search of the words “Montesquieu” and “Jefferson” produced 1,298 and 5,690 entries respectively while reviewing the Readex database of Latin American newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu>

<sup>173</sup> Luis Villoro, *El proceso ideológico de la revolución de independencia* (México: Fondo de Cultura Económica, 2010), 19.

million in 1808. The increase of 633% in production led an economic bonanza that had an effect on cultural development with a double meaning. On one hand it exacerbated optimism based on the criollo exaggeration of natural resources in the region. On the other, New Spain went through a phase known as the “Mexican Enlightenment.”<sup>174</sup> Not surprisingly, a torrent of new power relations and socio-cultural exigencies emerged, demanding technologies capable of producing instability and social hierarchies for a transitional period.

In order to understand the momentum of the Mexican pre-Independence transitional period, one must have considered the ideological process of such a revolution. The Mexican Independence movement has a precedent in 1808. Also, in a metropolitan setting—as the French Revolution—two groups became antagonistic within the structure of political power invested in the Ayuntamiento [Municipal government]. On one hand, the European group followed the European thinkers and aristocrats who based their legitimacy on the doctrine of the divine right of the king and required tacit obedience. For them society was, together with their rights, alienated by the sovereign. On the other, the Criollo party funded its pretensions beyond the current law and made an appeal to the historical right inherited by the conquistadors. Which is to say that the criollos, as direct descendants of the conquistadors, had appropriated the original pact made between the king and the conquistadors. Under such a pact, criollos thought that America had become incorporated to the Crown of Castilla. Their claim was simple: America did not depend on Spain, but on the King of Castilla; but if he was deprived of his liberty and his land occupied by a foreign enemy, then New Spain must unite all notable people of the kingdom

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<sup>174</sup> Luis Villoro, *El proceso ideológico*, 20-21.

in a junta, as stipulated in the Código Indiano, which provided New Spain with the same faculty to convoke courts just as other Hispanic kingdoms.<sup>175</sup>

However, neither group, whether they believed in divine rights or an original political pact, questioned the prevalent legal system, and therefore did nothing to eradicate it. After all, both parties were faithful to the spirit of the primitive legislation of Castile and Indias. The real ideological problem emerged from the feeling of lack of freedom and legal inadequacy. Mostly, the economic changes brought by the New Spain's prosperity, created an order not suitable or sustainable by the traditional juridical structure, so much respected by criollos. Legal representatives and Ayuntamiento functionaries had been removed by force, and yet the old colonial institutions, together with its legal code remained untouched. When criollos questioned the reason why this phenomenon could be possible, they found only one answer: "The arbitrary actions of a group of Peninsulares [Europeans]."<sup>176</sup> The battle became then in the terms of "Americans" against "Europeans," or criollos versus *Gachupines* [Spaniards born in Europe]. Thus, the testimonies of many insurgents gravitated around the idea, popular among elites and middle classes, about the feeling of animosity against Peninsulares: the greatest obstacle for the criollos' development and progress was in fact, the European group.

The criollos claimed direct lineage with the conquistadores aspiring to attain equality with the Peninsular ruling elite by emphasizing their superiority over the Indians—and consequently over the African slaves. Their efforts account from the Mexico City *cabildo*

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<sup>175</sup> Luis Villoro, *El proceso ideológico*, 49.

<sup>176</sup> Luis Villoro, *El proceso ideológico*, 63.

reforms, to the attempts of several professional guilds to restrict the membership to certain noble trades. A clear example is the painters, and their effort to implement a dramatic proof of blood, family and trade purity to belong to their guild.

In this dialectic process, the revolutionary wave reached the Indian population, who immediately sought the opportunity to improve their living conditions. This phenomenon can be appreciated at least in the proximity of the central government, Mexico City, as noted in Chapter 1, in the terms of the American republican modernity.

It was Simón Bolívar and his participation in the independence movement in Haiti that started the abolitionist movement in Latin America, but also it was the same fight that provided the criollo spirit with a decisive turn. Such was the trademark that would accompany the Latin American movements making them so different from the North American colonist who sought absolute control over Indigenous populations and African slaves. Thus, Bolívar who initially appealed to Montesquieu, claiming that a liberal Constitution would promote the “rights of man, the freedom to act, think, speak and write,” as well as the “division and balance of powers, civil liberty, freedom of conscience, a free press,” had different opinion about other types of revolution.<sup>177</sup> Contrary to the feelings of his North American counterparts, Bolívar celebrated the “general nightmare” of a “slave revolution from below” by citing the “history of the helots, Spartacus and Haiti.”<sup>178</sup>

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<sup>177</sup> Simon Bolivar, Vicente Lecuna and Harold, Bierck, *Selected Writings of Bolivar* (New York: Colonial Press, 1951), 168.

<sup>178</sup> Simon Bolivar et al., *Selected Writings*, 694.

North American colonists founded an identity on the conquest of a promised land in the quest for freedom, which took the form of “master-race democracy...based on the rule of law within the white community and among the chosen people,”<sup>179</sup> In contrast, Latin America found itself at the threshold of independence with the burden of profound contradictions. Indeed, on one hand the Latin American revolutionaries faced the true consequences of the “black legend of Spain” and its genocidal wounds, while on the other, miscegenation appeared to be an overwhelming reality. In reference to what Venezuela meant to the rest of Latin America, Bolívar manifested the ambiguity that would jumpstart the project of mestizaje as a modern nation-state priority:

Rather than an emancipation of Europe, it is a mixture of Africa and America because Spain itself ceased to be Europe on account of its African blood, its institutions and its character...The majority of the indigenous population has been destroyed, the Europeans have mixed with American and Africans, and the latter with Indians and Europeans...Such diversity entails a consequence of the greatest importance. Thanks to the Constitution, interpreter of Nature, all citizens of Venezuela enjoy complete political equality.<sup>180</sup>

The example of Bolívar and Venezuela illustrates that in Latin America what started with liberal intentions had radical results. To be sure, just as in the case of Locke, the ideas of liberty can be antagonistic. A certain dialectic opened the door to a revolution from two fronts, on one hand the criollo elite, on the other the lower classes. Thus, the dialectic of the revolution made sense in different directions. For the criollo elite signified how to get rid of aristocracy—and following the example of Locke and Raquel—how to emulate English gentlemen determined to

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<sup>179</sup> Lasurdo, *Liberalism*, 150.

<sup>180</sup> Simon Bolivar et al., *Selected Writings*, 682.

dispose freely of his servants. For the subalterns it meant a way to put an end to black slavery in Santo Domingo-Haiti and other parts of Latin America.<sup>181</sup>

The 1808 Mexican precedent of the War of Independence, and the subsequent liberal burst that took over socio-political structures confirm that the configuration of power relations, even in transitional periods, maintained a hierarchical order. From the establishment of a *casta* system to its visual representation in the late eighteenth century the construction of the other went hand in hand with the needs of global trends, the reflections of political economy of race at a local level, and the requirements of the political organizational structures. The mechanics of power expressed via scenes (light) and statements (language) encompassed *casta* paintings, printed press, and scientific journals of wide national circulation during a span of fifty years. These reflected two main racial aspects. First, they called for a socio-racial organization of unsanctioned human unions (that took place unrestrictedly in the New Spain). *Casta* paintings became the visual element preempting a new post-colonial era in need of a pre-capitalistic taxonomy. And second, the implicit contradiction of liberal thought that weaponized the idea of race. What in the *casta* visual classification used to be a generic, but marginal, Indian (the barbarous *Meca/o*), one who did not have a place in the new political economy of race, one hopeless savage outside the formula of *mestizaje*, would become the threat to an entire country's progress, civilization, and economy. The liberty and rights, and federal representation proclaimed by the Mexican constitution after Independence did not contemplate those outside limited racial categories. The ripples of liberal thinking reached the Indigenous peoples of the

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<sup>181</sup>Lasurdo, *Liberalism*, 151.

north, not in the form of revolutionary contestation, but in a desperate struggle for survival.

However, the Ceris, Yaquis, Apaches, and other groups had been marked as the hindrance to progress, and threat to the civilized people's security, who needed to be exterminated.

By analyzing the birth of human rights, Lynn Hunt argues that the simple consideration of a universal membership to the human family carried numerous “evil twins” with it. The idea of universal, equal and natural rights implied the development of ideologies of difference. Such an idea, which emerged in the context of forbidding exemplary public punishments in pre-revolutionary France lost its initial lure. The attempt to eliminate cruelty from its legal, judicial and religious vectors had an opposite effect. It made it a tool of domination and dehumanization.<sup>182</sup> Human rights, as the quintessential liberal product, hence carry a hefty contradiction, comparable to that inherent to the composition of a social construct, an omniscient and omnipresent beacon in modern times: the nation-state.

In modernity, the state has become almost synonymous with nation, and the latter appears to be the same as “one people” endowed with certain—if not limited—political traits. The state's need for a body politic, one that truly belongs and complies with certain requirements, is almost as self-evident as the natural laws that liberal thinkers loved to invoke while elaborating their treaties and declarations. The language found in the edicts from the City of Puebla corroborate a scheme of forces of power that constituted an important part in the political economy of race. Casta paintings as scenarios of power can be compared to the narrated scenes included in the Survey of Sonora. They both are clear examples of technological devices of race. Race as a

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<sup>182</sup> Lynn Hunt, *Inventing Human Rights. A History* (New York: Norton & Company, Inc. 2007), 212.



visual instrument, and race embedded in the interactions among power relations can be better understood in the consideration of race as the ultimate political expression. As such, *race as politics* became one of the most effective instruments of hierarchy, but also one of the most valuable technologies in the creation of an internal enemy of the nation. The tensions between internal actors found perfect accommodation within the formal creation of a region known as Latin America. Extrapolated transatlantic feuds into the local arena of a modern Mexican nation-state would develop yet another dimension to the already complex technology of race. Artificial unity engendered the ideal of homogenization, thus creating an allergic reaction, an autoimmune disease that would signify a war among races. Such war would become the main scaffolding during the construction of the Mexican nation-state.

## CHAPTER 4

### RACE AS POLITICS: A THEMATIZATION BATTLE IN MEXICO AND LATIN AMERICA

“History is inflexible. The Phalanx made the Hellenic world wider, the Legions did the same for the Latin, just like the Thirds contributed to the spread of Christianity [by the Spanish Empire]. However, the Phalanx, the Legion and the Third, have disappeared long time ago. Their historical function had concluded... All men of the idea and action on the Mother Homeland have a supreme duty of restoration... and healing of the wounds of our ancient and glorious Spain, exhausted mother of countries, *modern Niobe of the nations*.

Late nineteenth-century Mexican editorialist under the pseudonym of “Sertorio”<sup>183</sup>

“If Humboldt could have access to the documents we have now, he would find out that the cosmogonical memories of the Mexicans are as important as those from the ancient world, especially for those who wish to traverse into the fog of historical traditions.”

Don Manuel Larrainzar<sup>184</sup>

After the murder of a pawn lady and her sister, the guilt was consuming Raskolnikov; he looked for any incriminating clues in the newspaper. Nothing could make him think that extraordinary men like himself could not be above the law due to their privileged predestination.

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<sup>183</sup> Criticism of the Spanish belligerent pride during the US-Spanish War. The Mexican author employs examples taken from universal history to elaborate a harsh critic of the Spanish reluctance to acknowledge a defeat inflicted by the US. The note is followed by a brief note that talks about the celebration of the *Niños Heroes*, a group of military school cadets who defended the Chapultepec Castle during the US military intervention in Mexico City 1847. The purpose in the proximity of the notes is to make an analogical presentation of pain and defeat, however, in the case of the Mexican nation, the pain is channeled through the comfort of knowing that the bravery of the cadets is now part of Mexican history, and will be part of a legacy, honored and protected by the current government and president—Porfirio Díaz. “Notas de Actualidad,” *Revista Moderna*, Year 1, No. 3 (1898): 47-48.

<sup>184</sup> Manuel Larrainzar, “Dictamen presentado a la Sociedad de Geografía y Estadística de México por el Sr. Lic. D. Manuel Larrainzar, sobre la obra del Sr. Abate E. Carlos Brasseur de Bourbourg cuyo título es: ‘Si existe el origen de la historia primitiva de México en los monumentos egipcios, y el de la historia primitiva del Antiguo Mundo en los monumentos americanos,’” In *Boletín de Geografía y Estadística*, (1865): 285.

He only found notes about the “fires,” common in the city that the press attributed to the great number of wooden buildings and to the revolutionary activity of the restless 1860s youth. There was also a note about an awkward couple of “Lilliputian Aztecs.” Raskolnikov, the main character in Dostoevsky’s *Crime and Punishment*, found that the “Last Aztecs” had probably been at the *Zavedenie*, an establishment outside city limits owned by Johann Luzius Isler where they served artificial mineral waters and dinner and always presented the latest entertainment in Saint Petersburg.<sup>185</sup> Indeed, Máximo and Bartola, the “Aztecs,” had been greeted and received by the President of the United States, Napoleon III, the British Royal family and the Russian Tsar. Their fame was unprecedented even when in reality Máximo and Bartola were not Aztec, but Salvadoran. And although they were forced to marry on January 7<sup>th</sup>, 1867, they were not a couple, but rather siblings suffering from microcephaly and a very noticeable mental retardation. Ramón Selva, a Spanish businessman, took the children from their mother in El Salvador under the promise of seeking treatment in the United States. Unfortunately, Selva sold them to a Mr. Morris, who launched them into stardom by exploiting/exposing the story of how the Last Aztecs had been found in an Aztec temple where people rushed to worship the last two members of a sacred race. That was the time in which the *civilized public* stormed into the Barnum tent and other similar establishments, such as the *Zavedenie* in St. Petersburg, to witness the two small—although adult—siblings who had tiny “pinheads,” prominent noses, smiley faces, crooked feet, and funny outfits. The promotional slogan that emphasized that Máximo and Bartola, just like many other microcephaly “specimens” exhibited successfully throughout the world, were the

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<sup>185</sup> Fyodor Dostoyevsky, *Crimen Y Castigo* (Barcelona: Alba Clasica Maior, 2017), 86-87

“lost links” in the evolutionary chain, was not only a marketing hit. Inadvertently it was also a powerful incentive for science magazines to focus on such natural deviations.<sup>186</sup>

P. T. Barnum published his autobiography in 1855. He showed no frugality in words to express how a portrait of his contemporary society would imply a world of predators, cheaters, and immoral people hiding under a veil of hypocrisy. “All is valid in order to succeed in life...everyone is waiting to be deceived by others when the time is due.” Barnum thought that commerce/business was the perfect school to study the human soul, and such way of thinking led his biographer P.T. Hall to state that “[Barnum] was the first person to understand the modern world, and learn how to use it.”<sup>187</sup> As owner of an entertainment business amply questioned on moral basis, Barnum perhaps, in a very honest way described the decadence of the second half of a century in which the multiple layers of meaning of the word “economy”<sup>188</sup> had already produced civil wars, peasant uprisings, colonial aspirations, antagonist ideologies, congested urban developments, but above all, new ways of perceiving the human.

Mexico was not the exception to such world trends. Modernity reached Mexicans and their minds in similar ways as it reached their European counterparts. However, a colonial past and the inheritance of millenary American civilizations influenced the process in which modernity reproduced itself and dominated the recently independent country. Race, with its new modern connotations affected by politics, geography, economy, and science, became perhaps the

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<sup>186</sup> Omar Lopez Mato, *Monstruos como nosotros. Historias de freaks, colosos y prodigios* (Buenos Aires: Random, House Mandadori, 2012), Kindle, Loc. 682 & 692.

<sup>187</sup> Lopez Mato, *Monstruos*, Loc. 139.

<sup>188</sup> Economy here does not refer only to money and markets, but also to the attempt to segment and categorization of the human into systems and sub-systems ruled by an abstract idea, which assigns value, generates ontological strata, and commodifies human relations.

most influential vector within the group of forces that attempted to define the country and the nation. The perception of the human, amid a convulsive XIX Century all around the world, would dramatically imply a confrontation between politics and science in Mexico.

The political economy of race had an effective tool in visual racial instruments. Casta paintings of the late eighteenth century became a response to the needs of a larger global transformation which found specific contributions at local levels. The casta system and its plasticization in the visual ran in tandem with expression of political power, hence creating a background scenario for *biopolitics*.<sup>189</sup> This chapter will explore the close relations between a Mexican (and Latin American for that matter) foreground—the vernacular—and the global ideological scaffolding, represented in terms of racial European battles, in the background. The vernacular and the global, competing and complementing elements, became a foundational component in the formation of a Latin American sentiment of belonging. Such sentiment would produce a “we-ness” that was never exempt from racial divides, and which also served as primary building block of nationalisms in the region. Initially from a religious context, the idea of casta and race suffered transformations. The political and the economical—two main force fields shaping racial technologies—paved the road for the scientific nineteenth-century racial approach that would create new instruments of body politic depuration for a modern Mexican nation-state.

As seen in the previous chapters, the idea of race found resonance in the transitional periods associated with new political and economic world trends affecting the development of

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<sup>189</sup> Biopolitics refers to the capacity of power relations to penetrate and shape human daily life, particularly in the moments of nation-state conformation.

Mexico in multiple planes. Facing the enormous magnitude of the unsanctioned racial mixture in New Spain, the *casta* system mutated into a hierarchy of socio-economic classes designed for the new republic. The construction of *we-ness* for the modern nation was performed under the threat of foreign invasions, internal irreconcilable political factions, and an internal enemy of the nation: The Indian or barbarian who seemed to be in constant conceptual change. However, the sentiment of *we-ness* involved two main precursors. One, the idea of belonging to a select brotherhood of nations with a common European origin in which the Latin transfigured into the Latin-American. And two, a fluctuating axiology to justify, repudiate, or accept the presence of the indigenous population. The changing set of values affecting the perception of the Indians considered them as an undeniable force present in the Mexican territory as well as one of the many components in the *blood* of the Mexican modern nation-state. Thus, on one hand, the Last Aztecs represent the case of abnormality and the exoticism of certain indigenusness in a world in which the political economy of race has no categorization for such “race.” While on the other hand, the Latin origins of Mexico become the target of praise, an unquestioned component of the national identity. Comparisons such as the one in the chapter’s epigraph became notorious in the nineteenth-century Mexican printed press: The “glorious Spain” was Niobe, and the lost territories—Mexico and Cuba—her lost children, just like in Greek mythology. The result of the hermeneutical comparison of both cases is the racializing instrument of a shared *Latinité*, and its corollary, the idea of the mestizo as perfect national subject. Hence, Latin America (and in Spanish one word: *lo Latinoamericano*) can be considered as one of the most notorious technological devices of race, a perfect mechanism of inclusion and exclusion according to the times.

The first associations between the horrid and the morally bad were established in Greece. Not without certain malice, Aristotle referred to all those “malformations and monstrosities” exhibited in tents and markets in ancient times as *lusus naturae* (nature’s jokes). However, in his *Poetics*, argues that beauty can be created through a faithful imitation of what is “repulsive.”<sup>190</sup> Monsters, just as in mythology, can teach us lessons. But what lessons did indigenous microcephaly siblings teach under the light of modernity and science? Reactions to them showed that normality, homogeneity, and uniformity were the requirements to be modern, civilized, and morally acceptable. The same requirements were *sine qua non* conditions to belong to a modern nation-state. After all, the nation—an idea that had been in constant development since Machiavelli—had become the vehicle into modernity.

The tailoring of a Mexican nation-state that would encompass a wide variety of political, economic, ethnic and geographical problems implied a long series of confrontations—some violent, some intellectual, some spiritual, and some just irreconcilable—right after independence in 1821. In order to understand how the concept of race originated in castas and became central to the modern technology of nation-state building in Mexico it is necessary to look at the creation of the idea called Latin America. Deconstructing the idea of Latin America will make visible the elements involved in defining citizenship and political culture. It will also point at the ways in which anthropology, philosophy and economy shaped the idea of race as a main component in an ontology required to build a modern nation-state.

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<sup>190</sup> Lopez Mato, *Monstruos*, Loc. 20.

The myth of globalization can be compared to the idea of Latin America, and both are useful for this study. The first possesses a varnish of newness, and mostly in trade/commerce terminology, has to do with a correlation of the local and the global within the context of systems ruling modern life i.e. economy and politics. The latter can be parochially associated with the Marxist concept of class. Such a concept involves self-defining properties, which make it to be “in-itself” and “by-itself,” hence providing some type of uniqueness. Due to the capacity of self-definition and auto-determination the concept of class may exhibit strong redemptive aspirations. Thus, in the Marxist class struggle, the proletariat becomes an indispensable condition, the engine of change in history that will liberate, by means of its own self-realization, society from the yoke of capitalism. Latin America, as a privileged place of cultural fusion and abundance would momentarily think of itself as the bearer of modernity and civilization while confronted with a retrograde Europe attached to monarchies and colonialism. To be sure, a certain Latin American self-awareness produced the idea of a separate continental entity that as beacon of modernity, gave birth to an independent geographic region that thought of itself in self-referenced teleological terms. The only caveat was that a self-referential attitude in Latin America could only mean a global inheritance.

From the colonial era to post-Independence Mexico, scribes, intellectuals and politicians made a true art and habit out of the tendency to use world historical references when attempting to describe a current local issue. In his essay and public speech presented in segments mainly to a select audience of scientists, Manuel Larrainzar described the way in which history had been written in Mexico and about Mexico from the exterior. An extensive body work contemplated the division of Mexican history in three basic eras comprised between the markers of the



Conquest, Independence and his contemporary time. However, what makes his work worthy of analysis is Larrainzar's historical objectives and his presentation of facts. He shows the typical Mexican narrative style mixed already with tones of positivism. For Larrainzar history should be instrumental, it "must discover the contrast between the centuries of barbarity and enlightenment," and also point clearly at all "procedures by which the human condition has either improved or worsened."<sup>191</sup> Additionally, history according to Larrainzar, is an inheritance of experience that passes from the hands of generations linking them to each other via the remembrance of facts. In other words, history should be an impartial mentor and mirror of truth. His description continues into the realm of high rhetoric when history becomes a "means of redemption among the nations... a beacon of welfare among the fog of ignorance, and shows the immortality of the nations."<sup>192</sup> This description should not surprise since Larrainzar's goal at the time is clear: to create a general history of Mexico for the nascent Second Mexican Empire led by Maximilian, and above all, to assemble a historical narrative capable of forging a nation. For the Mexican historian, even when there have been attempts to produce partial historical pieces, there must be an effort to collect all "extant materials... and many other dispersed through several archives" in order to create a master narrative "in which thought unity prevails." He argued that the delay in the gathering of all material into a single history work should not be considered a failure since "five hundred years passed before the Romans had historians and their work until the times of *Salustio*, who did not exactly comply with the exigencies of such delicate

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<sup>191</sup> Manuel Larrainzar, "Algunas ideas sobre la historia. Manera de escribir la de México, especialmente la contemporánea desde la declaración de Independencia en 1821 hasta nuestros días." In *Boletín de la Sociedad de Geografía y Estadística* (1865): 479.

<sup>192</sup> Larrainzar, "Algunas," 480.

and grave enterprise. *Tiraboshi* assures that until Cicero's times no one had seen a history presented with elegance. How many years and efforts were necessary to produce a *Thucidides* or a *Xenofonte!*"<sup>193</sup>

However, finding links between the global and the local events is complicated. The challenge resides in the difficulty to capture a particular "everything-that-has-to-do-with-everything" in terms of its power to affect "the simultaneity of the present."<sup>194</sup> According to recent scholarship the problem of the historian is synthesis. The only way to achieve a historical synthesis is by having some philosophical point of view. In the case of mid-nineteenth century Mexico that perspective was dominated by liberal thought. By the same token all philosophical perspectives emanate from some sort of historical synthesis. Thus, Mexican approaches to its own problems had to do with a philosophical view that made sense within a context of a specific historical synthesis. Larrainzar in this regard was not far from the contemporary need for synthesis, for him a general history of Mexico would be the summary of all those particular histories, data and news interesting enough to be part of it, particularly from the outlook of methods: the ethnographic and the synchronic. Such an approach would take the historian's work into the direction of consolidation of a general history, which can go beyond the history of all "Departments or Provinces," hence the radical importance of the unifying work produced by the

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<sup>193</sup> Larrainzar, "Algunas ideas," 495.

<sup>194</sup> In effect, as Mauricio Tenorio-Trillo argues, the exercises of globalization are not a recent discovery. The historians of the sixteenth or of eighteenth century were familiar with what he calls the "everything that has to do with everything." For example, some New Spanish Indian caciques in the seventeenth century invoked stories full of references to Jerusalem, Rome, and Jesus. They did it so in attempts to defend their rights using their knowledge of Nahuatl, Spanish and Latin. See Mauricio Tenorio-Trillo, *Latin America. The Allure and Power of an Idea* (Chicago: University of Chicago Press, 2017), 138.

National Society of Geography and Statistics. Such society can function in the way in which the “sages of San Petersburg have advised Russia and the Tartary, and the experts from the English Society of Calcutta have done in respect to India, China and Tibet.”<sup>195</sup> Larrainzar hence confirms that synthesis was a must for a general history of Mexico in the way in which the idea of Latin American functioned as part of globality.

But synthesis can be misleading, the knowledge that it represents can also express power relations. One must see Latin America beyond the “overgeneralizations and atavisms” that lead some, for example, to consider mestizaje as something exclusive of Latin American coinage. Instead of Latin American mestizaje, a history of the idea of race in multiple places and times could be more useful. Put through a language metaphor: The developments of local phenomena are in fact gears of a larger “Latin” technological device of race. In a synecdoche manner all vernacular themes can be unique and also a version of the Latin. By analyzing localness of the vernacular, “the Latin both visualizes itself and evaporates.” To think about the vernacular occurrences as part of the whole is to think about a globalness in the making.<sup>196</sup>

Such an approach implies working with cosmopolitanisms in a somehow paradoxical manner. On the one hand, there is the “awareness of unfamiliarity,” which is to say that conceptual translations can exist in the absence of true command of context. For example, it is an impossibility to know the surroundings of a Nahuatl speaker in San Juan Chamula who cited the Bible. On the other hand, there is the need to elaborate “through painfully researched

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<sup>195</sup> Larrainzar, “Algunas ideas,” 497.

<sup>196</sup> Tenorio-Trillo, *Latin America*, 177.

familiarity.” This is to say that a researcher will experiment the discomfort of finding the effects of a racialized epistemology. Knowledge, as seen in Chapter 2, can propose a categorization in relation to the value of events or other ways of being. In this way, the Nahuatl scribe narrating his version of a request for the respect of his rights within a globality may have been seen by the Portuguese and Spanish empires as mimicry of what has been known as the modern world. Despite the denial of the value in terms of the locus of enunciation in reality the Americas have been the modern world as well.<sup>197</sup>

Chapter 1 of this dissertation dealt in depth with the concept of “appropriation” and translation of local cultures in the exclusive terms of a hegemonic epistemic perspective. In order to avoid the trap of the Latin American as self-delineating mechanism, one must take into account the opposite: The *globalness in the making* invested in the awareness of *familiarity*—as opposed to the possible unfamiliarity of some rural/oral accounts—found in the archival testimonies which comprise the local printed cultural heritage of cities such as Puebla. To be sure, even for the purpose of exalting the riches of Sonora, authors such as José Francisco Velasco initiate their long presentations with what could be a lecture on universal history. The task of exploitation of the Department in fact begins with a statement on Velasco’s readings of the Baron Von Humboldt’s report to the Viceroy in 1771 and memoirs presented to the representatives of Sonora and Nueva Vizcaya that inspired the desire to explore the great wealth of the region. Such accounts by themselves represent other extensive narrations of the revolutions in the region, but more than anything they corroborate a style of self-description that

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<sup>197</sup> Tenorio-Trillo, *Latin America*, 177.

initiates abroad with no details, but a general idea of them. He states, for example: “Speaking about the mining potential of Sonora, we can assure that it is unknown in the rest of the country including the metropolis. It is well known around the world that a wealthy Department of Sonora exists, just the same as we all are aware of the existence of Siberia or the country of the Hotentotes...” Furthermore, such knowledge would be beneficial not only for the government, “but for the convenience involved [in the spreading of this knowledge] within the universal mass of the State.”<sup>198</sup> In the paragraph, a set of personalities include Von Humboldt and conquerors in addition to remote countries. They all comprise the background for the description of a local event. However, between the lines the phenomenology of the political economy of race manifests in the terms of biopower: the effort to construct a plan for progress would be not only be exclusionary—as seen in previous chapters. But it will also become intertwined within the “mass of the State,” a concept Velasco uses to refer to the purpose and power mechanisms exhibited by a conglomerate of countries organized in the form of modern nation-states. A clear example of the expression of power relations via *statements*.

Following current scholarship, Latin America should not “delineate our historical topics,” hence the study of any historical phenomena associated with the region should depart from an epistemological cumuli derived from long political, cultural, and social flows.<sup>199</sup> In these terms, the case of Máximo and Bartola—and its historical intersections with literature, nationhood, business, and science—opens a window into the history of the modern, global concept of race

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<sup>198</sup> *Universal mass of the State* refers to what the state and its functions signified at the time. Jose F. Velasco, Capitulo VIII, In “Continuación De La Estadística De Sonora Por El Señor José F. Velasco,” *Boletín de la Sociedad Mexicana de Geografía y Estadística* XI (1865): 43.

<sup>199</sup> Tenorio-Trillo, *Latin America*, 170.

that is simultaneously a pillar of the idea of Latin America in the nineteenth century. The question then becomes not why Russian literature or European philosophy, but how these two fields of knowledge manifested to be *incarnated* in Latin American socio-political flows.

Thus, Latin America is a modern concept, furthermore a metaphor that has semantically reincarnated several times during the past two hundred years. In seventeenth-century New Spain or in eighteenth-century France “No one but the poets of the ancient lingua franca were considered Latins.” The term Latin America encompasses history, language, and culture. But, above all, it constitutes a lasting confirmation of racial beliefs. Undeniably, each transformation of the term has been a different expression of the same belief in the term’s ability to name and/or designate the same “region, people, and phenomena as it has from the outset—the Bilbao Law for Latin America.”<sup>200</sup>

In effect, the base of Bilbao’s Law can be found in the 1820s writings of Leopold von Ranke, who believed that the amalgamation of territories via violent conquest would have an eventual scission, a marker in the history of Europe. Such a divide became a true challenge to the duality of Rome, which embodied both the *imperium populi Romani* or the adoption of Roman laws and institutions, and the Roman Empire itself. Medullar to Ranke’s work, he argued in the first page of his book *History of the Latin and Teutonic Nations* that on one hand “Atauf, King of the Visigoths, conceived the idea of gothicising the Roman world, and making himself the Caesar of all; he would maintain Roman laws.” On the other hand, the purple of a Caesar passed to the German houses in the person of Charlemagne; these also adopted Roman law. The

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<sup>200</sup> Tenorio-Trillo, *Latin America*, 34.

combination produced six great nations: “three in which the Latin element predominated—viz., the French, the Spanish, and the Italian; and three in which the Teutonic element was conspicuous, viz., the German, the English, and the Scandinavian.”<sup>201</sup> Rome and Latinity divided the world and set the arena for the dispute between “Teutonic” and “Latin,” which, according to Ranke, implied the “fear of absorbing the Jewish and Moorish features” into the two protagonists “races;” a struggle that formed the foundation of modern history.<sup>202</sup> Even when the opposition between Latin and Teutonic faded in terms of joint “enterprises,” in reality the true incompatibility lay somewhere else. For Ranke the Crusades, migration and the colonization of other countries represented a “common stock” among races. Inter-marriage and absorption of religious ideas among Europeans seemed the normal product of human mobility. Both elements—the Latin and Teutonic—“became welded and blended together.” However, the threat came from the Arabs, Hungarians and Slavs. According to Ranke the “Arabs were averted by the complete incompatibility of their religion; the Hungarians were beaten back within their own borders,” while the Slavs were simply annihilated or dominated. In this way, despite their differences, the “close community of kindred blood” developed a close relationship by participating in the same “destiny and common history.”<sup>203</sup>

The birth of the Latin American idea consisted of the extrapolation of a battle field in which modern imperialism and national confrontations contained an element against the “Anglo-

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<sup>201</sup> Leopold von Ranke and Philip Arthur Ashworth, *History of the Latin and Teutonic Nations from 1494 to 1514* (London,: G. Bell and sons, 1887), 1.

<sup>202</sup> Tenorio-Trillo, *Latin America*, 3

<sup>203</sup> Ranke and Philip Arthur Ashworth, *History of the Latin*, 3.

Saxon races.” To be sure, the Napoleon III’s plans of a *l’Amérique latine* in Mexico failed, but not that other latinité. Such term at the time signified the unification of the Latin people *par excellence*, in other words, Italy. A military alliance among all nations, supposedly embodying the Latin element failed in Europe, but the racial, cultural, and political components in the term Latin successfully prevailed.<sup>204</sup>

Throughout the years the term “Latin America” has been used both to include and exclude in terms of a utopia of unity, authenticity, and spiritual superiority. It has been used by Jacobins, reactionary Catholics, monarchists, republicans, and anybody that wants to make a difference in ontological terms: because Latin America “meant always not barbarian, and thus often not black and not Oriental,” an alternative West, or better yet, a non-Western place of alternative modernity.<sup>205</sup>

By 1850, in a similar tenor, Chilean Francisco Bilbao (1823-1865) referred to Latin America echoing the French trend of anti-Pan-Slavism. A Mason and believer in a radical Catholic social agenda, Bilbao was the translator and follower of H. F. R. Lamennais—a friend of Auguste Comte—and as other thinkers of the decade he considered that the meaning of the 1850s had been imprinted by the Mexican-American War, and the 1856 US intervention in Nicaragua, as well as the restructuring of European empires. Under the imminent threat of U.S. aggression, Latin America began to be used as a form of antibarbarism.<sup>206</sup>

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<sup>204</sup> Tenorio-Trillo, *Latin America*, 4.

<sup>205</sup> Tenorio-Trillo, *Latin America*, 36.

<sup>206</sup> Tenorio-Trillo, *Latin America*, 5.



By 1865, José Velasco expressed his laconic preoccupations about the danger of coexisting with barbarian tribes. "What would be the luck of Sonora? The same as the province of New Mexico in 1644, when all Indians castas revolted and destroyed the capital and other towns, with exception of two memorable ones denominated Pecos and San Juan de los Caballeros." However bitter was his complaint against the Indians, the only other tangible threat to the national integrity of Mexico was, throughout his texts—the United States. Some of Velasco's contemporaries expressed fear of the danger invested in the figure of the apaches, especially when they could receive help from adventurers and/or any of the confederate states of America. "Will this be the sad luck of Sonora?" In general, there was a rhetoric of losing the state to the hands of the savages or to the hand of the northern neighbor as he had stated invoking the case of Tejas.<sup>207</sup>

The sentiment of belonging to a Latin brotherhood required an external foe. Thus, while the United States incarnated individualism and materialism, East European Jewish and backward enclaves, or Russian-sponsored Pan-Slavism turned into a common enemy. Latin America also began to imply unity of a natural spirit (the Latin), "that entelechy at times articulated with romantic eloquence and at times considered simply a racial [and eventually] (scientific) fact."<sup>208</sup>

In such discourse and having Lamennais as a beacon who thought in terms of a democratic ecumenism—all religions are equal but Christianity is the universal tradition—Bilbao's proposal was utopian but not equalitarian. Latin America represented the synthesis

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<sup>207</sup> Velasco, "Continuación de la Estadística de Sonora," 90.

<sup>208</sup> Tenorio-Trillo, *Latin America*, 5.

between the old civilization of Rome in a constant struggle against the rest of the world. That Manichean perspective often translated into similar struggles such as Catholic Spain vs. countless enemies; or France opposing Russian imperialism, defining Eastern Europeans as barbarians in need of civilization; and even that of “*iberism*, understood as unity in diversity of peoples belonging to a common God and spirit—alas, with diverse sovereignties.”<sup>209</sup>

Thus, before one more dramatic mutation in the meaning of the term, Latin America embodied truths and clichés based on the Bilbao Law: “Latins have not lost the tradition of human destiny’s spirituality. We believe in, and love, everything that unites; we prefer the social over the individual, beauty over wealth, justice over power, art over commerce, poetry over industry, philosophy over texts, absolute spirit over calculations, duty over interest.”<sup>210</sup> Such asseveration divided Latin America in two parts. The first was one embraced by the republicans who proposed unity of Latin Americans versus the demagogic barbarism of the United States, but excluded Brazil. The other was a Latin America with monarchical aspirations, led by French-sponsored anti-Anglo-Saxonism centered in Mexico. The latter had enemies beyond liberal republicans like Benito Juárez; the Lincoln administration could be counted in this antagonistic trend. The scission translated into a momentary and partial support for U.S. ideals, which sporadically appeared in events such as the congress of the *Sociedad de la Unión Americana*. The result was the rejection of a French-sponsored Latin America and became the precedent of Pan-Americanism including a reevaluation of the Monroe Doctrine as a weapon against

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<sup>209</sup> Tenorio-Trillo, *Latin America*, 5.

<sup>210</sup> Francisco Bilbao and Manuel Bilbao, *Obras Completas De Francisco Bilbao*, 2 vols. (Buenos Aires: Impr. de Buenos Aires, 1866).

European imperialism. The brief movement was spearheaded by personalities such as Domingo Sarmiento.<sup>211</sup> He among many others, launched from New York in 1867-68, *Ambas Américas*, a magazine with the conviction that a joint US and Spanish American education effort in South America could make the territory less Latin and more in the image of a well rooted liberalism that encompassed practical education and agricultural ideas promoted by US educators and Hispanistas who did not emphasized an *iberista* o *pro-latinité* proposal.<sup>212</sup>

To be sure, the molding of the idea of Latin America had as initial elements the exposure to European projects of self-definition such as Pan-Slavism, Pan-Germanism, or iberismo, as well as many forms of “imperial nationalisms” (Provençal, Catalan, Portuguese, Hispanic, Mexican, Brazilian, French or Italian). Predominantly, in the 1860s the French sense of *l’Amérique latine* meant anti-Anglo-Saxonism from a racial battle trench. But it also encompassed Catholic antimodernism, anti-Semitism, and anti-Protestantism. However, in a general sense United States represented some sort of toxic modernity, and Latins reflected this notion regardless of the clarity in which their reference to the U.S or England was made. After all the spirit of unity—under iberismo or latinité—and corporate goals had to be stronger than the individual interest and passions according to the Bilbao Law.<sup>213</sup> There was no way to escape

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<sup>211</sup> Domingo Sarmiento published *Facundo, Civilización y barbarie* in 1845. Considered a seminal work, in his essay—which is difficult to define since it is not a novel, not a history book, not biography—Sarmiento describes the struggle that keeps Argentina submerged in barbarity. Civilization understood as republicanism a la U.S should eliminate the barbarity of the Argentinian Pampa—the dessert, the countryside—embodied in the character of the Gaucho. For Sarmiento, Gauchos, a reminder of the Indigenous, poverty, non-European, nomadic aspects of Argentina—are the cause of the countries underdevelopment, and should be eliminated. Gauchos as symbol of mestizaje (more in cultural terms than the biological that apply for the rest of Latin America) became a contested icon of casta and class interests.

<sup>212</sup> Tenorio-Trillo, *Latin America*, 7.

<sup>213</sup> Tenorio-Trillo, *Latin America*, 9.

the turbulent formation of nation-states after the collapses of old empires; imperial languages were the measure of the universe and new realities. Most intellectuals thought of their respective languages as equivalents of their own homelands or *patrias*. To be a Spanish-speaking intellectual implied to understand the world in French, not as a foreign language, but as one's own lingua franca.<sup>214</sup> Beyond the constant citation in French, or the frequent reference to Paris or Parisian personalities in Mexican journals and newspapers, entire reports or articles appeared in the printed press during the last half of the nineteenth century. As an example, the Baron Hoben de Kentzinger, honorary member of the Mexican National Geography and Statistics Society, addressed his public in French while presenting his research on the effects of climate on human beings, particularly in places below the equatorial line where most French colonies were located. During the speech, words such as "Cayenne, Senegal, Antilles and Tahiti" were combined with geographical lingo and terms to denote hot, humid weather. Hence, Mexican scientists learned about the "primitive vegetation of the tropics," in French, in contrast to the more favorable conditions affecting the public health or *salubrité* at other altitudes.<sup>215</sup>

All combined activities in what can be called an epistemological commerce comprise the dynamics of the political economy of race. That is to say that the extrapolation of a racial battlefield in America somehow signified the birth of Latin America as a place in which lineage—castas—and ethnical sympathies defined contenders, whether local or transnational. In *Il faut defendere la societe*, Michel Foucault argues that the concept of racism has its roots

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<sup>214</sup> Tenorio-Trillo, *Latin America*, 41.

<sup>215</sup> Hoben de Kentzinger, "Discurso," In *Boletín de la Sociedad Mexicana de Geografía y Estadística*, Vol. XI (1865): 184-190

within the problem of power inherent to the historic-political discourse of a war among races. Consequentially, the birth of biopolitics should be thought as embedded in another concept: population. Such a term is particularly important within the Mexican period of nation-state construction. As seen in Chapter 2 the configuration of power during the transitional period colony-republic renamed the categories of social stratification, and therefore, an ideal type of subject for the nation.

The transition from a single-source narrative of power to a counter-history in which biopower employed racism as a technology and justification to interfere legitimately in the population's lives—in order to separate by hierarchies—required new parameters. Such hierarchy allowed the state to discern between those who must be *allowed* to die and other who must live. Foucault locates the first construction of such political-historic discourse at the end of the religious and civil wars of the sixteenth century. An iconic example is the English bourgeois revolution (1640-1688) in which such a narrative had been consolidated. For that matter, in accordance with Ranke's theory, in the sixteenth and seventeenth centuries the society that had a Roman conscience was dissolved. Such a society was based upon the rituals and myths of sovereignty. That is to say that lineage, divine right and monarchy were the pillars of political order. Language and culture provided a shell for such political order as well. With the arrival of modernity and the change to a paradigm of anthropocentric nature that consciousness ceased to be based on sovereignty. Revolution became the legitimator of sovereign power employing a series of promises of liberation that acquired prophetic tones.<sup>216</sup>

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<sup>216</sup> Michel Foucault, *Genealogía del racismo*, (La Plata: Caronte, 1976), 71.

Thus, for the historians of French and English ancestry who thought about the racial wars as engine of history, the concept of race was equivalent to nation. For them race, as in Latin vs. Teutonic, was the foundation of the state, the law, and its institutions. Nation in a broad sense was beyond biology and statehood; the nation was a term that would characterize a group of individuals bonded by norms, rules, and common languages. Under these optics, the idea of such a counter-discourse in which the nation is the subject that makes its own history, becomes central to the matrix of revolutionary nation. Contrary to the effects of a severing race war, a revolutionary nation allows the concepts of nationalism, race and the notion of social class to emerge.<sup>217</sup> Power in this perspective is more than domination, it is rather a correlation of forces in the terms of a war that defines social relations and becomes the base of institutions. Revolution and nation as a formula generated an ambiguous discourse that would be used by antagonistic groups such as the aristocracy—when fighting against absolutist monarchies—and the bourgeoisie and popular groups confronting the aristocracy. To be clear, the understanding of races—one exterior, the other interior, as in the case of France and the Gauls fighting the Germans, or the uprising Criollos creating a new nation independent from Spain—suffered a transformation, a displacement. In the new configuration a new race emerged from the very own social body creating a true race (attached to the law and norms) and a counter-race, a degeneration that threatens the unity and integrity of the national race.

Chapter 2 explained in detail the visual and linguistic mechanisms of power in terms of the displacement of the enemy from the exterior to the interior, not only by promoting a

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<sup>217</sup> Jorge Gomez Izquierdo, “La conceptualización del racismo en Michel Foucault,” *Interdisciplina*, Vol. 2, No. 4 (2014): 125

transfiguration of the existing system of hierarchy, but producing as well a residual, non-classifiable subject: the barbarous *race* or Meco. En route to a modern Mexico politics in the deepest meaning of the word became racial. It did not spare any efforts in the process of advertising the dangers of sharing the national space with dangerous races.

The main characteristic of the documents published at the Sonora Geographical Survey in 1865 may seem in the foreground as the need to evaluate the available resources for the new empire. However, the narratives produced by the explorers always constitute an attempt to define a sub-race marked for elimination. Not without certain pomposity inherent to cavalry novels, explorers explain how the trip to the Tiburon Island and other places in the region were plagued with hardship and Indian attacks: Epic narrations exalting the bravery of his men—short in number—and the savagery of the Indians who were used to the brutal conditions of the region: extreme temperatures, lack of potable water, and nomadic life styles.<sup>218</sup>

New elements intervened during the transformation and changed the war among races into a war between classes. By the late nineteenth century the notion of medical and biological terms would be directly applied to the counter-history that re-codified revolutionary actions.

The complexity of the semantic matrix that composed the idea of Latin America also allowed changes in terms of the dichotomy civilization-barbarity. The obligated reference in this regard is Domingo Sarmiento, who published in 1845 *Facundo, Civilization and Barbarity*. The book is a novelesque, non-authorized biography of Facundo Quiroga, an Argentinian caudillo—political/revolutionary leader—who according to Sarmiento embodied the politics and

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<sup>218</sup> Velasco “Continuación,” 31.

revolutions of his natal country. In effect, Sarmiento, who traveled throughout Europe and visited the U.S. incarnated the *authentic* Latin American writer and intellectual who curtailed the field of action for his own words by focusing on a Latin American topic. In *Facundo*, Sarmiento depicted a barbarous caudillo, product and transmitter of traditions associated with a colonial country. He is eventually replaced by Rosas, another politician and an educated despot “who did evil without passion”.<sup>219</sup> In this dialectic formula Sarmiento found the raw materials of a true national literary work: the struggle between civilization, represented in the Western values of progress and capitalist development, and the barbarity of the violent people of the Argentinian Pampas, or the countryside. Civilized life in *Facundo* is represented by the city man, the person in “European attire” who lives where the law and the progress ideas thrive, where there is means to obtain an education, and the municipal organization regulates life; whereas outside the “precinct” of the city the observer can only find the blatant rejection of reason, luxury, and absolute lack of manners.<sup>220</sup>

Echoes of such thought permeated the continent, and for that reason José Francisco Velasco ended his first note to the Sonora Survey by calling for the intervention of civilization against barbarity: "On the other hand, they will not face the imminent danger of running into the apaches within a distance of six leagues, from Hermosillo to Altar presidio. Not to mention that Tiburon concurs into the same situation, however, running into the *evil and de-naturalized* Ceris, as it has been said before in this notebook, which only due to the ineptitude of the Sonoran

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<sup>219</sup> Domingo Sarmiento, *Facundo. Civilización y barbarie. Vida de Juan Facundo Quiroga* (México: Porrúa, 2006), 1.

<sup>220</sup> Sarmiento, *Facundo*, 20-21.



government they can commit the murders we deplore, because we all know that only a handful of men that do not exceed sixty shall be reduced to nullity once the government exercises what its inherent to itself."<sup>221</sup>

The barbarity in these terms is contained in the different, the other, and the non-assimilable within civilization. The thought that permeated the Argentinian capital of Buenos Aires was that of the European Enlightened reason, which had the goal of expanding the values of the civilized West. This notion became a central part in the discourses of modernity. In the case of Mexico, the discourse of modernity and nation-state building assumed a republican form in the decade immediately after the Independence. The idea of a modern nation resonated within the public sphere, the space where public opinion was expressed, understood mainly as the views of the press and intellectuals who echoed the political promises of leaders from a spectrum of ideologies.

According to James Sanders, despite the fact that “subalterns” in the 1820s continued to use the colonial method of petitions to a patriarchal leader, the great body of evidence corroborates that the populace knew about life in new nation-states and wanted to participate in the flows of socio-political activity one way or another. “[Such] claims also reveal how quickly the rhetoric of the Atlantic Age of Revolution penetrated into the lower classes.”<sup>222</sup>

Voices that echoed such a belief prevailed, in the following decades, via the small circulation of media oriented towards the populace [el pueblo]. Hence, by 1856 a local

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<sup>221</sup> Velasco, “Continuación”

<sup>222</sup> James Sanders, *The Vanguard of the Atlantic World. Creating Modernity, Nation, and Democracy in Nineteenth-Century Latin America* (Durham: Duke University Press, 2014), 56.

newspaper in the city of Puebla, *El Interés General* dedicated a long editorial piece to the situation during the Reforma War. The tone and rhetoric of the article are enlightening. The author praises the abolition of slavery through the birth of a nation, a nation that had been in gestation since the “interregnum of Moctezuma to Hidalgo and Iturbide.” The article also claims that the success of the revolution had no paragon “in modern times” and that it was applauded in Europe. According to the piece, it was liberal principles that, together with some help from God, provided freedom to the Mexican people. Of course, there are a couple of paragraphs dedicated to the comparison with the freedom obtained in “1789” at a “universal level” when “the tyranny became postponed by the march of civilization and the right of men.”<sup>223</sup>

The masses, at least initially, could not escape the centripetal force inherent to a discourse in which Latin America had become the epicenter of the modern world. Thinkers such as professor and diplomat Jesús Escobar y Armendariz were vocal about how “decrepit Europe retrogressed...in many aspects.” Mexico’s position seemed to be referenced, in the style of the historical synthesis, as a focal point that could be related to *an everything*. Thus, Armendariz added that Mexico was “heading toward a universal Republic which had been already achieved in much of Latin America, even if Hungary, Poland, and Italy were still struggling against despotism in Europe.”<sup>224</sup> The barbarism attributed to colonialism and monarchy temporarily changed the loci of modernity to Latin America, and contrary to the sentiment manifested by the most conservative or Europhilic *letrados*<sup>225</sup> (a la Sarmiento) modernity did not “flower”

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<sup>223</sup> Santiago Vicario. “Revoluciones,” in *El Interés General. Diario del Pueblo*. Vol. I, No. 8 (Jun3, 1856).

<sup>224</sup> As cited in Sanders, *The Vanguard*, 86.

<sup>225</sup> *Letrado* was the name given to intellectuals, particularly to lawyers, journalists and writers.

somewhere else, but in the New World, and would also transform the backward—revolutionless—Europe.

American republican modernity, as Sanders argues, was tightly related to the Liberal's ascension in Mexico. Liberals as political party, came to power in 1855 after the Revolution of Ayutla (1854-55) which deposed caudillo and dictator Antonio López de Santa Anna.<sup>226</sup> Their influence can be felt in praises such as the example of the local newspaper in Puebla, but also in the way in which the Mexican state began to shape a constitutional self. Liberals instituted a sustained program to remake Mexican society called La Reforma. This revolutionary movement, highly attached to the imagery of the French Revolution as noted in the note from the *Interés General*, promoted a radical break with the colonial past represented by three main entities: the Church, the Spanish Crown, and the casta system and its corporate byproducts (including indigenous villages). The restrictions on the Church and the army, together with the extension of citizenship to all adult males represented a frontal attack on the ideals of conservatives who were traditionally associated with a centralist, monarchical, and Europhilic views.

Thus, American republican modernity emerged from a belief in citizenship as a “right of primordial importance.” Republican politicians firmly believed in the centrality of politics as the force that created the citizen. For radical liberals the citizen was the result of economy's effects. According to Sanders: “After mid-century, American republicanism was more powerful than economic liberalism in both Colombia and Mexico.”<sup>227</sup>

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<sup>226</sup> Sanders, *The Vanguard*, 82.

<sup>227</sup> Sanders, *The Vanguard*, 134.

The liberal revolution embraced by American republicanism as expressed in the public sphere also had to deal with fraud and corruption. But it still consisted in a panoply of personal rights that included freedom of press, religion, and speech. On a daily basis, it was a more democratic and republican practice “far exceeding that of most of the world.” At the time, it was a common practice for subalterns to engage in acts of voting, campaigning, marching, petitioning, orating, and associating. Such an environment denoted a rich democratic republican culture that flourished in the mid-nineteenth-century Mexico.<sup>228</sup> In this milieu, subalterns assumed an identity of rights-bearing citizens, based on the idea of *pueblo*’s sovereignty as opposed as everything that the aristocracy, monarchy and colony had come to mean. Popular sovereignty hence became a strong signifier of a relationship between citizens and the state; it became a proof of the nation’s existence, and also a way to resist the abuses that the nation [pueblo], understood as regular natives in constant struggle with the wealthy and foreign invaders, was no longer willing to endure.<sup>229</sup>

At least discursively at the urban level, the hope of true independence and citizenship resided in the *pueblo* [the people]. While inaugurating an elementary school for adults and *artesanos* [artisans], Don Juan Gutierrez Mallen began his speech with a quote from Gregorie (sic) “The perfection of the arts is the conservation principle of liberty: to shake off the yoke of foreign industry is to insure one’s own independence.”<sup>230</sup> Ironically, the school was to be placed

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<sup>228</sup> Sanders, *The Vanguard*, 114-115.

<sup>229</sup> Sanders, *The Vanguard*, 177.

<sup>230</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), April 6, 1842: 2. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-13321295C1147188@2393932-13320B32EE1CDAF8@1>.

in the convent of Saint Agustin, in Guadalajara. This represented the insertion of the liberal arts within the bastion of colonial power in Mexico. The Licenciado<sup>231</sup> Gutierrez pronounced an elaborated explanation of how history showed the way in which the arts can in fact be promoted from below, from the people. Xenofonte, Aristotle, Thearion, and even Franklin were mentioned on the purest comparative Mexican style. However, Gutierrez used “Plautus, Esopo and the black man Eustaquio” to say that prior to their distinguished place in world history they had been slaves. “In a republic, says a republican, all arts must be liberal,” and then Gutierrez asked how the simple man can understand the simplest political matters if he does not read. How can the illiterate man demand law and respect of his rights when he cannot even quote them because he probably has not even seen them on paper or heard of them? In a country where the power of one can be imposed easily, the decision must be taken by the “authority of the numbers and not classes.” The lack of education translates as lack of independence, and such a condition facilitates the extraction of raw materials by the metropolis. Gutierrez finished his speech with a question: And what else does Europe do with us? Artisans from the republic engrave deep in your hearts that the ‘perfection of the arts is the conservation principle of liberty’ ...”<sup>232</sup>

Education, the improvement of the arts as industry, and the basic liberal principles of individual participation would, according to Gutierrez, promote a republican independence from tyranny

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<sup>231</sup> Licenciado denotes a person who has a license, but generally speaking it refers to a law graduate. Until late twentieth-century Mexico, the figure of the Licenciado represented erudition, therefore the most common “letrado” or lettered man, an intellectual, would be a Licenciado.

<sup>232</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), April 6, 1842: 3. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-13321295C1147188@2393932-13320B32EEC42B00@2>.

and Europe's hunger of raw materials. Gutierrez spoke in 1842, twenty years into the Mexican independent period.

Politicians in the mid-nineteenth century expressed themselves through a discourse of varied tonalities not exempt from contradictions. Some liberals used the term of popular sovereignty as a way of excluding the pueblo on the basis of gender, education, and race. However, the discursive practice of making the people the repository of sovereignty implied that subalterns “voted in elections, vigorously campaigned for favored candidates, pressured representatives from legislature's galleries, marched in demonstrations, joined political clubs, sent petitions, served as citizen soldiers in national guards, organized boycotts, attended political ceremonies and speeches, and interpreted abstract political theories to make them meaningful for their daily lives.” Such behavior eliminated the exclusivity citizenship rights, normally associated with the elite and a few *letrados*, which made of the average Mexican citizen a far more participative person than a counterpart in the U.S. or France, where voting rights were more limited by race, ownership and gender.<sup>233</sup>

The ephemeral and bountiful era of American republicanism had a caveat. However inclusive the factional politics pretended to be, liberal and conservative groups had an overlapping area in which they agreed while engaged in the struggle to destroy the colonial era apparatus: “Mexico had fallen to the wayside in its race to modernity—largely, many in the *letrado* class claimed, due to the failure of its non-European, ignorant, and backward people.” Hence the improvement of the pueblo became a necessary condition since most of the three

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<sup>233</sup> Sanders, *The Vanguard*, 109.

million who had some European ancestry were illiterate, and the four million Indians were not considered apt to be part of a society that despised their “semi-savage” state. The intellectuals who adamantly exposed such views were not conservative; in fact they held the Spanish colonial era and the influence of the Catholic Church as culprits for the population’s unfitness to enter the civilized world.<sup>234</sup>

Liberals in Mexico could not escape the attraction of choosing a scape goat embodied in the Indian question; nevertheless, liberalism still had a *sui generis* meaning and interpretation. Thus, following Stefan Gandler, Mexico entered the universal modernity through the political liberalism of Juárez, a paladin of the Reforma. Indeed, modernity was presented to the world as a European conglomerate of philosophical fights; however, the French Revolution and its political ideals did not find a deep echo in the subcontinent considered the crib of modernity. On the contrary, the project of political liberalism found its true resonance in America—the Continent.

During the Juárez era, Europe was mainly a feudal sub-Continent, where the influence of the French Revolution was almost imperceptible, as opposed to what generally is believed.<sup>235</sup> However, in Mexico the construction of the modern nation-state advanced without hesitation in similar terms: the monarchical subjects—just as in the French Revolution—became the new citizens of a state, which, by using abstract universal definitions appealed to ample exclusions of segments of the population. As noted in Chapter 1, the *casta* system and its visual technologies, *casta* paintings, set the new classification under a changing economy. As an example, Gandler

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<sup>234</sup> Sanders, *The Vanguard*, 62.

<sup>235</sup> Stefan Gandler, *El discreto encanto de la modernidad. Ideologías contemporáneas y su crítica* (México: Siglo XXI Editores, 2013), 29.

cites the case of the territories that form today's Germany, and which after the occupation of the French troops had representatives negotiating with Napoleonic authorities in order to avoid at all cost the opening of the Jewish ghetto and the adjudication of the same rights that the Christians enjoyed. It was not until 1812, with the political intervention of Napoleon that the city applied the Napoleonic Code to all male adults including the Jews. This triumph did not last long since in 1814, after the liberation of Frankfurt, the first thing the representatives did was to re-establish the ghetto, where the Jews went back to living as they had under medieval Christian laws.<sup>236</sup>

Surprisingly, as Gandler points out, the decision to cancel the application of the French ideals, *liberté, égalité, fraternité*, was supported by one of the most celebrated citizens of Frankfurt, Johan Wolfgang Goethe. And similar expressions can be found, at the time, throughout Europe. The anti-liberal reaction would be in the core of the alliance between clergy and army in the Spain of the first three decades of the twentieth century, which violently rejected the declaration of a Spanish Republic. Hungary after the liberation from the Soviet yoke could only find the symbols for a new state among the remnants of the Austro-Hungarian monarchy.<sup>237</sup> Vernacular reactions throughout the world did not allow Mexico to stand alone in the making of a globality, and modernity that functioned in terms of exclusivity and alliance to a mythical past.

News and articles published in Mexico corroborate the intellectual environment and *Zeitgeist*. A multi-segment journalistic piece that appeared on February 1842 titled "Mérito, fortuna, errores, crímenes y desgracias de Napoleon Buonaparte" [Merits, fortune, mistakes,

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<sup>236</sup> Gandler, *El discreto*, 29.

<sup>237</sup> Gandler, *El discreto*, 30.



crimes, and disgraces of Napoleon Buonaparte] praised the genius of the French warrior and Emperor. After a detailed account of Napoleon's unjust campaigns in Africa, the criticism begins with the interference in terms of other nation's independence. According to the author, Napoleon chose peace and forged a future process of independence via the resurrection of the Cisalpine republic: "even when to the interior he ruled with a true absolute and arbitrary authority behind a constitutional and limited veneer, Napoleon did not abuse such extraordinary power, instead he employed it in the reconstruction of the revolution, and the parts of the social building."<sup>238</sup> Napoleon's unforgivable error, more than falling in the temptations of despotism, was against philosophy, according to the *Siglo Diez y Nueve*. The "sin" consisted of "retrograding" a philosophical project in detriment of the Revolution. Discrediting the "liberal ideals" and at the same time reestablishing the "empire of ignorance and preoccupations" forced a return into the barbaric centuries. An inexplicable error committed by a man who knew well his time but did everything in his power to service despotism: "an impiety of a man who owned himself to the Revolution and the lights which started it."<sup>239</sup> At least in the paper, for the Mexican intellectual, the ideals of liberalism were sacred.

Gandler argues that the ideals of the French Revolution were not the ultimate historical project. However, they can certainly be considered an indispensable way of fighting against the exclusion and repression forms inherited from feudalism. The latter had a more solid presence in

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<sup>238</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), February 11, 1842: 2. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-1333BDDD291F9E50@2393878-1332087D6EF59B40@1-1332087D6EF59B40@>.

<sup>239</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), February 11, 1842: 2.

the American Continent than they did in Europe. This is mainly because of the systematic relationship between political liberalism and anti-colonialism. Hence the comparison between Juárez and Robespierre: The Jacobin knew perfectly that no human being can be truly free while obstructing the freedom of other human beings.<sup>240</sup>

However the liberal concept of equality implies a contradiction, as the very concept used to surpass the old forms of abuse and oppression becomes the new platform of repression and exploitation: the concept of equality—not coinciding with the physical, psychological, or civilizing reality of human beings—can only be applied by “implicitly negating the real infinity of difference.” This implicit negation of real difference gives strength to those predominant forms of being, in particular regions or times.<sup>241</sup>

In effect, the dominant ideology permeating the written media, starting in the second half of the nineteenth century, would implicitly praise liberal principles as pillars of the nation. The sentiment of “we-ness” became more selective throughout the years and hard liberals would raise their voices against imperialism—as in the case of Napoleon—but more than anything against the betrayal of liberal principles. Such sentiment grew stronger against non-Latin foreigners. In a heated article on the nature of the foreigners who walked into Mexico “as homeless and beggars, displaced by their own countries” but somehow found fortune and respectful lives, a journalist touched the topic of popular culture. The narrative of a confrontation between “someone who had all the Mexican appearance” and a foreigner included comment from all parts involved. The

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<sup>240</sup> Gandler, *El discreto*, 31

<sup>241</sup> Gandler, *El discreto*, 32.

foreigner, who “expressed himself as a citizen of the republic, by Plato,” said that Mexican had no aspirations, no freedom, and no qualifications to become republicans nor men of the “Enlightenment and the progress it brought.” The argument began when the Mexican man, in the spirit of civil liberalism, spoke against bull fighting shows. According to the narrator, the foreigner then justified his fanatic position by arguing that bull fighting was as barbarous as the Mexican, and that was the reason he loved both. “How surprised do you think I was when I found out who was this bullfight lover?” The journalist responded to himself: “A Russian!! A Russian criticizing our political institutions, lack of liberty and republicanism...I know, we lack the freedom of the slaves in Siberia and Poland, we do not have the whip of the tsar on our backs!”<sup>242</sup> Denial of civility and liberal ideals became the sin of the Russian, while his Mexican interlocutor sinned by sharing the barbarous fondness of bullfighting—and criticism of the Mexican institutions—with a foreigner who dismissed the noble origins of the Mexican nation as liberal and modern.

The illusion of universalization invested in the internal contradiction of equality, through dialectical means, coincides with the colonizer, making his civilization project the only acceptable one. But for the colonized or the ex-colonies, the idea of equality is “more than the description of a reality that has been achieved or achievable, it is the scream of pain, and the rebellion of the always excluded and forgotten.” Equality is thus the initial claim of belonging to the same society from which they have been excluded: to be equal is the condition to be heard

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<sup>242</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), December 6, 1869: 2. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-13812488C603E6D8@2404038-13811D7B59AAEC40@1-13811D7B59AAEC40@>.

and to surpass invisibility; because “what is completely different may not be only imperceptible, but inexistent...for this reason the colonizers that established verbal communication and civilization exchange with the inhabitant of colonized countries, also sustained long conversations about their membership, or lack of thereof, to the ‘human race.’”<sup>243</sup>

The ideology of sister republics in America that emanated from the belief in a larger Latinité, was soon replaced by a rhetoric of anti-imperial tones. With President Benito Juárez, republicanism had been seen as providing the moral force necessary to defeat an imperial French enemy. But on the other hand, the country needed soldiers and a defensive vision that would incarnate in *hispanismo*.<sup>244</sup> The North Atlantic imperial ambitions had also affected the way in which modernity was perceived in Latin America. Industry as indicator of modernity made Latin American letrados and state builders think in different terms about their region. Latin America was now behind in the race to civilization. Therefore, *Letrados*, of different affiliations—liberals and conservatives—reanimated certain new love for *hispanidad*. In the process of embracing *hispanismo* ideas of universalism (long rejected by Conservatives) became relegated by the ruling elite and ample sectors of the middle class. Latin America once a leader of a shared Atlantic republican tradition, was now behind in the race towards progress.<sup>245</sup>

In a logical manner, the most harmful link between Western industrial modernity, patriotic nationalism, and *hispanismo* was the resurgence of racism and racial thinking. The transformation of castas/vassals into classes/citizens did not happen in the presence of a *true*

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<sup>243</sup> Gandler, *El discreto*, 32.

<sup>244</sup> Hispanismo is the love of Spanish Peninsular culture as emancipatory cultural project.

<sup>245</sup> Sanders, *The Vanguard*, 184.

belief in equality. As seen through the journalistic notes and reports cited, the American republican modernity's universalism fell to the wayside. A new expression of instrumental social hierarchy emerged with hispanismo's anti-African and anti-Indian racism combined. The result gained momentum with an affiliation to the "scientific racism that was gaining hegemony in the North Atlantic (and its celebration of Anglo-Saxons)."<sup>246</sup> Scientific views in the form of positivistic thought, as discussed in chapter V, propelled the notion of a sub-race, enemy of progress, barbarian, and non-assimilable by the civilized order achieved by liberal forces of revolution. Thus, liberalism became the language of universal exclusion. It became the link to a virulent modernity in which race was essential in a manner that surpassed the illusion of the *casta*, social class, and the brotherhood of *Latinité*.

Order and progress, the motto of the forthcoming racist wave hidden behind positivism, became the central argument of a type of liberalism in which economic development clashed frontally with the desire for a healthy political life. Capitalistic modernity had to suppress the idea of revolution (or politics) as engine of modernity. Such suppression implied the cancellation of any possibilities for subaltern's expression of political demands. After all, modernity was tied not so much to the nation-state as it was to the nation and the state. Different entities usually antagonistic, especially within the forced geographical delimitations of modern countries.

Although American republican modernity favored the nation, as Sanders argues, Western industrial modernity needed and fetishized the state.<sup>247</sup> The result was a dangerous combination

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<sup>246</sup> Sanders, *The Vanguard*, 188.

<sup>247</sup> Sanders, *The Vanguard*, 197.

for those who did not fit the ideal population for the nation, and for those who represented obstacle to the development of the state.

In fact, such transformations in the political life were the result of the rise of positivism and the internal tensions in the liberal mind. In effect, after decades of catastrophic social revolts, and ruthless confrontation for the control of the country among liberals and conservatives, Mexico produced a new political class. These political neophytes tired of the burden of the colonial inheritance, looked once more towards Europe with hopeful eyes. The solution resided in the adaptation of the philosophical proposal of French and English positivism. In the Mexican mid nineteenth century became more than a utopian thought as it did in Europe. Positivism became first a pedagogical weapon, and second, an instrument of political control.

The perception of different races, in non-biological terms, gave birth to a series of multinational relations at a global level. Latin America came to be a geographical expression of such a way of thinking. In the beginning it overlapped with vernacular expressions and their interactions with a larger Latinité. The local expressions of a battle among races i.e. Latinos vs Teutons that took place in Europe, defined the way in which socio-political interactions would take place during the process of racial inclusion/exclusion in Latin America. A process of affiliation based on language and culture would soon become modernized—with the help of the language of liberalism—in the terms of science and biology. With the penetration of the state's power in everyday life, its most notable byproduct, biopower, would dictate who would turn into a desirable candidate to comprise the body politic of a modern nation-state. Beyond the metaphysical and strict order offered by the colonial regime in Mexico another type of abstract promise appeared. Liberalism's promise of equality caused pruritus among the old casta

members who eventually would evolve into the bourgeoisie or the social class of merchants, rulers, and thinkers. The old belief in the lineage and purity of blood turned into thematization. Under such intellectual exercise race became a theme of atavism, inheritance and the scientific explanation of all those aspects of socio-political life that needed to be changed in order to achieve technological progress. Just like the spectacle of Maximo and Bartola, the failures of nature could be isolated and exhibited—not only for entertaining purposes but—as a way of warning society: difference is abominable, atavism is the result of a personal choice associated with lack of development and savage customs. Civilization as the antidote of backwardness in humanity should be the positive way to follow, and in Mexico the doctrine of positivism would make backwardness go away. The war among races—pure race as politics—in a brutal transformation and adoption of new racial technologies, would turn the incipient Mexican state into a vanishing machine for the rest of the nineteenth century and the entirety of the twentieth.

## CHAPTER 5

### THE STATE: RACE AS A VANISHING MACHINE

“However, Navarro did not count more than 3,676,000 [Indians] in 1810. Why the low number after so many years of peaceful colonial government, which instead of persecuting Indians used to protect them? Navarro used to do research about this race, and probably exaggerated on its importance in order to disguise the adverse appreciations related to their progress... We hope he was wrong about the diminishing number of Indians living in Mexico between 1810 and 1858... Nevertheless, there is no doubt that such race is in decadence.”

Dr. Jourdanet<sup>248</sup>

“In the moment in which there has been great efforts to promote the flow of European immigration into Mexico, I believe that it is the duty of the press to work in favor of instructing the immigrants, and the very own country, about their true interests.”

Dr. Jourdanet<sup>249</sup>

The Mexican writer Ignacio Manuel Altamirano was born in 1834 in Tixtla, Guerrero, and would soon be adopted by Don Francisco, a criollo who had acquired wealth via his relationship with another fortunate and celibate criollo, Sebastian de Viguri. Sharing a last name with his adopted godfather, Altamirano had to be singled out as the “Indio” in order avoid the homonymous confusion. The prominent writer always bragged about his “Aztec ugliness” and most literary critics think that it was a sign of vanity given the harsh life he had as a child. Thus his childhood contrasted with the exceptionalism of his success as professor and novelist. As the recipient of multiple scholarships for boarding schools, he suffered the segregation norms of the

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<sup>248</sup> Denis Jourdanet, “De la estadística de México. Considerada en sus relaciones con los niveles del suelo y con la aclimatación de las diferentes razas humanas que lo habitan,” in *Boletín de la Sociedad Mexicana de Geografía* (1865): 242.

<sup>249</sup> Jourdanet, “De la estadística,” 227.



Spanish system of castas in his natal Tixtla. Customary at the time, the dark-skinned Altamirano used to be placed with the indigenous group of children. But indigenous students focused largely on prayer, so he would miss the real benefits of private education. Using his influence over the school's administrators Altamirano's father had his son transferred to the group of white criollos, or *niños de razón* [children capable of reason]. The imposition of an Indian in the classroom caused loud and bitter complaints. So, the teacher "almost as if using a magic spell conjured an "identity transformation by declaring: 'From this day forward, this child shall be with reason!'"<sup>250</sup>

According to Joshua Lund, Altamirano's work promoted a personal branding of Indian-centered nationalism, however rooted in a tradition of liberal individualism. Altamirano, part of a bipolar social order (Indio-Criollo) witnessed the construction of a mestizo state and its frantic production of a "fictive ethnicity" that would define the Mexican race-nation articulation. The proposal of *mestizaje* never implied that actual mixed people would take over government or industry, nor that social advantages "attached to visible whiteness" could disappear. It would only signify that "through the rise of the liberal republic, Mexican intellectuals reinvented national identity, and this process involved the imagination of a newly racialized protagonist of national progress: the mestizo."<sup>251</sup>

Mestizaje has a strong culturalist logic. The mixed-race subject cannot be in reality appreciated through empirical quantification—as opposed to the hard segregationism of the U.S.

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<sup>250</sup> As cited by Josua Lund, *The Mestizo State. Reading Race in Mexico* (Minneapolis: University of Minnesota Press, 2012), 36-38.

<sup>251</sup> Lund, *The Mestizo State*, 39.

and the one-drop standard—which makes that all “behaviors, practices, and social status come to the fore in Modern Mexico’s race politics.”<sup>252</sup>

Altamirano’s life, his struggle and aspirations, could not be understood without exploring the socio-political context of the nineteenth century: the emancipated, incipient liberal state. The state will be dissected in this chapter with the sole purpose of exposing a built-in mechanism of homogenization that allowed it to act as a synthesizer of a single national race: the mestizo. A term specifically designed to devour and/or eliminate the otherwise non-assimilable Indian. Mestizaje in this way and throughout the chapter must be understood as an effective vanishing technology that displaced the focus of attention from a single origin to a positive *collision*, between Spaniards and Indians.

Legal proceedings in pre-independent Mexico showed influence of the language employed by the technology of race. In effect, when Diego de Santa María and Pedro Pablo were apprehended and taken into the custody of Don Bartolomé de Echanove Echeverri, during a summer day of 1728 in the City of Puebla, their names were followed by the tag and qualifier: mestizo. The long judicial process involved many other persons, among them Don Francisco Gonzalez, municipal commissar, and Don Bartolomé de Echanove, who served as a sort of district attorney. Only the two defendants were racially tagged as the two mestizos accused of the possession of thirteen sheep, three cured sheepskins, and some kilos of meat. What initially started as a case of theft turned into an investigation into unregulated subcontracting: Diego de Santa María and Pedro Pablo, both unlucky mestizos, were in fact selling illegal sheep heads,

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<sup>252</sup> Lund, *The Mestizo State*, 39.

skins, and meat butchered in a slaughter house that had no city permits.<sup>253</sup> There was no theft involved, only tax evasion due to unlicensed slaughter operations. To be sure, the legal description made by a scribe who was under the “light” of the *Foucauldian* scenes of power coincides with the power relations explained in Chapter 2. Such scene projected by the influence of the casta system, qualified the social status of the defendants, and simultaneously gave hints of the moral credit inherent to their racial condition. Thus, the denomination mestizo in 1728 had more to do with a socio-economic niche and the war among races implied in such hierarchy. A different situation from the case of Ignacio Altamirano, whose condition of mestizaje-by-education had built-in racial and national aspirations explained through the language of liberalism and the illusion of universal equality. The “mestizo” after the names of Diego and Pedro was designated to place them in their correct social shelf. The acquired “mestizo” status associated with Altamirano implied the hope of never seeing the Indian inside him again.

The evolution and change in the meaning of mestizaje had to do with the needs of a nation for the Mexican state. The nineteenth-century transformation in the conceptual structure of the state evinces juxtapositions within the role of government and institutions, particularly in the case of Mexico. As seen in the cases of Altamirano and Santa Maria the education and judicial systems took part in the political economy of race. Mexico at the time was dealing with a multinational territory and a political transition to a liberal republic. Such transformation would necessarily affect the development of the state.

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<sup>253</sup> Archivo de Actas. Acta titulada “Abasto de carne de oveja” (1728) Archivo Municipal de Puebla de los Ángeles. Ficha 3038, Tomo 167, Fojas 96-103.

In order to understand the transitional moment that defined Mexico in the transitional moment of study one must first comprehend the origins and functions of a state. Thus, classic political theory argues that the people, those governed, made a covenant to ensure their physical protection, thus creating a huge and terrifying power that at the same time is capable of imposing peace. Hobbes's state theory originated when "a representative person is or a corporation comes to being by way of a covenant between individuals. For its part the individual or corporation elevates those that entered into the covenant to a unified person, namely, the state."<sup>254</sup>

To be sure, the state is an absolute human creation. While being identified with the "leviathan," it symbolized the fusion of a human and an animal, capable of excesses, and possibly a victim of its own fallibility. Perhaps that is the reason why Schmitt was punctual to state: "the *civitas* or *res publica* is a huge man, a huge leviathan, an artificial being, an animal artificiale, an automaton, or a *machina*."<sup>255</sup>

Such a machine, a product of human intelligence, must be understood initially within the frame of its own time—the seventeenth century. For this reason, Hobbes pointed out the huge man state's need for a "soul." The soul of the machine could not be anything else but the "sovereign-representative." A man as soul of this machine was vulnerable to time, which explains its temporality, fallibility, and susceptibility to transformation.<sup>256</sup>

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<sup>254</sup> Carl Schmitt, *The Leviathan in the State Theory of Thomas Hobbes. Meaning and Failure of a Political Symbol* (Chicago: The University of Chicago Press, 2008), 19.

<sup>255</sup> Schmitt, *The Leviathan*, 19.

<sup>256</sup> Thomas Hobbes et al., *Leviathan, or, the Matter, Forme, & Power of a Common-Wealth Ecclesiasticall and Civill* (London: Printed for Andrew Ckooke i.e. Crooke, at the Green Dragon in St. Pauls Church-yard, 1651), 7-8

According to Hobbes, personal security became the central preoccupation of the state. In this fashion, it was the democracy of the state of nature, the pre-*civitas* state that implied the acknowledgement of the possibility of being slayed by everyone else. In other words, “everyone is therefore the foe and the competitor of everyone else –the well-known *bellum omnium contra omnes* [war of all against all]. In the ‘civil’ stately condition all citizens are secure in their physical existence; there reign peace, security, and order.”<sup>257</sup> Even when the idea sounds attractive, what constitutes the state as guarantor of the people’s security is by all means the definition of police.

Thus, security became the leitmotiv of the state, and police its more vital institution. Following another obligated reference in terms of state theory can provide additional meaning in the construction of the state’s foundation. Carl Schmitt, for example made comparisons with the meaning of divinity in the elaboration of the state construction. Schmitt associates this fact with the notion of peace as a derivative of the police. The appropriation of the condition of peace emanated from the police “formula of Francis Bacon of Verulam.” In the argument Bacon spoke of man becoming god to man, *homo homini deus*, whereas in the state of nature man was wolf to man, *homo homini lupus*. According to such conception the terror of the state of nature drives anguished individuals to come together. Fear rises to an extreme which produces a spark of reason (*ratio*) that “flashes, and suddenly there stands in front of them a new god.”<sup>258</sup> That is to say, men in the context of the state can incur in the usurpation of God’s functions. Fear as the

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<sup>257</sup> Schmitt, *The Leviathan*, 31.

<sup>258</sup> Schmitt, *The Leviathan*, 31.

bonding agent among men can make other men appear as wolfs, threats; while others appear to be gods.

The Geographical Survey of Sonora, used amply in this dissertation, encompassed a number of research pieces by renowned members of the Geography and Statistics Society. The survey was published in 1865, which is to say, in the midst of the Second Mexican Empire backed by the French through Maximilian of Hamburg. Miguel Arroyo, editor in charge of the volume, stated that even when the Survey had complied with the obligation stipulated in the articles of its own statute, the purpose of the “work [was] to produce a statistical record for the Empire, without which the government would be unable to reorganize the public administration and be of the outmost service to society.”<sup>259</sup> The message, broadcast constantly within the Survey and produced in the context of an imposed imperial government, carried the liberal idea of progress. It became a compass for all those entrepreneurs, local and foreign, interested in the exploitation of the vast territory of Sonora. However, another type of message was essential and emphatically written within the lines of the Survey. The words used in the narratives about Sonora exuded fear of the Indian barbarous. Progress and fear reflected clearly the leitmotiv of the state and a centralized government.

However, the fear of the Indian did not dissipate with the end of the imperial government. After the defeat and expulsion of the French occupiers, a renewed liberal effort came to power with Benito Juárez. A decade later Porfirio Díaz would not only promote the forced modernization of the nation in its central region, a territory historically vital due to its mining

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<sup>259</sup> Miguel Arroyo “Introducción” in *Boletín de la Sociedad Mexicana de Geografía* (1865): 8.

activities and concentration of political power. But he would unconditionally support the Sonoran elite who had had a long history of animosity against the original inhabitants of the region.

Hence, Porfirio Díaz and the Sonoran politico-military elite incarnated the *Leviathans* of modern late nineteenth-century Mexico. As powerful politicians they could decide the moments of exception. A strong state, according to the theory of sovereignty, uses a police discourse that confirms and increases the power of the state. But the original goal is to make good use of its power by ensuring the safety and happiness of all subjects. If the exception in jurisprudence can be compared to a miracle in theology<sup>260</sup>, then a handful of Porfirian politicians were *miraculous* in an unconventional fashion.

In effect, the conflict between the Mexican government and the Yaqui tribe of Sonora had a precedent not only in the inheritance of the colonial era (and the parenthesis of the Second Empire) but in the liberal struggle of the second half of the nineteenth century. Capitalist development during the war of La Reforma signified the beginning of the nightmare for the Yaquis and other Indigenous peoples in Mexico. The Juarez liberal victory meant a triumph of the new land owning class that placed on the market property belonging to the Church and Indian communities. The elimination of the Church's feudal structures created a bourgeoisie that relied on the Jacobean methods of the plebs, mixing modes of production that involved pre-capitalistic and capitalistic features such as the hacienda. The loss of national territory to the U.S. and the separation of producers from their land created pauperization and *proletarianization*. Those peasants

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<sup>260</sup> Gareth Williams, *The Mexican Exception. Sovereignty, Police and Democracy* (New York: Palgrave MacMillan, 2011), 6.

integrated the new capitalized agriculture (depending on peons) in the hands of new small land owners, which were linked to the world market.<sup>261</sup> Hence the relevance of the hacienda system.

Standing in the threshold of the modernization and pauperization caused by the liberal development double-speak, the surveyors of Sonora had expressed their concern a few years earlier. José Francisco Velasco observed that “the natural inclination of uncultured nations of the North [the U.S] to transmigrate have been fueled by other tribes up north and the Anglo-American government, which at the same time builds an impenetrable barrier with the progression of its population and promotes friendship via commerce and beneficence.” That is to say that Velasco was afraid of the effects implied in the supposed alliance between the North American Indians and the US government. The development “welfare” programs for the Indian groups in the U.S. would represent a containment. Such a “barrier” would only signify that “the impulsive forces [of the Apacheria] would launch themselves over our establishments and settlements.” In this way the US actions became a threat for Sonora. The Department had seen some displacement of its peoples, and such mobilization should have been an example of how to deal with the Apaches.<sup>262</sup>

Thus, a form of forced capitalist development consolidated the destruction of the free villages and communal land through capitalistic farming. For example, in Morelos the sugar cane industry still showed forms of colonial exploitation combined with the new production style.

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<sup>261</sup> Adolfo Gilly, *The Mexican Revolution* (New York: The New Press, 2005), 19-21.

<sup>262</sup> José F. Velasco, “Continuación de la Estadística de Sonora,” in *Boletín de la Sociedad Mexicana de Geografía* (1865): 96.



Peasants actively resisted the change and they represented the link between the pre-capitalistic production relations and the ideologies that fed the Revolution in the early twentieth century.

As noted throughout the Sonora Survey a language of fear became common. The use of terms such “barbarous” and “savages” would be equated to ontological categories that led the conversations to the field of security for the citizens under the possible attack of the Indians. The state as animal-machine with a soul as conductor, that possesses the ability to transform wolves into citizens could function as guarantor of physical integrity only under “unconditional obedience to the laws by which it functions.” Any defiance could lead to a “pre-political” condition of insecurity, which is to say that physical security is at risk. The state of nature or life in a state-less phase of human existence meant danger because justice and truth in such state never produce peace but war.<sup>263</sup> Such had been the justification of the war against Indians since the de Las Casas-Sepulveda confrontations. The explorations to survey the land of the Ceris and Yaquis would certainly not be the exception.

In the legal arena, the liberal laws that dismantled the massive land ownership of the clergy also abolished other types of communal land ownership. This liberal precedent later paved the way for the institution of the Porfirian hacienda. Such production system concentrated large plots of land in the hands of only a few owners. Legal manipulations produced additional severe injustices such as the Sonoran constitution’s denial of Mexican nationality to members of Yaqui tribes.<sup>264</sup>

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<sup>263</sup> Schmitt, *The Leviathan*, 45.

<sup>264</sup> Paco Ignacio Taibo II, *Yaquis. Historia de una Guerra popular y de un genocidio en México* (México: Planeta, 2013), 15.

Almost two decades before the Second Empire, Vicente Calvo went to Sonora to try to acquire land and wealth. He wrote a description of the Yaquis, saying they were of regular height and weak due to all the disorderly customs they have. “Their aspect is repugnant and their skin is bronze [dark tan].” Oddly, years later, the American journalist John Kenneth Turner contradicted the account by stating that Yaquis had an impressive physical development. In his trips he learned that Yaquis had broad shoulders, strong legs and angled physiognomies.<sup>265</sup> The fascination caused by the Indians appearance produced different effects depending on the eye of the beholder. In the purest Levinasean terms an ontological language would only consider the Indians as representations—repugnant or ideal—beyond the reality of the other.

But Calvo’s description seemed endless. He argued that Yaquis wore no shirts or underwear, that they were very poor, and that “vengeance was their vice of predilection. Their indolence is reflected in the custom of spending all day long on the floor drinking liquor... working only when it is totally unavoidable... They are vile, cowards...Thieves as the other tribes, they steal cows, horses and oxen... they are so lazy that if they open a door, they leave it open. In order to talk they scratch their heads first and if they are women, they scratch their thighs, those *semi-savages* have a lugubrious and melancholic song which they perform with obscene instruments.”<sup>266</sup>

Such language seemed to be the norm among explorers and prospectors concentrated in the Mexican Northwest. As seen in previous chapters, Tiburon Island became a strategic point

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<sup>265</sup> Taibo II, *Yaquis*, 24.

<sup>266</sup> Taibo II, *Yaquis* 25.

for commerce and communication between Alta California and Baja California. The federal government sent military forces to occupy the island in an effort to survey the frontier, while securing as many land parcels as possible. The occupation of the island became difficult due to the "continuous and repeated revolutions" organized by the Ceris Indians. Soldiers and settlers often accused the Indians of animal theft and some murders, and the government responded with "denial" of protection" [quitarles el abrigo de la isla]. To be clear, that denial in reality meant to deprive them of citizenship, an action that would convert the area from a community ruled and administered by the Ceris into a hub or transit route for the new central government.<sup>267</sup>

Porfirian officials and military leaders might have been pioneers in the implementation of *biocratic* measures or ways in which political power affected directly the life of the population. Additionally, they thought that the Yaquis and Ceris were not the legitimate owners of their land. Based on the "scientific" basis of racism, "the federal government opted to completely extinguish the Yaqui Indians in Sonora,"<sup>268</sup> a task promoted on many fronts including the one on the Ceris and Tiburon Island.

By 1904 the Yaqui Valley was again in chaos. Governor Izabal ordered apprehensions and executions of non-combatants everywhere. Yaqui rebels would not yield in the resistance against what they thought was a second attempt of colonization. Because of his fierce attitude in this campaign, many called him "the second god," reflecting the power of life and death he had

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<sup>267</sup> Velasco. "Continuación," 29.

<sup>268</sup> Taibo II, *Yaquis*, 227.

over the Indian communities. He ordered arrests, torture, hangings, and execution—but oddly not among the peons of his own haciendas.<sup>269</sup>

The state as the maximum “lawgiver” must subjugate all law and make all laws. If it fails in the attempt to do so then it cannot prevent the return to the state of nature. The impossibility of functioning as a “big machine... technically perfect,” causes a break down “because of rebellion or civil war.” Here resides the paradox of the state. The development of war within a state does not always constitute a right to resist. In medieval societies where unlawful rulers prevailed there might have been a right to resist. The “politically recognized right to civil war—that is the right to destroy the state” only exist within the state itself.<sup>270</sup>

However, the right to start a civil war does not imply that all people living within the same geo-political borders can enjoy it. The revolutions initiated by the Apaches, Yaquis, and Ceris had to be crushed to ensure peace and stability for the true citizens of the nation. In a constant exercise of homogenization, José Francisco Velasco uses the first pages of a second intervention before the Geographic Society to describe the Apaches. The term “Apache” seemed to be interchangeable and flexible enough to encompass a multitude of other Indian tribes from the North. “Something has been said in relation to the tribes of disastrous existence...a menace to the rest of the republic...However, being this a matter of vital importance for the country, in terms of pursuing for years a war of desolation and extermination against the said savages, it is necessary to give our readers an idea about the character, life, customs, hostilities and other

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<sup>269</sup> Taibo II, *Yaquis*, 197.

<sup>270</sup> Schmitt, *The Leviathan*, 47.

personal and local circumstances pertaining these barbarians.”<sup>271</sup> The single paragraph preamble provides a solid idea of what Velasco repeated throughout another speech for the Society. One can expect to read that most of what the Apaches did had to be considered illegal, and therefore, punishable by death.

The cumuli of laws born from the state are concentrated in a constitution, made by humans. A state that operates under codified laws is a “constitutional state.” Its justification lays under the general legality of all its expressions of state authority. A closed legal system establishes the claim to obedience and justifies the elimination of every right of resistance.<sup>272</sup> The answers to understand the birth of the state and the justification of its existence in a contemporary version are encompassed in the state’s capacity to provide security and to transform right into law, in other words “the specific justification of state coercion is legality.” Frequently legality can be confused with legitimacy. In the same tone “legality is the positivistic mode of operation of bureaucracy. The modern state and legality, therefore, belong essentially together.”<sup>273</sup>

“Every single savage learns how to handle weapons from a very young age, their senses are very perspicacious, they acquire an incredible resistance [to the elements] through a life of hunting and nomadic style.”<sup>274</sup> The threat implied in Velasco’s narrative is not only a reminder of the obvious danger the Indians represent to civilization, but a call to mobilize a bureaucratic

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<sup>271</sup> Velasco, “Continuación,” 81.

<sup>272</sup> Schmitt, *The Leviathan*, 66.

<sup>273</sup> Schmitt, *The Leviathan*, 66.

<sup>274</sup> Velasco, “Continuación,” 86.

apparatus in a more efficient way. The Ceris were already at the margin of the law, outside social classes. Velasco called for expediting more extermination resources from the new sovereign empire.

In this way, it can be said that the state and its alter ego, the Leviathan, needs a soul, the sovereign-representative, but this binomial expression needs energy to function. That energy is called political power, which is “a faculty, a capacity, that one possesses or not, but more precisely it cannot be taken. Those that can be assaulted, taken and dominated are the instruments or the institutions mediating its own exercise.”<sup>275</sup>

According to Enrique Dussel, power can be better understood as *potentia*, a starting point, and *potestas*, as the power outside itself. This ontological scission can be represented with a seed as *potentia*, or the community’s power that is not yet but has the force and the future possibility of being. *Potestas* is the tree born of that seed, or the community institutionalized in possession of the means to exercise its own power. Therefore, political power is always inherent to a community, and becomes manifest when the same is exercised through the institutions.<sup>276</sup> The real exercise of such *potestas* could be reserved for a perfect democratic and politically participative society. As close example, the expression of *potestas* was the thrust that initially inspired the wave of American republicanism in the aftermath of the Mexican Independence.

During the process of nation-state building the spreading of a feeling of belonging to a nation was key. Previous chapters have noted the importance of citizenship and the feeling of

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<sup>275</sup> Enrique Dussel, *20 Tesis de Política*. (México: Siglo XXI Editores, 2006), 29.

<sup>276</sup> Dussel, *20 Tesis*, 31.

being Latino or a modern subject. In the case of the state a similar process occurs that involves more than a feeling. The exercise of power makes the state *tangible*. Given that the state is intangible and invisible, power has to be personalized before it can be seen; it needs to be symbolized before it can be desired. Nothing can personalize power better than the manifestation of *potestas* and *potentia*. An example can illustrate such a mechanism. During a long and painful litigious process, the citizens of Xanenetla fought for their right to have their access to a quarry. Private contractors interested in the same quarry took the case to the Puebla municipal authorities complaining on the intransigence of the “indigenous” inhabitants. Contractors and municipal officials generally referred to the citizens of Xanenetla as indigenous, preempting certain behavior. However, in 1829 the *Ayuntamiento* had no other option but to listen to their arguments for not allowing other contractors to exploit the quarry. The concern was that exploiting the quarry would have polluted their river. After all, the post-Independence rhetoric was of republican inclusion. The *acta* [deposition] states that the Indians must be “educated” in this matter (*hacer entender*), since the common perception at the time was that the Indians did not have reasoning capacity and therefore were very obstinate. Even when they had to negotiate their access via an agreement with the local church, their claims had to be heard when the Indians of Puebla raised their voice.<sup>277</sup> This case demonstrates that power does not only manifest via those who are traditionally powerful. The means to exercise such power as *potestas* can also be understood as subaltern action and negotiation. These type of citizen’s power manifestations were clearly expressed through multiple peasant rebellions during the nineteenth century.

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<sup>277</sup> Archivo de Actas. Archivo del Ayuntamiento de la Ciudad de Puebla de los Ángeles. Ficha 2405, Tomo 128, Fojas 104-135.

Mexican peasants claimed the principle of municipal autonomy as a means of preserving their ancient ways of community government. The elite's discourse was appropriated by the subaltern classes numerous times. Such practice provided legitimation to insubordination acts which had the goal to alter the status quo.<sup>278</sup>

Power flowing, lingering, and accumulating in many localized places became the norm at the crucial moments of state formation in Mexico. Such political phenomena developed not in the ideal and smooth context portrayed in the texts of liberal theoretical framers such as Hobbes and Locke. In Mexico transitional economic and political momentum always encountered the friction of a varied racial topography. In September of 1822, the Constituent Congress ordered the elimination of all *casta* racial identifications from any public or private documents. But the new system that emerged merely substituted the previous distinction between Indians and “people of reason” with a new categorization between the poor and the rich. As a result, the ruling elites shifted their preoccupation to the clear identification between two different races or modes of being. Lacking a proper class struggle, the incipient and antagonistic classes were defined by racial elements, and developed a war, *internal war*,<sup>279</sup> within the borders of the Mexican nation-state. In order to avoid an openly and formally declared internal war, elites and other influential members of society—such as Altamirano—looked for ways to bring order to a *casta*-less society, which had started to exhibit class conflicts. The answer was *mestizaje*. The ideological project of *blanqueamiento* [whitening] known as *mestizaje* had as one of its major

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<sup>278</sup> Rhina Roux, *El príncipe mexicano. Subalternidad, historia y estado* (México: Ediciones Era, 2005), 84.

<sup>279</sup> This is the war as suggested by Michel Foucault, and the internal war as a questioning of the state rule, which can develop a civil war as noted by Schmitt.



goals the depuration of all negative indigenous traits contained in the racial union of Spaniards and Indians. It would eventually take place allowing the nobility and energy of the European people to dominate the process of nation-state development. Even when the Indian was considered a problematic part of the nation most intellectuals suggested a non-violent solution, hence avoiding the physical extermination of the Indians. Their proposal often included the elevation of the Indian to a civilized life through education. And in the most radical cases the project included miscegenation with European colonizers as means to accelerate the effectiveness of mestizaje”<sup>280</sup>

To be sure, the Mexican state and its intellectual elites attempted to resolve the race problem through a type of race technology, or what Ma. Eugenia Sánchez and Jorge Gómez call *Ideología Mestizante* [Mesticizing Ideology]. Such ideology took its main ideals from a taxonomic and colonial system that bestialized the castas. The European Enlightenment and its disciplines—such as anthropology, craniology and physiognomy—contributed to the formation of a scientific type of racism, which attempted to define social hierarchies and moral qualities departing from body appearance and skin tonalities.<sup>281</sup>

Quickly after its transition to a liberal republic, the Mexican modern state would become a mestizo state. And just like in the case of Altamirano, a technological process of *blanqueamiento* (whitening) was required in order to make the retrograde elements of the Indian

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<sup>280</sup> Jorge Gómez Izquierdo, and Ma. Eugenia Sánchez Díaz de Rivera, *La ideología mestizante, el Guadalupanismo y sus repercusiones sociales. Una revisión crítica de la “identidad nacional”* (México: Lupus Inquisitor), 55-57.

<sup>281</sup> Gómez and Sánchez, *La ideología mestizante*, 41.

race disappear. The new project of nation-state construction depended on a strategy of body politic depuration, a cleansing or gardening to eliminate any weeds.

A glimpse at the interweaving of power relations embedded in the state's functioning clarifies and exposes the obsession with the production, identification and, annihilation of an enemy of the state's body politic. Braulio Rojas pursues a connection between the nature of the liberal state and the common practice of the *forced disappearances* characteristic of many Latin American dictatorial regimes. He argues that liberalism, or the language of capitalism as Lasurdo points out, is committed to the cleansing of the body politic. In order to do so the liberal state may promote *disappearances*, whether they are physical or symbolic.

The consideration of a confrontation between “friend” and “enemy” à la Schmitt allows Rojas to link the twentieth-century physical disappearance, not only with death, but also with liberalism's economic significance during the emancipation epoch in Latin America. The logic of the friend/enemy, which according to Schmitt is the foundation of all politic, has a tendency to dissipate within any logic inherent to liberal economy. Liberalism attempts to resolve a typical problem of economy's spirit that implies competitiveness. On the one hand, the figure of the enemy appears as a competitor from a commercial angle. On the other, it becomes a discussion adversary strictly from a symbolic point of view, differences among adversaries can be negotiated avoiding real violence. In the economic arena there is no room for enemies, only competitors and discussion adversaries as in the case of the Xanenetla quarry dispute. A situation such as this creates a displacement of adverse sentiments focused on an ensemble of men or human groups living under the protection of a state. They can, at least virtually, combat other human groups. Such displacement within an economy of free men and market obscures the

social conflicts naturally inscribed throughout the social body, and becomes the foundation of the concept of “internal enemy.”<sup>282</sup>

In general, such vision, embedded in the thought of Hobbes, Rousseau and Descartes, represents a mechanistic conception in which society is an artifice, “a great machine invented by men, a technical solution for problems traceable to human nature, an ingenious way to approach the goals only known by the evidence of sentiments and reason.”<sup>283</sup>

Thus, the violent act of forced disappearance can be catalogued as a practice of political economy and a major problem for political philosophy, which can be traced not only to the initial and concomitant pillars of liberalism, but to the roots of the modern nation-state. The disappearance, the clearing of space in order to implement a socio-economic model had also multiple discursive “evil twins.” Hence, the logic of disappearance as an accelerator of the process of modernization, found allies and fuel in the contemporary theoretical proposals suggesting the vanishing of the primitive people, who in some cases were the internal enemy i.e. the lower castas, the Mecos.

A concern expressed multiple times throughout the Sonora Survey pertains to the Indians’ living conditions at the verge of disappearance. In such stories the good, peaceful Apaches lived in impoverished towns, and had not even “one single horse to ride...Exterminated like this, reduced to a fifth or sixth part of the population they used to be, some town are totally abandoned like in the case of Saric at the Pimeria Alta, the Altar compression, Agua Caliente,

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<sup>282</sup> Braulio Rojas Castro, “La ‘disparition’ force de personnes comme dispositif de l’économie politique neo liberale.” In *Cahiers Critiques de Philosophie*, No. 18 (2017).

<sup>283</sup> As cited in Rojas “La ‘disparition’ forcé.”

Mochopo...and other cases in which the Apaches have nothing to steal or pray on, so they have descended into the Department...as close as 18 leagues from Hermosillo, in search of horses to steal.”<sup>284</sup> The description of the living style of all barbarous tribes always implies arguments and conditions of self-inflicted decimation. The idea of helping in the process of unavoidable extinction exacerbated by the systemic effects of state marginalization, pervades documents such as the Survey.

Disappearance as a dispositive was not new in the technological repertoire of the modern-nation state. Casta paintings functioned as smoke curtains for the complexity of a society entangled in inter-racial relations beyond any classificatory effort. The implementation of a mestizo culture intended to erase the controversies that came along with the inclusion of more than two races. It found a powerful ally in language, a harbinger of destruction always present behind many cases of colonial genocide. To be sure, the assignation of race and its deterministic traits via pictorial media was an expression, and perhaps a premonition, of what the *language of extinction*<sup>285</sup> meant to communicate: the intertwining of “the dual ideologies of imperialism and racism—a ‘discourse formation,’ to use Foucauldian terminology...found wherever and whenever Europeans and white Americans encountered indigenous peoples.”<sup>286</sup>

From the early discussions among Spanish religious authorities in regard to indigenous people’s humanity and potential for salvation to the nineteenth-century public policy measures to

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<sup>284</sup> Velasco, “Continuación,” 84.

<sup>285</sup> The language of extinction became the corner stone of the discourse of extinction: the expression of the idea that all savage, barbaric and therefore, indigenous races would eventually disappear from earth due to their limited capacity to engage in adaptive processes; and their tendency to exterminate each other.

<sup>286</sup> Patrick Brantlinger, *Dark Vanishings. Discourse on the Extinction of Primitive Races, 1800-1930* (Ithaca: Cornell University Press, 2003), 1.

create a mestizo nation, the general idea of the ruling elite and intellectuals consisted of an awkwardly unified faith in the “inevitable disappearance of some or all primitive races.” As Patrick Brantlinger points out the idea that savagery would naturally vanish from a world dominated by progress had a double function. It would ameliorate any guilt for the exercise of violence against indigenous peoples, but also it would encourage such violence.<sup>287</sup>

The Sonora Survey’s leading voice of Velasco provides an example. Diminishing and self-segregated, the savage tribes such as the Apaches, and other “indigenous peoples who have been decimated since the times of the Conquest and subjected to our government have constantly described themselves as peaceful but in general have not shown any type of sympathy toward whites, they have not amalgamated into our things, furthermore there has not been a complete fulfillment of the intention of trusting each other as a member of a single race would do.”<sup>288</sup> The inspiration of trust in the *other*, in a narrative such as Velasco’s, comes from homogeneity. Traits that make people different such as opposition, rebelliousness, and distrust of the government could only mark them as vanishing from the body politic. Difference in the terms of indigenous life reminded too much of the danger of sharing the national territory with people who seemed to be ruled by natural pre-state norms.

Race became a key factor in the universal projection of the evil twin of the noble savage, that is, the “self-exterminating savage.” The bi-polar concept allowed the strengthening of the legitimacy of Western ideas while homogenizing a great diversity of people, which not only

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<sup>287</sup> Brantlinger, *Dark Vanishings*, 3.

<sup>288</sup> Velasco, “Continuación,” 89.

catalogued them “into the stages of savagery and barbarism but also into the stereotypic models of separate, radically unequal types of mankind.”<sup>289</sup>

Mexico, especially during its positivistic era, was not immune to the waves of progressive enthusiasm caused by British imperial expansion and American manifest destiny between the 1800s and the 1930s.

Brantlinger distinguishes three main—supposedly—scientific discourses addressing the extinction of primitive races predating Darwin’s 1859 world-changing *On the Origin of Species*. The first discourse had to do with the creation of series and hierarchy,<sup>290</sup> that is, “natural history” embracing geology and biology in the form “of taxonomies of organisms offered by Carl von Linnaeus, Georges-Louis Leclerc de Buffon, Johann Friedrich Blumenbach, and Georges Curvier,” that included the categorization of the human races in reference of the unsurpassable “Caucasian race.”<sup>291</sup> The categorization frenzy reached Mexican newspapers that frequently published notes advertising the referenced books for sale at local printers. Such is the case of the *Cosmografía abreviada del uso del globo celeste y terrestre*, a compendium that included the *Práctico botánico* by Carlos Lineo [Linnaeus].<sup>292</sup> Notes including comments on the latest world publications were also frequent.

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<sup>289</sup> Brantlinger, *Dark Vanishings*, 3

<sup>290</sup> Already mentioned in Foucault’s terms as knowledge production, see Chapter 2.

<sup>291</sup> Brantlinger, *Dark Vanishings*, 17.

<sup>292</sup> *Diario de Mexico* (Mexico City, Undefined) VIII, no. 64, September 2, 1816: 4. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&doref=image/v2:1291263580EE29DC@WHNPLAN1-12AC9C2068ABC9F8@2384585-12AC9C20910C0B50@3>.

In second place, another purveyor of the extinction discourse was economics with powerful interpretations of the modern world, such as the 1803 second edition of the *Essay on Population*. Offering a wide range of information and “speculation about the population dynamics of both civilized and primitive societies,” the Reverend Thomas Robert Malthus—carefully avoiding any emphasis on race—utilized the “savages” and the “starving Irish” as key components of the causes of human extinction, namely depopulation and overpopulation. Not in vain, Darwin credited Malthus in the preface of his *Origins* as the great contribution for his paradigmatic theme of “the struggle for existence.”<sup>293</sup> Mexico had knowledge about such intellectual trends. In addition to the numerous notes that mentioned Darwin, Mexican newspapers also published academic speeches by scientists. One of them was the discourse that Dr. Ramon Zambrana gave for his colleagues at the Havana University. In his speech he commented on Blumenbach’s proposal on the different sizes of bones according to race and the theoretical similarities among the authors he cited, such as Buffon, Camper and Linneaus. Oddly, the speech underlined the “unity” among races represented by basic human traits, although it also implied a hierarchy among humans after all.<sup>294</sup>

Mexico had its share of pessimistic economics while elaborating a national being. An example of the economic pressure on society to depurate itself can be found in the work of Luis Nava who wrote essays in positivistic tone starting in 1881. He was associated with *El Monitor*

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<sup>293</sup> Brantlinger, *Dark Vanishings*, 18.

<sup>294</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), May 17, 1862: 4. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-133D3CCDE9337470@2401278-133AFBEB72653EC0@3-133AFBEB72653EC0@>.

*Republicano*, a Mexico City newspaper that channeled constitutionalist liberal politics. Nava was among the first to address the “Indian problem,” and the relations between race and space, hence creating the most important link in the mestizo state concept: an indissoluble link between ethnological and geographical discourse.<sup>295</sup> However blunt his speech was, Nava acknowledged the race and class correspondence in Mexican society, but above all he was able to recognize the battle among internal enemies. Nava spoke of the quietism inherent to lower classes while he also pointed out the arbitrariness of the elites. The tension produced by such opposition and apparent peace for Nava was nothing but a war in its dormant state. With this type of expression Nava made clear his belief in the Indian as a victim of the lawgivers and the Constitution. The Indian, according to Nava and other positivist thinkers, must be regenerated and incorporated into the productive Mexican life. Indians must abandon vices, nudity and quietness, they must become “less Indian; the Indianization of Mexico slyly shifts into the de-Indianization of the Indian” with the objective of reaching a redeemed status in terms of citizenship.<sup>296</sup>

As contemporary of Nava, Ignacio Altamirano also promoted the idea of sanitizing the indigenous being via education. His literary works often reached the level of *magna moralia*<sup>297</sup> in terms of showing a path to embracing a culture of work, democracy and corporation-less spirituality. Altamirano used the word indigenous rather than Indian, but the message was the same: Some of the Indian’s customs became an obstacle to progress and development. Even when the Indian possessed virtues of honesty, justice and wisdom, his/her economic and spiritual

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<sup>295</sup> Lund, *The Mestizo State*, 6.

<sup>296</sup> Lund, *The Mestizo State*, 24.

<sup>297</sup> The epitome of someone’s ethical thought, a term borrowed from one of Aristotle’s works on ethics.



poverty could be attributed to their exclusion from society. Altamirano inadvertently began, through such thought, the dissemination of a myth in which the Indian became a historical character who represented serenity, melancholy and passiveness.

In his *Navidad en la montañas* [Christmas at the Mountains] (1871) Altamirano narrates the adventure of a Republican Army Captain who travels through the sinuous roads that lead to a mountain town in rural Mexico. The Captain is not alone, he has the company of an old private who symbolizes the loyal but resigned and uneducated Indian. In their trek the military men encounter a priest who is out of the ordinary. He is a true Christian: The prelate does not live surrounded by luxury, does not have a large house or a proper church, and better yet he does not charge for any of his services. After listening the priest's story, the baffled Captain abandons his defensive stance and runs to the priest so he can hug him and tell him that such should be the spirit of all religious persons and intuitions. "Give me your hand sir, you are not a friar, but one of Jesus' apostles... You have softened my heart, and made me cry... Sir, honestly from my military and republican honesty, I have been against the clergy since my youth, I have made war upon you! I joined the Reforma War believing you were the plague..."<sup>298</sup> Altamirano hence was promoting the access to spiritual growth through a Church without political power aspirations. Like many liberals at the time, he longed for religion but without the cost of corporate interventions.

After making an apology of the goodness of religion in the hands of humble and committed friars, Altamirano proceeds to describe all the benefits of the education provided by

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<sup>298</sup> Ignacio Manuel Altamirano, *Navidad en la montañas* (México: Universidad de Veracruz), 8.

the priest. It is not a coincidence that the educator and leader of the town is a Spanish prelate. The role of the Spanish heritage in the mestizo's identity had to be acknowledged in order to render reconciliation and pride. Thus, Altamirano portrays the work of the priest incarnated in a gorgeous village that emulated those in Europe. "Joyful little homes in the style of those found at Savoy or the Pyrenes, with red tile roofs, blue windows, walls ornamented with vines, all surrounded by twisting narrow, but clean streets...[everywhere one could see] dairy farms marked with quaint wind mills, fruit trees...and a very humble, austere but beautiful tiny church."<sup>299</sup> In his idyllic little town, Altamirano points out, that the effort of communal work and discipline had produced a miracle in which economic self-sufficiency became possible due to successful farming and cattle raising. The priest had also introduced new crops and agricultural techniques to the villagers. Technology found certain resistance at the beginning, but as soon as the people realized the benefits it brought, they "now give me their blessings for the wind mills, that now allow women to enjoy better health and more spare time with their families since they have no need to grind corn and other seeds by hand."<sup>300</sup>

In Altamirano's mind the ideal vessel of authority is the mestizo, a redeemed person who possessed a dual heritage in harmony. The story's Captain embodies the exemplar mestizo, a republican official and foreign-educated Catholic. The Spanish presence, although ancestral, remained in the realm of spirituality and progress: The priest or "apostle was able to introduce a peaceful God in to all the shrines that belonged to docile people who had also been regenerated

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<sup>299</sup> Altamirano, *Navidad*, 11.

<sup>300</sup> Altamirano, *Navidad*, 12.

by work and by means of virtue...God had been introduced in to the countryside [farm] and the workshop inspiring the populace to abide the holy law, the law of work and brotherhood.”<sup>301</sup>

The figure of the Indian appears in the novel through its old people, associated exclusively to the past. Indigenous facial features for Altamirano inspire respect, but the Indian eyes denote humbleness, serenity, and above all melancholy: A feeling “that showed with such intensity in [the Indian’s face] that one could have thought that a smile had never been able to illuminate it.”<sup>302</sup> The synthesis for liberal thinkers had been concocted. The Spanish side of the mestizo should lead to progress, spiritual and material. The concealed Indian should be removed through education, work and the practice of personal happiness brought by action and participation in society’s affairs. However, the mestizo occupied the central role of nation building and peacekeeping. After all, the novella has a happy ending: The priest and the Captain resolve the troubled love of two young persons in the village. He, a hardworking man who has traveled throughout the country and has become educated in many agricultural techniques. She, the daughter of a wealthy farmer. Their marriage, arranged by the starring characters signified the future of a modern, peaceful and mestizo Mexico.

However, Altamirano’s *Navidad en las montañas* represented the *ethos* of the epoch. Citing the work of Luis Nava,<sup>303</sup> who thought the “Indian race” as quiet, excluded and unproductive, Joshua Lund argues that the problem with the Indigenous people was not one of race, but one of economic positioning; in other words, of a hierarchy in relation to the production

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<sup>301</sup> Altamirano, *Navidad*. 13.

<sup>302</sup> Altamirano, *Navidad*. 24.

<sup>303</sup> Lund, *The Mestizo State*, 24.

system. Such positioning had been the matter of the transitional period colony-republic that employed the casta paintings as technological device of race. The state that proposed a mestizo status for the gross of its population did not think of race as neutral, and certainly did not dethrone pigmentocracy. The very own idea of a state of mestizo nature creates a transfiguration, converting race into a more complex, ubiquitous and insidious category. Hence mestizaje became culture understood in biological terms or a sort of cultural practice expressed through a process of biopolitization.<sup>304</sup> Mestizaje in this way virtually vanished the indigenous component of the mixture, but also assigned a value related to a racial function within the scheme of economics.

Natural history and economics were not alone in the promotion of a social practice of invisibilization of the Indian through mestizaje. Anthropology, as the third nascent science occupied with the extinction discourse, adopted a unique form of moral philosophy and natural science throughout the eighteenth century. Thus, in the first half of the century anthropology focused on the physical, mental, and hierarchical differences among races. But it did so under the light of imperialist expansion, which translated as efforts to understand the behavior of indigenous peoples worldwide. Oddly, anthropological associations with an initial attempt to preserve indigenous peoples and culture became more motivated by the fate of the “primitive peoples” as they shifted toward science, leaving behind any humanitarian purpose.<sup>305</sup>

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<sup>304</sup> Lund, *The Mestizo State*, 39

<sup>305</sup> Lund, *The Mestizo State*, 39.

Savagery, according to either or a combination of the three versions of the extinction discourse, was nothing more than a Hobbesian state of nature, a *bellum omnium contra omnes* or a war of all men against all. The logical result of the war would be the survival of the strong, and the extermination or enslavement of the weak. The association of a state of nature with the savage races became a sufficient condition and explanation for their extinction.<sup>306</sup> In effect, the descriptions of all Indian towns in Northern Mexico as vanishing and impoverished contradict the language of panic and desperate calls for the help of the central government. The fear of a savage's war against all and the horror of retuning to a state of nature was patent in the hundreds of pages of the Sonora Survey. "All this data induce the fear of becoming aware of an imminent danger, the fact of being surrounded by Apaches and all numerous tribes circumventing our borders...it is clear that in our state of misery we could not resist an attack coming from such extraordinary multitude, as per every single white person we could count two or three Indians."<sup>307</sup>

The need to vanish, disappear, or condemn to the subordination of the other "race" became an *ad hoc* process according to the times. Within the logic of a single nation-state the rhetoric of the condemned and vanishing race engendered pictorial and linguistic technologies in order to justify the physical or symbolic "gardening" of those different.<sup>308</sup> However, to really understand the manner in which the veil of the Enlightenment covered the world and facilitated

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<sup>306</sup> Brantlinger, *Dark Vanishings*, 18.

<sup>307</sup> Velasco, "Continuación," 90.

<sup>308</sup> Gardening refers to the concept of modern genocide by Zygmunt Bauman in which he compares society as a garden that requires the removal of weeds: "All weeds are to be exterminated...All visions of society-as-garden define parts of the social habitat as human weeds." In Bauman, Zygmunt, *Modernity and the Holocaust* (Ithaca, N.Y: Cornell University Press, 1989), 92.

the travels of its theoretical production to places that contributed to the weaving of a global fabric, one must refer to the term that sustained all: reason.

Reason was involved in the early intellectual confrontations between de Las Casas and Sepulveda as well as in the multiple ways in which nineteenth-century Mexican liberal thinkers approached the Indian problem. Reason, as questionable component of the Indigenous being, has always been in debate.

In his critique of the imperial reason, Ruiz Sotelo, demonstrates how de Las Casas expresses his modernity through the consideration of a pre-conquest *Being*<sup>309</sup> and existence of the Indians. Following Edmundo O’Gorman and his Heideggerian analysis, Ruiz Sotelo argues that the idea of the discovery of America by Colón became an irrefutable belief based on the interpretation of a “being made on the image of the inventor.” Europeans understood that comprehending “being,” and not the existence of things, implied only the meaning attributed by historic interpretation based on abstractions.<sup>310</sup> European belief did not acknowledge the existence of a being that was not Europe. This represents the entire process of appropriation and translation of empire discussed earlier in this dissertation.

Invariably, a Heideggerian hermeneutics leads to thinking that human nature can have several degrees or values. It explains cultural differences and historical developments not in association with the complexity of political and/or economic systems but in terms of an inherent

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<sup>309</sup> Being refers to existence within a historical context, it usually implies that different peoples exist in different ways according to pre-assigned value.

<sup>310</sup> Mario Ruiz Sotelo, *Critica de la Razón Imperial. La filosofía política de Bartolomé de las Casas* (México: Siglo XXI Editores, 2010), 56.

essence. Such way of cultural relativism is prone to accept the superiority of some over others in the way in which Sepulveda thought in regards of the Spanish war against the Indians”<sup>311</sup>

On the contrary, for de Las Casas the alterity of the Indians was real and valuable. He believed in dialogue with them. There was no need to make the war upon the indigenous peoples since they had legitimate governments, religious faith, and subjective rights. These qualities all emanated from a consensus tantamount to the social contract, which required advanced concepts of modernity which in the voice of de Las Casas imply a humanism different from the European type in which, for example, a Cartesian subject is an intellectual or a Dutch businessman.<sup>312</sup>

However, the value and importance of the *Indian being* became impossible in the face of the constant denial of the savage’s capacity for reason over the pass of the centuries. In a fragment from the Survey, Bonilla, nicknamed named El Guilo, was a soldier who was held captive in one of the presidios. After nine years he joined the Apaches, who made him a general. At some point he betrayed the Apaches and communicated that the objective of the barbarians was to conquer the land currently held by the “Spaniards,” as the Indians called all Sonoran white people and mestizos. Velasco, narrating the anecdote takes offense here, saying that the barbarous call all white men the same.<sup>313</sup> The Liberal and nationalist mind of Velasco considered an affront to be denominated under the single generic tag of “Spaniard,” which would maim his identity as Mexican and criollo. The main threat that the apaches might take the entire state of

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<sup>311</sup> Ruiz Sotelo, *Crítica*, 99.

<sup>312</sup> Ruiz Sotelo, *Crítica*, 193-195.

<sup>313</sup> Velasco, “Continuación,” 99.

Sonora at some point, for a moment became secondary compared to the decimation of the Mexican national being.

The question of freedom and right to self-determination erected a wall between two lines of thought. On one side were those who advocated for a violent treatment of the “barbarous” Indian and enforced the idea of a need for societal segmentation. Counter to them were others who considered the Indigenous being perfectible and capable of reform and salvation. Therefore, the indigenous could be integrated with the supposedly superior colonizers. Reason as an expression of freedom became a central point for the European thinkers of the Enlightenment, and their American counterparts. It remained for decades as the fuel of discussions and policies that reflected, one way or the other, the need to absorb Indian culture in order to digest it into a better “almost European, but not quite” New Spanish subject.

In effect, the Enlightenment’ thinkers believed that the eighteenth-century breakthrough, consisted of the conquest of autonomy. When they talked about freedom to express opinions, choose religion, or educate kids, they meant personal autonomy. The pinnacle of such way of thinking is expressed in Kant’s 1784 essay “What is Enlightenment?” in which he defines it as “mankind’s exit from self-incurred immaturity” which consisted of “the inability to make use of one’s own understanding without the guidance of another.”<sup>314</sup> For Kant, intellectual autonomy or the ability to think for oneself was Enlightenment’s gift for a humanity that needed to grow out the tutelage of the darkness of superstition, which kept people in an eternal stage of adolescence: which was exactly how Spaniards, criollos, and upper casta elite intellectuals saw the Indian.

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<sup>314</sup> Marvin Perry, et. al., *Sources of the Western Tradition*, Volume II (Boston: Houghton Mifflin Company, 1995), 56-57.



John Locke and others started a seventeenth-century revolution in political thinking by arguing that the social contract among autonomous males was the only option to build political authority. Autonomy granted by reason had been the main element in the displacement from a society guided by divine right.<sup>315</sup> The shift in pedagogical approach would abandon the focus on “obedience enforced by punishment,” as in the scholastic days of De las Casas. Instead the focus would shift to promoting a “cultivation of reason” as the means to independence.<sup>316</sup>

Considering the formation of a state, and an economic transition set in the context of the system of castas, one must also consider the importance of language and discourse as vehicles of powerful ideas that structure order. The idea of an Indian deprived of the capacity of reasoning permeated common knowledge and quotidian language in Mexico. In his *Refranero Mexicano*, Herón Pérez Martínez defines a *refrán* as a popular saying with aspirations to become a moralizing aphorism. It is a text of usually of one sentence that works as “situational semantic capsules.” As the definition indicates a refrán contains small doses of knowledge produced in a particular historic moment.” Thus, the refrán is always produced in relation to discourse. The brief forms of the refrán always depend directly on the major or hegemonic discourse from which they stem: “The refrán always requires a discursive context to be able to work.”<sup>317</sup>

Refranes have an emblematic nature, thus they always say more than is really advertised. The language of a culture assigns to the refrán an enthymematic function given that discourse is the most important element related to refranes. This characteristic gives refranes a life of historic

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<sup>315</sup> Lynn Hunt, *Inventing Human Rights*, 60.

<sup>316</sup> Reason and independence as proposed by Locke’s illustrations depicted in his *Thoughts Concerning Education* of 1693.

<sup>317</sup> Herón Pérez Martínez, *Refranero Mexicano* (México: Fondo de Cultura Económica, 2004), 12.

paremiology, “which is to say that refranes only exist as long as one community recognizes the discursive capacity of expressing the truth while speaking them.”<sup>318</sup>

In his book, Pérez Martínez includes 20 refranes, most of them created during the nineteenth century that refer to Indians, in feminine and masculine form. Knowing already the function and attributions of the refrán, one can expect that most of them imply derogatory warnings about Indians. These are some examples that express “interethnic battles of New Spain and the nineteenth century, whose original enunciator was probably mestizo.”<sup>319</sup>

Refrán	Translation	Meaning
Alabar al indio es engrandecerlo	To praise an Indian is to make him conceited	Self-explanatory
Indio que quiere ser criollo, al hoyo	Indian who wants to be criollo, to the hole	Warning for the Indio not to pretend to be superior; distrust
No te confíes de un indio barbón, ni de un Gachupín lampiño	Do not trust a bearded Indian, and never trust a beardless Spaniard	Indians are supposed to have no facial and body hair, so a bearded Indian is the same as a non-bearded Spaniard: worthless

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<sup>318</sup> Pérez, *Refranero*, 13.

<sup>319</sup> Pérez, *Refranero*, 248-253.

Quien vio un indio, un pueblo y un mono, ya lo vio todo	Who has seen one Indian, one town—rural village-, and one monkey, has seen them all	Derogatory way to say that rural people lesser and all the same.
Los indios y los burritos de chiquitos son bonitos	The Indians and the donkeys are pretty when they are little	Self-explanatory

Clearly, the power relations inherent to the modern Mexican state created a discourse that expressed disdain toward an internal enemy. Refranes talked not only about the popular desire to disappear the Indian both physically and semiotically but carried the paradoxical nature of the Enlightenment.

With the rise of the bourgeoisie, the apogee of liberal thinking and the supremacy of a single national race had already manifested through the idea of mestizaje. However, frequently the idea of mestizaje translated in exclusionary terms that left Indians on the side of the nation.

On May 1, 1861, *El Siglo Diez y Nueve*<sup>320</sup> published a long and verbose refutation of the Government and Municipality of Yucatán's attempt to nullify local elections. Manuel Sierra Arce, leader of the Liberal Party in Yucatán, argues that an environment of instability had prevailed in the region due to the “wars among races.” He specifically refers to the abuses suffered by the “savage and enraged Indians” who did not delay in using their mortal hatchets. However, he also notes that the “impostor liberals” who had been selling their brothers as slaves

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<sup>320</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), May 1, 1861: 5. *Readex: Latin American Newspapers*. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-13350AB2522BB008@2400897-1332592A4099DAB8@4-1332592A4099DAB8@>.

to be used as free labor in the island of Cuba, had therefore betrayed the spirit of the Liberal Party by acting as conservatives. What makes the article unique is that Sierra employed multiple keywords from the liberal language of freedom and democracy, while referring to the Indian, not only as incapable of a civilized self-defense, but also as unwilling to abandon the savage customs that made him a victim of the corrupt politicians who had been running the state and using the military force to repress the *pueblo*.<sup>321</sup>

A dialectic absorption of race into the mestizo state allowed the positioning of the Indian as disadvantaged and irreconcilable with modernity, hence the urgency to vanish any traces of the use of the “savage hatchet.” Just like in the note published by Sierra in Yucatán, Lund notes that in a political culture impregnated by the idea of a certain liberalism, Luis Alva gives form to the outlines of the mestizo state, the specificity of its racialization, and the contradiction it cannot resolve. Like many thinkers at the time, Alva showed his devotion to a modernized liberal political economy. According to Lund, Alva’s argument exposes the racism practiced by the state via state policy and social norms. The state’s paradox, as explained in previous chapters, failed to fulfil the liberal promise of cultural tolerance as vital part of the category of citizenship. However, such liberal critical position could not endure the test of a true racially neutral citizenship, since liberalism cannot tolerate true universal equality.<sup>322</sup>

The intersection of race and the hierarchical allotment of personal value found accommodation in the normalization and universalization of capitalist accumulation. This

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<sup>321</sup> Populace understood as those who have no privileges of any sort.

<sup>322</sup> Lund, *The Mestizo State*, XVIII.

constituted the contradictory center of liberalism's commitment to freedom of cultural practice, which required the enforcement that only the regime of Porfirian Mexico could provide.<sup>323</sup>

Race against an economic and epistemological background, from castas to republican citizens, and from savage races to productive workers, constituted a technological device. It mutated until it produced the normalization of a social classification useful for the nation-state. Elites, whether liberal or conservative emerged within a "racial matrix" inherent to the modern and colonial world.

Such a racial matrix allowed the construction of racial-ontological and racial-epistemic differences. Casta paintings are an example of the matrix that allocated hierarchy and value to human beings based on the value of their existence (ontological) and the system of knowledge that determined every position (epistemological). The mestizo as initial category had to be the racial center of the Mexican reality. The Meco became a candidate who could be sacrificed to economic and political order. Refranes on the other hand, also exemplify who remained at the bottom of the racial matrix.

Due to the contradictions inherent to the liberal state people became forced to disappear from their natural communities. Displaced, by the economy, and disposed of customary laws by abstract-universal liberal legal frameworks, certain human "categories," were, like in the case of the Indians sent to Yucatan and Cuba, destined to live a *personless* life embedded in biopolitics.

Manuel Grijalva argues that the figure of the rural (Indian or mestizo) worker became the key player in the process of Mexican industrialization, and that with this, the economic order

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<sup>323</sup> Lund, *The Mestizo State*, XVIII

relentlessly tried to pull human beings from their communities. Starting in the XVI century, the *obrajes* [or proto-factories] required vast quantities of Indian labor, initially provided by the Crown in the way of *encomiendas* [assignation of workers] to criollo producers. By mid-nineteenth century the productivity of *obrajes* had declined while new ways of production arrived in America after the Industrial Revolution. But according to Grijalva it was not technology that caused the extinction of the medieval-style fabric workshops, after all the *obrajes* initially had the same European technology, and the marvels of the Industrial Revolution did not spread through Europe uniformly, much less in America. The decline of the *obraje* in New Spain arose from the persistence of domestic forms of work, such as weaving at home, and the rural production of fabrics. The inclination toward domestic production illustrates the strong ties that local and Indian workers had with their communities.<sup>324</sup> Modern factories had to struggle in a battle first with rural production, and later with the lure of workers into the cities.

The decline of *obrajes* highlights how people resisted the concentration of labor, and therefore, power, in modern factories. Preference for work in local communities also represents those complex networks of power, and make visible the power relations, reinforcing the idea that power is multidirectional, and that it creates resistance in many forms.

In this way, the tragedy of liberalism resided in its condition *sine qua non*: in order to build a nation and a new republic it must not only unify its towns/peoples, but also homogenize a heterogeneous society in terms of language, culture and judiciary forms. Liberalism, which had appropriated the spirit of the country, needed to destroy the agrarian oligarchy, break the colonial

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<sup>324</sup> Mino Grijalva, Manuel. *El Obraje. Fabricas primitivas en el mundo hispanoamericano en los albores del capitalismo 1530-1850* (México: El Colegio de México, 2016), 406-407.

order and its corporate pillars inherited from Spain, subordinate the Church to the new state power, and obtain external recognition of its sovereign authority. Most importantly, it had to build a national community from a subjectivity, a way to trace the origins of the nation.<sup>325</sup> The struggle for the legitimacy of the Mexican state emerged with the fight for the origins. Liberalism could not accept the Spanish past as foundation of the Mexican nation, but it could neither accept the indigenous past, the one broken by the conquest. Acceptance of the latter would have implied acknowledging communal rights over the land that liberals themselves denied adamantly. The answer seemed to reside in the idea of *mestizaje*: an effective vanishing technology that displaced the focus of attention from a single origin to a positive *collision*, a fruitful cultural and biological merger.

Dr. Denis Jourdanet appeared to be the precursor to a scientific theory of *mestizaje* when he published a study on the relation of land altitude and human productivity in 1865. Adventurous as he was, his article challenged the ideas of the status quo in the midst of the period of the Second Empire in Mexico. Dr. Jourdanet thought of his study as indispensable among other Mexican efforts to promote European immigration. He considered the height above sea level as the main factor affecting the process of "acclimation" of the various races inhabiting the geography of Mexico. Contrary to the common belief, Jourdanet did not think that the low coastal territories were inappropriate for the European races in comparison with the high plateaus of central Mexico—comparable to the European geography.<sup>326</sup>

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<sup>325</sup> Roux, *El príncipe*, 73.

<sup>326</sup> Denis Jourdanet, "De la estadística de Mexico. Considerada en sus relaciones con los niveles de suelo y con la aclimatación de las diferentes razas humanas que lo habitan" in *Boletín de la Sociedad Mexicana de Geografía* (1865): 227.

Referring to previous local research, Jourdanet argued that statistical resources about Mexico were not the result of serious investigations or official censuses. For him the work of Mexicans was parochial and unstructured, it was the "deepest" expression of opinions which did not scientifically explore the true object of statistics, and therefore did not reflect the annual progress or decadence of the country's population.<sup>327</sup> Given his position, Jourdanet focused his study in the transitional period between 1793 and 1810, a period of peace under an administration that provided protection for all classes. Jourdanet argued that these circumstances guaranteed the free development of the human species.<sup>328</sup> After an elaborated study between different statistics by multiple surveyors, he isolated the historic development of multiple races at different altitudes. His conclusions were as follows: the weakness of the Indian race at high plateaus; the decadence of pure Spanish race in the same locations; and the sensible progress and aspirations of the mestizo race. In respect of the weakness of the Indian race, it was, according to him: "just useless to prove it. Nobody that has lived in the Anahuac could doubt it." The Indian weakness had not to be confused with "physical strength" or "health and the number of years that the individual can reach".<sup>329</sup> Weakness signified lack of success in economic and political terms, it meant poor character.

Hence, Indians were like boiling water. From the bottom layers of a liquid mass (coastal line) they could go up to higher ground only to suffer a process of cooling which led them back to the lower layers where they had come from. Certain displacements were successful only in the

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<sup>327</sup> Jourdanet, "De la estadística de México," 229.

<sup>328</sup> Jourdanet, "De la estadística de México," 233.

<sup>329</sup> Jourdanet, "De la estadística de México," 239.



preservation of a racial and linguistic purity. Such was the example of Yucatan where the “robust, smart Indian” who had imposed his tongue to the white race: “only mayo [Maya] can be heard throughout Yucatan with the exception of Campeche.” However, when speaking of the Anahuac (Mexico City) what was true for the local, and weak, Indians was also true for the Spaniards.<sup>330</sup>

Indeed, a clear separation of the population in terms of race and a particular degree of economic success lay behind Jourdanet’s statistical work. For him it was essential to note the separate development of three races: the Indian, the pure European, and the mestizo. Such differentiation became indispensable because in a mestizo race it would be soon impossible to distinguish the characteristics of the original races. Such was the problem with many other statisticians that placed the *white race* numbers in Mexico so high:

Because even the most judgmental and trained sight would be impotent for the determination of the type purity and the legitimacy of the individual’s pretensions. Every statistician has a degree of exigency in this regard. One can be horrified by the idea of including in the area of the white race the least trace of individuality that presupposes a mixture; other on the contrary, may confuse with the European races any individual who at plain sight possess the appearance of such type.<sup>331</sup>

Some statisticians had considered the white race to include all those who were mixed but were able to pass as pure whites throughout generations. New debates about the numbers of pure white race people now led to a simultaneous discussion on the decadence of the Indian race. In effect, beyond the allotment of certain people to group of pure race, Jourdanet swayed the conversation to the national and original characteristics of the mestizo race.

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<sup>330</sup> Jourdanet, “De la estadística de México,” 240.

<sup>331</sup> Jourdanet, “De la estadística de México,” 241.

"The decadence of the pure races, [compared] to the progress of the men with mixed blood," should be the topic of research, argued Jourdanet. And because of such decadence the eyes of the nation and the world should point at the originality and development of the mestizo. Mixed people could never be equated to one of its original types, namely the white component. But they would certainly incarnate the homogenous character demanded by the nation. The mestizo, a racial median, was destined to thrive right at the geographic heart of the country where pure races had failed. Finally, Mexico had a theory that encompassed race, climate and geography at the service of modernity and civilization. Such perspective could be translated as the impossibility of becoming equal to the European character, but at least it represented the hope of being considered productive and worthy of consideration. After all, Jourdanet stated that "there was no reason to speak of Latino races" when speaking of American countries; but one must speak of Americo-Latino races or those who must have attracted the eyes and attention of all Europe. The mestizo, as a modern hybrid of progress and exoticism could break with the [conservative] "movement hunted by the spirits of the past, perhaps too poetic, and based on the praise of the peoples consumed in this country."<sup>332</sup> Liberalism and science awkwardly sponsored by an Imperial force had nominated the mestizo as the new Mexican being. The mestizo as body politic member *par excellence* for the decades to come.

The cleared—and ordered—space produced by the castas system and its late eighteenth century visual technology found a more efficient dispositive in the idea of mestizaje. The transition of the colony into a republic required from its intelligentsia a "fictive ethnicity into a

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<sup>332</sup> Jourdanet, "De la estadística de México," 244.

general ideology of progressivist meritocracy with its attendant faith in the relations between education and economic development.” Altamirano, a self-proclaimed “pure race Indian” hence became the paradigm of the mestizo state: progressive liberalism made the miracle of success despite everything turning him into the model citizen, a “de-Indianized Indian or the mestizo subject.”<sup>333</sup>

Language as an expression of the power relations which develop an epistemological cumulus did its part in normalizing the contradictions inherent in liberalism. Refranes were able to obscure the toxic content of racist manifestations against Indians and Afro-descendants. The vanishing machine of the state had no option but to dismantle the colonial inheritance, however attached to it was the social diversity inherent in a highly stratified country. The rhetoric of the Enlightenment echoed in the thoughts of the Mexican intelligentsia. It changed national policy and discourse, but was not able to change the rural/communal ways of labor and production such as those of the *obrajes*.

The master work of the vanishing task of the state would become totally established by the last quarter of the nineteenth century. During the Porfiriato, the figure of the mestizo would rise up and become the stable symbol that could articulate the urban to the rural and the state to the nation. Ultimately, the mestizo would come to symbolize the resolution of the central political problem of the time. The idea of race embedded in the symbolization of racial unification would become palpable in the negotiation of sovereignty and hegemony, the

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<sup>333</sup> Lund, *The Mestizo State*, 39.

formation of a state that could not only represent but also somehow reflect its nation.<sup>334</sup> With the formal declaration of a mestizo state, the two main components of the hierarchical technology of race would be declared joint forever. Under the surface, they would remain in a constant struggle to hide its antagonist nature. Just like in the anthropological vanishing theories, the expected outcome was always that somehow the Indian component would evaporate due its feebleness and lack of adaptability to modern life. Race as a vanishing machine had found its maximum expression in mestizaje, which sought heroes in those poets, such as Altamirano, who sang odes to the hidden and forbidden Indian inside them.

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<sup>334</sup> Lund, *The Mestizo State*, XVIII.

## CHAPTER 6

### A POSITIVIST STATE: RACE AS BIOLOGY

“You need more than simple knowledge to make a pair of boots; to build a house; to drive a train or sail a ship. And do we really believe that the physical and intellectual development of the human being is a comparable insignificant matter that can be delegated to any person without previous training?”

H. Spencer<sup>335</sup>

Nicolas León appears in 6 different pictures, wearing a three-piece black suit and shiny shoes. He also sports a meticulous haircut, which accommodates the scarce hair left in his head. He has measuring instruments in his hands at all times. An unidentified indigenous woman appears in five of those pictures, totally naked, taciturn, but curious. In three of the pictures, despite the anguish and shameful look in her eyes, she stares at the camera. León concentrates while taking numerous anthropometric measurements, relentlessly using his graded apparatus to measure her skull, eye distance, maxilla, breasts, hands, and pelvis. Pictures of this type illustrate the treatment of human subjects during the 1880s in Mexico, when the idea of race as a biological expression disseminated throughout the entire world. Anthropometric studies based on the European white male led the discussion that pursued the understanding of the human body in general, and perceived anything different as abnormal. In the case of Mexico, abnormality would be found in indigenous and the female bodies. The embodiment of such academic research

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<sup>335</sup> *El Educador Practico Ilustrado*, “Galería de niños celebres de México,” (January 15, 1886): 5.

reached its zenith when in 1884, *The Medical Mexican Gazette* reported the first cesarean section performed on a living woman.<sup>336</sup>

The narrative of a triumphalist discourse, embedded in pure scientific national glory, soon languished before the eyes of the conscious contemporary reader. Mexican doctors' perception of the patient as inferior drove this movement. To be sure, medical professionals had performed cesarean sections post mortem until they began experimentation on the living indigenous body. "I will try to portray her," stated the medical narrator: Monstrous face with small skull, thick and stiff black hair, dark tanned skin consumed by small pox, small "Japanese" eyes, stupid look, wide nose, drooling big mouth with thick lips...huge breasts with black nipples, short extremities according to body proportion, and "claws" rather than hands made an absolute inhuman subject out of a woman who in reality was Indigenous and poor and suffered some sort of mental retardation.<sup>337</sup>

The description alone made this woman a perfect candidate for a procedure that would corroborate the obstetric theory in vogue: According to the new discipline of "pelvis-metrics" Mexican women, presented a "viced" pelvis, defined as a "crowded" pelvic condition that made them inferior in comparison with European counterparts; Medical experts tied this condition to mixed race ancestry—primitive race mixed with the conqueror's race. More importantly, it made them prone to squeeze the fetus in such way that an intervention became necessary. "The pelvis of Mexican women presented a general reduction in all dimensions, particularly in the height and

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<sup>336</sup> Olivia López Sánchez, "La Mirada médica y la mujer indígena en el siglo XIX," in *Ciencias* 60-61 (2000): 48.

<sup>337</sup> Sánchez, "La Mirada médica," 48.

inclination of the pubic symphysis...they also were very wide at the level of the iliac crests and very narrow at the pubic symphysis,” which made birth very difficult. Such a verdict made most Mexican obstetric doctors believe that a “crowded pelvic floor” explained why most women treated in welfare hospitals had trouble during birth. The discovery, through scientific means, of the “anomaly” and “degeneration” of the women’s skeletal system led Mexican doctors to generalize. They did so in broad terms of race, claiming to know the cause of a great number of dystocia births. Such asseveration brought a rapid response, and led to the wide use of forceps, a practice that had severe consequences. However, such practice in conjunction with the irrational practice of cesarean sections, constituted more an expression of the discourse that disqualified the women’s bodies and their inferior race, than a positive and effective modification of the idea of assisted birth.<sup>338</sup>

*The Medical Mexican Gazette* did not flourish in a vacuum. It was rather a product of its era, and specifically, the product of a national project. This chapter will examine one of the last transformations of the idea of race through the intervention of science and the language of positivism as mediators in the restructuring of a political economy of race within a defined project of nation. I define project of nation as a proposal for the collective future of a nation, framed around a certain ideology and sustained by a party or coalition accepted by a substantial number of citizens. It carries certain level of utopia and idealism. Mexico had national projects of a liberal, revolutionary, and post-revolutionary nature that lasted for decades.<sup>339</sup> Additionally,

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<sup>338</sup> Sánchez, “La Mirada médica,” 46-48.

<sup>339</sup> As Lorenzo Meyer notes, the ideology that fuels national projects is persistent and can be cyclic as in the recent, neoliberal authoritarian regime that only lasted for 12 years consisting of two terms from 2000 to 2012 before crumbling. In Lorenzo Meyer, *Nuestra tragedia persistente. La democracia autoritaria en México* (México: Debate, 2013), 56.

in countries like Mexico or periphery nations, national projects have an overwhelming international dimension.<sup>340</sup> Therefore is it necessary to include a double perspective in any analysis of the national project and its corresponding ideology: one that deals with the way in which Mexicans confronted modernity at the time, and another that expresses what outsiders thought about Mexico—and the influence of such opinions on a national level.

An example of the complex connectivity between the local and the global thought during the last half of the nineteenth century can be found in Mexican scientific publications such as the *Mexican Medical Gazette* and the *Bulletin of the National Geography Society*. The latter, not only reflects the considerations of scientists willing to collaborate with the Second Empire or Maximilian Intervention in order to exploit the riches of the country, but it represents the purest ideological trends of the day, namely the scaffolding of liberal thinking employed as tool in the most challenging period of nation-state construction. Hence, the work and words of contributors to the Geographic Survey of Sonora, included in the Bulletin of 1865, expressed more of a commitment to their own personal ideology of liberalism, than a confirmation of allegiance to a foreign crown.

As seen in previous chapters, Tiburón Island became a strategic point in the way of commerce and communication between Alta California and Baja California. The occupation of the island became difficult, of course, due to the "continuous and repeated revolutions" organized by the Ceris Indians. The Ceris were accused often of animal theft and some murders, which

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<sup>340</sup> Meyer, *Nuestra tragedia*, 57.



became the cause of the government "denial" of protection" [quitarles el abrigo de la isla] that would allow the conversion from Ceris' community to a hub or transit route.<sup>341</sup>

The description of the physical appearance of the Ceris and other Apaches becomes overwhelming due its repetition throughout the various contributions to the Survey. However, it is the connection between certain personality and cultural traits with specific moral attributes that makes the narrative valuable. In effect, the notes regarding the short height, dark skin, unrefined physiognomy, and overall lack of facial/body hair become overshadowed by the gratuitous psychological analysis provided by the authors. "Their genius [understood as temperament] is bilious, which makes them astute, daring, suspicious, instable, and proud." The Apache [as one way of denomination for all Northern Indians] showed a degree of suspiciousness achieved by no other barbarian race, according to Velasco; and therefore, they trusted no one from the outside or even from their own tribes. Therefore, the Indians needed to carry weapons of all sorts, and they never felt safe.<sup>342</sup> The temptation to narrate recidivism betrays Velasco, and he goes back to criticizing the size of the Indian female feet, their ears adorned by shells and green stones, and above all the nomadic traditions unintelligible to the Liberal nineteenth-century mind. In such context, the conversation turns to alimentary impulses of the Indians, as opposed to the culinary ritual of the modern man: "Indians are gluttons too, a single one can eat a rib rack, liver, and tripe of a large oxen, but they are also stoic, and can endure hunger, lack of food for several days as well as thirst. Indians know what type of cactus to eat so they can refresh the mouth, but also

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<sup>341</sup> José Francisco Velasco, "Nota Primera. Continuación de la estadística de Sonora." In *Boletín de la Sociedad Mexicana de Geografía* (1865): 29.

<sup>342</sup> Velasco, "Nota Primera," 100.

how to find roots that contain moisture and can be used as temporary provisions until they find real food.”<sup>343</sup> Velasco found the barbarous fascinating. Besides gluttony—a well-documented practice among European aristocracy—they were polygamist, and established as many as 5 or 6 *jacales* (or small homes) for an equal number of wives acquired through arranged marriages, paid for using cattle, arms, or animal skins as trading tokens. This characteristic behavior engenders, according to Velasco, a life of servitude and jealous attacks that often ended in the murder of the women. Velasco saw these traits as evidence of the barbarous life of the Apaches.<sup>344</sup>

For the purposes of this chapter, Velasco’s arguments in regards the reproductive health of the Indigenous women become invaluable. Setting a precedent at least two decades prior to Nicolas León’s scientific arguments, Velasco’s perspectives represent a broad paintbrush in the ontological categorization of the Indian body. “Women give birth just like animals in any open field. Once they throw out<sup>345</sup> the fetus, they immediately look for water to bathe if possible. If the birth occurs while marching they just look for any shady tree off the road, where they can make the drop off easily, so they can go back as if nothing had happened to continue marching with the newborn and one other rascal wrapped around her shoulders in some type of net that also contains plates, utensils and provisions.”<sup>346</sup> The technological devices of race had been incorporated in the language of politicians, technicians and scientists. Their words implied

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<sup>343</sup> Velasco, “Nota Primera,” 100.

<sup>344</sup> Velasco, “Nota Primera,” 101.

<sup>345</sup> The original phrase in Spanish reads: “Las mujeres paren lo mismo que los animales en el campo raso. Luego que arrojan al feto, se echan al agua bañarse...”

<sup>346</sup> Velasco, “Nota Primera,” 103.

expressions of racism and prejudice in the form of a metaphor for the oppression of the Indians. Altogether, the intersections of race and language always implied the doom of the barbarous race in the terms of an inevitable event. In this way, the event required the vanishing of an inferior race via physical extermination or virtual disappearing through mestizaje.

From his comment on the subject of obstetrics Velasco, as usual, changes the topic abruptly moving from childbirth to dietary practices. He focused on the practice of eating raw meats and what he referred to as “salt-less cuisine.” The use of salt and roasting all meats, is for Velasco a sign of civilization. He pays special attention to the “coyotero” Indians, whose namesake derives from the fact of eating “filthy coyote meat, which is known to be heinous.” Additionally, he provides a lengthy description of thievery “on full moon nights,” and the habit of hiding in the sierra or small canyons throughout the day. Following the brief account of the Apaches’ *modus operandi*—steal at night, nap and rest during the day—Velasco inserts the moral alibi associated with the narrative: Nothing is more valuable to the Apache than bravery. All Apache males brag and tell stories about their adventures. Those who can claim such adventures have the word *sanquie* added to their name. Velasco translates term into Castilian as *hombre bizarro* [bizarre man].<sup>347</sup> However, bizarre in Spanish means chivalry, generosity and extravagance. After all, there was something that fascinated Velasco while talking about the male Apache, and that was the universal norms of patriarchy. But outside the respect for primal male behavior, and according to Velasco and León, the particular set of moral traits ascribed to

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<sup>347</sup> Velasco, “Nota Primera,” 103.

the Apache can be compared to the biological and medical perspective of Indigenous women in general. Such is the essence of racial thinking.

Thus, slowly but effectively the transformation of the idea of race in Mexico had solid and noticeable results. The technological devices of race started to become indispensable and more powerful since their inception in the transitional moment at the end of the eighteenth and beginning of the nineteenth centuries. Those same devices found a breeding ground when new scientific European ideas arrived in post-independence geographies throughout the Americas. The epistemological changes affecting the idea of race in colonial Mexico had a blunt impact on the tailoring of national policies and national projects that changed the lives of the Mexican citizens that endured for 200 years.

After the victory of Benito Juárez over Emperor Maximilian and the Mexican Conservative Party in 1867, liberalism became an ideology that brandished freedom of the individual against any institutions associated with despotism. *Fueros*, or special legal privileges enjoyed by the Church and the military, caused significant social unrest in Mexico, and eventually led to a series of violent confrontations. Liberalism's goal became paradigmatically concerned with the protection of civil liberties, representative institutions, and the separation of powers, as well as federalism, and municipal autonomy. In terms of politics and governance, the liberal program embraced a constitutional approach.<sup>348</sup>

But beyond governing structures, Mexican liberals believed individual freedom could only be achieved in a society where the traditional corporate entities i.e. church, army, guilds and

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<sup>348</sup> Charles Hale, *The Transformation of Liberalism in Late Nineteenth-Century Mexico* (New Jersey: Princeton University Press, 1989), 4.

even the Indian communities, were replaced by a regime of “legal uniformity.” Under such a system, the free individual is reinforced by the principle of private property and encompassed by a secular state that is more powerful than any of the traditional corporate entities of the colonial period. “These classic liberal assumptions guided article 27 of the Constitution of 1857, which reaffirmed the inviolability of private property; article 28, which abolished monopolies and prohibitive tariffs; and the many anticlerical decrees issued between 1856 and 1863, which first disentailed and then nationalized ecclesiastical wealth.”<sup>349</sup> The Constitution of 1857 had become a symbol of the liberal success in the terms of individualism. The defeat of corporate privilege associated with a colonial past had cost many years of internal battles, and for such reason the liberal ideas encompassed by the Constitution would become one of the foundational myths of the modern nation.

However, all the angst produced by the thought of coexisting with despotism or any ancient regime institutions had its true origin in the Mexican men of mid-nineteenth century and the way in which they approached modernity. The ruling elites and intellectuals considered themselves modern and in charge. They understood that they could steer modernity by simply accepting it and reproducing it partially or in its totality. Or they could blatantly reject it. The point was simple: modernity was considered an already existing *thing*, and lives had to develop either inside or outside of it.<sup>350</sup>

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<sup>349</sup> Hale, *The Transformation*, 4.

<sup>350</sup> Bolívar Echeverría, “Modernidad y capitalismo (15 Tesis)” in *Ensayos de la modernidad*, 1. [http://www.bolivare.unam.mx/ensayos/modernidad\\_capitalismo5.html](http://www.bolivare.unam.mx/ensayos/modernidad_capitalismo5.html)

In effect, Mexican intellectuals saw modernity as a “fatality or unquestionable fate” that had to be accepted in terms of a yoke rather than a choice or adopted lifestyle. The notion of modernity as pure goodness became a mantra due to its incompleteness, not because of its aspirations of totality. Hence, the elite resorted to explaining anything bad or deficient in terms of the absence of modernity.<sup>351</sup>

Mexican leaders began to see modernization as the goal of nineteenth-century life. A utopian spirit developed, promoting progress associated with production technics, social organization, and political exercise. The temptation to change the world first appeared in the political dimension in the late eighteenth century “when the modernization of the Industrial Revolution had barely started and its presence as a weapon against the ancient regime was undisputable; it was already the historical movement of all bourgeois revolutions.”<sup>352</sup> Thus absolute progress was incarnated in the act of revolution, and its purpose was essentially the elimination of a “nefarious past.” In the case of Mexico the past implied a polarized colonial order. Revolution after all did not eliminate the war among races that created a common front for the civilized versus the barbarous, it encouraged it.

The relation of global modernity with Mexican life can only be explained in terms of the attributes of modernity. The essence of modernity refers to a self-referenced but crucial moment of Occidental Europe’s civilization. Such civilization’s influence over the rest of the world made its choices expansive throughout most of the globe. Modernity implied finding a non-traditional

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<sup>351</sup> As Bolívar Echeverría argues, in the last quarter of the twentieth century, all nation-states of the previous century used the absence of modernity in their mottos, not only denoting ingenueness but making a solid path for cynical practices in public policy. Bolívar Echeverría, “Modernidad,” 2

<sup>352</sup> Echeverría, “Modernidad,” 2.

historic path that allowed an instrumental field and its technical efficiency to rid human life from the “scarcity of the original situation” and establish abundance as global measure of development.<sup>353</sup> Control over nature and production of goods defined modernity. Thus, modernity manifested disdain toward the relative scarcity of all goods required for life, and a hostility towards the other or the not human (understood as nature), both of which could not have been conceived in any other way that was not “a strategy to defend one’s existence within a dominion always foreign.”<sup>354</sup>

Modernity and its language of continuous progress became almost synonymous with Mexican narratives of liberalism. As leader of the educational reform commission, Gabino Barreda first introduced liberalism as a proposal that incarnated a positivistic manner. In his *Oración Cívica* he spoke of mental emancipation—from the religious and certain forms of scientific dogma—that would come after political emancipation. He also outlined the “recent war to regain national independence, the conflict between ‘American civilization’ and ‘European retrogression.’” The statement seems to expose the dark side of the liberalism exercised by those who Barreda praised as paladins of the right of free inquiry, equality and popular sovereignty.<sup>355</sup> The war for independence followed by numerous confrontations between leading political factions created a turbulent first half of the nineteenth century. At the same time, Mexico struggled to find a coherent national project to accommodate its peoples and newly emerged social classes. In this environment, a political class emerged who, weary of the burden of the

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<sup>353</sup> Echeverría, “Modernidad,” 8.

<sup>354</sup> Echeverría, “Modernidad,” 5.

<sup>355</sup> Hale, *The Transformation*, 5.

colonial inheritance, looked once more towards Europe with hopeful eyes. The legacy of the castas engendered a system of social division that prevailed as a result of technologies of race capable of imposing hierarchy in efficient ways. The solution to the challenge to reorganize a nation and state seemed to reside in French and English positivism. Unlike in Europe where it remained a utopian thought, in Mexico positivism became first a pedagogical weapon, and second, an instrument of political control.

Leopoldo Zea offers an insightful glimpse into the evolution of the positivistic thought in Mexico as he demonstrates that Mexican thinkers adopted and adapted only the convenient parts to the Mexican reality. Zea explains the stages of the positivist theory that fit Mexico. During a theological phase society remains under the control of colonial and religious institutions. That early phase is followed by the metaphysical, when theories become dogmas—such as the universal ideas of the French Revolution or the belief of the Jacobin groups in the supremacy of the state. During the final, positive phase social order guarantees liberty and progress. Following August Comte, the ideas related to order were part of theological and military systems, in other words, Catholic and feudal. Barreda as disciple of Comte argued that the colonial era was an expression of the “theological spirit.”<sup>356</sup> However, the other pole was progress that represented a negative philosophy such as Protestantism and the Enlightenment. Barreda associated both with “anarchical liberalism” that led to the “metaphysical spirit” attached to politics.<sup>357</sup> Deep in its

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<sup>356</sup> Gabino Barreda, *Oración cívica, Cuadernos de la cultura latinoamericana* 72, (México, UNAM: 1979), 3.

<sup>357</sup> Barreda, *Oración*, 3.



ideology, Mexican positivism moved toward the reestablishment of a rigorous Catholic-feudal order but on the service of a new social class that is not the clergy or the aristocracy.<sup>358</sup>

Such ideas acting upon Mexican thinkers should not surprise. The tendency to look for answers in Europe was not only mimicry by the colonial subject, and was not a natural identification with Latinité or the affinity among all Latin people. Mexico, as yet another place producing its own modernity, had an interaction with the global via its own vernacular occurrences,<sup>359</sup> and this signified that the phenomena characteristic of modern times affected the Mexican intellectual topography.

The adoption of positivism to guide national policy became tied to humanism.<sup>360</sup> Humanism was not interpreted exclusively in the terms of centrality of man within nature. Humanism signified more than an anthropocentric idea that guided human life in the creation of an autonomous world (cosmos), and which aspired to relative self-sufficiency in relation to the other (chaos). Humanism, to follow Echeverría, was about the pretension of holding the other's reality under dependence of the man or independent subject, who always has the quality of being

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<sup>358</sup> Leopoldo Zea, *El positivismo en México: Nacimiento, apogeo y decadencia* (México: Fondo de Cultura Económica, 1993), 42.

<sup>359</sup> As explained in Chapter 2, vernacular occurrences can be identified with local experiences related to a bigger or global context.

<sup>360</sup> Bolívar Echeverría identifies five distinctive phenomena of modernity: Humanism, rationalism (reduction of the human particularity to the rational capacity and the association of this with technical practice/instrumentalization of the world), progressivism (the transformation of history is based on two processes, one of innovation in which the old is substituted by the new, and two, a process of renovation in which the old is restored as the new. In progressivism one of these modes of historicizing prevails over the other—innovation over renovation—and that is why all dispositives, practices and discourses related to the reproduction of society and its associated mode of consumption become embedded in a trend that goes perennially from the backward to the sophisticated and from the “defective to the unsurpassable”), urbanism, and individualism (a mode of identity construction departing from an abstract synthesis which establishes existence in terms of private ownership/property of merchandise, or as members of an anonymous mass lacking qualitative definition, bonded by exteriority. See Echeverría, “Modernidad y capitalismo (15 Tesis).”

a foundational part of nature.<sup>361</sup> Mexican intellectuals, for example Velasco, considered themselves as part of the autonomous world, and capable of reason, while the barbarous races were placed always in relation to chaos, absence of law and rationality.

The hunger for autonomy had other consequences in nineteenth-century Mexico. Autonomy usually led to the purse of progress as it was clearly expressed in the pages of the Sonora Survey. Progressism was another phenomenon of modernity in which the way of historicizing privileged the supremacy of innovation over renovation. This creates a hunger for novelty but above all it produces a feeling of the old as defective, while the new becomes unsurpassable. Humanism in conjunction with progressism led to urbanism, a key phenomenon of modernity in which the apparently spontaneous construction of the world occurs under the premise of a constant substitution of chaos by order, and barbarity by civilization. Thus, the interacting phenomena result in the creation of an entity which becomes the precinct of the human: the Great City.<sup>362</sup> Not in vain Mexico City always appeared as the only option of civilization in reference to the barbarous Northwest Department of Sonora, and the unproductive and Indigenous Southern region of Oaxaca.

Progress was an important topic in nineteenth-century Mexico. Barreda as leader of the Juárez commission in 1867 restructured the national education system through the introduction of Comtean positivism.<sup>363</sup> In his *Oracion Civica* he summarized the purpose of the new liberal government as a phase for the realization of progress. After the conservative and retrograde

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<sup>361</sup> Echeverría, "Modernidad," 10.

<sup>362</sup> Echeverría, "Modernidad," 12

<sup>363</sup> Hale, *The Transformation*, 140.

Second Empire led by Maximilian, Mexico had to thrive within the “stabilization” period brought by positivism. The defeat of the theological and anarchical spirits would give way to a positive era of reconstruction. The triumph of Mexico’s spirit had to be perceived as an “extraordinary stage in universal history.” The battle of Mexican liberalism in its positivistic version was also resistance against “universal conservatism.”<sup>364</sup> Barreda’s thought privileged a “currency” made of liberty, order, and progress. He was clear to specify that liberty would work as the medium, order as the base, and progress as the end. Barreda compared the triple goal proposal to the banner held by the national heroes of the Independence. The three colors of the flag held by Ignacio Zaragoza during the battle against the French in May 1862 would also symbolize the three components of Mexican positivism. *Oración Cívica* also made emphasis on the connection that Mexico and Latin America had with the world: Both victories, the Independence and the Battle of Puebla, signified the protection of America [the continent] and the rest of the world against conservatism, hence preserving the integrity of all republican institutions.<sup>365</sup>

Thus, positivism considered that after Mexican independence and the War of Reform, the country needed to exalt the values and goals of a liberal class that had defeated the ancient regime and continued to stand against the colonial order. The time seemed appropriate for an honest tyranny, spearheaded by a strong man capable of enforcing the law in order to maintain social order at the cost of political freedoms. The interests of the bourgeoisie became central,

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<sup>364</sup> Barreda, *Oración*, 5.

<sup>365</sup> Barreda, *Oración*, 21.

giving the highest priority to private property and individual freedom of the few who could call themselves “mestizos.” Policies favored the class that showed no negative Indian traits because in its European mixture prevailed the good of an advanced civilization. The elite viewed indigenous claims to communal property and the poor’s demands for social programs as a threat. Positivists aimed to eradicate such threats, in part because they considered the wealth of the self-made man as integral in the pursuit of progress.

As Zea notes, liberals led the Reforma—a socio-political attempt at progressive reform that became violent due to the constant confrontations between Liberals and Conservatives. The Mexican bourgeoisie with a jacobinean attitude, produced officials, generals, journalists, judges, ministers, and martyrs who fought to gain rights once reserved for a conservative and oppressive class. After attaining political power, liberals began to prioritize order. Barreda’s positivism became the source of “conceptual elements that justified a determined social and political reality, established by the Mexican bourgeoisie.” Barreda who appears to be the educator of a specific social class was in charge of importing positivism in Mexico. The import of a philosophical response to the national problems was not a mere cultural or erudite curiosity, it was a plan of national policy.<sup>366</sup>

In this way, liberal leaders first adapted positivism as a national education program that pursued the creation of freethinkers who could collaborate to organize a peaceful country. Nevertheless, it quickly became the instrument of domination for an economic and political class. The bourgeoisie implemented a racial discourse of exclusion and used positivism as the

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<sup>366</sup> Zea, *El Positivismo*, 47.

political basis of an impersonal tyranny. The political system<sup>367</sup> claimed to be scientific, law abiding and a sort of catalyzer of national progress. Gabino Barreda tried to establish a “spiritual” power independent from material power, a substitute for the spiritual power encompassed by the church. The attempt created a scission between two antagonistic groups that would fight until 1910: radical liberals or Jacobins, and positivists or Científicos, who engaged in a struggle for that spiritual power vacuum. Towards the end of the nineteenth century the positivists who turned into a political group denominated the Científicos [Scientists] would reach the best positions within the Porfirian regime. The Científicos would come to represent snobbery, unmeasured elite and material power; they would transform the philosophy of positivism into an instrument on the service of material power.<sup>368</sup>

As one of the structures of power more susceptible to show hegemonic changes language was not immune to political influences during the positivistic era and its focus on material power. The promotion of order and progress reached the pages of magazines dedicated to teachers and parents. Just like in the case of *refrânes* that diminished the Indian stereotyped character and physiognomy, the new narrative conferred exemplar value to anything non-national, and therefore associated with a higher foreign culture. However, this newspeak had a varnish of scientific elements toned by a discourse—reminiscent of certain spirituality—which emphasized the need to create good citizens for the future. The January 1886 publication of the *Educador Práctico Ilustrado* [Savvy Educator Illustrated] inaugurated a series of biographic

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<sup>367</sup> Political system refers to a series of practices and beliefs that coexist with a political regime. The regime is the formal institutional arrangement established by a constitution.

<sup>368</sup> Zea, *El Positivismo*, 147.

pieces dedicated to notable children of Mexico. The magazine's correspondent visited the Colegio Franco-Mexicano in search of extraordinary elementary school students. At the school attended by the children of Porfirio Díaz and other prominent politicians and businessmen, the journalist identified Carlos Roumagnac, Manuel Falco, and Fernando Kososky as model students. The students themselves drew from a box the lucky name of the person to be portrayed for the *Educador Práctico Ilustrado*. Fernando Kososky won by the stroke of luck.<sup>369</sup> Mexican readers learned that he had been born in Bordeaux, France in 1873, but considered himself Mexican since he had been raised and educated in Mexico since the age of three. Before saying anything else about Fernando, the reporter notes "that the entirety of his [Fernando's] physiognomy will give, better than the pen, an understanding of the student's capacities: the honesty of his facial features is proof of his good instincts and ample intelligence (Fig. 4). His clear, honest and expansive sight manifest his abilities for prompt and thorough perception. [Fernando's] forehead is wide, open, and smooth showing only the prominence inherent to talent. He is entering the stage of development and the energetic forms of his body are becoming obvious at the same time that he looks flexible and well-built."<sup>370</sup> Political power reflected in speech exposed the need to know about the moral integrity and intellectual capacities of a boy who was not representative of the Mexican youth. The technological devices of race normalized the image of kids like Fernando as the future of Mexico.

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<sup>369</sup> It would have been really interesting to read what the interviewer had to say about Carlos Roumagnac. At the time he was 16 or 17 years old and would soon begin his journalistic career. Even more intriguing would have been to know what the father of Mexican Criminology had to say about his future inclinations: Roumagnac would write books and articles about the incarceration system in Mexico City, and would explore in depth the minds of the criminals he met at the famous Belén prison.

<sup>370</sup> *El Educador Práctico Ilustrado*, "Galería de niños celebres de México" (January 1886) in *El Boletín Municipal*, (1886): 4.

Very much impressed with the intelligence and manners proper of a gentleman, the reporter explains how Fernando is not only mature and an excellent friend to his fellow students, but also a refined humorist. While walking up the stairs that led to the portrait of the Dean Mr. Cruz—of considerable size—Fernando noted that “Mexico is 5,400 meters above sea level, while the picture of the Dean is about 12 meters tall, therefore at this point we must be at 5,412 meters of altitude.”<sup>371</sup> The joke made the reporter’s day, and also led to the incorporation of more of Fernando’s qualifications: he is very tender and loving with his mother, a popular rhetoric champion who had spoken in events for Porfirio Díaz, and an erudite in the subjects of geography, arithmetic, French, English, Spanish, syntax, analogy and prosody. Summarizing, the editorial piece concludes that Fernando has all what it takes to become a “man of instruction,” a reliable and dignified gentleman; a “person of value” [persona de provecho].<sup>372</sup> Fernando in this way incarnated the model citizen who through education and the right biological traits would promote the progress of the nation. Contrary to what the Indian represented to doctors such as León, Fernando was that element in the mestizo formula who everybody would want/need to emulate.

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<sup>371</sup> *El Educador Practico Ilustrado*, 5.

<sup>372</sup> *El Educador Práctico Ilustrado*, 5.



Figure 4: Fernando Kososky

Fenando's spirit—visible via his physiognomy—associated with his moral character make the *Educador Práctico Ilustrado* a great example of the penetration of positivist discourse in pedagogical publications. Thus, in 1867 Gabino Barreda the educator could see the triumph of Mexican liberalism as the triumph of the “positive spirit” against the retrograde forces of the old regime. By 1877 it was clear that Mexico had not reached the level of progress necessary to arrive in the positive state. The positive state could only be reached by achieving an effective mental emancipation from colonial practices and the metaphysical/abstractions proposed by radical liberalism. The positive state was based on political organization and individual autonomy, both were linked to order and progress. The climate of political tensions caused preoccupation even between liberal factions. Among those critical of the social stagnation phase



embedding the country was a young historian and journalist, the son of the famed Mexican writer Justo Sierra O’Rielly, Justo Sierra Méndez.

The primary preoccupation of Sierra was the lack of progress expressed in the terms of economy and political organization. The constant confrontations that the Díaz government had with other liberal factions made Sierra a vocal advocate of Spencer’s theory. Sierra as harsh judge of the 1857 liberal constitution argued that the “declamations of the metaphysicians” prevented society from organic development. The idea of the possibility to obtain absolute rights, according to Sierra, caused deception among citizens. Instead, a process of evolution would promote the better organization of society and the “tendency of the individual to widen his activity.”<sup>373</sup>

Therefore, progress had to be imposed, making the Comtian theory obsolete. Instead, Mexican ideologues looked to Hebert Spencer since “a new order had to be imposed for the sake of the Mexicans. Such order [did] not have a goal of social progress, but it [became] an instrument at the service of individual liberty...a liberty that [could] only be reached during a superior state of social progress.”<sup>374</sup>

Justo Sierra became the deacon of a new stage in Mexican positivism. At this time, Mexican elite became aware of the danger represented by the United States, but they simultaneously blamed the Latino race for the feeling of inferiority and weakness before the Northern neighbor. The binary utopia-materialism became central in the positivist debate.<sup>375</sup> The

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<sup>373</sup> Justo Sierra, *Obras completas* Vol. IV (México: UNAM, 1977), 238.

<sup>374</sup> Zea, *El Positivismo*, 307.

<sup>375</sup> Zea, *El Positivismo*, 308.

Latino race became a symbol of social incapacity for organization and utopian thinking, the two main obstacles that positivism associated with a negative phase of society.

Sierra would state that society acted as an organism and as such had to obey the law of integration and differentiation, both concepts linked to evolutionism. Integration referred to becoming better organized within the superorganism of society, while differentiation implied individualism and personal development. Sierra would declare that he “found Spencer’s system to be true, since it compares industry, commerce, and government to the organs in charge of nutrition, and circulation.” The Mexican population due to its *incoherence* and heterogeneity lacked a real cohesion force. Lack of homogeneity would increase the incoherence “day after day, and the organism will never integrate itself, and this society will become an abortion.”<sup>376</sup> The only authority capable of contributing to the development of the heterogeneous and individual would be a powerful central government, namely the Díaz government. The state of homogeneity and concentrated power to keep order would only derive from “Darwin’s theory and the struggle we [Mexicans] have against all odds.”<sup>377</sup>

The influence of Spencer’s positivism spread efficiently throughout Mexican society. In effect, a brief note contiguous to the Fernando’s biographical piece points out the increasing number of people dedicated to the “priesthood of magisterium”<sup>378</sup> and the value of re-taking the “pedagogical press” in order to create a new strategy of professional formation. The note, which

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<sup>376</sup> Sierra, *Obras completas*, 239–40.

<sup>377</sup> Sierra, *Obras completas*, 240.

<sup>378</sup> In Mexican Spanish *magisterio* [magisterium] refers to the ministry of education and its legion of practicing teachers; the term usually excludes the bureaucracy groups involved.

starts with a small epigraph by Spencer (the one also used in this chapter's beginning) clarifies that Spencer best illustrates the case of the author-teacher. He states that the profession of teaching invariably requires academic training and vocation, from the creation of knowledge to the classroom. Spencer warns against unprepared charlatans, and the possibility of making out of the magisterium a refuge for "misery, ignorance or some sort of varnish for speculation and deceit."<sup>379</sup> The main argument of the note becomes clear when the author mentions that "learning by memory" has created major problems in the schools. It cites as example the French educator Maria Pape Carpentier's argument that memory is not only the accumulation of data, but the exercise and cultivation of such information in the brain. Thus, memory should be comprehension, and intelligence must be a part of the memory process since it can explain what it has been stored. According to the note, Mexican teachers must be prepared to explain what the children should be memorizing.<sup>380</sup> This pedagogical approach was not an easy task, but one that was inherent to a career compared to priesthood, in the religion of Positivism and its need to fill a spiritual vacuum after waves of Jacobin impetuous.

Mexico's connection with the world was not established only by Mexicans educated abroad such as Barreda, or by the admiration and implementation of European philosophies, as Sierra's. Foreign visitors also acted as agents of a political economy of race by producing opinions and knowledge related to the country. They acted as links in a chain of semiotic exchange. The gaze of the modern foreign nations played an important role in the dialectics of

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<sup>379</sup> *El Educador Practico Ilustrado*, 6.

<sup>380</sup> *El Educador Practico Ilustrado*, 6.

the vernacular and global relation sustained between Mexico and the world. Some interesting and valuable examples can be found in the travel journals of foreigners who, for varied reasons, pursued adventurous treks or simply lived in what was considered an exotic land. Nineteenth-century French travelers had an image of Mexico based on either English historiography about Spanish colonialism or the work of Alexander von Humboldt. The former was created in the eighteenth century and considered the young and recently independent Mexico as the victim of a period of colonization that only brought oppression and underdevelopment. The latter announced Mexico as the country of the future—a nation with vast natural riches and heir of a great ancient civilization. But this version also portrayed Mexico as in need of a political regime capable of improving the “morale state” of society. It described a state affected by three centuries of Spanish domination, which resulted in low cultural and economic development.<sup>381</sup>

A policy of secrecy dominated the Spanish expeditions to its colonies in America, hence is not surprising that few publications of scientific explorations emerged, even during the Enlightenment. This situation changed with the work of baron von Humboldt, who influenced travelers and writers during the period between the independence of Mexico in 1810 and the Maximilian intervention in 1864. French intellectuals complained about the lack of objective information about a rich land which had so far inspired either negative or fantastic descriptions. In 1866, Lucien Biart wrote that he “had the purpose of letting France know about a country that could not be ignored anymore;” while the archeologist Desire Charnay condemned the distorted

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<sup>381</sup> Chantal Cramaussel, “Imagen de México en los relatos de viaje franceses (1821-1862)”, *Presencia francesa en el México del siglo XIX*, ed. Javier Pérez Siller, (México: Universidad Autónoma de Puebla/El Colegio de San Luis Potosí, 1998), 333-365.

image that many Frenchmen had about Mexico: they would expect to find Indians wearing feathers and the attires shown in opera representations at the time.<sup>382</sup>

The Frenchmen produced many published travel accounts and the authors came from multiple backgrounds. Some were writers, politicians, scientists, businessmen and even enlightened millionaires in search of adventure. The taste for the exotic, popular during the late eighteenth century, seemed to be complemented by the need of scientific discovery and also the influence of a political economy centered on the convenience of having a country like Mexico under the protective umbrella of a European power such as France.

French travelers were not the only Europeans interested in Mexico during the late nineteenth century. Germans also visited, and they were influenced by Alexander von Humboldt, but in different ways. In his travels through Mexico the idea of exchange was parallel to the idea of reciprocity and perfection in order to create equality and comparable living conditions throughout the world. This European perspective considered that universal relations not only benefited Europeans but the whole humanity. It embraced a *citoyen de l'univers* [universal citizen] and pursued ideals for a universal history on a cosmopolitan scale. Nevertheless, this universality cannot be based upon the foundation of a state or supra-state system, but on nature, or a cosmic order that ends up being de-historicized.<sup>383</sup>

The ideas of cosmopolitanism and the intermittent allusions to a certain type of universal citizenship had been present during post-revolutionary periods. The universal idea of citizenship

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<sup>382</sup> Cramaussel, "Imagen," 335.

<sup>383</sup> Ottomar Ette, "El científico como cosmopolita. Alejandro de Humboldt en el camino hacia la cosmopolítica," in León E. Bieber (ed.) *Las relaciones Germano-mexicanas desde el aporte de los hermanos Humboldt hasta el presente* (México: El Colegio de México, 2001), 59.

mobilized the populace in post-Independence (as seen in Chapter 1). After the Reforma and during the spring of 1886 few embraced a sentiment of belonging to world culture better than the *Educador Práctico Ilustrado*. In effect, while the attributes of the average citizen during the first post-Independence decade remained attached to basic liberal directives, in 1880s Mexico, those political values transfigured into aspirations of a higher social class intrinsically associated with race. *Totón*, whose real name was Asunción Barbier y Puig exemplifies how the Mexican “pedagogical press” praised the physical, intellectual, and moral qualities of children who could be associated with a criollo elite influenced by foreign visitors. But, beyond the obvious, this praise really focused on the belonging to a supra-national race, which possessed multiple similarities with a national social class considered as the model to follow. “Who in Mexico does not know Totón? Who has not applauded her speeches and award ceremonies, who has not been enchanted by her elegance, gallantry, splendor and impeccable diction?” asks the correspondent from the *Educador Práctico Ilustrado*. The anonymous writer continues to mention that Totón in reality was born in Madrid, “the capital of a great European nation,” however, her education had been attained in one of the best institutes of Mexico. Totón’s achievements included calligraphy, geography and history, and declamation in Castilian, French and English. The note dedicated to Totón might not be as explicit as Fernando’s, however, its language of exclusivity makes clear the politics of the projection of certain universalism associated with race and gender. The praise she receives does not focus on her future as a citizen but on the good woman she would become. “We publish a distinguished bibliographic note for such beautiful creature, model of many virtues and education; while we also send a vote of our deepest sympathy from this editorial group. Asuncion Barbier is called to honor Spain, land of her birth; and Mexico, the place where

she is growing up and receiving her education.”<sup>384</sup> The implicit language of class denotes also the technological device of race that immediately reminds a racial classification. Totón, therefore, cannot be thought as Indian nor mestiza given her membership to a universal race. Furthermore, just like in the case of *Raquel*, the intersection with gender normativity also implies that such a refined young woman must be destined to become the wife of a well to do Mexican man.

Despite the waves of Hispanic and Franco-philía, Mexico occupied the German minds, especially in terms of its natural wealth. Business leaders expected commerce and mining to generate the most profit. In 1823 the *Allgemein Preußische Staatszeitung* published an enthusiastic article about the natural treasures of Mexico. A few years later the Prussian bureaucracy was eager to establish commercial relations with Mexico and to sign export contracts as soon as they recognized the country’s newly-achieved independence.<sup>385</sup> By 1825, Mexico was already importing 81 million marks of European products, of which about 15 million corresponded to German goods, which made preserving the Mexican market a priority for the Prussian government.<sup>386</sup>

In February 1831 Prussia and Mexico signed a Treaty of Friendship, Navigation and Commerce, which was ratified three years later. The treaty implied a compensatory character,

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<sup>384</sup> *El Educador Práctico Ilustrado*, “Galería de niños celebres de México” (January 1886), in *El Boletín Municipal*, (1886): 3-5.

<sup>385</sup> Ette, “El científico,” 92.

<sup>386</sup> Ette, “El científico,” 97.

stipulating a preferential tax treatment in Mexico in exchange for political recognition on Prussia's part.<sup>387</sup>

Most travelers from Germany did not have the intention of colonizing Mexico, but rather wanted to establish commercial relations to expand Prussian interest. Other travelers like the philologist Max Leopold Wagner had an interest in taking a deep look into the essence of the Mexican nation. His narrative of travel, published during the early twentieth century in the magazine *Deutsche Rundschau für Geographie*, was a hybrid between ethnography and tourism. He depicted himself as a romantic German who showed great interest in the people, the natural richness, the quaint towns, and above all the varied linguistic and folkloric elements that confronted him every step of the way. He elaborated a list of words that attracted his attention either for the resemblance to Andalusian argot or due to their roots from indigenous languages. His great deduction, and contribution argues that the Spanish dialect spoken in Andalusia had defined the speaking accent of Veracruz, over the coast of the Gulf of Mexico.<sup>388</sup>

However, travelers who seemed to comment on the benefits of foreign intervention in Mexico did not always advocate in favor of any type of domination of the former Spanish colony again. It was common at the time to associate the citizenship of a nineteenth-century European civilization with an expansionist spirit that considered the great “extra-European military enterprises as part of the promotion of scientific knowledge.” As an example, the expedition of Napoleon I in Egypt led to the inauguration of the Institute of Egypt; its contribution to the

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<sup>387</sup> Ette, “El científico,” 105.

<sup>388</sup> Luis Fernando Lara, “Noticia de un viaje de Max Leopold Wagner por México en 1914,” in *Las relaciones Germano-mexicanas desde el aporte de los hermanos Humboldt hasta el presente* (México: El Colegio de México, 2001), 173.



development of the modern history and anthropological science is undeniable. In 1811, the *Essai politique sur le Royaume de la Nouvelle-Espagne* by Alexander von Humboldt focused on the mining riches awaiting the counties that could venture into Mexico and make it the most prosperous country on earth. Such statement made Mexico fashionable in France. Novella writers did not take long before talking about a distant an exotic land, and they dedicated columns to describing Mexico in newspapers throughout the country.<sup>389</sup>

In addition to commercial agreements in the first half of the nineteenth century, France also had several colonization projects taking place in agricultural and low populated areas of the country. While it is impossible to estimate the number of French people living in Mexico at the time, it is clear that immigration projects did not yield the expected results. The census of heads of family in 1854 reflects 10,000 men, who can be associated with similar numbers of women and children. In 1857, an expeditionary photographer named Desire Charnay commented in Mexico City: “As we had said, the center of the city is European. In the streets of Plateros, San Francisco, de la Profesa, Espiritu Santo, one can hear French and Spanish spoken: but almost all the well educated people speak our language.”<sup>390</sup>

French travelers saw Mexican peasants as similar to the feudal servants of Europe, and those views come from two sources. First, travelers influenced by the Enlightenment thought that the colonial period had submerged Mexico under the darkness of monarchism and a catholic church ruled by the Jesuits. Additionally, English authors, influenced by the Black Legend of

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<sup>389</sup> Cramaussel, “Imagen,” 337.

<sup>390</sup> Cramaussel, “Imagen,” 339.

Spain, emphasized the cruelty of the Spaniards against the Indians and supported by the church.<sup>391</sup>

Thus, French travelers found social hierarchy in Mexico problematic. They praised the brilliant pre-Hispanic civilizations who had survived the impositions of the criollos (or Conquerors as they called them), and they simultaneously condemned the hacienda system in which a type of slavery existed under the tyrannical rule of criollos supported by the church. Such a view became paradoxical since the criollos (unmixed people of Spanish descent), still represented the best part of Mexico; that is why they were called “decent.” French visitors hoped that one day the oppressed would rise against the “10,000 decent” who sustained a constant regime of oppression. However, for other travelers, such as Beltrami, the criollo was the race par excellence, superior to other social strata, particularly to the mestizo—who has inherited the worse vices from the Indians and the white Spanish—represented in the cities by the *lepero* or *vago* [the rude and the vagrant].<sup>392</sup>

The figure of the Indian became romanticized, and most French travelers considered them stuck in a state of nature, isolated from the ancient splendor of their ancestors. The elite considered such people too bucolic to be part of the new nation. Therefore, the Indians appeared in narratives as a peripheral part of the Mexican context, working in haciendas or mines, but otherwise voiceless. Many illustrations show them as pre-Conquest people—usually naked, wearing feathers in their heads, and engaging in ceremonies that required proximity to pyramids.

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<sup>391</sup> Cramaussel, “Imagen,” 341.

<sup>392</sup> Cramaussel, “Imagen, 343.

Charnay complained when Indians refused to pose naked for his “natural” paintings.<sup>393</sup> For him, Latin America and Mexico represented not only an affinity among Latin people for the locals, but some sort of extreme source of authenticity or living anthropological material for the foreign gaze. French travelers and Mexican positivists coincided in the consideration of belonging to a Latin family. But a family was not the same as race. The concept of race would be reserved for the categorization of the Indian in biological terms as a lesser being. The indigenous as reminiscence of the past.

In a sea of world semiotic commerce, and within the political economy of race, Mexico seemed to thrive within its hierarchical order, supported locally and internationally. Mexico City or *Petit Paris*<sup>394</sup> was a breeding ground of discrimination. While medical professionals analyzed Indigenous women as abnormal specimens, the journals in charge of disseminating the national education policy focused on children who were exceptional as model for an abstract nation. The *Educador Práctico Ilustrado*, in its February 1886 edition, featured Adelina Salazar y Ortiz, who was not only an example of morality, love of God, and human obedience-dignity-hygiene, but also a living proof of the connection between physiognomy and character espoused by modernity: “...and yet one would think that only a bias has guided our pen; however, it is easy to get an idea of Adelina (Fig. 5) just by looking at her portrait, in which mainly one can observe

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<sup>393</sup> Cramaussel, “Imagen,” 344

<sup>394</sup> People in Mexico City used to refer to their city as *Petit Paris*, whether they were foreign or nationals. One of them was Gustavo Gosdawa Baron of Gostowski. He was born in Warsaw between 1840 and 1846, of Polish father and French mother. As other young liberals that supported the ideals of Napoleon III as paladin of freedom, Gosdawa joined the two thousand polish soldiers ready to participate in the enterprise of Maximilian of Hapsburg in Mexico. He fell in love with Mexico and decided to establish his residence permanently in the capital. See Francisco Mercado Noyola, “El barón de Gostkowski, un juarista del viejo mundo,” *Nexos* (Nexos, July 2012).

her stern but gorgeous gaze, and her facial features so honest and decisive, just like in the fashion in which phrenologists are able to determine intelligence and determination.”<sup>395</sup> Adelina’s description implied a double message. First, a position of gender: women should be pretty, pious, obedient and clean. Second, physical traits could be expression of character, intelligence, and human value. The pedagogical publication was clear about what the Mexican nation should be in terms of population, and once more the barbarous and unreasonable Indian was not included.



Figure 5: Adelina Salazar y Ortiz

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<sup>395</sup> *El Educador Práctico Ilustrado*, “Galería de niños celebres de México” (February 1, 1886). In *El Boletín Municipal*, (1886):4-5.

Modernity, as a state of mind, and ethereal place for the development of the human life manifested its natural anxiety for order and progress through positivism. Whether it was education policy, economic planning, or implementing a civilizing agenda, modernity in its positive-reconstructing phase prevailed in mid-nineteenth-century economic, political, and journalistic discourses. As seen in chapters I and II the transfiguration of the engine of history went from a narrative of racial confrontation to a notion of revolution and rebellion as the energy moving society towards a modern nation-state. This counter-narrative allowed ruling elites to normalize a national race discourse, but by the same token it created a sub-race, an enemy within society, who had to be either subdued and neutralized or totally eradicated. The task, hence became to make the enemy, the different, the unadaptable, and the hindrance to progress, disappear.

It is crucial to understand that the process of nation-state construction is not unidirectional, nor vertical, or exclusively horizontal. The sea of forces acting upon political actors takes the forms of the valleys and geographic depressions that contain such power relations. The relations among groups and individuals represent a key component in the mechanisms of power. It is necessary to remember that the subaltern classes have a major role in modeling the state, and that the history of state formation is the history of human actions recorded in time. Such subaltern interventions can be considered as nothing short of the “brushing of history against the grain”<sup>396</sup> useful in order to make visible the active side of subalterns in insubordinations, the memories, and even the ways in which people remain silent

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<sup>396</sup> Walter Benjamin dixit

about certain events. In Mexico silence incentivized the creation of myths that more than a relation to the fantastic have a certain amount of truth mixed with the fear of reprisal, but always designed to carry a symbolic charge that prevails over the centuries.

By 1881, the discussion of positivistic policies and trends had become a common topic in the public sphere. News outlets such as the *Monitor Republicano* announced periodical supplements dedicated to science and philosophy, having as a goal the “promotion of in-depth philosophical studies capable to explain one of the philosophical systems which for the most part occupies the minds of today’s thinkers.” Porfirio Parra, director of the supplement, promised to make available through his publications the most important works of the school of positivism. The dispute for the ownership of innovation and knowledge created true intellectual battlefields in common places accessible to most educated citizens. In effect, the constant references to positivism, nation building, modern thought, and the implementation of progress also brought sharp and noxious comments against political or ideological opponents. A brief two paragraph note—inserted in a news dossier which also contained a very detailed weather analysis for Mexico City—concluded with a stinging clarification: the leitmotiv of the Positivist periodical was to make available new and unknown *opusculum* (small works) written by Comte, Spencer, “and others not even known by Mr. Barreda [Gabino] funder of the Mexican Positivism.”<sup>397</sup>

Thus, a mixture of social unrest, modernity, and continuous nation-state building became the perfect breeding ground for the Porfiriato. This historical term in Mexican politics is also

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<sup>397</sup> *Monitor Republicano* (Mexico City, Undefined), December 28, 1881: 3. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:12859D1B768074BA@WHNPLAN1-1292DDD565ACDDF0@2408443-1292DDD5A533F4D0@2-1292DDD5A533F4D0@>.

known for its implementation of ruthless positivistic and racial measures of enemy disappearance—both, through physical violence and discursive proposals of mestizaje.

José de la Cruz Porfirio Díaz Mori was born in Oaxaca on September 15, 1830—a day as symbolic in Mexican history as his personality, which incarnated the attitude of a soldier and a man of order, discipline and common sense. His values as triumphant general as well as his honesty, inspired “trust and certain degree of confidence” according to U.S. Secretary of State John W. Foster, who like many other politicians considered Díaz’s personality indispensable for a time lacking equality and social organization.<sup>398</sup>

“Mexico, at fifty-five years of independent political life, had not yet witnesses the process of mechanization of human groups, inherent to state and nationality formation. Authority had only manifested exclusively through the use of violence, but never through the power of mechanics.”<sup>399</sup> These words, authored by historian José C. Valdez in 1941, reinforce the notion that even fifty years after the height of the Porfiriato the thesis about the need for social engineering, as panacea for the ailments of Mexican society, was still alive and well.

Faithful to the common view of Mexican post-revolutionary official history of his time, Valdez portrays Díaz’s life and work in a non-demonizing way. But he also portrays an accurate socio-political context of the pre-Porfirian era. Sebastian Lerdo de Tejada replaced President Juárez, but preceded Díaz. He had inherited a dysfunctional bureaucracy which became the leitmotiv of state and society. Such a government attitude ignored the calls from a world of

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<sup>398</sup> José C. Valdez, *El Porfirismo. Historia de un régimen* (México: Fondo de Cultura Económica, 2015), 11.

<sup>399</sup> Valdez, *El Porfirismo*, 11.

progress and the “phantasies” that soared throughout the last third of the nineteenth century. The era was a witness of everything the positivists were constantly complaining about: the metaphysical, meaning political abstractions and dogmas; and the incoherent, or lack of political and administrative organization. The unfulfilled promises of modernity included the improvement of communications, and creation of productive industries in the form of “anonymous societies.”<sup>400</sup> The disappointment also derived from the lack of constant supervision of norms of public and private hygiene, the promotion of newspaper circulation, the attention to new social ideas, the tendency to incentivize inventions, and the fixation of human values. The unfulfilled promises of modernity sabotaged what was considered as part of a steady march towards civilization and the modern state. Centered in the persecution of religious entities, Lerdo had forgotten not only about the pursue of happiness via instauration of official modernity, but also about the consequences of the *desamortización* laws—from the Juárez era—which had negatively affected the Mexican agricultural activity. The liberal attempt to promote individual development by land ownership had failed due to land concentration in the hands of a few families. The state basically eliminated the *capellanías* and by that, a system of agricultural reserves had collapsed. Additionally, Lerdo, made the concession to the Union Contract, a railroad company that appropriated four thousand hectares of vacant land per every kilometer of track constructed.<sup>401</sup>

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<sup>400</sup> In Mexico an anonymous society is the counterpart of a limited liability corporation.

<sup>401</sup> Valdez, *El Porfirismo*, 18.



The feeling of disorganization and constant agrarian revolt became the incentive for the creation of a powerful and centralized government. When Díaz came to power in 1876 the pacification of the country and setting the path towards economic development became the priority. Hence, the battle against a retrograde government regime went beyond politics alone. Progress rode into Mexico via train. Probably the most palpable modernization effort was directed towards the railroad construction throughout the country. The length of track in 1876 was only a little over 600 kilometers, but it soared to 5,891 kilometers in 1884 and steadily grew until it reached 20,000 kilometers in 1910. The train represented the promise of a golden era in which Mexico left behind a past of violence and backwardness to become a front runner with other industrial nations.<sup>402</sup> The strengthening of the macroeconomic sectors was impressive: exports showed a six-fold increase, while general economic growth averaged 6 percent per year. Some sort of economic boom reached many small towns such as Cananea, in Sonora. The village had one hundred people in 1891, and by 1906 the town was producing 10 percent of the entire Mexico's mineral output in addition to having a population of twenty-five thousand persons. For the first time Mexico's government had a budget surplus. Foreign investments had also spectacular transformations: they went from 110 million pesos in 1884 to 3.4 billion pesos in 1911, having the most notable participation of United States in mining and railroads, Britain in petroleum, and France in the banking industry. Such transformation progressed quickly

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<sup>402</sup> Anita Brenner, *The Wind that Swept Mexico* (Austin: University of Texas Press, 1940), 15.

integrating the country into the “north Atlantic capitalist world.” By 1911 Mexico was producing 14 million barrels of oil, placing it as the third largest oil producer in the world.<sup>403</sup>

The political regime, understood as the institutional framework that makes government possible must be differentiated from the political system, which is associated to the series of political practices and beliefs hegemonic in a country. In its effort to engender a new political system, the Porfirian regime dealt with the construction of an economy in parallel to the formation of a state.

In effect, the “illusion” of progress had to be a primary component of the state, but also had to be awakened inside the individual. Thus, private industry in the Porfirian era became lured by speculation. The concentration of wealth only occurred at the top. The key was to maintain the same influential people at the top during the boom and to shelter them in times of crisis. Consequently, one affected sector in such formula was the middle class that was excluded from gaining any type of wealth and influence. Small commerce minded landowners and ranchers, as well as all those involved in low volume trading and mercantile activities, were excluded from the economic growth amply reserved for the super-rich. In the same tenor, the educated middle class, encompassing mostly lawyers, professors and journalists, were marginalized and deprived from the political voice inherent to their level of education.<sup>404</sup> Most agricultural resources were allocated to a wider range of people. But this was only the Díaz’ way to benefit large landowners. With the 1883 law on *terrenos baldios* [vacant land] a massive land

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<sup>403</sup> Stuart Easterling, *The Mexican Revolution. A Short History 1910-1920* (Chicago: Haymarket, 2012), 6-7.

<sup>404</sup> Easterling, *The Mexican Revolution*, 8.

transfer initiated. For example, any surveying company working on the lands could keep one third of them, and the right to acquire the rest of the surveyed plots from the government at dirt-cheap prices. The result of such land acquisition process was baffling. During the Díaz regime some thirty-nine million hectares or one fifth of the country's territory became private property. To illustrate: 547,000 hectares became the property of Richardson Construction in Los Angeles; William Randolph, a newspaper tycoon acquired 350,000 hectares in the state of Chihuahua (more than four times the size of New York City's five boroughs); and the worst of all, and largest landowner in Latin America, Luis Terrazas, who owned three million hectares alone.<sup>405</sup> In a country where an average of 80 percent of the population were dedicated to agricultural activities the land acquisition process of the Porfiriato represented a huge survival problem. Additionally, commercial activity witnessed problems between European and American monopolies in a time in which credit had been recently introduced, and exports become balanced with all imports. The working classes were negatively affected by economic theories and the hopes and plans of foreign investment in Mexico.<sup>406</sup>

However predominant the idea of industrial progress may be in association with the Porfirian era, in reality the economy depended greatly on the displacement of capitals. The displacement mainly took place from the incipient Mexican industrial sector into agricultural areas and production. The mining and industrial sectors were crucial in Porfirian economy as

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<sup>405</sup> Easterling, *The Mexican Revolution*, 18.

<sup>406</sup> Valdez, *Porfirismo*, 50.

well. However, the hacienda as one of the pillars of production amplified the link between labor and race. In the words of Valdez:

“The old politician, as well as the old [high rank] military official, both winners in the Porfiriato, see no more option than to become businessmen; and the hacienda—country estate—becomes the most attractive venture. The hacienda, nevertheless, does not create a real power in terms of agricultural production, but a power directly related to labor and *race*.”<sup>407</sup>

Valdez’s note on race acquires an important symbolic content. The hacienda encompassed an agricultural work setting that contained the families of the workers in a state of captivity due to the enormous amount of debt acquired at the hacienda’s shop. In this way credit became a form of pseudo-slavery. The hacienda represented a microcosm of self-sufficiency; it was comprised of a central area and was usually enclosed by protective walls, which protected the landowner’s mansion along with all the comforts commonly found among the landed aristocracy. The compound also had offices, shop, a church, a jail, barns, and stables. Most importantly, the hacienda shop (or *tienda de raya*) sold such items as coarse cloth, maize, beans, soap, and aguardiente, and almost always charged exorbitant prices.<sup>408</sup> The hacienda shop created a system of perpetual debt, which translated into a sort of modern slavery, primarily for the Indians or poor mestizos.

The world economic crisis had serious effects, and Mexico did not escape from the storm. In addition to the five decades of low economic growth and social unrest, the country had to deal

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<sup>407</sup> Valdez, *Porfirismo*, 50. The emphasis is mine to make sure the class and racial connotation is not overseen.

<sup>408</sup> Gilly, Adolfo. *The Mexican Revolution* (New York: The New Press, 2005), 19.

with a world economy in crisis. Government leaders offered profitable concessions in an attempt to incentivize investment and other capital inflows. Some of the wealthiest families in Mexico were consolidated in the Porfirian era by means of railroad development and land exploitation, such as the development of the carbon mines of Sonora.

But the wealth of the few families that benefited from the economic boom throughout the *Pax Porfiriana* was in fact inversely proportional to the welfare of the peons working in the economic enclaves such as the haciendas. Salaries through the Mexican Republic were meagre, and in cases such as Queretaro, the workers received only “a real and one quart of corn per day.” Meanwhile in the cities, the stimulation of the factory development and the associated salary transformation gave birth to a wave of labor demands. The incipient Porfirian economy witnessed numerous strikes. In 1877 textile workers demanded a 12-hour workday, abolition of night work, abolition of voucher payments and corporal punishment, and the implementation of medical services focused on work related illnesses. Multiple similar worker-led movements also arose in Guadalajara, the Sinaloa mines, Mexico City, and Puebla.<sup>409</sup>

Social unrest and the contradictions that emanated from the imposition of progress often brought violent responses that required repression. As seen in previous chapters, during the nineteenth century almost all forms of government interference and repression found a justification. Officials and intellectuals claimed that a racial component, was the source of backwardness opposing modernity and progress, and that it was the social component to be extirpated in order to produce a healthy and coherent body politic. Of course, a narrative of

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<sup>409</sup> Valdez, *Porfirismo*, 85-86.

technological race devices in Mexico must mention the attempt at genocide that took place in the Sonora territory of the late 1800s in the name of order and progress. In addition to the conquest of Tiburón Island (1844) and the routes of communication with the Alta California during the Second Empire, the Indian problem in subsequent decades reached other ethnic groups as well.

The culmination of a long dispute for land and resources in Sonora involved an intense war campaign against the Yaqui. The history of the Yaqui people is a history of resistance and a popular war that almost lasted forty years, developed for the most part during the Porfirian era. (1867-1909). The Yaquis always refused the fallacies of progress imposed by war. It is interesting to note that the language of the government and intellectuals shows the use of euphemisms associated with the cleansing of the body politic. In the case of the Yaquis the key word was “pacification.” As the barbarous they were, just like the Ceris, Yaquis needed to be violently or “pacified.”<sup>410</sup>

There was no shortage of media coverage, even from liberal leaning newspapers such as *El Siglo Diez y Nueve*, which applauded the effort of “pacification” in Sonora. In 1868, an editorial note praised the efforts of the troops who “due to the patriotic initiative of the government, soon will definitively punish the last standing Yaquis; putting an end to the last trace of treason that had threatened the safety of the population of the state, and the so longed tranquility and peacefulness needed to repair the deep rooted ailments inherited from the previous despicable domination [of the Indians].”<sup>411</sup> The arguments of the press appealed to fear

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<sup>410</sup> Paco Ignacio Taibo II, *Yaquis. Historia de una Guerra popular y de un genocidio en México* (México: Planeta, 2013), 13-14.

<sup>411</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), February 13, 1868: 4. Readex: Latin American Newspapers. <https://infoweb-newsbankcom.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-133CFBE0BAA60DA8@2403376-133B469B5A982AA0@3-133B469B5A982AA0@>.

of the Indian, who had always the intention of revenge. Fear of a return to a state of nature dominated by the Indians fueled a sense of patriotism. The defense of the nation became equated with the effort to punish Indian rebellions, but most commonly with the desired to vanish the Indian presence whether it was physical or symbolic.

The Sonoran politico-military elite worked hard to create a negative image of the Yaquis through their scarce intellectuals and the press. They portrayed the Yaquis as semi-savages. The term of common use by the Sonoran people became a symbol. For them a semi-savage meant a “lower grade of civilization well below the fully civilized Mexicans.”<sup>412</sup> In the same tone, a desperate cry from Sonora in the voice of Velasco called to put a stop on a fratricide war. He requested to abandon the twisted “spirit of the [political] party” that produced a civil war in Mexico. Velasco was referring to the long confrontation between liberals and conservatives. Instead, both parties, “real brothers” should forget about hard feelings, and join forces against the “passions of a strong [enemy], the savages.”<sup>413</sup>

Just like in the case of the Ceris, Apaches, and Mayos, newspaper notes and articles continuously fed readers the idea that the obstacles to modernization and progress were incarnated in the non-civilized Indian. Official documents such as the *Sonora Survey* maintained that the forces of the government should engage in a harsh campaign against the barbarous [the Yaqui] in all districts occupied by them. In 1878, the narrative about the “barbarous, the Yaquis” had not disappeared, but rather it intensified. Reports by the inhabitants of the Yaqui River

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<sup>412</sup>Taibo II, *Yaquis*, 15.

<sup>413</sup> Velasco, “Continuación,” 106.

region never ceased to accuse the Yaqui leaders of savage practices, while attempting to present a segment of the Yaqui population as victims of Indian manipulation for political purposes.<sup>414</sup> In other words, there was in fact something called *noble Indian*. But all those noble Indians needed to be saved from the tyranny of the barbarous rebels who had made war against the “patriotic” forces of the central government.

Contrary to their rugged discourses and attitudes, the elite of Sonora, the armed aristocrats, dressed in the latest European military and civilian fashion to project an image of success and modernity. Image became relevant in Mexican society of the late nineteenth century. Pedagogical publications, such as *Educador Práctico Ilustrado*, glorified themselves by showcasing images of model/modern children, presented as a sort of universal young student. The portraits of the elite almost erase the fact that they had an ideology forged on the belief of the self-made man and that they grew up defending an emerging class that owed little to family money and birth, but much to the multiple wars they fought: The Reforma and the war against the Maximilian Empire.<sup>415</sup>

By the turn of the century, the Mexican political and economic elite had already adopted the rhetoric of positivism which made of progress and uncontrolled industrialization a new religion. As true sons of the Enlightenment the Sonoran elite just followed the modern dictum of a dialectic process in which people who are not “productive” become abstractions and obstacles.

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<sup>414</sup> *Siglo Diez y Nueve* (Mexico City, Undefined), July 13, 1878: 3. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:13316854647F044D@WHNPLAN1-138024DF8D72A080@2407179-1380212C6F2D8F78@2-1380212C6F2D8F78@>.

<sup>415</sup> Taibo II, *Yaquis*, 17.



In 1887, some press outlets showed signs of exhaustion against the scientific sugar coating of political language. “For heaven’s sake, who can talk to them about Darwinism and positivism? They are scholastics! They hate of materialism and idealism the opposite of what they claim. Scholastics that is the true philosophy. In which type of head can one think that men descend from monkeys? They are the monkeys themselves; they make fools of themselves with such scientific pedantry. Comte, Spencer...Names, just names and names, or, if you wish: Locke and Condillac dressed in modern fashions.”<sup>416</sup> Newspapers showed contempt for the overwhelming expressions of intellectualism in the nineteenth-century public sphere. Discrepancies between discourse and government actions created frustration among authors of journalistic notes. In a country where polarization, racism and abuse had become the norm the intellectual’s elite opinion started to appear obsolete.

Positivism and its language of difference and entitlement for the few damaged the social fabric of the late nineteenth-century society in Mexico. The technology of mestizaje had been fructiferous, identifying the non-compatible within the body politic of a modern nation. The long wars against the Indians of the North are evidence of the murderous paradoxes of liberalism in its positivistic version. A careful construction of the other via racial technologies of the past launched yet a new way of seeing the internal enemy within the norms of a political economy of race. The racial instruments necessary for the elaboration of a post-revolutionary nation-state building had been laid in perfect order for the twentieth-century nationalist heroes. Velasco and

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<sup>416</sup> *Monitor Republicano* (Mexico City, Undefined), September 11, 1887: 2. Readex: Latin American Newspapers. <https://infoweb-newsbank-com.libproxy.utdallas.edu/apps/readex/doc?p=WHNPLAN1&docref=image/v2:12859D1B768074BA@WHNPLAN1-12959EA180690E88@2410526-12959EA19BD1EED8@1-12959EA19BD1EED8@>.

his observations about the Apache women's behaviors in the 1840s surfaced with even more energy by the end of the century. Nicolás León did his part in elegant scientist outfits, using sophisticated instruments, and a more florid language to say what would be the racial mantra for the century to come: the Indian represents atavisms, the only way to survive is to eradicate them and to have hope in the technology of mestizaje, which will vanish the Indian inside every Mexican. After all, the only good Indian is the epic, but dead Indian.

## CHAPTER 7

### CONCLUSIONS

In 2011 a Mexican advertisement agency, Agencia de Publicidad Social 11.11 Cambio Social, published a video as part of a campaign against racism. The highlight of the campaign was a short three-minute video in which an interviewer asked several children to choose between two plastic dolls. One doll resembled a white baby, the other doll had a very dark brown skin tone. The answers were very similar, with a few exceptions. When asked to point at the bad or ugly baby, the common answer was the “brown baby.” To the question of why they thought that way, most of the children answered that “I don’t like brown [color],” or “I trust more the *güero* [white] because I would not trust a person like this [the brown doll].”<sup>417</sup> The name of the video, was in fact *Viral Racismo en Mexico*, but it did not go viral. Indeed, one of the YouTube channels re-streaming the video only has 139,900 views.<sup>418</sup> The original site that posted the video is currently unavailable, but shows 3.6 million views. Other channels had to disable the comment section due to the high number of inflammatory comments. However, in 2012 a YouTube personality published an insensitive parody of the *Viral* campaign. As of July 31, 2019, the mocking video has 3.9 million views, and comments are still pouring in, unabated, uncensored.<sup>419</sup>

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<sup>417</sup> “Viral Racismo en México-El Original” on Vimeo (2016) accessed July 25, 2019 <https://vimeo.com/user3713380/viral-racismo-en-méxico-el-original>

<sup>418</sup> Viral Campaña “Racismo en México,” (January 2012) accessed July 25, 2019 <https://youtu.be/5bYmtq2fGmY>

<sup>419</sup> Viral Racismo Mexico Werevertumorro (January 2012) accessed July 25, 2019 <https://youtu.be/MbAcTRAYFS8>

In Mexico humor related to racism is common, and it is the very ground upon which many comedians build up their comedy routine. Jokes about Indians, Spaniards, and Afro-Latinos are present in almost every stand-up comedy act. The common belief that a “little humor does not hurt anyone” indicates that the technology devices of race have accomplished well the normalization of racial thought.

However, the Mexican state of affairs in terms of the idea of race is not a comedic matter. The judicial, political, and economic systems exhibit symptoms of the penetration by racial thought. For example, the average citizen tends to instantly associate criminality with race. As in the case of the Huachicol (fuel theft) public opinion tends to understand criminality as the result of a certain essence provided by race. The way in which the massive commercial product market in Mexico operates denotes the presence of technological devices of race. Such a situation is a remnant of the Mexican past.

The colonial system of human classification, castas, evolved into a more sophisticated taxonomy during the transitional period at the end of the eighteenth century. Demands from a changing socio-economic order at the world and local levels forced a classification change. Castas marked by lineage and religious affiliation acquired first a tone associated with physical appearance. For the transformation, the casta system required a visual technology to send a clear message to New Spain. The casta paintings sent a new message conveying that colonial subjects going into the entrails of a republic would be allocated a niche in a socio-economic hierarchy. By relegating Indians, and other mixed races to the bottom of the hierarchical distribution chart, casta paintings privileged the Criollo elite, and the new Mexican subject for the republic: the Mestizo, a person of mixed Spanish and Indian descent.

Criollos and Mestizos as principal actors in the political and economic development of the country leaned towards a liberal construction of the Mexican mind and nation. Ideas from the European Enlightenment became crucial in the process of nation-state building throughout the nineteenth century in Mexico. In the post-Independence period, a time of constant violent reforms, liberalism became an immediate foundational myth for the framers of the Mexican nation and state. Liberalism associated with revolution, and therefore with the future constituted the base for most political discourses at the time. The anxiety to leave the colonial past behind privileged progress over tradition and religion. But in a country where most citizens were of indigenous descent the tendency to associate the past with a hindrance to development created multiple problems.

Additionally, the assumption of the belonging to a Latin race made the intellectual and political elite of Mexico believe that they represented a vanguard, not only locally but also internationally. In this way, liberalism in Mexico, as a revolutionary discourse, was more concerned about the limits of power than individual liberties. Liberals promoted the separation of Church and state as much as they argued for the limitation of the power invested in the army. In the positivist era, Church, army, and a colonial past represented the metaphysical state from which the nation had to be emancipated. But also the fantasies of extreme liberal abstractions in terms of universal rights were considered a metaphysical issue. The proposal of the liberal rulers of the country hence considered a strong central government with the capacity not only to unify the nation, but also to make it homogeneous. The hierarchy that had assigned the Indians the lower levels of human value would, in the second half of the nineteenth century, mark them as the internal enemy. The public sphere, politicians, and intellectuals from all over the country

seemed to agree that the barbarous races were a danger to Mexico. The country at the time did not need, according to its political elite, anything but order and progress. The Mexican state hence became a vanishing machine. Physically it vanished Indians and undesirable persons by war campaigns i.e. Yaquis and Ceris. The state took advantage of theories of mestizaje in order to hide the Indian component thought to be part of most Mexicans. Mestizaje reinforced the notion of being closer to one race than the other. No one wanted to be Indian.

The idea of race prevailed by assuming the form of human classificatory system, politics, foundational myth for a region, and vanishing machine. To do so it needed to be incorporated into different technological devices of race. Such devices have proven to be efficient and perennial. With few modifications, classificatory systems that assign value to human beings are still alive and well. They maintain the same purpose as they did during the Mexican colonial period: to qualify people in terms of character and morals without really knowing the person. The technological devices of race still prevail in a society in which racism is intimate and acceptable among family members. Such a society is embedded in racial thought so deeply that children inadvertently learn that to be *moreno* [dark skin] is bad, and that the color of the skin makes a person not trustworthy. Efficiently, publicity promotes the same tropes. The Mexican modeling industry openly uses a classificatory system comparable to the *casta* system. The modeling executives unapologetically ask job seekers to not show up to castings if they do not comply with the requirements: that is race requirements of eye, hair and skin color. But the catch is in the hierarchy not the persona hired for a commercial. According to model agencies *morenos do not sell*.

The extreme level of racism in Mexico may not always be violent, but it is certainly a factor of discrimination, and more than anything else, injustice. Five hundred years passed before a morning on 1994 when the Zapatista Army declared the beginning of an armed conflict in Chiapas, Mexico. Their claim was simple. The indigenous peoples of the South demanded to be heard and considered as part of the nation. They also demanded respect for their culture, and systems of justice, politics, and economy. Above all, their demand was for dignity. Racism had made them not only feel as they were lesser beings, but also essentially invisible. Therefore, the paradox of race is to make visible the physical features that identify a person as a lesser being, while making invisible the needs of a historically disadvantaged group.

The dismantling of the technological devices of race will take time and willingness to do so. It will require intense campaigns and education in human rights. Institutionally, courses that affect the perception of students in terms of the dignity of the human being are necessary at early age, so difference can be perceived as valuable. Until then international models will illegally migrate to Mexico in search for a dream job; and parody videos will generate more views than original anti-racist campaigns.

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## **BIOGRAPHICAL SKETCH**

Pedro José González Corona was born in Mexico City in 1970. He attended State Preparatory School No.1 and specialized in physics and mathematics. After completing a bachelor's degree in political science and public administration at Mexico's Autonomous University (UNAM) he went to work for the Mexican government. His first governmental experience was as International Press Intern at the Presidency of the Republic. He was also a Federal Agent at the General Attorney's Office.

Pedro has experience in the communications and construction industries. In the communications industry, he was an anchor and producer of the political analysis show Agenda Politica at TV America. He was a project manager and operations manager for a multimillion-dollar company involved in the development of low-income housing, retail commercial spaces, religious organization buildings, and luxury zero-energy homes in the construction industry.

In 2012 Pedro completed his master's degree in liberal studies with a concentration in human rights. Currently he is a doctoral candidate in the History of Ideas. While working towards his doctorate, Pedro is working as a research assistant at the Center for U.S.-Latin America Studies and as an academic advisor at the Ackerman Center for Holocaust Studies which includes lecturing on the Holocaust and human rights in Latin America.

The title of his doctoral dissertation is: Genealogy of Mexican Racism. Technological Devices of Race and their Transformation in Modern Mexico.



# CURRICULUM VITAE

## Pedro José González Corona

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### Education

- Ph.D. Candidate, History of Ideas, Certificate of Holocaust Studies, UT Dallas, Richardson TX (Dissertation defense scheduled for August 2019).
- Fellow at International Faculty Seminar: The holocaust, genocide and mass violence, Museo Memoria y Tolerancia, 2019, Mexico City, Mexico
- Scholar in Residence at the Summer Institute for the Study of Global Antisemitism and Policy, St. John's College, 2018, Oxford, UK.
- Fellow at the Oaxaca Summer Institute, Mexican History Seminar (UT Dallas and University of Arizona), 2015, Oaxaca, Mexico
- Master of Liberal Studies with concentration in Human Rights, 2012, Southern Methodist University, Dallas, TX.
- BS in Political Science and Public Administration, Universidad Nacional Autónoma de México, 1997, Mexico City, Mexico.

### Professional Experience

- International Press Intern at Presidencia de la Republica (President Ernesto Zedillo's Office), México.
- Federal Offenses Investigator at General Attorney's Office, Anti-Drugs Unit, Southern Border Security, Mexico.
- Television producer and co-host, political analysis talk shows at TeleAmerica Channel 44, Dallas, TX.
- Business administration and development, Dallas, TX.
- Special Focus Case Coordinator, Regional Campaign for the Women of Atenco, Amnesty International, USA, 2010-11.
- Liaison and coordinator of the academic collaboration agreements between the Ackerman Center for Jewish Studies (University of Texas at Dallas) and: The Museum of Memory and Tolerance (Mexico City); the Museum of the Holocaust in Guatemala; and the Museum of the Holocaust in Buenos Aires, Argentina.

### Teaching/Research Assistant Experience

- UTD Visiting Assistant Professor, Spring 2019. Course: The Holocaust and Human Rights in Latin America; this class will be repeated in Fall 2019 along with Race and Antisemitism in Mexico and Argentina.
- Spanish Translator of Dr. Monica Rankin's article "¿Buenos Vecinos? La diplomacia de la OIAA durante la Segunda Guerra Mundial" published by *Huellas de Estados Unidos*, Argentina, 2018.
- Research Assistant/Outreach Coordinator at the Center for U.S.-Latin American Initiatives, UTD, since Fall 2016.
- Research Assistant for Dr. Monica Rankin, Associate Professor of History at UT Dallas, since 2014.
- Instructor/organizer of workshops –in Atlanta, GA, Clearwater, OK, Austin, TX and DFW as Special Focus Case Coordinator for the case of the Women of Atenco for Amnesty International, 2010.
- Continuing education instructor (2010) at Cedar Valley Community College, Dallas, TX.
- Instructor at the Human Rights Basic Workshop for Hispanic Immigrants at Emmanuel Lutheran Church, Dallas, TX, 2009.

### Research Interests

Analysis of state sponsored violence, not only from the classic historiography perspective, but from the history of ideas approach, which requires a detailed exploration of the ideology, philosophy, sociology and politic economy of the macro-movements affecting target groups; for this reason, I am interested in the complex networks and philosophical background involved in such phenomena. My focus areas are the Holocaust, Latin America and Mexico.

### Conference Presentations

- Panelist at the International Conference on Interculturalism and Multiculturalism, Porto, Portugal, March 28-30, 2019. Presenting in the panel: *Multimodal Intercultural Dialogues*, Saturday, March 30, 2019 09:00-11:00, Room: 015. Chairperson: Nils Roemer. Pedro González (en) “Epistemic Dialogues, Memory Spaces, and Peripheral Knowledge. The Case of the Museum of Memory and Tolerance in Mexico City”
- Organizer and presenter at the Third Annual Philosopher and Race Workshop, sponsored by the Ackerman Center for Holocaust Studies, February 2019.
- Presenter at the 2018 Institute for the Study of Global Antisemitism and Policy, summer 2018, St. John’s College, Oxford: “The Politics of Mexican Antisemitism: A Narrative of Modern Nation-State Construction,” on August 7<sup>th</sup>, 2018; and presentation of syllabus draft: “The Genealogy of Antisemitism in Latin America: The Case of Argentina and Mexico” on August 10, 2018.
- Speaker at the 2018 Hispanic Heritage Month, UTD, in the panel: *Platicando con Café: The Meaning of LatinX*. September 2018.
- Event leader and coordinator at the 2018 Health Fair, organized by the Mexican General Consulate in Dallas, October 20, 2018, Mountain View College.
- Presenter at the Emeritus University of Puebla (BUAP), Mexico, 2018: “Introduction to the Study of Human Rights”.
- Panelist at the 2017 World Union of Jewish Studies in Jerusalem, Israel, August 4-11, 2017. Presenting in the panel: *Pain and Beauty in Holocaust Literature*, Tuesday, August 08, 2017 17:30-19:30, Room: 2734
- Chairperson: David Patterson. Pedro González (en) “Torture and the Search for the Unknowable Secret.”
- Speaker at the 2017 Hispanic Heritage Month, UTD, in the panel: *Breaking Machismo*. September 2017.
- Session Leader at *Voices*, during the 2017 Hispanic Heritage Month, presented an introduction to stereotypes and their negative effects.
- Event leader and coordinator during the 2017 Health Fair, organized by the Mexican General Consulate in Dallas, October 21, 2017, Mountain View College.
- Guest panelist at the *Conoce tu derechos* workshop, organized by the Embrey Human Rights Program (Southern Methodist University) and Pueblos Sin Fronteras, 2013.
- Volunteered as Bilingual Guide/Docent for the Dallas Museum of the Holocaust and hosted a Spanish television special report on the Holocaust for Channel 29 presented in the community service segment, 2012.
- Speaker and organizer, with the support of Dr. Rick Halperin (SMU, History Department), of the documentary screening of “Juarez, The City where Women are Disposable” with documentary director Alex Flores, 2010.
- Guest Speaker in the screening of “Bordertown” and “Missing Young Woman” at UTD in an effort to create awareness on the Juarez femicides; both events with support of Amnesty International Dallas Group 205, 2008.
- Spanish Speaking Media Volunteer for Amnesty International since 2007, coordinating media exposure for Human Rights events.
- Co-organizer of Carlos Ernesto Garcia’s (Nicaraguan poet and author) visit to Dallas; facilitated interviews with Univision and EstrellaTV; presented Garcia’s book—*Bajo la sombra de Sandino*—at the Dallas Peace Center, 2007.
- Organized a panel to discuss the actual safety situation of journalists in Mexico at the Mexican General Consulate in Dallas, TX.

### Awards & Honors

- Full Fellowship, Scholar in Residence at the Institute for the Study of Global Antisemitism and Policy, summer 2018, St. John’s College, Oxford.
- Recipient of the *2017-18 Abrams Dissertation Research Travel Award* (original archival investigation in the city of Puebla, Mexico, in 2018).
- Recipient of the *Mike Jacobs Grant for Dissertation Research* 2018.

- Recipient of the *Center for U.S.-Latin America Initiatives Travel Grant for Research* 2018.
- Recipient of the *Itsvan and Szuszanna Ozsvath Research Fund* grant in 2017 (associated with a paper presentation at the 2017 World Union of Jewish Studies in Jerusalem, Israel, August 4-11, 2017).
- Search Committee Member, hiring process for History Professor, School of Arts and Humanities, UTD, 2017.
- Recipient of the Embrey Human Rights Program (SMU) travel abroad scholarship in four different occasions: Independent studies in Germany and Poland for 3-hour credits each, and Hungary and Italy as community member.

#### **Languages**

- English
- Spanish

#### **Memberships & Associations**

- Amnesty International, Dallas Group 205.
- Victory Temple, Interim Board of Directors for Charter School.
- Ackerman Center for Holocaust Studies.
- Institute for the Study of Global Antisemitism and Policy, International Board of Academic Advisors.