

Fall of the Spanish Empire 1833–1898

Fernando Fleming



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Ebook ISBN: 9781984668486



Published by:

Bibliotex

Canada

Website: www.bibliotex.com

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Chapter 1

Ferdinand VII of Spain

Ferdinand VII (Spanish: *Fernando*; 14 October 1784 – 29 September 1833) was the King of Spain during the early- to mid-19th century. He reigned over the Spanish Kingdom in 1808 and again from 1813 to his death in 1833. He was known to his supporters as *el Deseado* (the Desired) and to his detractors as *el ReyFelón* (the Felon King).

Born in Madrid at El Escorial, Ferdinand VII spent his youth as heir apparent to the Spanish throne. Following the 1808 Tumult of Aranjuez, he ascended the throne. That year Napoleon overthrew him; he linked his monarchy to counter-revolution and reactionary policies that produced a deep rift in Spain between his forces on the right and liberals on the left. Back in power in December 1813, he reestablished the absolutist monarchy and rejected the liberal constitution of 1812. A revolt in 1820 led by Rafael del Riego forced him to restore the constitution thus beginning the Liberal Triennium: a three-year period of liberal rule. In 1823 the Congress of Verona authorized a successful French intervention restoring him to absolute power for the second time. He suppressed the liberal press from 1814 to 1833, jailing many of its editors and writers.

Under his rule, Spain lost nearly all of its American possessions, and the country entered into a large-scale civil war upon his death. His political legacy has remained contested since his passing, with most historians regarding him as incompetent, despotic, and short-sighted.

Early life

Ferdinand was the eldest surviving son of Charles IV of Spain and Maria Luisa of Parma. Ferdinand was born in the palace of El Escorial near Madrid. In his youth Ferdinand occupied the position of an heir apparent who was excluded from all share in government by his parents and their favourite advisor and Prime Minister, Manuel Godoy. National discontent with the government produced a rebellion in 1805. In October 1807, Ferdinand was arrested for his complicity in the El Escorial Conspiracy in which the rebels aimed at securing foreign support from the French Emperor Napoleon. When the conspiracy was discovered, Ferdinand submitted to his parents.

Abdication and restoration

- Following a popular riot at Aranjuez Charles IV abdicated in March 1808. Ferdinand ascended the throne and turned to Napoleon for support. He abdicated on 6 May 1808 and thereafter Napoleon kept Ferdinand under guard in France for six years at the Château de Valençay. Historian Charles Oman records that the choice of Valençay was a practical joke by Napoleon on his former foreign minister Talleyrand, the owner of the château, for his lack of interest in Spanish affairs.

While the upper echelons of the Spanish government accepted his abdication and Napoleon's choice of his brother Joseph Bonaparte as king of Spain, the Spanish people did not.

Uprisings broke out throughout the country, marking the beginning of the Peninsular War. Provincial juntas were established to control regions in opposition to the new French king. After the Battle of Bailén proved that the Spanish could resist the French, the Council of Castile reversed itself and declared null and void the abdications of Bayonne on 11 August 1808. On 24 August, Ferdinand VII was proclaimed king of Spain again, and negotiations between the council and the provincial juntas for the establishment of a Supreme Central Junta were completed. Subsequently, on 14 January 1809, the British government acknowledged Ferdinand VII as king of Spain.

Five years later after experiencing serious setbacks on many fronts, Napoleon agreed to acknowledge Ferdinand VII as king of Spain on 11 December 1813 and signed the Treaty of Valençay, so that the king could return to Spain.

The Spanish people, blaming the policies of the Francophiles (*afrancesados*) for causing the Napoleonic occupation and the Peninsular War by allying Spain too closely to France, at first welcomed *Fernando*. Ferdinand soon found that in the intervening years a new world had been born of foreign invasion and domestic revolution. In his name Spain fought for its independence and in his name as well *juntas* had governed Spanish America. Spain was no longer the absolute monarchy he had relinquished six years earlier. Instead he was now asked to rule under the liberal Constitution of 1812. Before being allowed to enter Spanish soil, Ferdinand had to guarantee the liberals that he would govern on the basis of the Constitution, but, only gave lukewarm indications he would do so.

On 24 March the French handed him over to the Spanish Army in Girona, and thus began his procession towards Madrid. During this process and in the following months, he was encouraged by conservatives and the Church hierarchy to reject the Constitution. On 4 May he ordered its abolition and on 10 May had the liberal leaders responsible for the Constitution arrested.

Ferdinand justified his actions by claiming that the Constitution had been made by a Cortes illegally assembled in his absence, without his consent and without the traditional form. (It had met as a unicameral body, instead of in three chambers representing the three estates: the clergy, the nobility and the cities.) Ferdinand initially promised to convene a traditional Cortes, but never did so, thereby reasserting the Bourbon doctrine that sovereign authority resided in his person only.

- Meanwhile, the wars of independence had broken out in the Americas, and although many of the republican rebels were divided and royalist sentiment was strong in many areas, the Manila galleons and the Spanish treasure fleets – tax revenues from the Spanish Empire – were interrupted. Spain was all but bankrupt.

Ferdinand's restored autocracy was guided by a small *camarilla* of his favorites, although his government seemed unstable. Whimsical and ferocious by turns, he changed his ministers every few months. "The king," wrote Friedrich von Gentz in 1814, "himself enters the houses of his prime ministers, arrests them, and hands them over to their cruel enemies;" and

again, on 14 January 1815, "the king has so debased himself that he has become no more than the leading police agent and prison warden of his country."

The king did recognize the efforts of foreign powers on his behalf. As the head of the Spanish Order of the Golden Fleece, Ferdinand made the Duke of Wellington, head of the British forces on the peninsula, the first Protestant member of the order.

During the aftermath of the Mexican War of Independence, the general of the Army of the Three Guarantees, Agustín de Iturbide, and Jefe Superior Juan O'Donojú, signed the Treaty of Córdoba, which concluded the war of independence and established the Mexican Empire. They intended to offer the Mexican Imperial Crown to Ferdinand VII, in which he would rule in personal union, but he decreed that it was "void" and stated that no European could accede to the Mexican throne.

Revolt

In 1820 a revolt broke out in favor of the Constitution of 1812, beginning with a mutiny of the troops under Col. Rafael del Riego. The king was quickly taken prisoner. Ferdinand had restored the Jesuits upon his return, but now they had become identified with repression and absolutism among the liberals, who attacked them: twenty-five Jesuits were slain in Madrid in 1822. For the rest of the 19th century, expulsions and reinstatements of the Jesuits would continue to be the hallmarks of liberal and authoritarian political regimes, respectively.

At the beginning of 1823, as a result of the Congress of Verona, the French invaded Spain, "invoking the God of St. Louis, for the sake of preserving the throne of Spain to a descendant of Henry IV, and of reconciling that fine kingdom with Europe." When in May the revolutionary party carried Ferdinand to Cádiz, he continued to make promises of amendment until he was free.

When Ferdinand was freed after the Battle of Trocadero and the fall of Cádiz, reprisals followed. The Duc d'Angoulême made known his protest against Ferdinand's actions by refusing the Spanish decorations Ferdinand offered him for his military services.

During his last years Ferdinand's political appointments became more stable. The last ten years of reign (sometimes referred to as the Ominous Decade) saw the restoration of absolutism, the re-establishment of traditional university programs and the suppression of any opposition, both of the Liberal Party and of the reactionary revolt (known as "War of the Agraviados") which broke out in 1827 in Catalonia and other regions.

Death and succession crisis

As Ferdinand lay dying, his new wife Maria Christina of Bourbon-Two Sicilies had him set aside the Salic Law which would have made his brother Don Carlos heir to the throne instead of any female. Ferdinand was thus succeeded by his infant daughter Isabella II. Carlos revolted and said he was the legitimate king. Needing support, Maria Christina (as Regent for her daughter Isabella) turned to the liberals. She issued a

decree of amnesty on 23 October 1833. Liberals who had been in exile returned and dominated Spanish politics for decades, and the Carlist Wars resulted.

Marriages

Ferdinand VII was married four times. In 1802, he married his first cousin Princess Maria Antonia of Naples and Sicily (1784–1806), daughter of Ferdinand I of the Two Sicilies and Marie Caroline of Austria. There were no children, because her two pregnancies (in 1804 and 1805) both ended in miscarriages.

In 1816, Ferdinand married his niece Maria Isabel of Portugal (1797–1818), daughter of his older sister Carlota Joaquina and John VI of Portugal. She bore him two daughters, the first of whom lived only five months and the second of whom was stillborn. In 20 October 1819, in Madrid, Ferdinand married Princess Maria Josepha Amalia of Saxony (1803–1829), daughter of Maximilian, Prince of Saxony, and Caroline of Parma. No children were born from this marriage.

Lastly, on 27 May 1829, Ferdinand married another niece, Maria Christina of the Two Sicilies (1806–1878), daughter of his younger sister Maria Isabella of Spain and Francis I of the Two Sicilies. She bore him two surviving daughters, the older of whom succeeded Ferdinand upon his death.

Chapter 2

Spanish–American War

The **Spanish–American War** (April 21 – August 13, 1898, Spanish: *Guerra hispano-estadounidense* or *Guerra hispano-americana*; Filipino: *Digmaang Espanyol-Amerikano*) was an armed conflict between Spain and the United States. Hostilities began in the aftermath of the internal explosion of USS *Maine* in Havana Harbor in Cuba, leading to U.S. intervention in the Cuban War of Independence. The war led to the U.S. emerging predominant in the Caribbean region, and resulted in U.S. acquisition of Spain's Pacific possessions. It led to U.S. involvement in the Philippine Revolution and later to the Philippine–American War.

The main issue was Cuban independence. Revolts had been occurring for some years in Cuba against Spanish colonial rule. The U.S. backed these revolts upon entering the Spanish–American War. There had been war scares before, as in the *Virginius* Affair in 1873. But in the late 1890s, American public opinion swayed in support of the rebellion due to reports of concentration camps (death estimates range from 150,000 to 400,000 people) set up to control the populace. Yellow journalism exaggerated the atrocities to further increase public fervor and to sell more newspapers and magazines.

The business community had just recovered from a deep depression and feared that a war would reverse the gains. Accordingly, most business interests lobbied vigorously against going to war. President William McKinley ignored the exaggerated news reporting and sought a peaceful settlement.

However, after the United States Navy armored cruiser *Maine* mysteriously exploded and sank in Havana Harbor on February 15, 1898, political pressures from the Democratic Party pushed McKinley into a war that he had wished to avoid.

On April 20, 1898, McKinley signed a joint Congressional resolution demanding Spanish withdrawal and authorizing the President to use military force to help Cuba gain independence. In response, Spain severed diplomatic relations with the United States on April 21. On the same day, the U.S. Navy began a blockade of Cuba. Both sides declared war; neither had allies.

The 10-week war was fought in both the Caribbean and the Pacific. As U.S. agitators for war well knew, U.S. naval power would prove decisive, allowing expeditionary forces to disembark in Cuba against a Spanish garrison already facing nationwide Cuban insurgent attacks and further wasted by yellow fever.

The invaders obtained the surrender of Santiago de Cuba and Manila despite the good performance of some Spanish infantry units, and fierce fighting for positions such as San Juan Hill. Madrid sued for peace after two Spanish squadrons were sunk in the battles of Santiago de Cuba and Manila Bay, and a third, more modern fleet was recalled home to protect the Spanish coasts.

The result was the 1898 Treaty of Paris, negotiated on terms favorable to the U.S. which allowed it temporary control of Cuba and ceded ownership of Puerto Rico, Guam, and the Philippine islands. The cession of the Philippines involved payment of \$20 million (\$620 million today) to Spain by the U.S. to cover infrastructure owned by Spain.

The defeat and loss of the Spanish Empire's last remnants was a profound shock to Spain's national psyche and provoked a thorough philosophical and artistic reevaluation of Spanish society known as the Generation of '98. The United States gained several island possessions spanning the globe, which provoked rancorous debate over the wisdom of expansionism.

Historical background

Spain's attitude towards its colonies

The combined problems arising from the Peninsular War (1807–1814), the loss of most of its colonies in the Americas in the early 19th-century Spanish American wars of independence, and three Carlist Wars (1832–1876) marked the low point of Spanish colonialism. Liberal Spanish elites like Antonio Cánovas del Castillo and Emilio Castelar offered new interpretations of the concept of "empire" to dovetail with Spain's emerging nationalism. Cánovas made clear in an address to the University of Madrid in 1882 his view of the Spanish nation as based on shared cultural and linguistic elements—on both sides of the Atlantic—that tied Spain's territories together.

Cánovas saw Spanish colonialism as more "benevolent" than that of other European colonial powers. The prevalent opinion in Spain before the war regarded the spreading of "civilization" and Christianity as Spain's main objective and contribution to the New World. The concept of cultural unity bestowed special significance on Cuba, which had been Spanish for almost four hundred years, and was viewed as an integral part of the

Spanish nation. The focus on preserving the empire would have negative consequences for Spain's national pride in the aftermath of the Spanish–American War.

American interest in the Caribbean

In 1823, the fifth American President James Monroe (1758–1831, served 1817–25) enunciated the Monroe Doctrine, which stated that the United States would not tolerate further efforts by European governments to retake or expand their colonial holdings in the Americas or to interfere with the newly independent states in the hemisphere. The U.S. would, however, respect the status of the existing European colonies. Before the American Civil War (1861–1865), Southern interests attempted to have the United States purchase Cuba and convert it into a new slave state. The pro-slavery element proposed the Ostend Manifesto proposal of 1854. Anti-slavery forces rejected it.

After the American Civil War and Cuba's Ten Years' War, U.S. businessmen began monopolizing the devalued sugar markets in Cuba. In 1894, 90% of Cuba's total exports went to the United States, which also provided 40% of Cuba's imports. Cuba's total exports to the U.S. were almost twelve times larger than the export to her mother country, Spain. U.S. business interests indicated that while Spain still held political authority over Cuba, it was the US that held economic power over Cuba.

The U.S. became interested in a trans-isthmus canal in either Nicaragua or Panama and realized the need for naval protection. Captain Alfred Thayer Mahan was an exceptionally

influential theorist; his ideas were much admired by future 26th President Theodore Roosevelt, as the U.S. rapidly built a powerful naval fleet of steel warships in the 1880s and 1890s. Roosevelt served as Assistant Secretary of the Navy in 1897–1898 and was an aggressive supporter of an American war with Spain over Cuban interests.

Meanwhile, the "Cuba Libre" movement, led by Cuban intellectual José Martí until he died in 1895, had established offices in Florida. The face of the Cuban revolution in the U.S. was the Cuban "Junta", under the leadership of Tomás Estrada Palma, who in 1902 became Cuba's first president. The Junta dealt with leading newspapers and Washington officials and held fund-raising events across the US. It funded and smuggled weapons. It mounted an extensive propaganda campaign that generated enormous popular support in the U.S. in favor of the Cubans. Protestant churches and most Democrats were supportive, but business interests called on Washington to negotiate a settlement and avoid war.

Cuba attracted enormous American attention, but almost no discussion involved the other Spanish colonies of Puerto Rico, also in the Caribbean, or of the Philippines or Guam. Historians note that there was no popular demand in the United States for an overseas colonial empire.

Path to war

Cuban struggle for independence

The first serious bid for Cuban independence, the Ten Years' War, erupted in 1868 and was subdued by the authorities a

decade later. Neither the fighting nor the reforms in the Pact of Zanjón (February 1878) quelled the desire of some revolutionaries for wider autonomy and, ultimately, independence. One such revolutionary, José Martí, continued to promote Cuban financial and political freedom in exile. In early 1895, after years of organizing, Martí launched a three-pronged invasion of the island.

The plan called for one group from Santo Domingo led by Máximo Gómez, one group from Costa Rica led by Antonio Maceo Grajales, and another from the United States (preemptively thwarted by U.S. officials in Florida) to land in different places on the island and provoke an uprising. While their call for revolution, the *grito de Baíre*, was successful, the result was not the grand show of force Martí had expected. With a quick victory effectively lost, the revolutionaries settled in to fight a protracted guerrilla campaign.

Antonio Cánovas del Castillo, the architect of Spain's Restoration constitution and the prime minister at the time, ordered General Arsenio Martínez-Campos, a distinguished veteran of the war against the previous uprising in Cuba, to quell the revolt. Campos's reluctance to accept his new assignment and his method of containing the revolt to the province of Oriente earned him criticism in the Spanish press.

The mounting pressure forced Cánovas to replace General Campos with General Valeriano Weyler, a soldier who had experience in quelling rebellions in overseas provinces and the Spanish metropole. Weyler deprived the insurgency of weaponry, supplies, and assistance by ordering the residents of some Cuban districts to move to reconcentration areas near

the military headquarters. This strategy was effective in slowing the spread of rebellion. In the United States, this fueled the fire of anti-Spanish propaganda. In a political speech President William McKinley used this to ram Spanish actions against armed rebels. He even said this "was not civilized warfare" but "extermination".

Spanish attitude

The Spanish government regarded Cuba as a province of Spain rather than a colony. Spain depended on Cuba for prestige and trade, and used it as a training ground for its army. Spanish Prime Minister Antonio Cánovas del Castillo announced that "the Spanish nation is disposed to sacrifice to the last peseta of its treasure and to the last drop of blood of the last Spaniard before consenting that anyone snatch from it even one piece of its territory". He had long dominated and stabilized Spanish politics. He was assassinated in 1897 by Italian anarchist Michele Angiolillo, leaving a Spanish political system that was not stable and could not risk a blow to its prestige.

US response

The eruption of the Cuban revolt, Weyler's measures, and the popular fury these events whipped up proved to be a boon to the newspaper industry in New York City. Joseph Pulitzer of the *New York World* and William Randolph Hearst of the *New York Journal* recognized the potential for great headlines and stories that would sell copies. Both papers denounced Spain but had little influence outside New York. American opinion generally saw Spain as a hopelessly backward power that was

unable to deal fairly with Cuba. American Catholics were divided before the war began but supported it enthusiastically once it started.

The U.S. had important economic interests that were being harmed by the prolonged conflict and deepening uncertainty about Cuba's future. Shipping firms that had relied heavily on trade with Cuba now suffered losses as the conflict continued unresolved. These firms pressed Congress and McKinley to seek an end to the revolt. Other American business concerns, specifically those who had invested in Cuban sugar, looked to the Spanish to restore order. Stability, not war, was the goal of both interests. How stability would be achieved would depend largely on the ability of Spain and the U.S. to work out their issues diplomatically.

While tension increased among the Cubans and Spanish Government, popular support of intervention began to spring up in the United States. Many Americans likened the Cuban revolt to the American Revolution, and they viewed the Spanish Government as a tyrannical oppressor. Historian Louis Pérez notes that "The proposition of war in behalf of Cuban independence took hold immediately and held on thereafter. Such was the sense of the public mood." Many poems and songs were written in the United States to express support of the "Cuba Libre" movement. At the same time, many African Americans, facing growing racial discrimination and increasing retardation of their civil rights, wanted to take part in the war. They saw it as a way to advance the cause of equality, service to country hopefully helping to gain political and public respect amongst the wider population.

President McKinley, well aware of the political complexity surrounding the conflict, wanted to end the revolt peacefully. He began to negotiate with the Spanish government, hoping that the talks would dampen yellow journalism in the United States and soften support for war with Spain. An attempt was made to negotiate a peace before McKinley took office. However, the Spanish refused to take part in the negotiations. In 1897 McKinley appointed Stewart L. Woodford as the new minister to Spain, who again offered to negotiate a peace. In October 1897, the Spanish government refused the United States' offer to negotiate between the Spanish and the Cubans, but promised the U.S. it would give the Cubans more autonomy. However, with the election of a more liberal Spanish government in November, Spain began to change its policies in Cuba. First, the new Spanish government told the United States that it was willing to offer a change in the Reconcentration policies if the Cuban rebels agreed to a cessation of hostilities. This time the rebels refused the terms in hopes that continued conflict would lead to U.S. intervention and the creation of an independent Cuba. The liberal Spanish government also recalled the Spanish Governor-General Valeriano Weyler from Cuba. This action alarmed many Cubans loyal to Spain.

The Cubans loyal to Weyler began planning large demonstrations to take place when the next Governor General, Ramón Blanco, arrived in Cuba. U.S. consul Fitzhugh Lee learned of these plans and sent a request to the U.S. State Department to send a U.S. warship to Cuba. This request led to the USS *Maine* being sent to Cuba. While *Maine* was docked in Havana harbor, a spontaneous explosion sank the ship. The sinking of *Maine* was blamed on the Spanish and made the

possibility of a negotiated peace very slim. Throughout the negotiation process, the major European powers, especially Britain, France, and Russia, generally supported the American position and urged Spain to give in. Spain repeatedly promised specific reforms that would pacify Cuba but failed to deliver; American patience ran out.

USS *Maine* dispatch to Havana and loss

McKinley sent USS *Maine* to Havana to ensure the safety of American citizens and interests, and to underscore the urgent need for reform. Naval forces were moved in position to attack simultaneously on several fronts if the war was not avoided. As *Maine* left Florida, a large part of the North Atlantic Squadron was moved to Key West and the Gulf of Mexico. Others were also moved just off the shore of Lisbon, and others were moved to Hong Kong too.

At 9:40 P.M. on February 15, 1898, *Maine* sank in Havana Harbor after suffering a massive explosion. More than 3/4 of the ship's crew of 355 sailors, officers and marines died as a result of the explosion. Of the 94 survivors only 16 were uninjured. In total, 260 men were killed in the initial explosion, six more died shortly thereafter from injuries, marking the greatest loss of life for the American military in a single day since the defeat at Little Bighorn twenty years prior.

While McKinley urged patience and did not declare that Spain had caused the explosion, the deaths of hundreds of American sailors held the public's attention. McKinley asked Congress to appropriate \$50 million for defense, and Congress unanimously obliged. Most American leaders believed that the cause of the

explosion was unknown. Still, public attention was now riveted on the situation and Spain could not find a diplomatic solution to avoid war. Spain appealed to the European powers, most of whom advised it to accept U.S. conditions for Cuba in order to avoid war. Germany urged a united European stand against the United States but took no action.

The U.S. Navy's investigation, made public on March 28, concluded that the ship's powder magazines were ignited when an external explosion was set off under the ship's hull. This report poured fuel on popular indignation in the US, making war virtually inevitable. Spain's investigation came to the opposite conclusion: the explosion originated within the ship. Other investigations in later years came to various contradictory conclusions, but had no bearing on the coming of the war. In 1974, Admiral Hyman George Rickover had his staff look at the documents and decided there was an internal explosion. A study commissioned by *National Geographic* magazine in 1999, using AME computer modeling, stated that a mine could have caused the explosion, but no definitive evidence was found.

Declaring war

After *Maine* was destroyed, New York City newspaper publishers Hearst and Pulitzer decided that the Spanish were to blame, and they publicized this theory as fact in their papers. Even prior to the explosion, both had published sensationalistic accounts of "atrocities" committed by the Spanish in Cuba; headlines such as "Spanish Murderers" were commonplace in their newspapers. Following the explosion, this tone escalated with the headline "Remember The Maine, To

Hell with Spain!", quickly appearing. Their press exaggerated what was happening and how the Spanish were treating the Cuban prisoners. The stories were based on factual accounts, but most of the time, the articles that were published were embellished and written with incendiary language causing emotional and often heated responses among readers. A common myth falsely states that when illustrator Frederic Remington said there was no war brewing in Cuba, Hearst responded: "You furnish the pictures and I'll furnish the war."

However, this new "yellow journalism" was uncommon outside New York City, and historians no longer consider it the major force shaping the national mood. Public opinion nationwide did demand immediate action, overwhelming the efforts of President McKinley, Speaker of the House Thomas Brackett Reed, and the business community to find a negotiated solution. Wall Street, big business, high finance and Main Street businesses across the country were vocally opposed to war and demanded peace.

After years of severe depression, the economic outlook for the domestic economy was suddenly bright again in 1897. However, the uncertainties of warfare posed a serious threat to full economic recovery. "War would impede the march of prosperity and put the country back many years," warned the *New Jersey Trade Review*. The leading railroad magazine editorialized, "From a commercial and mercenary standpoint it seems peculiarly bitter that this war should come when the country had already suffered so much and so needed rest and peace." McKinley paid close attention to the strong antiwar consensus of the business community, and strengthened his resolve to use diplomacy and negotiation rather than brute

force to end the Spanish tyranny in Cuba. Historian Nick Kapur argues that McKinley's actions as he moved toward war were rooted not in various pressure groups but in his deeply held "Victorian" values, especially arbitration, pacifism, humanitarianism, and manly self-restraint.

- A speech delivered by Republican Senator Redfield Proctor of Vermont on March 17, 1898, thoroughly analyzed the situation and greatly strengthened the pro-war cause. Proctor concluded that war was the only answer. Many in the business and religious communities which had until then opposed war, switched sides, leaving McKinley and Speaker Reed almost alone in their resistance to a war. On April 11, McKinley ended his resistance and asked Congress for authority to send American troops to Cuba to end the civil war there, knowing that Congress would force a war. On April 19, while Congress was considering joint resolutions supporting Cuban independence, Republican Senator Henry M. Teller of Colorado proposed the Teller Amendment to ensure that the U.S. would not establish permanent control over Cuba after the war. The amendment, disclaiming any intention to annex Cuba, passed the Senate 42 to 35; the House concurred the same day, 311 to 6. The amended resolution demanded Spanish withdrawal and authorized the President to use as much military force as he thought necessary to help Cuba gain independence from Spain. President McKinley signed the joint resolution on April 20, 1898, and the ultimatum was sent to Spain. In response, Spain

severed diplomatic relations with the United States on April 21. On the same day, the U.S. Navy began a blockade of Cuba. On April 23, Spain reacted to the blockade by declaring war on the U.S.

On April 25, the U.S. Congress responded in kind, declaring that a state of war between the U.S. and Spain had de facto existed since April 21, the day the blockade of Cuba had begun.

The Navy was ready, but the Army was not well-prepared for the war and made radical changes in plans and quickly purchased supplies. In the spring of 1898, the strength of the U.S. Regular Army was just 25,000 men. The Army wanted 50,000 new men but received over 220,000 through volunteers and the mobilization of state National Guard units, even gaining nearly 100,000 men on the first night after the explosion of USS *Maine*.

Historiography

The overwhelming consensus of observers in the 1890s, and historians ever since, is that an upsurge of humanitarian concern with the plight of the Cubans was the main motivating force that caused the war with Spain in 1898. McKinley put it succinctly in late 1897 that if Spain failed to resolve its crisis, the United States would see "a duty imposed by our obligations to ourselves, to civilization and humanity to intervene with force." Intervention in terms of negotiating a settlement proved impossible—neither Spain nor the insurgents would agree. Louis Perez states, "Certainly the moralistic determinants of war in 1898 has been accorded preponderant explanatory

weight in the historiography." By the 1950s, however, American political scientists began attacking the war as a mistake based on idealism, arguing that a better policy would be realism. They discredited the idealism by suggesting the people were deliberately misled by propaganda and sensationalist yellow journalism. Political scientist Robert Osgood, writing in 1953, led the attack on the American decision process as a confused mix of "self-righteousness and genuine moral fervor," in the form of a "crusade" and a combination of "knight-errantry and national self-assertiveness." Osgood argued:

- A war to free Cuba from Spanish despotism, corruption, and cruelty, from the filth and disease and barbarity of General 'Butcher' Weyler's reconcentration camps, from the devastation of haciendas, the extermination of families, and the outraging of women; that would be a blow for humanity and democracy.... No one could doubt it if he believed—and skepticism was not popular—the exaggerations of the Cuban *Junta's* propaganda and the lurid distortions and imaginative lies pervade by the "yellow sheets" of Hearst and Pulitzer at the combined rate of 2 million [newspaper copies] a day.

In his *War and Empire*, Prof. Paul Atwood of the University of Massachusetts (Boston) writes:

The Spanish–American War was fomented on outright lies and trumped up accusations against the intended enemy. ... War fever in the general population never reached a critical temperature until the accidental sinking of the *USS Maine* was

deliberately, and falsely, attributed to Spanish villainy. ... In a cryptic message ... Senator Lodge wrote that 'There may be an explosion any day in Cuba which would settle a great many things. We have got a battleship in the harbor of Havana, and our fleet, which overmatches anything the Spanish have, is masked at the Dry Tortugas.

In his autobiography, Theodore Roosevelt gave his views of the origins of the war:

Our own direct interests were great, because of the Cuban tobacco and sugar, and especially because of Cuba's relation to the projected Isthmian [Panama] Canal. But even greater were our interests from the standpoint of humanity. ... It was our duty, even more from the standpoint of National honor than from the standpoint of National interest, to stop the devastation and destruction. Because of these considerations I favored war.

Pacific theater

Philippines

In the 333 years of Spanish rule, the Philippines developed from a small overseas colony governed from the Viceroyalty of New Spain to a land with modern elements in the cities. The Spanish-speaking middle classes of the 19th century were mostly educated in the liberal ideas coming from Europe. Among these *Ilustrados* was the Filipino national hero José Rizal, who demanded larger reforms from the Spanish authorities. This movement eventually led to the Philippine Revolution against Spanish colonial rule. The revolution had

been in a state of truce since the signing of the Pact of Biak-na-Bato in 1897, with revolutionary leaders having accepted exile outside of the country.

Lt. William Warren Kimball, Staff Intelligence Officer with the Naval War College prepared a plan for war with Spain including the Philippines on June 1, 1896 known as "the Kimball Plan".

On April 23, 1898, a document from Governor General Basilio Augustín appeared in the *Manila Gazette* newspaper warning of the impending war and calling for Filipinos to participate on the side of Spain.

- The first battle between American and Spanish forces was at Manila Bay where, on May 1, Commodore George Dewey, commanding the U.S. Navy's Asiatic Squadron aboard USS *Olympia*, in a matter of hours defeated a Spanish squadron under Admiral Patricio Montojo. Dewey managed this with only nine wounded. With the German seizure of Tsingtao in 1897, Dewey's squadron had become the only naval force in the Far East without a local base of its own, and was beset with coal and ammunition problems. Despite these problems, the Asiatic Squadron destroyed the Spanish fleet and captured Manila's harbor.

Following Dewey's victory, Manila Bay became filled with the warships of other naval powers. The German squadron of eight ships, ostensibly in Philippine waters to protect German interests, acted provocatively—cutting in front of American ships, refusing to salute the American flag (according to

customs of naval courtesy), taking soundings of the harbor, and landing supplies for the besieged Spanish.

With interests of their own, Germany was eager to take advantage of whatever opportunities the conflict in the islands might afford. There was a fear at the time that the islands would become a German possession. The Americans called Germany's bluff and threatened conflict if the aggression continued. The Germans backed down. At the time, the Germans expected the confrontation in the Philippines to end in an American defeat, with the revolutionaries capturing Manila and leaving the Philippines ripe for German picking.

- Commodore Dewey transported Emilio Aguinaldo, a Filipino leader who led rebellion against Spanish rule in the Philippines in 1896, from exile in Hong Kong to the Philippines to rally more Filipinos against the Spanish colonial government. By June 9, Aguinaldo's forces controlled the provinces of Bulacan, Cavite, Laguna, Batangas, Bataan, Zambales, Pampanga, Pangasinan, and Mindoro, and had laid siege to Manila. On June 12, Aguinaldo proclaimed the independence of the Philippines. On August 5, upon instruction from Spain, Governor-General Basilio Augustin turned over the command of the Philippines to his deputy, Fermin Jaudenes. On August 13, with American commanders unaware that a peace protocol had been signed between Spain and the U.S. on the previous day in Washington D.C., American forces captured the city of Manila from the Spanish in the Battle of Manila. This battle marked the end of Filipino–American collaboration,

as the American action of preventing Filipino forces from entering the captured city of Manila was deeply resented by the Filipinos. This later led to the Philippine–American War, which would prove to be more deadly and costly than the Spanish–American War.

The U.S. had sent a force of some 11,000 ground troops to the Philippines. On August 14, 1898, Spanish Captain-General Jaudenes formally capitulated and U.S. General Merritt formally accepted the surrender and declared the establishment of a U.S. military government in occupation. The capitulation document declared, "The surrender of the Philippine Archipelago." and set forth a mechanism for its physical accomplishment. That same day, the Schurman Commission recommended that the U.S. retain control of the Philippines, possibly granting independence in the future. On December 10, 1898, the Spanish government ceded the Philippines to the United States in the Treaty of Paris. Armed conflict broke out between U.S. forces and the Filipinos when U.S. troops began to take the place of the Spanish in control of the country after the end of the war, quickly escalating into the Philippine–American War.

Guam

On June 20, 1898, the protected cruiser USS *Charleston* commanded by Captain Henry Glass, and three transports carrying troops to the Philippines, entered Guam's Apia Harbor. Captain Glass had opened sealed orders instructing him to proceed to Guam and capture it while enroute to the Philippines. *Charleston* fired a few rounds at the abandoned

Fort Santa Cruz without receiving return fire. Two local officials, not knowing that war had been declared and believing the firing had been a salute, came out to *Charleston* to apologize for their inability to return the salute as they were out of gunpowder. Glass informed them that the U.S. and Spain were at war. No Spanish warships had visited the island in a year and a half.

The following day, Glass sent Lieutenant William Braunersreuther to meet the Spanish Governor to arrange the surrender of the island and the Spanish garrison there. Two officers, 54 Spanish infantrymen as well as the governor-general and his staff were taken prisoner and transported to the Philippines as prisoners of war. No U.S. forces were left on Guam, but the only U.S. citizen on the island, Frank Portusach, told Captain Glass that he would look after things until U.S. forces returned.

Caribbean theater

Cuba

Theodore Roosevelt advocated intervention in Cuba, both for the Cuban people and to promote the Monroe Doctrine. While Assistant Secretary of the Navy, he placed the Navy on a war-time footing and prepared Dewey's Asiatic Squadron for battle. He also worked with Leonard Wood in convincing the Army to raise an all-volunteer regiment, the 1st U.S. Volunteer Cavalry. Wood was given command of the regiment that quickly became known as the "Rough Riders".

The Americans planned to destroy Spain's army forces in Cuba, capture the port city of Santiago de Cuba, and destroy the Spanish Caribbean Squadron (also known as the Flota de Ultramar). To reach Santiago they had to pass through concentrated Spanish defenses in the San Juan Hills and a small town in El Caney. The American forces were aided in Cuba by the pro-independence rebels led by General Calixto García.

Cuban sentiment

For quite some time the Cuban public believed the United States government to possibly hold the key to its independence, and even annexation was considered for a time, which historian Louis Pérez explored in his book *Cuba and the United States: Ties of Singular Intimacy*.

The Cubans harbored a great deal of discontent towards the Spanish government, due to years of manipulation on the part of the Spanish. The prospect of getting the United States involved in the fight was considered by many Cubans as a step in the right direction. While the Cubans were wary of the United States' intentions, the overwhelming support from the American public provided the Cubans with some peace of mind, because they believed that the United States was committed to helping them achieve their independence. However, with the imposition of the Platt Amendment of 1903 after the war, as well as economic and military manipulation on the part of the United States, Cuban sentiment towards the United States became polarized, with many Cubans disappointed with continuing American interference.

Land campaign

- From June 22 to 24, the Fifth Army Corps under General William R. Shafter landed at Daiquirí and Siboney, east of Santiago, and established an American base of operations. A contingent of Spanish troops, having fought a skirmish with the Americans near Siboney on June 23, had retired to their lightly entrenched positions at Las Guasimas. An advance guard of U.S. forces under former Confederate General Joseph Wheeler ignored Cuban scouting parties and orders to proceed with caution. They caught up with and engaged the Spanish rearguard of about 2,000 soldiers led by General Antero Rubín who effectively ambushed them, in the Battle of Las Guasimas on June 24. The battle ended indecisively in favor of Spain and the Spanish left Las Guasimas on their planned retreat to Santiago. The U.S. Army employed Civil War-era skirmishers at the head of the advancing columns. Three of four of the U.S. soldiers who had volunteered to act as skirmishers walking point at the head of the American column were killed, including Hamilton Fish II (grandson of Hamilton Fish, the Secretary of State under Ulysses S. Grant), and Captain Allyn K. Capron, Jr., whom Theodore Roosevelt would describe as one of the finest natural leaders and soldiers he ever met. Only Oklahoma Territory Pawnee Indian, Tom Isbell, wounded seven times, survived.

Regular Spanish troops were mostly armed with modern charger-loaded, 7mm 1893 Spanish Mauser rifles and using smokeless powder. The high-speed 7×57mm Mauser round was termed the "Spanish Hornet" by the Americans because of the supersonic crack as it passed overhead. Other irregular troops were armed with Remington Rolling Block rifles in .43 Spanish using smokeless powder and brass-jacketed bullets. U.S. regular infantry were armed with the .30–40Krag–Jørgensen, a bolt-action rifle with a complex magazine. Both the U.S. regular cavalry and the volunteer cavalry used smokeless ammunition. In later battles, state volunteers used the .45–70 Springfield, a single-shot black powder rifle.

On July 1, a combined force of about 15,000 American troops in regular infantry and cavalry regiments, including all four of the army's "Colored" Buffalo soldier regiments, and volunteer regiments, among them Roosevelt and his "Rough Riders", the 71st New York, the 2nd Massachusetts Infantry, and 1st North Carolina, and rebel Cuban forces attacked 1,270 entrenched Spaniards in dangerous Civil War-style frontal assaults at the Battle of El Caney and Battle of San Juan Hill outside of Santiago.

More than 200 U.S. soldiers were killed and close to 1,200 wounded in the fighting, thanks to the high rate of fire the Spanish put down range at the Americans. Supporting fire by Gatling guns was critical to the success of the assault. Cervera decided to escape Santiago two days later. First Lieutenant John J. Pershing, nicknamed "Black Jack", oversaw the 10th Cavalry Unit during the war. Pershing and his unit fought in the Battle of San Juan Hill. Pershing was cited for his gallantry during the battle.

The Spanish forces at Guantánamo were so isolated by Marines and Cuban forces that they did not know that Santiago was under siege, and their forces in the northern part of the province could not break through Cuban lines. This was not true of the Escario relief column from Manzanillo, which fought its way past determined Cuban resistance but arrived too late to participate in the siege.

After the battles of San Juan Hill and El Caney, the American advance halted. Spanish troops successfully defended Fort Canosa, allowing them to stabilize their line and bar the entry to Santiago. The Americans and Cubans forcibly began a bloody, strangling siege of the city. During the nights, Cuban troops dug successive series of "trenches" (raised parapets), toward the Spanish positions. Once completed, these parapets were occupied by U.S. soldiers and a new set of excavations went forward. American troops, while suffering daily losses from Spanish fire, suffered far more casualties from heat exhaustion and mosquito-borne disease. At the western approaches to the city, Cuban general Calixto Garcia began to encroach on the city, causing much panic and fear of reprisals among the Spanish forces.

Battle of Tayacoba

Lieutenant Carter P. Johnson of the Buffalo Soldiers' 10th Cavalry, with experience in special operations roles as head of the 10th Cavalry's attached Apache scouts in the Apache Wars, chose 50 soldiers from the regiment to lead a deployment mission with at least 375 Cuban soldiers under Cuban Brigadier General Emilio Nunez and other supplies to the mouth of the San Juan River east of Cienfuegos. On June 29,

1898, a reconnaissance team in landing boats from the transports *Florida* and *Fanita* attempted to land on the beach, but were repelled by Spanish fire. A second attempt was made on June 30, 1898, but a team of reconnaissance soldiers was trapped on the beach near the mouth of the Tallabacoa River. A team of four soldiers saved this group and were awarded Medals of Honor. The USS *Peoria* and the recently arrived USS *Helena* then shelled the beach to distract the Spanish while the Cuban deployment landed 40 miles east at Palo Alto, where they linked up with Cuban General Gomez.

Naval operations

The major port of Santiago de Cuba was the main target of naval operations during the war. The U.S. fleet attacking Santiago needed shelter from the summer hurricane season; Guantánamo Bay, with its excellent harbor, was chosen. The 1898 invasion of Guantánamo Bay happened between June 6 and 10, with the first U.S. naval attack and subsequent successful landing of U.S. Marines with naval support.

On April 23, a council of senior admirals of the Spanish Navy had decided to order Admiral Pascual Cervera y Topete's squadron of four armored cruisers and three torpedo boat destroyers to proceed from their present location in Cape Verde (having left from Cádiz, Spain) to the West Indies.

The Battle of Santiago de Cuba on July 3, was the largest naval engagement of the Spanish–American War and resulted in the destruction of the Spanish Caribbean Squadron. In May, the fleet of Spanish Admiral Pascual Cervera y Topete had been spotted in Santiago harbor by American forces, where they had

taken shelter for protection from sea attack. A two-month stand-off between Spanish and American naval forces followed.

When the Spanish squadron finally attempted to leave the harbor on July 3, the American forces destroyed or grounded five of the six ships. Only one Spanish vessel, the new armored cruiser *Cristóbal Colón*, survived, but her captain hauled down her flag and scuttled her when the Americans finally caught up with her. The 1,612 Spanish sailors who were captured, including Admiral Cervera, were sent to Seavey's Island at the Portsmouth Naval Shipyard in Kittery, Maine, where they were confined at Camp Long as prisoners of war from July 11 until mid-September.

During the stand-off, U.S. Assistant Naval Constructor, Lieutenant Richmond Pearson Hobson had been ordered by Rear Admiral William T. Sampson to sink the collier USS *Merrimac* in the harbor to bottle up the Spanish fleet. The mission was a failure, and Hobson and his crew were captured. They were exchanged on July 6, and Hobson became a national hero; he received the Medal of Honor in 1933, retired as a Rear Admiral and became a Congressman.

US withdrawal

Yellow fever had quickly spread among the American occupation force, crippling it. A group of concerned officers of the American army chose Theodore Roosevelt to draft a request to Washington that it withdraw the Army, a request that paralleled a similar one from General Shafter, who described his force as an "army of convalescents". By the time of his letter, 75% of the force in Cuba was unfit for service.

On August 7, the American invasion force started to leave Cuba. The evacuation was not total. The U.S. Army kept the black Ninth U.S. Cavalry Regiment in Cuba to support the occupation. The logic was that their race and the fact that many black volunteers came from southern states would protect them from disease; this logic led to these soldiers being nicknamed "Immunes". Still, when the Ninth left, 73 of its 984 soldiers had contracted the disease.

Puerto Rico

On May 24, 1898, in a letter to Theodore Roosevelt, Henry Cabot Lodge wrote, "Porto Rico is not forgotten and we mean to have it".

In the same month, Lt. Henry H. Whitney of the United States Fourth Artillery was sent to Puerto Rico on a reconnaissance mission, sponsored by the Army's Bureau of Military Intelligence. He provided maps and information on the Spanish military forces to the U.S. government before the invasion.

The American offensive began on May 12, 1898, when a squadron of 12 U.S. ships commanded by Rear Adm. William T. Sampson of the United States Navy attacked the archipelago's capital, San Juan. Though the damage inflicted on the city was minimal, the Americans established a blockade in the city's harbor, San Juan Bay. On June 22, the cruiser *Isabel II* and the destroyer *Terror* delivered a Spanish counterattack, but were unable to break the blockade and *Terror* was damaged.

The land offensive began on July 25, when 1,300 infantry soldiers led by Nelson A. Miles disembarked off the coast of

Guánica. The first organized armed opposition occurred in Yauco in what became known as the Battle of Yauco.

This encounter was followed by the Battle of Fajardo. The United States seized control of Fajardo on August 1, but were forced to withdraw on August 5 after a group of 200 Puerto Rican-Spanish soldiers led by Pedro del Pino gained control of the city, while most civilian inhabitants fled to a nearby lighthouse. The Americans encountered larger opposition during the Battle of Guayama and as they advanced towards the main island's interior. They engaged in crossfire at Guamaní River Bridge, Coamo and Silva Heights and finally at the Battle of Asomante. The battles were inconclusive as the allied soldiers retreated.

A battle in San Germán concluded in a similar fashion with the Spanish retreating to Lares. On August 9, 1898, American troops that were pursuing units retreating from Coamo encountered heavy resistance in Aibonito in a mountain known as *Cerro Gervasio del Asomante* and retreated after six of their soldiers were injured.

They returned three days later, reinforced with artillery units and attempted a surprise attack. In the subsequent crossfire, confused soldiers reported seeing Spanish reinforcements nearby and five American officers were gravely injured, which prompted a retreat order.

All military actions in Puerto Rico were suspended on August 13, after U.S. President William McKinley and French Ambassador Jules Cambon, acting on behalf of the Spanish Government, signed an armistice whereby Spain relinquished its sovereignty over Puerto Rico.

Cámara's squadron

Shortly after the war began in April, the Spanish Navy ordered major units of its fleet to concentrate at Cádiz to form the 2nd Squadron, under the command of Rear Admiral Manuel de la Cámara y Livermoore. Two of Spain's most powerful warships, the battleship *Pelayo* and the brand-new armored cruiser *Emperador Carlos V*, were not available when the war began—the former undergoing reconstruction in a French shipyard and the latter not yet delivered from her builders—but both were rushed into service and assigned to Cámara's squadron. The squadron was ordered to guard the Spanish coast against raids by the U.S. Navy. No such raids materialized, and while Cámara's squadron lay idle at Cádiz, U.S. Navy forces destroyed Montojo's squadron at Manila Bay on 1 May and bottled up Cervera's squadron at Santiago de Cuba on 27 May.

During May, the Spanish Ministry of Marine considered options for employing Cámara's squadron. Spanish Minister of Marine Ramón Auñón y Villalón made plans for Cámara to take a portion of his squadron across the Atlantic Ocean and bombard a city on the United States East Coast—preferably Charleston, South Carolina—and then head for the Caribbean to make port at San Juan, Havana, or Santiago de Cuba, but in the end this idea was dropped. Meanwhile, U.S. intelligence reported rumors as early as 15 May that Spain also was considering sending Cámara's squadron to the Philippines to destroy Dewey's squadron and reinforce the Spanish forces there with fresh troops. *Pelayo* and *Emperado Carlos V* each were more powerful than any of Dewey's ships, and the possibility of their

arrival in the Philippines was of great concern to the United States, which hastily arranged to dispatch 10,000 additional U.S. Army troops to the Philippines and send two U.S. Navy monitors to reinforce Dewey.

On 15 June, Cámara finally received orders to depart immediately for the Philippines. His squadron, made up of *Pelayo* (his flagship), *Emperador Carlos V*, two auxiliary cruisers, three destroyers, and four colliers, was to depart Cádiz escorting four transports. After detaching two of the transports to steam independently to the Caribbean, his squadron was to proceed to the Philippines, escorting the other two transports, which carried 4,000 Spanish Army troops to reinforce Spanish forces there. He then was to destroy Dewey's squadron. Accordingly, he sortied from Cádiz on 16 June and, after detaching two of the transports for their voyages to the Caribbean, passed Gibraltar on 17 June and arrived at Port Said, at the northern end of the Suez Canal, on 26 June. There he found that U.S. operatives had purchased all the coal available at the other end of the canal in Suez to prevent his ships from coaling with it. He also received word on 29 June from the British government, which controlled Egypt at the time, that his squadron was not permitted to coal in Egyptian waters because to do so would violate Egyptian and British neutrality.

Ordered to continue, Cámara's squadron passed through the Suez Canal on 5–6 July. By that time, word had reached Spain of the annihilation of Cervera's squadron off Santiago de Cuba on 3 July, freeing up the U.S. Navy's heavy forces from the blockade there, and the United States Department of the Navy had announced that a U.S. Navy "armored squadron with

cruisers" would assemble and "proceed at once to the Spanish coast." Fearing for the safety of the Spanish coast, the Spanish Ministry of Marine recalled Cámara's squadron, which by then had reached the Red Sea, on 7 July 1898. Cámara's squadron returned to Spain, arriving at Cartagena on 23 July. No U.S. Navy forces subsequently threatened the coast of Spain, and Cámara and Spain's two most powerful warships thus never saw combat during the war.

Making peace

With defeats in Cuba and the Philippines, and its fleets in both places destroyed, Spain sued for peace and negotiations were opened between the two parties. After the sickness and death of British consul Edward Henry Rawson-Walker, American admiral George Dewey requested the Belgian consul to Manila, Édouard André, to take Rawson-Walker's place as intermediary with the Spanish government.

Hostilities were halted on August 12, 1898, with the signing in Washington of a Protocol of Peace between the United States and Spain. After over two months of difficult negotiations, the formal peace treaty, the Treaty of Paris, was signed in Paris on December 10, 1898, and was ratified by the United States Senate on February 6, 1899.

The United States gained Spain's colonies of the Philippines, Guam and Puerto Rico in the treaty, and Cuba became a U.S. protectorate. The treaty came into force in Cuba April 11, 1899, with Cubans participating only as observers. Having been occupied since July 17, 1898, and thus under the jurisdiction of the United States Military Government (USMG),

Cuba formed its own civil government and gained independence on May 20, 1902, with the announced end of USMG jurisdiction over the island. However, the U.S. imposed various restrictions on the new government, including prohibiting alliances with other countries, and reserved the right to intervene. The U.S. also established a *de facto* perpetual lease of Guantánamo Bay.

Aftermath

The war lasted 16 weeks. John Hay (the United States Ambassador to the United Kingdom), writing from London to his friend Theodore Roosevelt, declared that it had been "a splendid little war". The press showed Northerners and Southerners, blacks and whites fighting against a common foe, helping to ease the scars left from the American Civil War. Exemplary of this was the fact that four former Confederate States Army generals had served in the war, now in the U.S. Army and all of them again carrying similar ranks. These officers included Matthew Butler, Fitzhugh Lee, Thomas L. Rosser and Joseph Wheeler, though only the latter had seen action. Still, in an exciting moment during the Battle of Las Guasimas, Wheeler apparently forgot for a moment which war he was fighting, having supposedly called out "Let's go, boys! We've got the damn Yankees on the run again!"

The war marked American entry into world affairs. Since then, the U.S. has had a significant hand in various conflicts around the world, and entered many treaties and agreements. The Panic of 1893 was over by this point, and the U.S. entered a long and prosperous period of economic and population growth, and technological innovation that lasted through the

1920s. The war redefined national identity, served as a solution of sorts to the social divisions plaguing the American mind, and provided a model for all future news reporting.

The idea of American imperialism changed in the public's mind after the short and successful Spanish–American War. Due to the United States' powerful influence diplomatically and militarily, Cuba's status after the war relied heavily upon American actions. Two major developments emerged from the Spanish–American War: one, it firmly established the United States' vision of itself as a "defender of democracy" and as a major world power, and two, it had severe implications for Cuban–American relations in the future. As historian Louis Pérez argued in his book *Cuba in the American Imagination: Metaphor and the Imperial Ethos*, the Spanish–American War of 1898 "fixed permanently how Americans came to think of themselves: a righteous people given to the service of righteous purpose".

Aftermath in Spain

The war greatly reduced the Spanish Empire. Spain had been declining as an imperial power since the early 19th century as a result of Napoleon's invasion. The loss of Cuba caused a national trauma because of the affinity of peninsular Spaniards with Cuba, which was seen as another province of Spain rather than as a colony. Spain retained only a handful of overseas holdings: Spanish West Africa (Spanish Sahara), Spanish Guinea, Spanish Morocco and the Canary Islands. With the loss of the Philippines, Spain's remaining Pacific possessions in the Caroline Islands and Mariana Islands became untenable and were sold to Germany in the German-

Spanish Treaty (1899). The Spanish soldier Julio Cervera Baviera, who served in the Puerto Rican Campaign, published a pamphlet in which he blamed the natives of that colony for its occupation by the Americans, saying, "I have never seen such a servile, ungrateful country [i.e., Puerto Rico] ... In twenty-four hours, the people of Puerto Rico went from being fervently Spanish to enthusiastically American.... They humiliated themselves, giving in to the invader as the slave bows to the powerful lord." He was challenged to a duel by a group of young Puerto Ricans for writing this pamphlet.

Culturally, a new wave called the Generation of '98 originated as a response to this trauma, marking a renaissance in Spanish culture. Economically, the war benefited Spain, because after the war large sums of capital held by Spaniards in Cuba and the United States were returned to the peninsula and invested in Spain. This massive flow of capital (equivalent to 25% of the gross domestic product of one year) helped to develop the large modern firms in Spain in the steel, chemical, financial, mechanical, textile, shipyard, and electrical power industries. However, the political consequences were serious. The defeat in the war began the weakening of the fragile political stability that had been established earlier by the rule of Alfonso XII.

Teller and Platt Amendments

The Teller Amendment was passed in the Senate on April 19, 1898, with a vote of 42 for versus 35 against. Subsequently, the House of Representatives passed the amendment with a vote of 311 for versus 6 against allowing President William McKinley to sign the resolution. The Teller Amendment, which

was enacted on April 20, 1898, was a promise from the United States to the Cuban people that it was not declaring war to annex Cuba, but to help it gain its independence from Spain. The Platt Amendment was a move by the United States' government to shape Cuban affairs without violating the Teller Amendment.

The U.S. Congress had passed the Teller Amendment before the war, promising Cuban independence. However, the Senate passed the Platt Amendment as a rider to an Army appropriations bill, forcing a peace treaty on Cuba which prohibited it from signing treaties with other nations or contracting a public debt. The Platt Amendment was pushed by imperialists who wanted to project U.S. power abroad (in contrast to the Teller Amendment which was pushed by anti-imperialists who called for a restraint on U.S. rule). The amendment granted the United States the right to stabilize Cuba militarily as needed. In addition, the Platt Amendment permitted the United States to deploy Marines to Cuba if its freedom and independence was ever threatened or jeopardized by an external or internal force. The Platt Amendment also provided for a permanent American naval base in Cuba. Guantánamo Bay was established after the signing of the Cuban–American Treaty of Relations in 1903. Thus, despite that Cuba technically gained its independence after the war ended, the United States government ensured that it had some form of power and control over Cuban affairs.

Aftermath in the United States

The U.S. annexed the former Spanish colonies of Puerto Rico, the Philippines and Guam. The notion of the United States as

an imperial power, with colonies, was hotly debated domestically with President McKinley and the Pro-Imperialists winning their way over vocal opposition led by Democrat William Jennings Bryan, who had supported the war. The American public largely supported the possession of colonies, but there were many outspoken critics such as Mark Twain, who wrote *The War Prayer* in protest. Roosevelt returned to the United States a war hero, and he was soon elected governor of New York and then became the vice president. At the age of 42, he became the youngest person to become president after the assassination of President McKinley.

The war served to further repair relations between the American North and South. The war gave both sides a common enemy for the first time since the end of the Civil War in 1865, and many friendships were formed between soldiers of northern and southern states during their tours of duty. This was an important development, since many soldiers in this war were the children of Civil War veterans on both sides.

The African-American community strongly supported the rebels in Cuba, supported entry into the war, and gained prestige from their wartime performance in the Army. Spokesmen noted that 33 African-American seamen had died in the *Maine* explosion. The most influential Black leader, Booker T. Washington, argued that his race was ready to fight. War offered them a chance "to render service to our country that no other race can", because, unlike Whites, they were "accustomed" to the "peculiar and dangerous climate" of Cuba. One of the Black units that served in the war was the 9th Cavalry Regiment. In March 1898, Washington promised the

Secretary of the Navy that war would be answered by "at least ten thousand loyal, brave, strong black men in the south who crave an opportunity to show their loyalty to our land, and would gladly take this method of showing their gratitude for the lives laid down, and the sacrifices made, that Blacks might have their freedom and rights."

Veterans Associations

In 1904, the United Spanish War Veterans was created from smaller groups of the veterans of the Spanish–American War. Today, that organization is defunct, but it left an heir in the Sons of Spanish–American War Veterans, created in 1937 at the 39th National Encampment of the United Spanish War Veterans.

According to data from the United States Department of Veterans Affairs, the last surviving U.S. veteran of the conflict, Nathan E. Cook, died on September 10, 1992, at age 106. (If the data is to be believed, Cook, born October 10, 1885, would have been only 12 years old when he served in the war.)

The Veterans of Foreign Wars of the United States (VFW) was formed in 1914 from the merger of two veterans organizations which both arose in 1899: the American Veterans of Foreign Service and the National Society of the Army of the Philippines.

The former was formed for veterans of the Spanish–American War, while the latter was formed for veterans of the Philippine–American War. Both organizations were formed in response to the general neglect veterans returning from the war experienced at the hands of the government.

To pay the costs of the war, Congress passed an excise tax on long-distance phone service. At the time, it affected only wealthy Americans who owned telephones. However, the Congress neglected to repeal the tax after the war ended four months later. The tax remained in place for over 100 years until, on August 1, 2006, it was announced that the U.S. Department of the Treasury and the IRS would no longer collect it.

Postwar American investment in Puerto Rico

The change in sovereignty of Puerto Rico, like the occupation of Cuba, brought about major changes in both the insular and U.S. economies. Before 1898 the sugar industry in Puerto Rico was in decline for nearly half a century. In the second half of the nineteenth century, technological advances increased the capital requirements to remain competitive in the sugar industry. Agriculture began to shift toward coffee production, which required less capital and land accumulation. However, these trends were reversed with U.S. hegemony. Early U.S. monetary and legal policies made it both harder for local farmers to continue operations and easier for American businesses to accumulate land. This, along with the large capital reserves of American businesses, led to a resurgence in the Puerto Rican nuts and sugar industry in the form of large American owned agro-industrial complexes.

At the same time, the inclusion of Puerto Rico into the U.S. tariff system as a customs area, effectively treating Puerto Rico as a state with respect to internal or external trade, increased the codependence of the insular and mainland economies and benefitted sugar exports with tariff protection. In 1897, the

United States purchased 19.6 percent of Puerto Rico's exports while supplying 18.5 percent of its imports. By 1905, these figures jumped to 84 percent and 85 percent, respectively. However, coffee was not protected, as it was not a product of the mainland. At the same time, Cuba and Spain, traditionally the largest importers of Puerto Rican coffee, now subjected Puerto Rico to previously nonexistent import tariffs. These two effects led to a decline in the coffee industry. From 1897 to 1901, coffee went from 65.8 percent of exports to 19.6 percent while sugar went from 21.6 percent to 55 percent. The tariff system also provided a protected market place for Puerto Rican tobacco exports. The tobacco industry went from nearly nonexistent in Puerto Rico to a major part of the country's agricultural sector.

In film and television

The Spanish–American War was the first U.S. war in which the motion picture camera played a role. The Library of Congress archives contain many films and film clips from the war. In addition, a few feature films have been made about the war. These include

- *The Rough Riders*, a 1927 silent film
- *A Message to Garcia*, 1936
- *Rough Riders*, a 1997 television miniseries directed by John Milius, and featuring Tom Berenger (Theodore Roosevelt), Gary Busey (Joseph Wheeler), Sam Elliott (Buckey O'Neill), Dale Dye (Leonard Wood), Brian Keith (William McKinley), George Hamilton (William Randolph Hearst), and R. Lee Ermey (John Hay)

- *Crucible of Empire: The Spanish-American War*, a 1999 television documentary from PBS
- *The Spanish–American War: First Intervention*, a 2007 docudrama from The History Channel
- *Baler*, a 2008 film about the Siege of Baler
- *Los últimos de Filipinas* ("The Last Ones of the Philippines"), a 1945 Spanish biographical film directed by Antonio Román
- *Amigo*, 2010
- *1898, Our Last Men in the Philippines*, a well-acclaimed 2016 film about the Siege of Baler

Military decorations

United States

The United States awards and decorations of the Spanish–American War were as follows:

Wartime service and honors

- Medal of Honor
- Specially Meritorious Service Medal
- Spanish Campaign Medal—upgradeable to include the Silver Citation Star to recognize those U.S. Army members who had performed individual acts of heroism
- West Indies Campaign Medal
- Sampson Medal, West Indies service under Admiral William T. Sampson

- Dewey Medal, service during the Battle of Manila Bay under Admiral George Dewey
- Spanish War Service Medal, U.S. Army homeland service

Postwar occupation service

- Army of Puerto Rican Occupation Medal
- Army of Cuban Occupation Medal

Spain

- Army Cross of Military Merit/Cruces del Mérito Militar—Spain issued two Crosses of Military Merit including one for fighters with a red badge and a red ribbon with a white stripe, and one for non-fighters with a white badge and a white ribbon with a red stripe. An example of the Silver Cross of Military Merit with the red emblem for fighters was issued on July 18 of 1898 for good behavior on the 11th of May in defense of the fortress of El Faro and the Pueblo de Jagua on May 11 in the Battle of Cienfuegos.
- Army Operations Medal/Medalla Para Ejercito de Operaciones, Cuba
- Medal for Volunteers/Medalla Para Los Voluntarios, Cuban Campaign, 1895–1898
- Army Operations Medal for Valor, Discipline and Loyalty, Philippines, 1896–1898
- Army Medal for Volunteers/Medalla Para Los Voluntarios, Philippines, Luzon Campaign, 1896–1897

Other countries

The governments of Spain and Cuba issued a wide variety of military awards to honor Spanish, Cuban, and Philippine soldiers who had served in the conflict.

Chapter 3

Spanish American Wars of Independence

The **Spanish American wars of independence** were the numerous wars in Spanish America with the aim of political independence against Spanish rule during the early 19th century. These began shortly at the starts of the French invasion of Spain during Europe's Napoleonic Wars.

In 1808, the sequestration of the Spanish royal family by Napoleon Bonaparte, the Abdications of Bayonne, gave rise to an emergence of liberalism and liberties throughout the Spanish empire. The violent conflicts started in 1809, with short-lived governing juntas established in Chuquisaca and Quito in opposing the government of the Supreme Central Junta of Seville.

At the beginning 1810, numerous new juntas appeared across the Spanish domains in the Americas when the Central Junta fell to the French invasion. Although various regions of Spanish America objected to many crown policies, "there was little interest in outright independence; indeed there was widespread support for the Spanish Central Junta formed to lead the resistance against the French." While some Spanish Americans believed that independence was necessary, most who initially supported the creation of the new governments saw them as a means to preserve the region's autonomy from the French. Although there has been research on the idea of a separate Spanish American ("creole") identity separate from

that of Iberia, political independence was not initially the aim of most Spanish Americans, nor was it necessarily inevitable.

At the end of 1810, Ferdinand VII of Spain, captive, is recognized by the courts of Cadiz and by the American Governing juntas as a subordinate king to the popular sovereignty. In agreement on this, a military conflict arose between Spaniards and Americans over the unity or independence of the empire. However, in 1814, with the defeat of Napoleon, the treaty of Valençay,

Ferdinand VII returned, and with a coup d'état reimpose absolutism. Ferdinand was able to defeat and repress the peninsular liberals, abolished the Constitution of Cadiz, considered republican, although he could not defeat the American revolutionaries, they resisted and formed national congresses, the Spanish navy there was collapsed in the war against Napoleon, and completely ruined in practice support the expeditionary forces who arrives in penny packets. In 1820 the Spanish army revolted by Rafael Riego against absolutism, restored the so-called Trienio Liberal, and ended the threat of invasion against Río de la Plata and Venezuela, but did not change the position of Spain against separatism, the defenders of the King collapsed in Americas. Over the course of the next decade the Patriot's armies won their major victories and obtained the independence of their countries, the political instability in Spain, without navy, without army and without treasury convinced many Spanish Americans of the need to formally establish independence from the mother country. In Spain, a French army of the Holy Alliance invades and supports the absolutists, restores Ferdinand VII, and occupies Spain until 1828.

These conflicts were fought both as irregular warfare and conventional warfare. These wars began as localized civil wars, that later spread and expanded to promote general independence from Spanish rule. This independence led to the development of new national boundaries based on the colonial provinces, which would form the future independent countries that constitute contemporary Latin America during the early 19th century.

Cuba and Puerto Rico remained under Spanish rule until the Spanish–American War in 1898. The new republics from the beginning abolished the formal system of racial classification and hierarchy, *Casta* system, the Inquisition, and noble titles. Slavery was not abolished immediately but ended in all of the new nations within a quarter century.

Criollos (those of Spanish descent born in the New World) and mestizos (those of mixed American Indigenous and Spanish blood or culture) replaced Spanish-born appointees in most political governments. Criollos remained at the top of a social structure that retained some of its traditional features culturally, if not legally. For almost a century thereafter, conservatives and liberals fought to reverse or to deepen the social and political changes unleashed by those rebellions.

The events in Spanish America were related to the wars of independence in the former French colony of St-Domingue, Haiti, and the transition to independence in Brazil. Brazil's independence, in particular, shared a common starting point with that of Spanish America, since both conflicts were triggered by Napoleon's invasion of the Iberian Peninsula, which forced the Portuguese royal family to flee to Brazil in

1807. The process of Latin American independence took place in the general political and intellectual climate that emerged from the Age of Enlightenment and that influenced all of the Atlantic Revolutions, including the earlier revolutions in the United States and France. A more direct cause of the Spanish American wars of independence were the unique developments occurring within the Kingdom of Spain and its monarchy during this era, concluding, finally, with the emergence of the new Spanish American republics in the post-Napoleonic world.

Historical context

Political independence was not necessarily the foreordained outcome of the political turmoil in Spanish America. "There was little interest in outright independence." As historians R.A. Humphreys and John Lynch note, "it is all too easy to equate the forces of discontent or even the forces of change with the forces of revolution." Since "by definition, there was no history of independence until it happened," when Spanish American independence did occur, explanations for why it came about have been sought. The Latin American Wars of Independence were essentially led by European diaspora against European empires.

Administrative and economic reforms

There are a number of factors that have been identified to have provoked the independent movements. First, increasing control by the Crown of its overseas empire via the Bourbon Reforms of the mid-eighteenth century introduced changes to the relationship of Spanish Americans to the Crown. The language

used to describe the overseas empire shifted from "kingdoms" with independent standing with the crown to "colonies" subordinate to Spain.

In an effort to better control the administration and economy of the overseas possessions the Crown reintroduced the practice of appointing outsiders, almost all *peninsulars*, to the royal offices throughout the empire. This meant that Spanish American elites were thwarted in their expectations and ambitions by the crown's upending of long-standing practices of creole access to office holding.

The regalist and secularizing policies of the Bourbon monarchy were aimed at decreasing the power of the Roman Catholic Church. The crown had already expelled the Jesuits in 1767, which saw many creole members of the Society of Jesus go into permanent exile. By limiting the power of the Church, the crown attempted to centralize itself within the institutions of colonial Latin America. Because of the physical and ideological proximity that the clergy had, they could directly influence and dictate the interactions between populations of colonial Latin America, either as legal counsel or an advisor; a directness which the crown would need to attempt to create the centralized, colonial state which it wanted to implement.

Later in the eighteenth century the crown sought to decrease the privileges (*fueros*) of the clergy, restricting clerical authority to spiritual matters and undermining the power of parish priests, who often acted as agents of the crown in rural parishes. By desacralizing power and frontal attacks on the clergy, the crown, according to William B. Taylor, undermined

its own legitimacy, since parish priests had been traditionally the "natural local representatives of their Catholic king."

In the economic sphere, the crown sought to gain control over church revenues. The Church functioned as one of the largest economic institutions within colonial Latin America. It owned and retained jurisdiction over large amounts of land, which the crown wanted for itself because of the economic value which could be derived from the land. Moreover, by taking that land for itself, the Crown had the opportunity to cut down the physical presence of the Church to further weaken its ideological and social role within local colonial communities.

In a financial crisis of 1804, the crown attempted to call in debts owed the church, mainly in the form of mortgages for haciendas owned by the elites. The Act of Consolidation simultaneously threatened the wealth of the church, whose capital was mainly lent for mortgages, as well as threatening the financial well-being of elites, who depended on mortgages for acquiring and keeping their estates. Shortening the repayment period meant many elites were faced with bankruptcy. The crown also sought to gain access to benefices elite families set aside to support a priest, often their own family members, by eliminating these endowed funds (*capellanías*) that the lower clergy depended on disproportionately. Prominently in Mexico, lower clergy participated in the insurgency for independence with priests Miguel Hidalgo and José María Morelos.

The reforms had mixed results. In some areas—such as Cuba, Río de la Plata and New Spain—the reforms had positive effects, improving the local economy and the efficiency of the

government. In other areas, the changes in the crown's economic and administrative policies led to tensions with locals, which at times erupted into open revolts, such as the Revolt of the Comuneros in New Granada and the Rebellion of Túpac Amaru II in Peru.

The loss of high offices to Peninsulars and the eighteenth-century revolts in Spanish South America were the some of the direct causes of the wars of independence, which took place decades later, but they have been considered important elements of the political background in which the wars took place.

Many Creoles, particularly the wealthy creoles, were negatively impacted by the Bourbon Reforms. This resulted in their taking action by using their wealth and positions within society, often as leaders within their communities, to spur resistance to convey their displeasure with Spanish reforms because of the negative economic impact which they had. However, because of how quickly their revolts would further radicalize the lower classes, the Creoles quickly stopped supporting general violent insurrection because they benefitted from social change that occurred through the systems of the Spanish crown. Institutional change ensured stability by supporting the political institutions that allowed for the creation of a wealthy Creole class and further adapting those institutions to meet demands, rather than propose a radical shift in the complete make-up of socioeconomic life and traditions. However, institutional change did not come as anticipated and further spurred on the radicalization of Spanish-American social classes towards independence.

Military restructuring

Spain's international wars in the second half of the 18th century evidenced the empire's difficulties in reinforcing its colonial possessions and provide them with economic aid. This led to an increased local participation in the financing of the defense and an increased participation in the militias by the Chilean-born. Such development was at odds with the ideals of the centralized absolute monarchy.

The Spanish did also formal concessions to strengthen the defense: In Chiloé Archipelago Spanish authorities promised freedom from the *encomienda* those indigenous locals who settled near the new stronghold of Ancud (founded in 1768) and contributed to its defense. The increased local organization of the defenses would ultimately undermine metropolitan authority and bolster the independence movement.

Spread of Enlightenment ideals

Other factors may include Enlightenment thinking and the examples of the Atlantic Revolutions. The Enlightenment spurred the desire for social and economic reform to spread throughout Spanish America and the Iberian Peninsula. Ideas about free trade and physiocratic economics were raised by the Enlightenment in Spain and spread to the overseas empire and a homegrown Spanish American Enlightenment. The political reforms implemented and the many constitutions written both in Spain and throughout the Spanish world during the wars of independence were influenced by these factors.

Creation of new ruling institutions in Spain and Americas, 1808–1810

Collapse of the Bourbon dynasty

The Peninsular War was the trigger for conflicts in Spanish America in the absence of a legitimate monarch. The Peninsular War began an extended period of instability in the worldwide Spanish monarchy that lasted until 1823. Napoleon's capture of the Bourbon monarchs precipitated a political crisis in Spain and Spanish America. Although the Spanish world almost uniformly rejected Napoleon's plan to place his brother, Joseph, on the throne, there was no clear solution to the lack of a king. Following traditional Spanish political theories on the contractual nature of the monarchy (see Philosophy of Law of Francisco Suárez), the peninsular provinces responded to the crisis by establishing juntas. The move, however, led to more confusion, since there was no central authority and most juntas did not recognize the claim of some juntas to represent the monarchy as a whole. The Junta of Seville, in particular, claimed authority over the overseas empire, because of the province's historic role as the exclusive entrepôt of the empire.

This impasse was resolved through negotiations between the several juntas in Spain counted with the participation of the Council of Castile, which led to the creation of a main government: the "Supreme Central and Governmental Junta of Spain and the Indies" on 25 September 1808. It was agreed that the kingdoms of the peninsula would send two

representatives to this Supreme Central Junta, and that the overseas kingdoms would send one representative each. These kingdoms were defined as "the viceroyalties of New Spain (Mexico), Peru, New Granada, and Buenos Aires, and the independent captaincies general of the island of Cuba, Puerto Rico, Guatemala, Chile, Province of Venezuela, and the Philippines."

This plan was criticized for providing unequal representation to Spanish America; nevertheless, throughout the end of 1808 and early 1809, the regional capitals elected candidates, whose names were forwarded to the capitals of the viceroyalties or captaincies general. Several important and large cities were left without direct representation in the Supreme Junta. In particular Quito and Chuquisaca, which saw themselves as the capitals of kingdoms, resented being subsumed in the larger Viceroyalty of Peru and Viceroyalty of the Río de la Plata respectively. This unrest led to the establishment of juntas in these cities in 1809, which were eventually quashed by the authorities within the year. An unsuccessful attempt at establishing a junta in New Spain was also stopped.

Spanish institutional revolution

The escape to Cádiz and the dissolution of the Supreme Central Junta on 29 January 1810, because of the reverses suffered after the Battle of Ocaña by the Spanish forces paid with Spanish American money, set off another wave of juntas being established in the Americas. French forces had taken over southern Spain and forced the Supreme Junta to seek refuge in the island-city of Cádiz.

The Supreme Junta replaced itself with a smaller, five-man council, called the Regency, or the Council of Regency of Spain and the Indies. Next, to establish a more legitimate government system, the Regency called for the convening of an "extraordinary and general Cortes of the Spanish Nation": which was convened as the Cortes of Cádiz. The plan for the election of the Cortes, based on provinces, and not kingdoms, was more equitable and provided more time to determine what would be considered an overseas province. The Cortes of Cádiz was the first national assembly to claim sovereignty in Spain. It represented the abolition of the old kingdoms. The opening session was held on 24 September 1810, in the building now known as the Real Teatro de las Cortes under the siege of French army. It met as one body and its members represented the entire Spanish empire.

Response in Spanish America

Most Spanish Americans saw no reason to recognize a rump government that was under the threat of being captured by the French at any moment, and began to work for the creation of local juntas to preserve the region's independence from the French. Junta movements were successful in New Granada (Colombia), Venezuela, Chile and Río de la Plata (Argentina). Less successful, though serious movements, also occurred in Central America. Ultimately, Central America, along with most of New Spain, Quito (Ecuador), Peru, Upper Peru (Bolivia), the Caribbean and the Philippine Islands remained under control of royalists for the next decade and participated in the Cortes of Cádiz efforts to establish a liberal government for the Spanish Monarchy.

Military campaigns

Although on the battlefield the fight was to the death and without quarter, however, the recruitment of soldiers seemed to end up a common pool employed by opposing sides as cannon fodder. Socially, both apparently opposing positions, loyalist and pro-independence, had an uncertain significance for the different social strata of the monarchy.

In Europe, the Spaniards made a forced recruitment for the expeditionary forces, leading to constant rebellions. Independent states relied on privateers, mercenaries, adventurers or filibusters, reliable fighters when pay or booty was at a glance.

For the mobilization of the population in America, the vast majority or almost all of the troops of both sides, the indiscriminate recruitment of native American communities was used, in general in traditional confronted regions; social improvements were promised, by both sides, to the indigenous and the different mestizo colonial castes, such as mulattoes ("pardos"), cholos, etc., and even African slaves were recruited by both sides.

All those recruited in America, and also the Spaniards, joined the enemy armies as combatants when they were captured. Likewise, the Creole potentates of European origin could give their support to the royalist or pro-independence cause, in relation to the commercial interests of each region. The Church was also divided, and except for the lower clergy, involved as combatants of insurgency, their position was in accordance with the political power.

Civil wars for disputed sovereignty, 1810–14

The creation of juntas in Spanish America, such as the *Junta Suprema de Caracas* on 19 April 1810, set the stage for the fighting that would afflict the region for the next decade and a half. Political fault lines appeared, and were often the causes of military conflict. On the one hand the juntas challenged the authority of all royal officials, whether they recognized the Regency or not. On the other hand, royal officials and Spanish Americans who desired to keep the empire together were split between liberals, who supported the efforts of the Cortes, and conservatives (often called "absolutists" in the historiography), who did not want to see any innovations in government. Finally, although the juntas claimed to carry out their actions in the name of the deposed king, Ferdinand VII, their creation provided an opportunity for people who favored outright independence to promote their agenda publicly and safely. The proponents of independence called themselves patriots, a term which eventually was generally applied to them.

The idea that independence was not the initial concern is evidenced by the fact that few areas declared independence in the years after 1810. The congresses of Venezuela and New Granada did so in 1811 and also Paraguay in same year (14 and 15 May 1811). Some historians explain the reluctance to declare independence as a "mask of Ferdinand VII": that is, that patriot leaders felt that they needed to claim loyalty to the deposed monarch to prepare the masses for the radical change that full independence eventually would entail. Nevertheless, even areas such as Río de la Plata and Chile, which more or less maintained *de facto* independence from the peninsular authorities, did not declare independence until quite a few

years later, in 1816 and 1818, respectively. Overall, despite achieving formal or de facto independence, many regions of Spanish America were marked by nearly continuous civil wars, which lasted well into the 1820s. In Mexico, where the junta movement had been stopped in its early stages by a coalition of Peninsular merchants and government officials, efforts to establish a government independent of the Regency or the French took the form of rebellion, under the leadership of Miguel Hidalgo. Hidalgo was captured and executed in 1811, but a resistance movement continued, which declared independence from Spain in 1813. The Gutiérrez–Magee Expedition was a joint Tejanos-US volunteers expedition formed in Louisiana for Texas independence but was defeated in the Battle of Medina. In Central America, attempts at establishing juntas were also put down, but resulted in significantly less violence. The Caribbean islands, like the Philippines on the other side of the world, were relatively peaceful. Any plots to set up juntas were denounced to the authorities early enough to stop them before they gained widespread support.

Major cities and regional rivalries

Major cities and regional rivalry played an important role in the wars. The disappearance of a central, imperial authority—and in some cases of even a local, viceregal authority (as in the cases of New Granada and Río de la Plata)—initiated a prolonged period of balkanization in many regions of Spanish America. It was not clear which political units should replace the empire, and there were no new national identities to replace the traditional sense of being Spaniards. The original juntas of 1810 appealed first to a sense of being Spanish,

which was counterposed to the French threat; second, to a general American identity, which was counterposed to the Peninsula lost to the French; and third, to a sense of belonging to the major cities or local province, the *patria* in Spanish. More often than not, juntas sought to maintain a province's independence from the capital of the former viceroyalty or captaincy general as much as from the Peninsula itself. Armed conflicts broke out between the provinces over the question of whether some cities or provinces were to be subordinate to others as they had been under the crown. This phenomenon was particularly evident in South America. This rivalry also led some regions to adopt the opposite political cause to that chosen by their rivals. Peru seems to have remained strongly royalist in large part because of its rivalry with Río de la Plata, to which it had lost control of Upper Peru when the latter was elevated to a viceroyalty in 1776. The creation of juntas in Río de la Plata allowed Peru to regain formal control of Upper Peru for the duration of the wars.

Social and racial tensions

Underlying social and racial tensions also had a great impact on the nature of the fighting. Rural areas were pitted against urban centers, as grievances against the authorities found an outlet in the political conflict. This was the case with Hidalgo's peasant revolt, which was fueled as much by discontent over several years of bad harvests as with events in the Peninsular War. Hidalgo was originally part of a circle of liberal urbanites in Querétaro, who sought to establish a junta. After this conspiracy was discovered, Hidalgo turned to the rural people of the Mexican Bajío to build his army, and their interests soon overshadowed those of the urban intellectuals. A similar

tension existed in Venezuela, where the Spanish immigrant José Tomás Boves formed a powerful, though irregular, royalist army out of the *Llaneros*, mixed-race slave and plains people, by attacking the white landowning class. Boves and his followers often disregarded the command of Spanish officials and were not concerned with actually re-establishing the toppled royal government, choosing instead to keep real power among themselves. Finally, in the back country of Upper Peru, the *republiquetas* kept the idea of independence alive by allying with disenfranchised members of rural society and native groups, but were never able to take the major population centers.

Increasingly violent confrontations developed between Spaniards and Spanish Americans, but this tension was often related to class issues or fomented by patriot leaders to create a new sense of nationalism. After being incited to rid the country of the *gachupines* (a disparaging term for *Peninsulares*), Hidalgo's forces indiscriminately massacred hundreds of Criollos and *Peninsulares* who had taken refuge at the Alhóndiga de Granaditas in Guanajuato. In Venezuela during his Admirable Campaign, Simón Bolívar instituted a policy of a war to the death, in which royalist Spanish Americans would be purposely spared but even neutral *Peninsulares* would be killed, to drive a wedge between the two groups.

This policy laid the ground for the violent royalist reaction under Boves. Often though, royalism or patriotism simply provided a banner to organize the aggrieved, and the political causes could be discarded just as quickly as they were picked up. The Venezuelan *Llaneros* switched to the patriot banner

once the elites and the urban centers became securely royalist after 1815, and it was the royal army in Mexico that ultimately brought about that nation's independence.

King's war against independence, 1814–20

By 1815 the general outlines of which areas were controlled by royalists and pro-independence forces were established and a general stalemate set in the war. In areas where royalists controlled the main population centers, most of the fighting by those seeking independence was done by isolated guerrilla bands. In New Spain, the two main guerrilla groups were led by Guadalupe Victoria in Puebla and Vicente Guerrero in Oaxaca. In northern South America, New Granadan and Venezuelan patriots, under leaders such as Simón Bolívar, Francisco de Paula Santander, Santiago Mariño, Manuel Piar and José Antonio Páez, carried out campaigns in the vast Orinoco River basin and along the Caribbean coast, often with material aid coming from Curaçao and Haiti. Also, as mentioned above, in Upper Peru, guerrilla bands controlled the isolated, rural parts of the country.

Restoration of Ferdinand VII

In March 1814, following with the collapse of the First French Empire, Ferdinand VII was restored to the Spanish throne. This signified an important change, since most of the political and legal changes made on both sides of the Atlantic—the myriad of juntas, the Cortes in Spain and several of the congresses in the Americas, and many of the constitutions and new legal codes—had been made in his name. Before entering Spanish territory, Ferdinand made loose promises to the Cortes

that he would uphold the Spanish Constitution. But once in Spain he realized that he had significant support from conservatives in the general population and the hierarchy of the Spanish Catholic Church; so, on 4 May, he repudiated the Constitution and ordered the arrest of liberal leaders on 10 May. Ferdinand justified his actions by stating that the Constitution and other changes had been made by a Cortes assembled in his absence and without his consent. He restored the former legal codes and political institutions and promised to convene a new Cortes under its traditional form (with separate chambers for the clergy and the nobility), a promise never fulfilled. News of the events arrived through Spanish America during the next three weeks to nine months, depending on time it took goods and people to travel from Spain.

Ferdinand's actions constituted a definitive *de facto* break both with the autonomous governments, which had not yet declared formal independence, and with the effort of Spanish liberals to create a representative government that would fully include the overseas possessions. Such a government was seen as an alternative to independence by many in New Spain, Central America, the Caribbean, Quito, Peru, Upper Peru and Chile. Yet the news of the restoration of the "Ancien Régime" did not initiate a new wave of juntas, as had happened in 1809 and 1810, with the notable exception of the establishment of a junta in Cuzco demanding the implementation of the Spanish Constitution. Instead most Spanish Americans were moderates who decided to wait and see what would come out of the restoration of normalcy. In fact, in areas of New Spain, Central America and Quito, governors found it expedient to leave the elected constitutional *ayuntamientos* in place for several years

to prevent conflict with the local society. Liberals on both sides of the Atlantic, nevertheless, continued to conspire to bring back a constitutional monarchy, ultimately succeeding in 1820. The most dramatic example of transatlantic collaboration is perhaps Francisco Javier Mina's expedition to Texas and northern Mexico in 1816 and 1817.

Spanish Americans in royalist areas who were committed to independence had already joined the guerrilla movements. However, Ferdinand's actions did set areas outside of the control of the crown on the path to full independence. The governments of these regions, which had their origins in the juntas of 1810, and even moderates there, who had entertained a reconciliation with the crown, now saw the need to separate from Spain if they were to protect the reforms they had enacted.

Royalist military

During this period, royalist forces made advances into New Granada, which they controlled from 1815 to 1819, and into Chile, which they controlled from 1814 to 1817. Except for royalist areas in the northeast and south, the provinces of New Granada had maintained independence from Spain since 1810, unlike neighboring Venezuela, where royalists and pro-independence forces had exchanged control of the region several times. To pacify Venezuela and to retake New Granada, Spain organized in 1815 the largest armed force it ever sent to the New World, consisting of 10,500 troops and nearly sixty ships. (See, Spanish reconquest of New Granada.) Although this force was crucial in retaking a solidly pro-independence region like New Granada, its soldiers were eventually spread

out throughout Venezuela, New Granada, Quito, and Peru and were lost to tropical diseases, diluting their impact on the war. More importantly, the majority of the royalist forces were composed, not of soldiers sent from the peninsula, but of Spanish Americans.

Overall, Europeans formed only about a tenth of the royalist armies in Spanish America, and only about half of the expeditionary units, once they were deployed in the Americas. Since each European soldier casualty was replaced by a Spanish American soldier, over time, there were more and more Spanish American soldiers in the expeditionary units. For example, Pablo Morillo, commander in chief of the expeditionary force sent to South America, reported that he had only 2,000 European soldiers under his command in 1820; in other words, only half the soldiers of his expeditionary force were European. It is estimated that in the Battle of Maipú only a quarter of the royalist forces were European soldiers, in the Battle of Carabobo about a fifth, and in the Battle of Ayacucho less than 1% was European.

Pro-independence advances

Towards the end of this period the pro-independence forces made two important advances. In the Southern Cone, a veteran of the Spanish army with experience in the Peninsular War, José de San Martín, became the governor of the Province of Cuyo. He used this position to begin organizing an army as early as 1814 in preparation for an invasion of Chile. This was an important change in strategy after three United Provinces campaigns had been defeated in Upper Peru. San Martín's army became the nucleus of the Army of the Andes, which

received crucial political and material support in 1816 when Juan Martín de Pueyrredón became Supreme Director of the United Provinces. In January 1817, San Martín was finally ready to advance against the royalists in Chile. Ignoring an injunction from the congress of the Río de la Plata not to move against Chile, San Martín together with General Bernardo O'Higgins Riquelme, later Supreme Director of Chile, led the Army over the Andes in a move that turned the tables on the royalists. By 10 February, San Martín had control of northern and central Chile, and a year later, after a war with no quarter, the south. With the aid of a fleet under the command of former British naval officer Thomas Cochrane, Chile was secured from royalist control and independence was declared that year. San Martín and his allies spent the next two years planning an invasion of Peru, which began in 1820.

In northern South America, after several failed campaigns to take Caracas and other urban centers of Venezuela, Simón Bolívar devised a similar plan in 1819 to cross the Andes and liberate New Granada from the royalists. Like San Martín, Bolívar personally undertook the efforts to create an army to invade a neighboring country, collaborated with pro-independence exiles from that region, and lacked the approval of the Venezuelan congress. Unlike San Martín, however, Bolívar did not have a professionally trained army, but rather a quickly assembled mix of *Llanero* guerrillas, New Granadan exiles led by Santander and British recruits. From June to July 1819, using the rainy season as cover, Bolívar led his army across the flooded plains and over the cold, forbidding passes of the Andes, with heavy losses—a quarter of the British Legion perished, as well as many of his *Llanero* soldiers, who were not prepared for the nearly 4,000-meter altitudes—but the gamble

paid off. By August Bolívar was in control of Bogotá and its treasury, and gained the support of many in New Granada, which still resented the harsh reconquest carried out under Morillo. Nevertheless, Santander found it necessary to continue the policy of the "war to the death" and carried out the execution of thirty-eight royalist officers who had surrendered. With the resources of New Granada, Bolívar became the undisputed leader of the patriots in Venezuela and orchestrated the union of the two regions in a new state called Colombia (Gran Colombia).

Independence consolidated, 1820–33

To counter the advances the pro-independence forces had made in South America, Spain prepared a second, large, expeditionary force in 1819. This force, however, never left Spain. Instead, it became the means by which liberals were finally able to reinstate a constitutional regime. On 1 January 1820, Rafael Riego, commander of the Asturias Battalion, headed a rebellion among the troops, demanding the return of the 1812 Constitution. His troops marched through the cities of Andalusia with the hope of extending the uprising to the civilian population, but locals were mostly indifferent. An uprising, however, did occur in Galicia in northern Spain, and from there it quickly spread throughout the country. On 7 March, the royal palace in Madrid was surrounded by soldiers under the command of General Francisco Ballesteros, and three days later, on 10 March, the besieged Ferdinand VII, now a virtual prisoner, agreed to restore the Constitution.

Riego's Revolt had two significant effects on the war in the Americas. Militarily, the large numbers of reinforcements,

which were especially needed to retake New Granada and defend the Viceroyalty of Peru, would never arrive. Furthermore, as the royalists' situation became more desperate in region after region, the army experienced wholesale defections of units to the patriot side. Politically, the reinstatement of a liberal regime changed the terms under which the Spanish government sought to engage the insurgents. The new government naively assumed that the insurgents were fighting for Spanish liberalism and that the Spanish Constitution could still be the basis of reconciliation between the two sides. The government implemented the Constitution and held elections in the overseas provinces, just as in Spain. It also ordered military commanders to begin armistice negotiations with the insurgents with the promise that they could participate in the restored representative government.

New Spain and Central America

- In effect, the Spanish Constitution of 1812 adopted by the Cortes of Cádiz served as the basis for independence in New Spain and Central America, since in both regions it was a coalition of conservative and liberal royalist leaders who led the establishment of new states. The Spanish Constitution of 1812 attempted to return to the policies that the Spanish government had implemented under Habsburg rule. These policies gave recognized Spanish colonial territory as fellow kingdoms with equal standing to Spain. The policies under the Habsburgs, moreover, allowed for constant revisionism, through corruption and the sale of office, that provided the opportunity to grant more

rights and change policy to respond to the demands of the populations. The restoration of the Spanish Constitution and representative government was enthusiastically welcomed in New Spain and Central America. Elections were held, local governments formed and deputies sent to the Cortes. The Spanish Constitution of 1812 could have been an opportunity to enact social change slowly and without the threat of a radicalized uprising from the lower social classes by offering an opportunity to enact change that those in power would believe would best benefit their respective territories. Among liberals, however, there was fear that the new regime would not last; and conservatives and the Church worried that the new liberal government would expand its reforms and anti-clerical legislation. Yet, because the Cortes of Cádiz was located in Spain, political and economic power and decisions were localized in Spain, effectively giving them control over all of colonial Latin America. These tensions further frustrated many Spanish-Americans because of their inability to control the politics that directly affected their economic and sociopolitical wellbeing, further leading them towards independence. This climate of instability created the conditions for the two sides to forge an alliance. This alliance coalesced towards the end of 1820 behind Agustín de Iturbide, a colonel in the royal army, who at the time was assigned to destroy the guerrilla forces led by Vicente Guerrero.

In January 1821, in expectation of the abolition in Spain of the Constitution of 1812, Iturbide was chosen and was sent by the

officials of New Spain with Guerrero, the leader of the rebellions. He began so-called "peace" negotiations, suggesting the parties unite to establish an independent New Spain. Later, Iturbide was dethroned and quietly captured to be executed. The simple terms that Iturbide proposed became the basis of the Plan of Iguala: the independence of New Spain (now to be called the Mexican Empire) with Ferdinand VII or another Bourbon as emperor; the retention of the Catholic Church as the official state religion and the protection of its existing privileges; and the equality of all New Spaniards, whether immigrants or native-born. Many of that laws was abolished decades later or are in present-day Mexico. The following month the other important guerrilla leader, Guadalupe Victoria, joined the alliance, and on 1 March Iturbide was proclaimed head of a new Army of the Three Guarantees. The representative of the new Spanish government, Superior Political Chief Juan O'Donojú, who replaced the previous viceroys, arrived in Veracruz on 1 July 1821, but he found that royalists held the entire country except for Veracruz, Mexico City and Acapulco. Since at the time that O'Donojú had left Spain, the Cortes was considering greatly expanding the autonomy of the overseas Spanish possessions, O'Donojú proposed to negotiate a treaty with Iturbide on the terms of the Plan of Iguala. The resulting Treaty of Córdoba, which was signed on 24 August, kept all existing laws, including the 1812 Constitution, in force until a new constitution for Mexico could be written. O'Donojú became part of the provisional governing junta until his death on 8 October. Both the Spanish Cortes and Ferdinand VII rejected the Treaty of Córdoba, and the final break with the mother country came on 19 May 1822, when the Mexican Congress conferred the throne on Iturbide. Spain recognized Mexico's independence in 1836.

Central America gained its independence along with New Spain. On 15 September 1821, an Act of Independence was signed in Guatemala City which declared Central America (Guatemala, Honduras, El Salvador, Nicaragua, and Costa Rica) independent from Spain. The regional elites supported the terms of the Plan of Iguala and orchestrated the union of Central America with the Mexican Empire in 1821. Two years later, following Iturbide's downfall, the region, with the exception of Chiapas, peacefully seceded from Mexico on 1 July 1823, establishing the Federal Republic of Central America. The new state existed for seventeen years, centrifugal forces pulling the individual provinces apart by 1840.

South America

Unlike in New Spain and Central America, in South America independence was spurred by the pro-independence fighters who had held out for the past half-decade. José de San Martín and Simón Bolívar inadvertently led a continent-wide pincer movement from southern and northern South America that liberated most of the Spanish American nations on that continent. After securing the independence of Chile in 1818, San Martín concentrated on building a naval fleet in the Pacific to counter Spanish control of those waters and reach the royalist stronghold of Lima. By mid-1820 San Martín had assembled a fleet of eight warships and sixteen transport ships under the command of Admiral Cochrane. The fleet set sail from Valparaíso to Paracas in southern Peru. On 7 September, the army landed at Paracas and successfully took Pisco. After this, San Martín, waiting for a generalized Peruvian revolt, chose to avoid direct military confrontation. San Martín hoped that his presence would initiate an authentic Peruvian revolt

against Spanish rule, believing that otherwise any liberation would be ephemeral. In the meantime, San Martín engaged in diplomacy with Viceroy Joaquín de la Pezuela, who was under orders from the constitutional government to negotiate on the basis of the 1812 Constitution and to maintain the unity of the Spanish Monarchy. However, these efforts proved fruitless, since independence and unity of the monarchy could not be reconciled, so the army sailed in late October to a better strategic position in Huacho, in northern Peru. During the next few months, successful land and naval campaigns against the royalists secured the new foothold, and it was at Huacho that San Martín learned that Guayaquil (in Ecuador) had declared independence on 9 October.

Bolívar, learning about the collapse of the Cádiz expedition, spent the year 1820 preparing a liberating campaign in Venezuela. Bolívar was aided by Spain's new policy of seeking engagement with the insurgents, which Morillo implemented, renouncing to the command in chief, and returning to Spain. Although Bolívar rejected the Spanish proposal that the patriots rejoin Spain under the Spanish Constitution, the two sides established a six-month truce and the regularization of the rules of engagement under the law of nations on 25 and 26 November. The truce did not last six months. It was apparent to all that the royalist cause had been greatly weakened by the lack of reinforcements. Royalist soldiers and whole units began to desert or defect to the patriots in large numbers. On 28 January 1821, the *ayuntamiento* of Maracaibo declared the province an independent republic that chose to join the new nation-state of Gran Colombia. Miguel de la Torre, who had replaced Morillo as head of the army, took this to be a violation of the truce, and although the republicans argued that

Maracaibo had switched sides of its own volition, both sides began to prepare for renewed war. The fate of Venezuela was sealed when Bolívar returned there in April leading an army of 7,000 from New Granada. At the Battle of Carabobo on 24 June, the Gran Colombian forces decisively defeated the royalist forces, assuring control of Venezuela save for Puerto Cabello and guaranteeing Venezuelan independence. Bolívar could now concentrate on Gran Colombia's claims to southern New Granada and Quito.

- In Peru, on 29 January 1821, Viceroy Pezuela was deposed in a coup d'état by José de la Serna, but it would be two months before San Martín moved his army closer to Lima by sailing it to Ancón. During the next few months San Martín once again engaged in negotiations, offering the creation of an independent monarchy; but La Serna insisted on the unity of the Spanish monarchy, so the negotiations came to nothing. By July La Serna judged his hold on Lima to be weak, and on 8 July the royal army abandoned the coastal city to reinforce positions in the highlands, with Cuzco as new capital of the viceroyalty. On the 12th San Martín entered Lima, where he was declared "Protector of the Country" on 28 July, an office which allowed him to rule the newly independent state. To ensure that the Presidency of Quito became a part of Gran Colombia and did not remain a collection of small, divided republics, Bolívar sent aid in the form of supplies and an army under Antonio José de Sucre to Guayaquil in February 1821. For a year Sucre was unable to take Quito, and by November both sides,

exhausted, signed a ninety-day armistice. The following year, at the Battle of Pichincha on 24 May 1822, Sucre's Venezuelan forces finally conquered Quito; Gran Colombia's hold on the territory was secure. The following year, after a Peruvian patriot army was destroyed in the Battle of Ica, San Martín met with Simón Bolívar in Guayaquil on 26 and 27 July. Thereafter San Martín decided to retire from the scene. For the next two years, two armies of *Rioplatense* (Argentinian), Chilean, Colombian and Peruvian patriots were destroyed trying to penetrate the royalist bastion in the Andean regions of Peru and Upper Peru. A year later a Peruvian congress resolved to make Bolívar head of the patriot forces in the country. An internecine conflict between La Serna and General Pedro Antonio Olañeta, which was an extension of the Liberal Triennium, proved to be the royalists' undoing. La Serna lost control of half of his best army by the beginning of 1824, giving the patriots an opportunity.

Under the command of Bolívar and Sucre, the experienced veterans of the combined army, mainly Colombians, destroyed a royalist army under La Serna's command in the Battle of Ayacucho on 9 December 1824. La Serna's army was numerically superior but consisted of mostly new recruits. The only significant royalist area remaining on the continent was the highland country of Upper Peru. Following the Battle of Ayacucho, the royalist troops of Upper Peru under the command of Olañeta surrendered after he died in Tumusla on 2 April 1825. Bolívar tended to favor maintaining the unity of Upper Peru with Peru, but the Upper Peruvian leaders—many

former royalists, like Casimiro Olañeta, nephew of General Olañeta—gathered in a congress under Sucre's auspices supported the country's independence. Bolívar left the decision to Sucre, who went along with the congress. Sucre proclaimed Upper Peru's independence in the city which now bears his name on 6 August, bringing the main wars of independence to an end.

As it became clear that there was to be no reversal of Spanish American independence, several of the new states began to receive international recognition. Early, in 1822, the United States recognized Chile, the United Provinces of the Río de la Plata, Peru, Gran Colombia, and Mexico. Britain waited until 1825, after the Battle of Ayacucho, to recognize Mexico, Gran Colombia, and Río de la Plata. Both nations recognized more Spanish American states in the next few years.

Last royalist bastions

The Spanish coastal fortifications in Veracruz, Callao and Chiloé were the footholds that resisted until 1825 and 1826 respectively. In the following decade, royalist guerrillas continued to operate in several countries and Spain launched a few attempts to retake parts of the Spanish American mainland. In 1827 Colonel José Arizabalo started an irregular war with Venezuelan guerrillas, and Brigadier Isidro Barradas led the last attempt with regular troops to reconquer Mexico in 1829. The Pincheira brothers moved to Patagonia and remained there as multiethnic royalist outlaws gang until defeated in 1832. But efforts like these did not reverse the new political situation.

The increasing irrelevance of the Holy Alliance after 1825 and the fall of the Bourbon dynasty in France in 1830 during the July Revolution eliminated the principal support of Ferdinand VII in Europe, but it was not until the king's death in 1833 that Spain finally abandoned all plans of military reconquest, and in 1836 its government went so far as to renounce sovereignty over all of continental America. During the course of the 19th century, Spain would recognize each of the new states. Only Cuba and Puerto Rico remained under Spanish rule, until the Spanish–American War in 1898.

Effects of independence

Economics

The nearly decade and a half of wars greatly weakened the Spanish American economies and political institutions, which hindered the region's potential economic development for most of the nineteenth century and resulted in the enduring instability the region experienced. Independence destroyed the *de facto* trade bloc that was the Spanish Empire – Manila galleons and Spanish treasure fleets in particular. After independence, trade *among* the new Spanish American nations was less than it had been in the colonial period. Once the ties were broken, the small populations of most of the new nations provided little incentive to entice Spanish American producers to recreate the old trade patterns. In addition, the protection against European competition, which the Spanish monopoly had provided to the manufacturing sectors of the economy, ended. Due to expediency, protective tariffs for these sectors, in particular textile production, were permanently dropped and

foreign imports beat out local production. This greatly affected Native communities, which in many parts of Spanish America, specialized in supplying finished products to the urban markets, albeit using pre-industrial techniques. The wars also greatly affected the principal economic sector of the region, mining. Silver production in Bolivia halved after independence and it dropped by three-quarters in Mexico. Cities dependent on seaborne trade like Valdivia plunged into depression as the intracolony trade system collapsed.

Foreign trade policies varied among the new countries, some like the United Provinces of Río de la Plata and Peru applied initially protectionist policies while Chile was more open to foreign trade while still applying a kind of neomercantilism.

The new states that began to take root in Latin America, particularly Mexico, often courted foreign financial support from European nations. This foreign investment often came via loans, which only continued to cripple economies that had been destroyed or left alone during conflict. This investment was not enough to support economic recovery and can be considered to have only further negatively impacted economic growth in these newly developing states by pushing them further into debt in an attempt to recover and grow their economies. As the newly independent nations finally entered the world economy after the end of the French Revolutionary and Napoleonic Wars, when the economies of Europe and the United States were recovering and aggressively seeking new markets to sell their products after more than two decades of disruption. Ultimately Spanish America could only connect to the world markets as an exporter of raw materials and a consumer of finished products.

Society

Independence from the Spanish crown required solidarity across all social classes. However, each social faction had their ideas of what local society should and would look like after independence. This impacted the ability for societies to easily integrate because of the disunity of their ideas of future political systems and ideologies, which resulted in more conflict when it came to state consolidation. The power which the elite Creole class commanded allowed them to control state and national development to ensure that they remained in power. As a result, the newly forming Latin American states would fulfill some of the demands of other social factions to ensure the stability and integration of all into the social fabric of a new state while guaranteeing the continual reproduction of the Creole elite into position of power and control over the rest of society.

The political debate seeking answers to these questions was marked by a clash between liberalism and conservatism. Conservatives sought to maintain the traditional social structures to ensure stability; liberals sought to create a more dynamic society and economy by ending ethnically-based social distinctions and freeing property from economic restrictions. In its quest to transform society, liberals often adopted policies that were not welcome by Native communities, who had benefited from unique protections afforded to them by traditional Spanish law.

Independence, however, did initiate the abolition of slavery in Spanish America, as it was seen as part of the independence struggle, since many slaves had gained their manumission by

joining the patriot armies. In areas where slavery was not a major source of labor (Mexico, Central America, Chile), emancipation occurred almost immediately after independence was achieved. In areas where slavery was a main labor source (Colombia, Venezuela, Peru, Argentina), emancipation was carried out in steps over the next three decades, usually first with the creation of free-womb laws and programs for compensated emancipation. By the early 1850s, slavery had been abolished in the independent nations of Spanish America.

Role of women

Women were not simply spectators throughout the Independence Wars of Latin America. Many women took sides on political issues and joined independence movements to participate on many different levels. Women could not help but act as caring relatives either as mother, sister, wives or daughters of the men who were fighting. Women created political organizations and organized meetings and groups to donate food and supplies to the soldiers.

Some women supported the wars as spies, informants and combatants. Manuela Sáenz was a long term lover of Simón Bolívar and acted as his spy and confidante and was secretary of his archive. She saved his life on two occasions, nursed wounded soldiers and has even been believed some historians to have fought in a few battles. Sáenz followed Bolívar and his army through the independence wars and became known in Latin America as the "mother of feminism and women's emancipation and equal rights." Bolívar himself was a supporter of women's rights and suffrage in Latin America. It was Bolívar who allowed for Sáenz to become the great pioneer

of women's freedom. He wanted to set the women of Latin America free from the oppression and inferiority of what the Spanish regime had established. Bolívar even made Sáenz a Colonel of the Colombian Army due to her heroics which caused controversy because there were no women in the army at the time. Another woman who gained prominence in the fight for independence was Juana Azurduy de Padilla, a mixed-race woman who fought for independence in the Río de la Plata region. Argentine President Cristina Fernández de Kirchner posthumously promoted her to the rank of general.

According to gender stereotypes, women were not meant to be soldiers; only men were supposed to engage in fighting and conflict. There were still plenty of women present on the battlefields to help rescue and nurse soldiers. Some women fought alongside their husbands and sons on the battlefield. The majority of women assumed supportive and non-competitive roles such as fundraising and caring for the sick. Revolution for women meant something different than for men. Women saw revolution as a way to earn equal rights, such as voting, and to overcome the suppression of subordination of women to men. Women were usually identified as victims during the independence wars since the women of Latin America were forced to sacrifice for the cause. The ideals of womanhood meant that women must sacrifice what the situation required such as a mother sacrificing her son or a virgin knowing she might be sacrificing motherhood or marriage due to the loss of many young men. This view meant that women were meant to contribute to independence in a supportive role while leaving the combat and politics in the hands of the men.

Government and politics

Independence also did not result in stable political regimes, save in a few countries. First, the new nations did not have well-defined identities, but rather the process of creating identities was only beginning. This would be carried out through newspapers and the creation of national symbols, including new names for the countries ("Mexico", "Colombia", "Ecuador", "Bolivia", "Argentina"), that broke with the past. In addition, the borders were not firmly established, and the struggle between federalism and centralism, which began in independence, continued throughout the rest of the century. Two large states that emerged from the wars—Gran Colombia and the Federal Republic of Central America—collapsed after a decade or two, and Argentina would not consolidate politically until the 1860s.

The wars destroyed the old civilian bureaucracy that had governed the region for centuries, as institutions such as the audiencias were eliminated and many *Peninsular* officials fled to Spain. The Catholic Church, which had been an important social and political institution during the colonial period, initially came out weakened by the end of the conflicts. As with government officials, many *Peninsular* bishops abandoned their dioceses and their posts were not filled for decades until new prelates could be created and relations between the new nations and the Vatican were regularized. Then as the Church recovered, its economic and political power was attacked by liberals.

Despite the fact that the period of the wars of independence itself was marked by a rapid expansion of representative

government, for several of the new nations the nineteenth century was marked by militarism because of the lack of well-defined political and national institutions. The armies and officers that came into existence during the process of independence wanted to ensure that they got their rewards once the struggle was over. Many of these armies did not fully disband once the wars were over and they proved to be one of the stabler institutions in the first decades of national existence. These armies and their leaders effectively influenced the course of political development. Out of this new tradition came the caudillos, strongmen who amassed formal and informal economic, military and political power in themselves.

Foreign support

United Kingdom

Britain wanted to see an end to Spanish rule in South America and ultimately tap the monopoly of the important potential markets there. At the same time they wanted Spain as an ally to keep the balance of power in post Napoleonic Europe. To fulfil this, Britain went covert in support of the Revolutionaries in South America. In a kind of private free enterprise going by the law, she sent men, financial and material support to help the insurgents fight against Spain.

One of the most significant contributions were the British Legions, a volunteer unit that fought under Simón Bolívar. This force numbered upwards of 6,000 men – the majority of whom were composed of veterans of the Napoleonic wars. In combat their greatest achievements were at Boyacá (1819),

Carabobo (1821), Pichincha (1822) and Ayacucho (1824) which secured independence for Colombia, Venezuela, Ecuador and Peru from Spanish rule respectively. Bolívar described the Legions and all who served in them as "the saviours of my country".

Many members of the Royal Navy also volunteered for the revolutionary forces. The most famous being Thomas Cochrane who reorganised the Chilean navy, most of whom were composed of Royal Navy veterans. Amongst many feats he he captured the Spanish fortress of Valdivia in 1820; and in the same year he captured the flagship of the Spanish South American fleet, the *Esmeralda*, in the port of Callao. As well as helping Chile gain independence from Spain Cochrane did the same for Peru too by mounting an effective blockade and transporting troops. He then moved on to Brazil in their fight for independence from Portugal.

At their peak by 1819 around 10,000 men from the British Isles served in South America to fight against the Spanish.

British diplomacy also played a key role; in particular the role of foreign secretaries Viscount Castlereagh and later George Canning both of whom wanted to see the demise of Spain's South American colonies. Castlereagh's greatest achievement was to settle a deal with the European powers at the Congress of Aix-La-Chapelle in 1818 and the Congress of Verona four years later. This blocked aid to Spain which inhibited her reconquest of South America. With the Royal Navy in command of the oceans this set the precedence - they were also a decisive factor in the struggle for independence of certain Latin American countries.

United States

The intervention of the United States was due two distinct causes a territorial annexation and a revolts within the Spanish territories itself.

The Republic of West Florida was a short-lived republic in 1810 in the westernmost region of Spanish West Florida, which after less than three months was annexed and occupied by the United States a little later in 1810, and then became part of the territory of Louisiana. The Republic of East Florida was another republic declared against Spanish rule of East Florida by insurgents who wanted its annexation by the United States without success. In 1819, the Treaty of Florida was signed between Spain and the United States, and Spain ceded all of Florida to the United States.

In 1811, the Spanish crushed the San Antonio (Texas) revolt during the revolution against the royalists in the Mexican War of Independence. The remaining rebels then turned to the United States for help. Bernardo Gutiérrez de Lara traveled to Washington, D.C. Gutierrez gained the support of Augustus Magee and formed a U.S. filibuster force in Louisiana. A green flag from the expedition represented the rebels. The Northern Republican Army was defeated in the bloodiest battle in Texas, the Battle of Medina. Thus, Texas was incorporated into the Mexican Independence, and later Texas Independence and its annexation to the United States took place.

The United States remained neutral. Thus, for the rest of Madison's term, until 1817, the theoretical neutrality pending the development of events in the Old World. The point is,

Madison's policy of neutrality favored insurgents and this, along with the border-line problems in North America, led to a situation of pre-war tension with Spain. This situation forced the United States to act very cautiously in the Spanish-American issue, since it was trying to avoid at all costs to give an excuse for European intervention. At the end, the recognition in 1822 also was very delicate, at the international level the North American position against European powers.

Russia

The Spanish navy had been totally dismantled by a disastrous naval policy and relegated to the background by the urgency of the war against Napoleon itself. To 1817, Tsar Alexander supported reactionary governments. Ferdinand VII applied to the Tsar to purchase vessels. The Tsar agreed to this request with the offer of the sale of some of his own vessels. The agreement was finally negotiated at Madrid, between Dmitry Tatishchev, Russian ambassador, and Eguia, Minister of war. It was apparently known only to these two, and to the king himself. The text of the treaty of sale has not been found in the Spanish Naval archives. This diplomatic transaction was veiled in the deepest secrecy against Spanish Navy and Minister of Navy.

The requested fleet would consist of 5 warships and 3 frigates. The squadron would be delivered to Cadiz, duly armed, and supplied. The arrival of the Russian fleet in Cadiz in February 1818 was not to the liking of the Spanish navy, which was dissatisfied with the state of deterioration in which some supposedly new ships were found: between 1820 and 1823 all the Warships were scrapped as being useless. This fiasco put

an end to the whole plan to reconquer the Río de la Plata, which would end with the uprising of the Spanish Army in Cadiz (Trienio Liberal). In 1818 one of the frigates (Maria Isabel aka Patrikki) was captured in the Pacific, after the uprising of one of the Spanish troop transports that went over to the side of the American rebels delivering all the keys, routes and signals for the capture of the frigate. Only two of the Russian frigates provided important services in the Caribbean in defense of the island of Cuba, although they only made the one-way trip, they got lost, sunk when they arrived in Havana.

Portuguese Empire

After a long colonial dispute between Spain, and to avoid insurgency in this disputed territory, the Portuguese government organized an Army to defend the city of Montevideo against the revolutionaries (1811) and to annexed the disputed territory of Banda Oriental against Spain (1816).

In 1811, the first Portuguese invasion took place in support of the besieged city of Montevideo. The Portuguese invasion forces were commanded by the governor and captain general of the Captaincy of Río Grande de San Pedro, Diego de Souza (Diogo de Souza), and their declared objective was to help Montevideo and the viceroy of the Río de la Plata, Francisco Javier de Elío, who was besieged by revolutionary forces from the United Provinces of the Río de la Plata. The invasion included clashes with eastern forces led by José Gervasio Artigas. After an ephemeral agreement, the Portuguese did not completely abandon the occupied territory.

In 1816, the second Portuguese Invasion or War against Artigas, giving rise to the armed conflict that took place between 1816 and 1820 in the entire territory of the Oriental Republic of Uruguay, in the Argentine Mesopotamia and southern Brazil, and which resulted in the annexation of the Banda Oriental to the Portuguese Empire, with the name of Cisplatina Province.

This annexation broke relations with Spain, which prepared an army in Spain to recover Montevideo and invade the Río de la Plata, but this project ended up in rebellion of entire Army in 1820 in Cádiz. Portugal tries to ensure its annexation by being the first country to grant international recognition of the independence of Latin American Republics on 1821.

Chapter 4

Royalist Leaders

Pablo Morillo

Pablo Morillo y Morillo, Count of Cartagena and Marquess of La Puerta, a.k.a. *El Pacificador* (The Peace Maker) (5 May 1775 – 27 July 1837) was a Spanish general.

Biography

- Morillo was born in Fuentesecas, Zamora, Spain. In 1791 he enlisted in the Real Cuerpo de Marina (Spanish Royal Marine Corps) and participated in the Battle of Trafalgar in which he was wounded and made prisoner by the English in 1805. He also fought against Napoleon Bonaparte in 1808 during the Peninsular War (part of Napoleonic Wars) to defend his mother country Spain against the French invasion. Once the war ended and the Spanish monarchy was restored, King Ferdinand VII of Spain appointed him Expedition Commander and General Captain of the Provinces of Venezuela on 14 August 1814. He set sail with a fleet of 18 warships and 42 cargo ships and disembarked in Carupano and Isla Margarita with the mission to pacify the revolts against the Spanish monarchy in the American colonies. He travelled to La Guaira, Caracas, Puerto Cabello, Santa Marta and Cartagena de Indias

(United Provinces of New Granada) in a military campaign to fight Simon Bolívar's revolutionary armies.

On 22 August 1815 Morillo surrounded the walled city of Cartagena and put it under siege, preventing any supplies from going in until 6 December that year, when the Spanish Royal Army entered the city. With control over Cartagena, Morillo returned to Venezuela to continue the fight against revolutionaries. In June 1820 Morillo, under Royal mandate, ordered that everyone in the colonies obey the Cadiz Constitution and sent delegates to negotiate with Bolívar and his followers. Bolívar and Morillo later met in the Venezuelan town of Santa Ana and signed a six-months' armistice followed by a second one named "War Regularization".

Morillo returned to Spain, was named General Captain of New Castile, and supported the Liberal Constitution during the Liberal Triennium. He prevented a coup against the Constitution in 1822, and fought in 1823 the French invasion under Louis-Antoine, Duke of Angoulême in the north of Spain, where he was defeated. When King Ferdinand VII restored the absolute regime in 1823 he went to France. A few years later, he returned to Spain and participated in some military operations during the Carlist Wars. He felt ill and went back to France where he died on 27 July 1837, in Barèges.

Quotes

When Morillo ordered the execution of the scientist Francisco José de Caldas (known as *El Sabio Caldas*, "Wise Caldas") and the people present at San Francisco Square of Santa Fe

appealed for the life of the scientist, Morillo responded: "Spain does not need wise people." (*Spanish: "España no necesita sabios"*). This sentence became the slogan of Spain's wars for the re-conquest of the rebel colonies.

Félix María Calleja del Rey

Félix María Calleja del Rey y de la Gándara (Spanish: *Félix María Calleja del Rey, primer conde de Calderón*) (November 1, 1753, Medina del Campo, Spain – July 24, 1828, Valencia, Spain) was a Spanish military officer and viceroy of New Spain from March 4, 1813, to September 20, 1816, during Mexico's War of Independence. For his service in New Spain, Calleja was awarded with the title *Count of Calderon*.

Before the insurrection of 1810

Captain Calleja del Rey accompanied the Count of Revillagigedo to New Spain in 1789, when Revillagigedo took up the position of viceroy. Calleja became commander of an infantry brigade in the intendancy of San Luis Potosí. Under the government of Viceroy Miguel José de Azanza he fought with severity and cruelty to subdue the Indians of the area. He also fought against Anglo-American filibusters who were encroaching on the underpopulated Spanish territory of Texas. Among the officers under his command was Ignacio Allende, who was later to become a hero of Mexican independence. Calleja is famous for his finishing of the biggest insurrections in his time, the 1811 and the 1813 insurrections. He succeeded in killing the three famous leaders of these revolts, Hidalgo, Allende, and Morelos.

Calleja married Francisca de la Gándara, a very rich Criolla and owner of the hacienda of Bledos.

General in the royalist army

Calleja is regarded by some historians as one of the greatest military commanders that have ever fought in Mexico, because of his astute yet sometimes barbaric methods. With the Grito de Dolores of Miguel Hidalgo on September 16, 1810, supporters of independence rose in many places in New Spain.

Within a month many large cities in the central part of the country fell to the rebels — Celaya (September 21), Guanajuato (September 28), Zacatecas (October 7), Valladolid (October 17), and Guadalajara (November 11) among them.

At Monte de las Cruces, at the gates of Mexico City, 80,000 insurgents under Hidalgo and Ignacio Allende defeated the royalists on October 30, 1810. There was panic in Mexico City. However, in a moment of apparent indecision, Father Hidalgo ordered a retreat toward Valladolid. The reason for this has never been adequately explained.

After the retreat of the insurgents, Viceroy Francisco Javier Venegas ordered Calleja, now a brigadier in command of a cavalry division, to march from San Luis Potosí to the aid of the capital. On the march between Querétaro and Mexico City, Calleja met the insurgents in the plains of San Jerónimo Aculco, where he decimated them on November 7, 1810. He then retook Guanajuato on November 25 and Guadalajara on January 21, 1811.

Calleja defeated the insurgents again, decisively, in the Battle of the Bridge of Calderón on January 17, 1811. The insurgents were on the point of victory when a grenade ignited a munitions wagon in their camp, sowing confusion. The royalists took advantage, and routed the insurgents. A remnant of the rebel forces, including Hidalgo and other leaders, began retreating toward the United States. The leaders were captured by the royalists and executed.

Calleja's 4,000 troops became the basis of the royalist Army of the Center that fought Hidalgo, Ignacio López Rayón and Father José María Morelos.

Calleja retreated to Mexico City after an unsuccessful 72-day siege against Morelos in Cuautla. In his home in Mexico City he received royalists who were discontented with Viceroy Venegas's inability to suppress the insurrection. The Audiencia and other officials resolved to complain about the viceroy to Regency in Cadiz.

Viceroy of New Spain

Calleja received his appointment as Venegas's replacement on January 28, 1813, but did not actually take up the post until March 4. His initial assessment of the state of affairs was not encouraging. The government coffers were empty, and the government was floating a large debt. More than two million pesos were owed to the troops. Whole units lacked adequate uniforms and boots. Armament was in a bad state and there was a shortage of horses.

With his characteristic energy, he threw himself into remedying the situation. He confiscated the property of the Inquisition, which had been abolished by the Spanish Constitution of 1812. He solicited a loan of two million pesos from the commercial sector. He farmed out the *alcabala* (sales tax) to improve its collection. He reorganized the public treasury and required strict accounting of the viceroyalty's income and expenses. He reestablished commerce and the postal service, which had been interrupted by the war with the insurgents. With the money he raised he formed a powerful army, well equipped, paid, armed and disciplined.

In late 1813 an epidemic of fever killed tens of thousands of people. Morelos captured Acapulco on April 20, 1813. On November 6, 1813 the rebel Congress of Anáhuac, meeting in Chilpancingo, proclaimed the independence of Mexico. On October 22, 1814 the rebel Congress of Apatzingán promulgated a constitution.

Meanwhile, in Spain, Ferdinand VII had returned to the throne. He abrogated the Spanish Constitution on May 14, 1814, and reestablished government institutions as they had been in 1808. By a decree of July 21, 1814, he reestablished the Inquisition. On May 19, 1816 he authorized the Jesuits to return to Mexico, who had been expelled in the late eighteenth century.

Calleja had been exiling many insurgents to Cuba, and now he began exiling them to the Philippines. With the capture and subsequent execution of Morelos on December 22, 1815, the insurrection once again seemed to be at an end. But it soon broke out anew with the revolt of Vicente Guerrero in the

south. Calleja's rule became more dictatorial. Calleja was a determined, unscrupulous, cruel ruler who tolerated the numerous abuses of his commanders; he was someone to be feared. He was feared, and also hated, even by some of the more liberal royalists. They blamed his brutal methods for causing more rebellion after the death of Morelos. Their complaints against his dictatorial methods were received in the Spanish court and on September 20, 1816, he was relieved of his position.

Return to Spain

He returned to Spain, where he was given the title of *Conde de Calderón* and the grand crosses of Isabel the Catholic and San Hermenegildo. He was appointed military commander in Andalucía and governor of Cádiz. He was charged with organizing an expeditionary army to America. He was taken prisoner by Rafael Riego, whose uprising against Ferdinand VII initiated the Liberal Restoration of 1820, and remained incarcerated on Mallorca until the collapse of the uprising, whereupon he was freed and restored to his former rank and positions. He was commander in Valencia at the time of his death in 1828.

Santiago de Liniers, 1st Count of Buenos Aires

Santiago Antonio María de Liniers y Bremond, 1st Count of Buenos Aires, KOM, OM (July 25, 1753 – August 26, 1810) was a French officer in the Spanish military service, and a

viceroys of the Spanish colonies of the Viceroyalty of the River Plate. Although born **Jacques de Liniers** in France, he is more widely known by the Spanish form of his name, Santiago de Liniers.

He was popularly regarded as the hero of the reconquest of Buenos Aires after the first British invasion of the River Plate. As a result of his success, he was appointed as viceroy, replacing Rafael de Sobremonte. It was unprecedented for a viceroy to be replaced without the King's direct intervention. But he was confirmed in office by Charles IV of Spain.

He defended the settlement against a second British invasion and a mutiny that sought to replace him. He was replaced in 1809 by Baltasar Hidalgo de Cisneros, appointed as viceroy by the Junta of Seville, and retired from public activity. But when the May Revolution took place, Liniers decided to come out of his retirement and organized a monarchist uprising in Córdoba. Liniers was forced to flee, but was eventually captured, and executed without trial.

Biography

Early life

Santiago de Liniers y Bremond, Cavalier of the Order of Saint John, Cavalier of the Order of Montesa, Captain in the Spanish Royal Navy was born in Niort, France, as Jacques, 4th son of Jacques Joseph Louis, comte de Liniers (1723–1785) and captain of the French Navy, and Henriette Thérèse de Brémond d'Ars (1725–1770).

The Liniers family was a noble French family, known since the 11th century. One of its ancestors, Guillaume de Liniers, died in the Battle of Poitiers (1356). Eight members were Cavaliers of the Order of Saint John.

In 1765, when Jacques was 12 years old, he entered the military school at the Order of Malta. (As a younger son, he was unlikely to inherit the title and land, so was sent to military school in order to have a career.) After three years, he graduated with the Cross of Cavalier (1768). He was commissioned as a Sub-Lieutenant of Cavalry in the Royal-Piémont Regiment [fr] in France.

Serving the Spanish Crown

In 1774 Liniers requested dismissal and re-enlisted as a volunteer in the campaigns against the Moors in Algiers. He benefited from the third Pacte de Famille (1761), which allowed Frenchmen to take part in Spanish military campaigns with equal rights and requirements as the Spaniards. At the campaign's conclusion, Liniers took an exam as a Midshipman in Cádiz, to serve as a volunteer for the Spanish Crown. In 1775 he earned the rank of Ensign in the Spanish Navy.

In 1776, under the orders of Pedro de Cevallos, Liniers sailed to the Viceroyalty of the Río de la Plata and took part on the occupation of Santa Catarina Island in Brazil and the attack on Colonia del Sacramento (modern day Uruguay).

In 1779, Liniers was an officer on the *San Vicente*. Spain joined the Franco-American alliance in the American Revolutionary War as a renewal of the Bourbon Family Compact. The *San*

Vicente was part of the Spanish-French naval squadron fighting against the Royal Navy in South America.

Liniers distinguished himself during the American Revolution. In 1780, with a few sloops, he captured a three-masted ship of 24 guns. In 1782, he distinguished himself particularly in the siege of Port Mahon: under fire, he moved to where two British ships had collided, which were laden with arms and ammunition. He captured the ships and conveyed them to the Spanish lines. He was promoted to Frigate Captain.

A few months later Liniers took part in a new expedition, this time against the city of Algiers, in North Africa, which was the main base of the Barbary corsairs, with the aim of forcing them to stop piracy and the Barbary slave trade. As the campaign did not go well for the Spanish navy, Madrid tried to negotiate instead. Liniers was entrusted with this mission. The king of Tripoli was delighted with Liniers, and agreed to free several European prisoners. The Barbary pirates associated with North Africa had long been attacking European shipping in the Mediterranean, and had taken numerous prisoners over the years.

The Spanish court rewarded Liniers for this diplomatic success, promoting him to the rank of captain and entrusting him with the command of the Río de la Plata in 1788 to organize a flotilla of gunships. Liniers took with him his son Luis and his first wife, Juana de Menviel, whom he had married in Málaga. She died two years later in 1790. Liniers married again, this time in Buenos Aires, to María Martina Sarratea, daughter of one of the richest merchants of Buenos Aires.

First British Invasion

The Napoleonic Wars expanded to South America. Britain gained naval supremacy over France with its victory at the battle of Trafalgar. France attacked Britain economically by imposing the Continental System, locking the continent to British trade. Needing new markets, Britain invaded Buenos Aires and Montevideo, two Spanish colonies in South America (Spain was allied to France in the war). Home Riggs Popham attempted to invade Buenos Aires, without official orders. He knew the risk: if he succeeded, Britain would honour his deed, but if he failed, he would be condemned for it.

June 23, 1806, a British expeditionary force of 1,700 men landed on the left bank of the Río de la Plata and invaded Buenos Aires, which had been abandoned by the Viceroy. Liniers remained in the city in disguise, staying in the Dominican convent. At the altar of the Virgin, he vowed to return with the colours (flags) of the British. He escaped to Montevideo and, with the help of its governor Pascual Ruiz Huidobro, galvanized the people, raising a force of 1,200 volunteers.

He embarked with this liberation army on a few schooners, which joined a French privateer corvette. Landing on August 4, Liniers and his men rushed across the marshes to Buenos Aires. The city was recovered after fierce street fighting that ended with the storming of the cathedral, which had been fortified by the British. British General William Carr Beresford capitulated and offered his sword; true to Liniers's vow, British colours (those of the Highlanders regiment and Green St.

Helena) were transferred to the church of the convent of the Dominicans, where they are still held.

Designation as viceroy

After the victory, the society stayed on military alert, suspecting that the British might counterattack. The Buenos Aires Cabildo called an open cabildo to discuss the next steps, including the actions to take regarding viceroy Sobremonte. They decided to prevent the viceroy from returning to the city, and appoint Liniers, who was regarded as a hero, as commander-in-chief. Sobremonte accepted, and moved to Montevideo.

Liniers drafted all the male population capable of bearing arms, including African slaves, into the defense of the city. He arranged for each regiment to vote for its officers. All the lead in the city was confiscated (even pipes and cutlery) to be melted into ordnance.

The Cabildo requested other cities to lend gunpowder, and the horses were trained to ignore the noise of cannon shots.

A new British task force, much larger than the first one, arrived the next year. It was led by Samuel Auchmuty, later replaced by John Whitelocke. This time they attacked Montevideo, which fell under their domination. The Real Audiencia of Buenos Aires decided to depose Sobremonte from his role as viceroy, confirmed Liniers as commander-in-chief, and appointed him as interim viceroy. It was an unprecedented action.

Second British Invasion

Once the Banda Oriental had been secured, the British prepared the attack on Buenos Aires. They were aware that the city was prepared for the invasion, but the forces were greater than in the first one, 23 ships and 11,000 soldiers. John Whitelocke, leader of the British forces, moved to Buenos Aires next to the River. Liniers left the city to battle him, being defeated, but managed to retreat and return to Buenos Aires. Alzaga, assuming that Liniers had died, put his defense plans in motion, and the morale of the troops rose when Liniers returned alive. The British forced an entry into the city and encountered strong resistance, with many British battalions eventually being overwhelmed, while others tried to resist at strategic points. Whitelocke suggested a truce, which was rejected by Liniers, who also attacked the British ships within cannon range. Whitelocke's defeat was complete, and Liniers demanded that all British forces be removed from the territories of Viceroyalty, including the Banda Oriental, in no more than 2 months, as well as an exchange of prisoners. Whitelocke accepted the conditions and surrendered.

Government

There was a large number of celebrations after the victory against the British. Liniers was officially appointed as viceroy in May 1808, and awarded the title of "Count of Buenos Aires". However, this victory of the Argentine people which was obtained without any military help from Spain led to a new political situation in which some will for independence started to emerge. In this configuration, Liniers who appeared to be a fantastic leader during the emergency crisis began to be

criticized by the different parties including the conservative members of the Cabildo, led by Álzaga.

On one side, Spanish leaders criticized the new power of the Argentine people issued from the formation of criollo armies, and thought that Spanish influence was in danger. On the opposite side, criollo people who were asking for more independence, had some difficulty understanding the perfect sense of loyalty of a navy officer issued from old French nobility who intended to respect his oath to the king of Spain.

In this context, every action coming from Liniers became a source of criticism. As an example, his relation with Ana Périchon "la pericona" was severely pointed out, forcing him to lock her at her home and later to deport her to colonial Brazil. In the same spirit, his French birth became highly controversial when France invaded Spain, and started the Peninsular War, which included the removal of the Spanish king and queen by the French occupying forces. Despite the clear statements by Liniers of remaining loyal to the Spanish Empire and his refusal to accept Joseph Bonaparte as king, his political enemies created rumours that he was plotting to accept Bonaparte. They also promoted in the Río de la Plata the xenophobia that was taking place in Spain against the French, as an indirect means to attack Liniers and lower his prestige. The arrival of Sassenay, an agent of Napoleon seeking recognition for Joseph Bonaparte as King of Spain, boosted rumors and controversy.

The criollo peoples promoted the Carlotist project, which tried to crown Charlotte of Spain, sister of Ferdinand, as Regent of the Spanish territories in the Americas, under a Constitutional

monarchy. The project did not achieve success. The news of the creation of the Junta of Seville was seen by both criollos and peninsulars as a chance to create similar governments locally, but they had different perspectives on the political line such governments should have. Javier de Elío, governor of Montevideo and allied with Álzaga, created a Junta in the city. Álzaga set off a mutiny to do the same in Buenos Aires, but the forces under the command of Cornelio Saavedra defeated it and kept Liniers in power. Álzaga was jailed and the military bodies that took part in the mutiny were dissolved, which left only military bodies loyal to the criollos.

The Junta of Seville appointed a new viceroy, Baltasar Hidalgo de Cisneros. Some Criollos proposed Liniers to resist the replacement with the forces under his command. It was considered that only a rightful king could appoint viceroys, and despite the circumstances of his designation Liniers had been confirmed in office by Charles IV; whereas Cisneros, appointed just by the Junta, may have lacked such legitimacy. However, Liniers rejected the proposal, and gave up government without resistance.

After leaving government, he retired from politics and moved to Córdoba province, settling in the town of Alta Gracia. However, he came out of his retirement shortly after, when news of the May Revolution arrived to the province.

Counterrevolution and execution

The governor of Córdoba, Juan Antonio Gutiérrez de la Concha, called for a meeting of the social elite of Córdoba, Liniers included, in order to discuss reactions towards the Primera

Junta. At this time, Liniers's father-in-law, Martín de Sarratea, wrote a letter to ask him to stay away from the counterrevolution, which he refused in the name of honor and respect to his word.

The Córdoba Cabildo gave recognition instead to the Regency Council of Cádiz, and Cisneros secretly gave authorization to Liniers to raise the viceroyalty against the Junta. Liniers wrote to other Royalist leaders, trying to organize the forces to fight against Buenos Aires. The Junta decided that, among the many enemies that could threaten it, Córdoba was the most dangerous, so an army led by Ortiz de Ocampo was sent to fight against it. However, there was no fighting: the counterrevolutionary army was severely damaged by espionage, desertions, and sabotage. The mere proximity of the troops from Buenos Aires caused the complete dispersion of the army gathered by Liniers. Liniers and the other top personnel of the counterrevolution tried to flee in multiple directions, but Ocampo captured them all.

Ocampo refused to execute the prisoners, aware of their popularity, so he delivered them to Buenos Aires as prisoners instead. The Junta feared the effect that the entry of Liniers into the city might have, so Juan José Castelli was sent, with orders to replace Ocampo and execute the prisoners. The execution took place at Cabeza de Tigre, on the border between Santa Fe and Córdoba.

Legacy

Liniers had been recognized in life with a street of Buenos Aires named after him, after the triumph against the British

invasions. However, after the counterrevolution and the new number of heroes of the Argentine War of Independence, most names of such streets were modified in 1822, during the government of Martín Rodríguez.

The former *Liniers* street consisted of the modern *Defensa* and *Reconquista* streets. The higher recognition to the heroes of the War of Independence stayed, but Liniers got renewed recognition with time.

The Buenos Aires neighborhood of Liniers is named after him, as well as the Santiago de Liniers municipality in the Misiones Province.

In 1861, Queen Isabella II of Spain formally requested Liniers's body from the Argentine Government. The remains were brought back to Spain and solemnly buried in the Panteón de Marinos Ilustres of the island of San Fernando, Cádiz. At this time, Liniers's descendants received the hereditary title of "Conde de la Lealtad" (Count of Loyalty).

His house at Alta Gracia was abandoned after his death, and bought in 1820 by José Manuel Solares. His family kept it for a long time, until it was expropriated in 1969 and turned into a museum in 1977. It was declared heritage of humanity by UNESCO on December 2, 2000.

- One of the best known portraits of Liniers is *La Reconquista de Buenos Aires*, by Charles Fouquieray.
- *El último virrey*, a novel by Horacio Salduna, is based on Liniers' life.

José Fernando de Abascal y Sousa

José Fernando de Abascal y Sousa, 1st Marquess of Concordia, KOS (Spanish: *José Fernando de Abascal y Sousa, primer Marqués de la Concordia*), (sometimes spelled Souza) (June 3, 1743 in Oviedo, Asturias, Spain – June 30, 1821 in Madrid) was a Spanish military officer and colonial administrator in America. From August 20, 1806 to July 7, 1816 he was viceroy of Peru, during the Spanish American wars of independence.

Background

Abascal was born into a noble family. At the age of 19 he entered the army. After serving for 20 years he was promoted to colonel, and later in the war against France, to brigadier. In 1796 he took part in the defense of Havana against the British. Three years later he was named commanding general and intendant of Nueva Galicia (western Mexico). He took up that office in 1800. In 1804 he was named viceroy of Río de la Plata in Buenos Aires. He never took possession of the office, because in the same year (1804) he was named viceroy of Peru.

As viceroy of Peru

He was unable to occupy the position of viceroy in Lima until 1806, because he was taken prisoner by the British during his voyage from Spain. Once in office, Abascal promoted educational reforms, reorganized the army, and stamped out local rebellions. The last cargo of black slaves in Peru was

landed during his administration, in 1806. At that time an adult male slave sold for 600 pesos.

The Balmis Expedition arrived in Lima on May 23, 1806. This expedition, named for its head, Doctor Francisco Javier de Balmis, was propagating smallpoxvaccine throughout the Spanish Empire. Balmis himself was not with the group that arrived in Peru. The Peruvian group was headed by Doctor José Salvany, Balmis's deputy.

The vaccine had proceeded them, however, having arrived in Lima from Buenos Aires. On August 2, 1805, 22 Brazilian slaves had been vaccinated there and sent as living carriers of the vaccine to northern Argentina, Paraguay, Chile and Peru. (The Balmis expedition used Spanish orphans for the same purpose.) Abascal ordered mass vaccinations in Lima, but without much success. The vaccine was available, but it was not free, and vested interests were able to preserve it as a source of revenue.

On December 1, 1806, an earthquake lasting 2 minutes shook the towers of the city of Lima. Earthquake-generated waves at El Callao threw a heavy anchor onto the roof of the harbormaster. One hundred fifty thousand pesos were required to repair the walls of the city. In October 1807 a comet was seen in Lima, and in November 1811 another one appeared that was visible with the naked eye for six months.

In 1810 the medical school of San Fernando was founded. In 1812 and 1813 occurred the great fire of Guayaquil that destroyed half the city, a hurricane in Lima that uprooted trees in the Alameda, and earthquakes in Ica and Piura.

The wars of independence

When revolution broke out in Buenos Aires on May 25, 1810, Abascal reoccupied the provinces of Córdoba, Potosí, La Paz and Charcas (in Alto Perú, now Bolivia) and reincorporated them into the Viceroyalty of Peru. (These provinces had been separated from Peru when the Viceroyalty of Río de la Plata was created in 1776.) A royalist army defeated rebels in the Battle of Huaqui, Alto Perú.

He also reincorporated Chile and Quito (Ecuador) into the Viceroyalty of Peru. (Quito had been in the Viceroyalty of New Granada since the separation of that colony from Peru in 1739.)

Abascal was a dedicated and tireless supporter of absolute monarchy; nevertheless he supported the Cortes of Cádiz in the fight with Napoleon, sending money and materiel. During his administration, the Inquisition of Lima was temporarily abolished as a result of the reforms taken by the Cortes. Because of the distance between Peru and Spain and due to the wars in Spain and in the Americas, he governed nearly independently of mother country. He fought hard to suppress the independence movements in Spanish America, converting Peru into a center of royalist reaction. After the proclamation of the liberal Spanish Constitution of 1812 in Spain, Abascal fought to keep its provisions from being applied in Peru. This led to revolts in Cusco, Tacna and Arequipa, all of which were repressed.

In 1812 Abascal gave his support to a plan for a company organised by Francisco Uville to import steam engines made by

the Cornish engineer Richard Trevithick so the silver mines at Cerro de Pasco could be pumped out and worked at much greater depths.

On April 24, 1814 a Spanish force under Rafael Maroto disembarked at Callao to fight the rebels in the colony. The viceroy sent 2,400 troops under Brigadier Antonio Pareja to fight in Chile. When they arrived on the island of Chiloé, they were joined by a large number of other men, and they also gained reinforcements in the cities of Valdivia and Talcahuano. This southern part of the country was not sympathetic to the independence movement. Parejas then entered Concepción. He granted amnesty to the Spanish garrison there, and they joined his forces. Now leading about 4,000 troops he went to Chillán, which surrendered without a fight. There 2,000 more men joined the royalist forces.

In 1812 Abascal was created marqués de la Concordia. In 1816 he was recalled at his request, and returned to Spain. He was replaced by General Joaquín de la Pezuela. Abascal died at the age of 79 in 1821.

Chapter 5

Liberators and other Independence Leaders

José María Morelos

José María Teclo Morelos Pérez y Pavón (Spanish: [xo•se ma•i.a •teklo mo••elos •pe•es i pa• on]([listen](#))) (30 September 1765 – 22 December 1815) was a Mexican Roman Catholic priest and revolutionary rebel leader who led the Mexican War of Independence movement, assuming its leadership after the execution of Miguel Hidalgo y Costilla in 1811. Morelos and Ignacio López Rayón are credited with organizing the war of independence. Under Morelos the Congress of Anáhuac was installed on 13 September 1813, and in 6 November of the same year congress declared the country's independence. On 22 October 1814, a constitution, *Decreto Constitucional para la Libertad de la América Mexicana*, was drafted by the Congress which declared that Mexico would be a Republic.

After a series of defeats he was captured by the royalist military, tried by the Inquisition, defrocked as a cleric, and executed by civil authorities for treason in 1815. Morelos is a national hero in Mexico and is considered a very successful military leader despite the fact that he never took a military career and was instead a priest.

Early life

Morelos was born in Valladolid, since renamed "Morelia". Although often portrayed as being of "mixed" or "indigenous" descent, Morelos was classified as a Spaniard (*español*) in his baptismal register, a system in which the Catholic Church kept separate registers for ethnic affiliation. Although ethnic affiliation was fluid and flexible in colonial Spanish America (see *casta*) his family was considered as Spaniard according to the social categories of the time. His paternal family had both Spaniards and Mestizos whereas his maternal family was fully Spanish.

His father was José Manuel Morelos y Robles, a carpenter originally from Zindurio, village a few kilometers west of Valladolid. His mother was Juana María Guadalupe Pérez Pavón, originally from San Juan Bautista de Apaseo, also near Valladolid. Valladolid was the seat of a bishop and of the government of the colonial Intendency of Valladolid. It was known as the "Garden of the Viceroyalty of New Spain" because of its prosperity. Through his paternal line, Morelos was related to Miguel Hidalgo y Costilla. Both insurgents shared a common ancestor, Diego Ruiz de Cortés, who was a descendant of the conquistador Hernán Cortés. Hidalgo was the descendant of Ruiz de Cortés through his mother, Ana María Gallaga.

Morelos worked as a muleteer (*arriero*) in the area where he fought in the insurgency, on the ground experience of the terrain that would be valuable. He is also said to have worked on a rancho rented (rather than owned) by his uncle for nearly ten years. Morelos had ambitions for something more than working with his hands, and assiduously studied; his maternal

grandfather was a school teacher. In 1789, he enrolled in the Colegio de San Nicolás Obispo in Valladolid, where Father Miguel Hidalgo y Costilla was rector. When he was ordained a priest, he, as with many others without connections, had no benefice to guarantee any income as a priest. However, since he was a secular cleric and therefore took no vow of poverty, he could freely pursue business activities to make a living.

As a priest, he could not marry, but he did form a relationship with at least one woman, Brígida Almonte. He is known to have fathered three children: two sons and a daughter. His first born was Juan Nepomuceno Almonte, who played a significant role himself in Mexican history. Lucas Alamán, a fierce nineteenth-century opponent of the insurgency and after independence a conservative politician and historian, asserted that Morelos "fathered various children with anonymous women of the people." This charge of promiscuity might simply be a slur without foundation on the insurgent-priest. At Morelos's trial, the Inquisition accused him of sending his son to the United States. He testified at his trial that "while he had not been completely pristine for a priest, he had not acted in a scandalous manner" and that he had sent his son away for education and for his safety, thereby acknowledging his paternity.

Insurrection against the Spanish monarchy

The former rector of the Colegio de San Nicolás Obispo (where Morelos attended seminary), Father Miguel Hidalgo y Costilla was planning with others for the independence of New Spain

from the Spanish empire. About 6:00 a.m. on 16 September 1810, Hidalgo, then the parish priest of Dolores, Guanajuato (since renamed *Dolores Hidalgo* in his honor), hastily ordered the church bells to be rung, and gathered his congregation. Flanked by Ignacio Allende and Juan Aldama, Hidalgo addressed the people in front of his church, urging them to take up arms, with the Cry of Independence (*El Grito de Dolores*, now celebrated every year on 15 September at 11:00 p.m.) that called for armed revolt after the Spanish colonial authorities had discovered the Conspiracy of Querétaro, a clandestine movement seeking Mexican independence. Like Allende and Aldama, Josefa Ortiz de Domínguez, popularly known as *La Corregidora*, was one of the famous initial supporters of the revolt. Miguel Hidalgo and his followers rose in open rebellion against the Spanish colonial authorities launching what became the Mexican War of Independence.

With the imperial government taken by surprise, operatives took important cities of the Bajío region without an organized response. The insurgency proclaimed Hidalgo captain general of Mexico in Celaya on 21 September. Hidalgo y Costilla advanced as far as Guanajuato; and on 28 September, the rebels captured the Alhóndiga de Granaditas in battle, killing at least 500 Spaniards who had taken shelter there. Among the dead was the crown's highest official in Guanajuato, Intendant Juan Antonio Riaño, an old friend of Hidalgo y Costilla.

The bishop of Michoacán, Manuel Abad y Queipo, excommunicated the insurgents. Hidalgo y Costilla and his army marched on to Valladolid, where the locals feared that the slaughter of Guanajuato would be repeated, prompting

many people to abandon the region, particularly elites. Valladolid was taken peacefully on 17 October 1810.

In Tacámbaro Hidalgo y Costilla was proclaimed general, and Allende captain general. Hidalgo ordered a rest for his troops in Indaparapeo, where a few minutes before their departure, Morelos, who had read about his excommunication and his triumphs, found him.

Morelos had heard of the revolt in October 1810 and determined to join it. Hidalgo asked his former student to recruit troops in the south of the colony and capture the port of Acapulco, the west coast port for the Pacific trade to the Philippines, also a Spanish colony. Unlike Hidalgo, who was a poor tactician leading a huge and undisciplined following, Morelos quickly demonstrated military skills, gathering and training a small core of fighters. He sought allies in the region, and obtained cannon and other war materiel.

Morelos's hopes for the rebellion called for the creation of a republican government that "all Mexican people would participate, the abolition of slavery, and the elimination of divisions between races and ethnicities." Morelos saw the suffering of the poor at the hands of the Church and the elites, and believed that these things must be changed in order to achieve the full participation of the people in the new government.

Morelos also called for the end of the Church's special privileges and the redistribution of large estates among the people. These principles demonstrated the rebellion's desire to achieve both independence and justice for the poor.

Campaigns

Morelos soon showed himself to be a talented strategist, and became one of the greatest revolutionary military commanders of the war.

In his first nine months, he won 22 victories, annihilating the armies of three Spanish royalist leaders and dominating almost all of what is now the state of Guerrero. In December, he captured Acapulco for the first time, except for the Fort of San Diego. Spanish reinforcements forced him to raise the siege in January. By quick marches, he was able to capture most of the Spanish possessions on the Pacific coast of what are now Michoacán and Guerrero. On 24 May 1811, he occupied Chilpancingo and on 26 May he took Tixtla.

In his second campaign, Morelos divided his army into three groups. The most important engagement of this campaign was at Cuautla. On Christmas Eve 1811 the townspeople welcomed Morelos to the town. The next year his forces were besieged by the Spanish army under general Félix María Calleja del Rey. On 2 May 1812, after 58 days, Morelos broke through the siege, and started his third campaign.

Major victories on this third campaign were at Citlalli on 8 June 1812, Tehuacán on 10 August 1812, Orizaba, Oaxaca and Acapulco. Morelos arrived at Orizaba with 10,000 soldiers on 28 October 1812. The city was defended by 600 Spanish soldiers. Negotiation led to a surrender without bloodshed. He entered Oaxaca in triumph on 25 November 1812. Acapulco fell on 12 April 1813, forcing the Spanish army to take refuge in Fort of San Diego

Congress of Chilpancingo

In 1813, Morelos called the National Constituent Congress of Chilpancingo, composed of representatives of the provinces under his control, to consider a political and social program which he outlined in a document entitled "Sentimientos de la Nación" (Sentiments of the Nation). The Congress called itself the Congress of Anáhuac, referring poetically to the ancient Aztecs.

On 31 September 1813, the Congress, with Morelos present, endorsed the "Sentiments of the Nation". This document declared Mexican independence from Spain, established the Roman Catholic religion and created the legislative, executive and judicial branches of government. It declared respect for property and confiscated the productions of the Spanish colonial government. It abolished slavery and racial social distinctions in favor of the title "American" for all native-born individuals. Torture, monopolies and the system of tributes were also abolished. Morelos was offered the title "Generalissimo" with the style of address "Your Highness", but he refused these and asked to be called "Siervo de la Nación" (Servant of the Nation). On 6 November 1813, the Congress declared independence.

After several military defeats, the Congress organized a meeting in Apatzingán, and on 22 October promulgated the "Decreto Constitucional para la Libertad de la América Mexicana" (Constitution of Apatzingán). This established a weak executive and a powerful legislature, the opposite of what Morelos had called for. He nevertheless conceded that it was the best he could hope for under the circumstances.

Capture and execution

Shortly thereafter, Morelos began his fourth military campaign, a series of disasters beginning at Valladolid in late 1813. While escorting the new insurgent Congress in November 1815, he was defeated in Tezmalaca by royalist forces. Morelos and his guard were surrounded; rather than have all taken prisoner, Morelos told his men to each save himself. This left Morelos to be captured alone. As a Catholic priest, the church had jurisdiction for his imprisonment and trial; he was jailed in the Inquisition building in Mexico City. Although Morelos was a huge prize for the royal government, the viceroy decided not to make a public spectacle of his journey of incarceration, but rather slipped him into the capital before dawn.

The royal government had experience with the trial and execution of Father Miguel Hidalgo y Costilla, which was done far from the capital and in rushed fashion; but Morelos's trial was conducted in the capital with the highest officials presiding, with the outcome of a guilty verdict and execution by civil officials. Inquisition officials drew up 23 charges against Morelos, and following proper procedure, Morelos had a defense attorney, one Lic. José Quiles. He was charged with treason, disloyalty to the crown, and transgressions in his personal life, namely, sending his natural sons to the United States for education.

He was tried and sentenced to death for treason. Morelos was executed by firing squad on 22 December 1815, in San Cristóbal Ecatepec, north of Mexico City in order that his execution not provoke a dangerous public reaction. He was later judged to be reconciled to the church, lifting his

excommunication, as he was seen praying on his way to his execution. After his death, his lieutenant, Vicente Guerrero, continued the war for independence.

Legacy

- Morelos is considered a national hero of Mexico; the state of Morelos and city of Morelia are named after him. Morelos has been portrayed on the 50-peso note since 1997, and on 1-peso coins during the 1940s, 1970s and 1980s. The Estadio Morelos in Morelia, Puerto Morelos in the state of Quintana Roo, the Morelos Station on the Mexico City Metro, Ecatepec the city in Mexico State where he was executed and the Morelos Satellite from the Communications company Satmex are also named after him. His remains were transferred to the Monument to Independence El Ángel in Mexico City, along with those of other heroes of the insurgency. The Presidential aircraft Boeing 787 TP-01 was named José María Morelos y Pavón.

Miguel Hidalgo y Costilla

Don Miguel Gregorio Antonio Ignacio Hidalgo y Costilla y Gallaga Mandarte Villaseñor (8 May 1753 – 30 July 1811), more commonly known as **Don Miguel Hidalgo y Costilla** or **Miguel Hidalgo** (Spanish pronunciation: [mi•el i•ðal•o]), was a Criollo Catholic priest, leader of the Mexican War of Independence and recognized as the Father of the Nation.

He was a professor at the Colegio de San Nicolás Obispo in Valladolid and was ousted in 1792. He served in a church in Colima and then in Dolores. After his arrival, he was shocked by the rich soil he had found. He tried to help the poor by showing them how to grow olives and grapes, but in New Spain (modern Mexico) growing these crops was discouraged or prohibited by the authorities so as to avoid competition with imports from Spain. In 1810 he gave the famous speech, "Cry of Dolores", calling upon the people to protect the interest of their King Fernando VII (held captive by Napoleon) by revolting against the European-born Spaniards who had overthrown the Spanish Viceroy.

He marched across Mexico and gathered an army of nearly 90,000 poor farmers and Mexican civilians who attacked and killed both Spanish Peninsulares and Criollo elites, even though Hidalgo's troops lacked training and were poorly armed. These troops ran into an army of 6,000 well-trained and armed Spanish troops; most of Hidalgo's troops fled or were killed at the Battle of Calderón Bridge. After the battle, Hidalgo and his remaining troops fled north, but Hidalgo was betrayed, captured and executed.

Early years

Hidalgo was the second-born child of Don Cristóbal Hidalgo y Costilla Espinoza de los Monteros and Doña Ana María Gallaga Mandarte Villaseñor, both criollos. On his maternal side, he was of Basque ancestry. His most recent identifiable Spanish ancestor was his maternal great-grandfather, who was from Durango, Biscay. On his paternal side, he descended from criollo families native of Tejupilco, who were well-respected

families within the criollo community. Hidalgo's father was an hacienda manager in Valladolid, Michoacán, where Hidalgo spent the majority of his life. Eight days after his birth, Hidalgo was baptized into the Roman Catholic faith in the parish church of Cuitzeo de los Naranjos. Hidalgo's parents had three other sons; José Joaquín, Manuel Mariano, and José María, before their mother died when Hidalgo was nine years old. A step brother named Mariano was born later.

In 1759, Charles III of Spain ascended to the throne of Spain; he soon sent out a visitor-general with the power to investigate and reform all parts of colonial government. During this period, Don Cristóbal was determined that Miguel and his younger brother Joaquín should both enter the priesthood and hierarchy of the Roman Catholic Church. Being of significant means he paid for all of his sons to receive the best education the region had to offer. After receiving private instruction, likely from the priest of the neighboring parish, Hidalgo was ready for further education.

Education, ordination, and early career

- At the age of fifteen Hidalgo was sent to Valladolid (now Morelia), Michoacán, to study at the Colegio de San Francisco Javier with the Jesuits, along with his brothers. When the Jesuits were expelled from Mexico in 1767, he entered the Colegio de San Nicolás, where he studied for the priesthood.

He completed his preparatory education in 1770. After this, he went to the Royal and Pontifical University of Mexico in Mexico City for further study, earning his degree in philosophy and theology in 1773.

His education for the priesthood was traditional, with subjects in Latin, rhetoric and logic. Like many priests in Mexico, he learned some Indian languages, such as Nahuatl, Otomi, and Purépecha. He also studied Italian and French, which were not commonly studied in Mexico at this time. He earned the nickname "*El Zorro*" ("The Fox") for his reputation for cleverness at school. Hidalgo's study of French allowed him to read and study works of the Enlightenment current in Europe but, at the same time, forbidden by the Catholic church in Mexico.

Hidalgo was ordained as a priest in 1778 when he was 25 years old. From 1779 to 1792, he dedicated himself to teaching at the Colegio de San Nicolás Obispo in Valladolid (now Morelia); it was "one of the most important educational centers of the viceroyalty." He was a professor of Latin grammar and arts, as well as a theology professor.

Beginning in 1787, he was named treasurer, vice-rector and secretary, becoming dean of the school in 1790 when he was 39. As rector, Hidalgo continued studying the liberal ideas that were coming from France and other parts of Europe.

Authorities ousted him in 1792 for revising traditional teaching methods there, but also for "irregular handling of some funds." The Church sent him to work at the parishes of Colima and San Felipe Torres Mochas until he became the parish priest in Dolores, Guanajuato, succeeding his brother José Joaquín a

few weeks after his death on 19 September 1802. Although Hidalgo had a traditional education for the priesthood, as an educator at the Colegio de San Nicolás he had innovated in teaching methods and curriculum.

In his personal life, he did not advocate or live the way expected of 18th-century Mexican priests. Instead, his studies of Enlightenment-era ideas caused him to challenge traditional political and religious views. He questioned the absolute authority of the Spanish king and challenged numerous ideas presented by the Church, including the power of the popes, the virgin birth, and clerical celibacy.

As a secular cleric, he was not bound by a vow of poverty, so he, like many other secular priests, pursued business activities, including owning three haciendas; but contrary to his vow of chastity, he formed liaisons with women.

One was with Manuela Ramos Pichardo, with whom he had two children, as well as a child with Bibiana Lucero.

He later lived with a woman named María Manuela Herrera, fathering two daughters out of wedlock with her, and later fathered three other children with a woman named Josefa Quintana.

These actions resulted in his appearance before the Court of the Inquisition, although the court did not find him guilty. Hidalgo was egalitarian.

As parish priest in both San Felipe and Dolores, he opened his house to Indians and mestizos as well as creoles.

Background to the War of Independence

The conspiracy of Querétaro

Meanwhile, in Querétaro City a conspiracy was brewing organized by the mayor Miguel Domínguez and his wife Josefa Ortiz de Domínguez the military Ignacio Allende, Juan Aldama and Mariano Abasolo also participated.

Allende was in charge of convincing Hidalgo to join his movement, since the priest of Dolores had friendship with very influential characters from all over the Bajío and even from New Spain, such as Juan Antonio Riaño, mayor of Guanajuato, and Manuel Abad y Queipo Bishop of Michoacán.

Napoleonic Wars

In 1807, Spain and France invaded and occupied Portugal, an ally of the United Kingdom. The Spanish people were upset by the presence of French troops in Iberia. After a revolt by Spanish Troops and an uprising in Madrid, Napoleon forced King Charles IV and Prince Ferdinand to abdicate and installed his brother, Joseph Bonaparte as King of Spain.

This was followed by further revolts across Spain. In August 1808, a British Army landed in Portugal. Britain and France then went to war against each other in Portugal and Spain. The war and instability in Spain affected Mexico and other parts of New Spain.

Parish priest in Dolores

In 1803, aged 50, he arrived in Dolores accompanied by his family that included a younger brother, a cousin, two half sisters, as well as María and their two children. He obtained this parish in spite of his hearing before the Inquisition, which did not stop his secular practices.

After Hidalgo settled in Dolores, he turned over most of the clerical duties to one of his vicars, Fr. Francisco Iglesias, and devoted himself almost exclusively to commerce, intellectual pursuits and humanitarian activity. He spent much of his time studying literature, scientific works, grape cultivation, and the raising of silkworms.

He used the knowledge that he gained to promote economic activities for the poor and rural people in his area. He established factories to make bricks and pottery and trained indigenous people in the making of leather. He promoted beekeeping. He was interested in promoting activities of commercial value to use the natural resources of the area to help the poor. His goal was to make the Indians and mestizos more self-reliant and less dependent on Spanish economic policies. However, these activities violated policies designed to protect agriculture and industry in Spain, and Hidalgo was ordered to stop them. These policies as well as exploitation of mixed race castas fostered resentment in Hidalgo toward the Peninsular-born Spaniards in Mexico.

In addition to restricting economic activities in Mexico, Spanish mercantile practices caused misery for the native peoples. A drought in 1807–1808 caused a famine in the

Dolores area, and, rather than releasing stored grain to market, Spanish merchants chose instead to block its release, speculating on yet higher prices. Hidalgo lobbied against these practices.

"Grito de Dolores" or "Cry of Dolores"

Fearing his arrest, Hidalgo commanded his brother Mauricio, as well as Ignacio Allende and Mariano Abasolo, to go with a number of other armed men to make the sheriff release prison inmates in Dolores on the night of 15 September 1810. They managed to set eighty free.

On the morning of 16 September 1810, Hidalgo celebrated Mass, which was attended by about 300 people, including hacienda owners, local politicians and Spaniards.

There he gave what is now known as the *Grito de Dolores* (Cry of Dolores), calling the people of his parish to leave their homes and join with him in a rebellion against the current government, in the name of their King.

Hidalgo's *Grito* did not condemn the notion of monarchy or criticize the current social order in detail, but his opposition to the events in Spain and the current viceregal government was clearly expressed in his reference to bad government.

The *Grito* also emphasized loyalty to the Catholic religion, a sentiment with which both Creoles and Peninsulares could sympathize.

Hidalgo's army – from Celaya to Monte de las Cruces

Hidalgo was met with an outpouring of support. Intellectuals, liberal priests and many poor people followed Hidalgo with a great deal of enthusiasm. Hidalgo permitted Indians and mestizos to join his war in such numbers that the original motives of the Querétaro group were obscured. Allende was Hidalgo's co-conspirator in Querétaro and remained more loyal to the Querétaro group's original, more creole objectives. However, Hidalgo's actions and the people's response, meant he would lead and not Allende. Allende had acquired military training when Mexico established a colonial militia; Hidalgo had no military training at all. The people who followed Hidalgo also had no military training, experience or equipment. Many of these people were poor who were angry after many years of hunger and oppression. Consequently, Hidalgo was the leader of undisciplined rebels.

Hidalgo's leadership gave the insurgent movement a supernatural aspect. Many villagers that joined the insurgent army came to believe that Fernando VII himself commanded their loyalty to Hidalgo and the monarch was in New Spain personally directing the rebellion against his own government. They believed that the king commanded the extermination of all peninsular Spaniards and the division of their property among the masses. Historian Eric Van Young believes that such ideas gave the movement supernatural and religious legitimacy that went as far as messianic expectation.

Hidalgo and Allende left Dolores with about 800 men, half of whom were on horseback. They marched through the Bajío area, through Atotonilco, San Miguel el Grande (present-day San Miguel de Allende), Chamucuelo, Celaya, Salamanca, Irapuato and Silao, to Guanajuato. From Guanajuato, Hidalgo directed his troops to Valladolid, Michoacán. They remained here for a while and then decided to march towards Mexico City. From Valladolid, they marched through the State of Mexico, through the cities of Maravatio, Ixtlahuaca, Toluca coming as close to Mexico City as the Monte de las Cruces, between the Valley of Toluca and the Valley of Mexico.

Through sheer numbers, Hidalgo's army had some early victories. Hidalgo first went through the economically important and densely populated province of Guanajuato. One of the first stops was at the Sanctuary of Nuestra Señora de Guadalupe in Atotonilco, where Hidalgo affixed an image of the Virgin to a lance to adopt it as his banner. He inscribed the following slogans to his troops' flags: *"Long live religion! Long live our most Holy Mother of Guadalupe! Long live America and death to bad government!"* For the insurgents as a whole, the Virgin represented an intense and highly localized religious sensibility, invoked more to identify allies rather than create ideological alliances or a sense of nationalism.

The extent and the intensity of the movement took viceregal authorities by surprise. San Miguel and Celaya were captured with little resistance. On 21 September 1810, Hidalgo was proclaimed general and supreme commander after arriving to Celaya. At this point, Hidalgo's army numbered about 5,000. However, because of the lack of military discipline, the insurgents soon fell into robbing, looting and ransacking the

towns they were capturing. They began to execute prisoners as well. This caused friction between Allende and Hidalgo as early as the capture of San Miguel in late September 1810. When a mob ran through this town, Allende tried to break up the violence by striking at the insurgents with the flat of his sword. This brought a rebuke from Hidalgo, accusing Allende of mistreating the people.

- On 28 September 1810, Hidalgo arrived at the city of Guanajuato with rebels, who were, for the most part, armed with sticks, stones, and machetes. The town's Spanish and Creole populations took refuge in the heavily fortified Alhóndiga de Granaditas granary defended by Quartermaster Riaños. The insurgents overwhelmed the defenses after two days and killed everyone inside, an estimated 400 – 600 men, women and children. Allende strongly protested these events and while Hidalgo agreed that they were heinous, he also stated that he understood the historical patterns that shaped such responses. The mass's violence as well as Hidalgo's inability or unwillingness to suppress it caused the creoles and peninsulares to ally against the insurgents out of fear. This also caused Hidalgo to lose any support from liberal creoles he might otherwise have attained.

From Guanajuato, Hidalgo set off for Valladolid on 10 October 1810 with 15,000 men. When he arrived at Acámbaro, he was promoted to generalissimo and given the title of His Most Serene Highness, with power to legislate. With his new rank he had a blue uniform with a clerical collar and red lapels

meticulously embroidered with silver and gold. This uniform also included a black baldric that was also embroidered with gold. There was also a large image of the Virgin of Guadalupe in gold on his chest.

Hidalgo and his forces took Valladolid with little opposition on 17 October 1810. Here, Hidalgo issued proclamations against the peninsulares, whom he accused of arrogance and despotism, as well as enslaving those in the Americas for almost 300 years. Hidalgo argued that the objective of the war was "to send the gachupines back to the motherland" because their greed and tyranny lead to the temporal and spiritual degradation of the Mexicans. Hidalgo forced the Bishop-elect of Michoacan, Manuel Abad y Queipo, to rescind the excommunication order he had circulated against him on 24 September 1810. Later, the Inquisition issued an excommunication edict on 13 October 1810 condemning Hidalgo as a seditious, apostate, and heretic.

The insurgents stayed in the city for some days preparing to march to the capital of New Spain, Mexico City. The canon of the cathedral went unarmed to meet Hidalgo and got him to promise that the atrocities of San Miguel, Celaya and Guanajuato would not be repeated in Valladolid. The canon was partially effective. Wholesale destruction of the city was not repeated. However, Hidalgo was furious when he found the cathedral locked to him. So he jailed all the Spaniards, replaced city officials with his own and looted the city treasury before marching off toward Mexico City. On 19 October, Hidalgo left Valladolid for Mexico City after taking 400,000 pesos from the cathedral to pay expenses.

Hidalgo and his troops left the state of Michoacán and marched through the towns of Maravatio, Ixtlahuaca, and Toluca before stopping in the forested mountain area of Monte de las Cruces. Here, insurgent forces engaged Torcuato Trujillo's royalist forces. Hidalgo's troops forced the royalist troops to retreat, but the insurgents suffered heavy casualties for their efforts, as they had when they engaged trained royalist soldiers in Guanajuato.

Retreat from Mexico City

After the Battle of Monte de las Cruces on 30 October 1810, Hidalgo still had some 100,000 insurgents and was in a strategic position to attack Mexico City. Numerically, his forces outnumbered royalist forces. The royalist government in Mexico City, under the leadership of Viceroy Francisco Venegas, prepared psychological and military defenses. An intensive propaganda campaign had advertised the insurgent violence in the Bajío area and stressed the insurgents' threat against social stability. Hidalgo found the sedentary Indians and castes of the Valley of Mexico as much opposed to the insurgents as were the creoles and Spaniards.

Hidalgo's forces came as close as what is now the Cuajimalpa borough of Mexico City. Allende wanted to press forward and attack the capital, but Hidalgo disagreed. Hidalgo's reasoning for this decision is unclear and has been debated by historians. One probable factor was that Hidalgo's men were undisciplined and unruly and had suffered heavy losses whenever they encountered trained troops. As the capital was guarded by some of the best-trained soldiers in New Spain, Hidalgo might have feared a bloodbath. Hidalgo instead

decided to turn away from Mexico City and move to the north through Toluca and Ixtlahuaca with a destination of Guadalajara.

After turning back, insurgents began to desert. By the time he got to Aculco, just north of Toluca, his army had shrunk to 40,000 men. General Felix Calleja attacked Hidalgo's forces, defeating them on 7 November 1810. Allende decided to take the troops under his command to Guanajuato, instead of Guadalajara. Hidalgo arrived in Guadalajara on 26 November with more than 7,000 poorly armed men. He initially occupied the city with lower-class support because Hidalgo promised to end slavery, tribute payment and taxes on alcohol and tobacco products.

Hidalgo established an alternative government in Guadalajara with himself at the head and then appointed two ministers. On 6 December 1810, Hidalgo issued a decree abolishing slavery, threatening those who did not comply with death. He abolished tribute payments that the Indians had to pay to their creole and peninsular lords. He ordered the publication of a newspaper called *Despertador Americano* (*American Wake Up Call*). He named Pascacio Ortiz de Letona as representative of the insurgent government and sent him to the United States to seek support there, but Ortiz de Letona was apprehended by the Spanish army en route to Philadelphia and promptly executed.

During this time, insurgent violence mounted in Guadalajara. Citizens loyal to the viceregal government were seized and executed. While indiscriminate looting was avoided, the insurgents targeted the property of creoles and Spaniards,

regardless of political affiliation. In the meantime, the royalist army had retaken Guanajuato, forcing Allende to flee to Guadalajara. After he arrived at the city, Allende again objected to Hidalgo concerning the insurgent violence. However, Hidalgo knew the royalist army was on its way to Guadalajara and wanted to stay on good terms with his own army.

After Guanajuato had been retaken by royalist forces, Bishop Manuel Abad y Queipo excommunicated Hidalgo and those following or helping him on 24 December 1810. Bishop Abad y Queipo had formerly been a friend of Hidalgo and also worked for the welfare of the people, but the bishop was adamantly opposed to Hidalgo's tactics and the resultant disruptions, alleged "sacrileges" and purported ill-treatment of priests. The Inquisition pronounced an edict against him with charges including denying that God punishes sins in this world, doubting the authenticity of the Bible, denouncing the popes and Church government, allowing Jews not to convert to Christianity, denying the perpetual virginity of Mary, preaching that there was no hell, and adopting Lutheran doctrine with regard to the Eucharist. Fearful of losing the support of his army, Hidalgo responded that he had never departed from Church doctrine in the slightest degree.

Royalist forces marched to Guadalajara, arriving in January 1811 with nearly 6,000 men. Allende and Abasolo wanted to concentrate their forces in the city and plan an escape route should they be defeated, but Hidalgo rejected this. Their second choice then was to make a stand at the Calderon Bridge (*Puente de Calderón*) just outside the city. Hidalgo had between 80,000 and 100,000 men and 95 cannons, but the better

trained royalists decisively defeated the insurgent army, forcing Hidalgo to flee towards Aguascalientes. At Hacienda de Pabellón, on 25 January 1811, near Aguascalientes, Allende and other insurgent leaders took military command away from Hidalgo, blaming him for their defeats. Hidalgo remained as head politically but with military command going to Allende.

What was left of the insurgent Army of the Americas moved north towards Zacatecas and Saltillo with the goal of making connections with those in the United States for support. Hidalgo made it to Saltillo, where he publicly resigned his military post and rejected a pardon offered by General José de la Cruz in the name of Venegas in return for Hidalgo's surrender. A short time later, they were betrayed and captured by royalist Ignacio Elizondo at the Wells of Baján (*Norias de Baján*) on 21 March 1811 and taken to Chihuahua.

Execution

Hidalgo was turned over to the bishop of Durango, Francisco Gabriel de Olivares, for an official defrocking and excommunication on 27 July 1811. He was then found guilty of treason by a military court and executed. He was tortured through the flaying of his hands, symbolically removing the chrism placed upon them at his priestly ordination. There are many theories about how he was executed, the most famous that he was killed by firing squad in the morning of 30 July and then decapitated. Before his execution, he thanked his jailers, two soldiers, Ortega and Melchor, for their humane treatment. At his execution, Hidalgo stated "Though I may die, I shall be remembered forever; you all will soon be forgotten." His body and the bodies of Allende, Aldama and José Mariano

Jiménez were decapitated, and the heads were put on display in the four corners of the Alhóndiga de Granaditas in Guanajuato. The heads remained there for ten years until the end of the Mexican War of Independence to serve as a warning to other insurgents. Hidalgo's headless body was first displayed outside the prison and then buried in the Church of St Francis in Chihuahua. Those remains were transferred to Mexico City in 1824.

Hidalgo's death resulted in a political vacuum on the insurgent side until 1812. The royalist military commander, General Félix Calleja, continued to pursue rebel troops. Insurgent fighting evolved into guerrilla warfare, and eventually the next major insurgent leader, José María Morelos Pérez y Pavón, who had led rebel movements with Hidalgo, became head of the insurgents, until Morelos himself was captured and shot in 1815.

Legacy

"Miguel Hidalgo y Costilla had the unique distinction of being a father in three senses of the word: a priestly father in the Roman Catholic Church, a biological father who produced illegitimate children in violation of his clerical vows, and the father of his country."

He has been hailed as the *Father of the Nation* even though it was Agustín de Iturbide and not Hidalgo who achieved Mexican Independence in 1821. Shortly after gaining independence, the day to celebrate it varied between 16 September, the day of Hidalgo's Grito, and 27 September, the day Iturbide rode into Mexico City to end the war.

Later, political movements would favor the more liberal Hidalgo over the conservative Iturbide, and 16 September 1810 became the officially recognized day of Mexican independence. The reason for this is that Hidalgo is considered to be "precursor and creator of the rest of the heroes of the (Mexican War of) Independence." Diego Rivera painted Hidalgo's image in half a dozen murals. José Clemente Orozco depicted him with a flaming torch of liberty and considered the painting among his best work. David Alfaro Siqueiros was commissioned by San Nicolas McGinty University in Morelia to paint a mural for a celebration commemorating the 200th anniversary of Hidalgo's birth. The town of his parish was renamed Dolores Hidalgo in his honor and the state of Hidalgo was created in 1869. Every year on the night of 15–16 September, the president of Mexico re-enacts the Grito from the balcony of the National Palace. This scene is repeated by the heads of cities and towns all over Mexico. He is the namesake of Hidalgo County, Texas.

The remains of Hidalgo lie in the column of the Angel of Independence in Mexico City. Next to it is a lamp lit to represent the sacrifice of those who gave their lives for Mexican Independence.

His birthday is a civic holiday in Mexico.

Ignacio Allende

Ignacio José de Allende y Unzaga (US: /••j•nde•,-di/, UK: /æ•-,a•••n-/), Spanish: [i••nasjo a••ende]; January 21, 1769 – June 26, 1811), born **Ignacio Allende y Unzaga**, was a captain of the Spanish Army in Mexico who came to sympathize with the Mexican independence movement. He attended the secret

meetings organized by Josefa Ortiz de Domínguez, where the possibility of an independent New Spain was discussed. He fought along with Miguel Hidalgo y Costilla in the first stage of the struggle, eventually succeeding him in leadership of the rebellion. Allende was captured by Spanish colonial authorities while he was in Coahuila and executed for treason in Chihuahua.

Biography

Allende was born on January 21, 1769, to a wealthy Spanish criollo family in San Miguel el Grande in Guanajuato, Mexico. His father was Domingo Narciso de Allende, a wealthy trader.

In 1802, he joined the army, serving under general Félix María Calleja. In 1806, he started to favor the possibility of independence from Spain. His attendance at a conspiratorial meeting in Valladolid (today Morelia) was discovered, in 1809, by the Spanish and went unsanctioned. Regardless, Allende kept supporting the underground independence movement. He was eventually invited by the mayor of Querétaro, Miguel Domínguez and his wife Josefa Ortíz de Domínguez to discuss further plans for independence at their home. It was during one of these meetings where Allende met Miguel Hidalgo y Costilla and his captain Juan Aldama.

Originally, the independence movement was to be led jointly by Allende and Aldama. A change of plans prompted by the discovery of the conspiracy forced Hidalgo to start the rebellion earlier than agreed. The "Grito de Dolores" uttered by Hidalgo signaled the beginning of the revolution, after which the conspirators rallied behind him. The rebel army quickly

captured the town of Dolores and marched towards San Miguel el Grande, where Allende obtained the support of his cavalry regiment. On September 22, 1810, Hidalgo y Costilla was officially made captain general of the Revolutionary army while Allende was made lieutenant general. After the famous capture of the Alhóndiga de Granaditas, in Guanajuato, and his victory in the Battle of Monte de las Cruces Allende suggested Hidalgo march toward Mexico City and capture it. As a consequence of the rebels' defeat in the Battle of Calderón Bridge, the leadership of the Revolutionary army demanded the replacement of Hidalgo as their leader. Allende took this new responsibility and, with a decimated army, he decided to march north to the United States, with the goal of making connections with those in the United States for support. The rebels, however, were ambushed at the Wells of Baján due to the betrayal of Ignacio Elizondo, leading to the capture of Allende, Hidalgo, and several other commanders. Allende's illegitimate child Indalecio was killed during this ambush.

Allende was taken to the city of Chihuahua where he was tried for insubordination and imprisoned. He was informed of 2,000 Americans located near San Antonio de Bexar and asked for a meeting with the viceroy in order to contemplate a joint solution in defending a potential American invasion. His request was denied and was executed by firing squad on June 26, 1811. His body was decapitated and his head taken to the Alhóndiga de Granaditas where it was shown to the public inside a cage hung from one corner of the building. In 1824 his remains were buried in the vault reserved for the viceroys and presidents in the cathedral of Mexico. His remains were moved in 1925 to the Independence Column in Mexico City.

Legacy

Allende is a national hero of Mexico. Places named in his honor include the municipal district and city of San Miguel de Allende in the state of Guanajuato, and the Chihuahua municipal district of Allende and its municipal seat, Valle de Allende.

Juan Aldama

Juan Aldama also known as Shelias (January 3, 1774 in San Miguel el Grande, Guanajuato – June 26, 1811 in Chihuahua) was a Mexican revolutionary rebel soldier during the Mexican War of Independence in 1810.

Biography

He was also the brother of Ignacio Aldama [es].

At the beginning of the War of Independence, Aldama was a captain of the cavalry regiment of the Queen's militia. He attended the conspiratorial meetings for independence in Querétaro, organized by Josefa Ortiz de Domínguez, despite having to travel from San Miguel el Grande (now San Miguel de Allende) in neighboring Guanajuato.

Aldama was in San Miguel when he heard news that the conspiracy had been betrayed by a supporter who informed the Spanish colonial authorities. He traveled to Dolores (now Dolores Hidalgo) to inform Miguel Hidalgo y Costilla and

Ignacio Allende. He witnessed the Grito de Dolores ("Cry of Dolores") on the night of September 15, 1810, which started the armed conflict.

Aldama was captured by the Spanish colonial authorities on March 21, 1811 at the Wells of Baján in Coahuila. He was court-martialed for insubordination towards the Spanish Crown and executed for treason, by firing squad on June 26, 1811, together with Allende and other members of the rebel army including Mariano Jiménez and Manuel Santa María.

Aldama's body was decapitated and his head taken to the Alhóndiga de Granaditas where it was shown to the public inside a cage hung from one corner of the building. In 1824, his remains were moved to an altar in the Metropolitan Cathedral in Mexico City. Finally, in 1925, his remains were moved one last time to the mausoleum in the Independence Column in Mexico City.

Legacy

Aldama is a national hero of Mexico. In his honor, several towns and villages are named after him. The following category includes:

- The municipality of Juan Aldama, Zacatecas.
- The municipality of Villaldama, Nuevo León.
- The municipality of Aldama, Tamaulipas.
- The municipality of Aldama, Chihuahua.
- The municipality of Villa Aldama, Veracruz

- The city of León, Guanajuato, was officially renamed to "León de los Aldama" in honor of brothers Juan and Ignacio Aldama.
- The municipality of Los Aldamas, Nuevo León was also named after him and his brother.
- The village of Juan Aldama, "El Tigre", Sinaloa outside of Culiacán.
- The street Juan Aldama in Mexicali, Baja California in the Colonia Independencia (neighborhood).

Chapter 6

Venezuela, New Granada & Quito

Simón Bolívar

- **Simón José Antonio de la Santísima Trinidad Bolívar y Ponte Palacios y Blanco** (24 July 1783 – 17 December 1830) also colloquially as *El Libertador*, or *Liberator of America* was a Venezuelan military and political leader who led what are currently the countries of Venezuela, Bolivia, Colombia, Ecuador, Peru, and Panama to independence from the Spanish Empire.

Bolívar was born in Caracas (Venezuela) into a wealthy family and as was common for the heirs of upper-class families in his day, was sent to be educated abroad at a young age, arriving in Spain when he was 16 and later moving to France. While in Europe he was introduced to the ideas of the Enlightenment, which later motivated him to overthrow the reigning Spanish in colonial South America.

Taking advantage of the disorder in Spain prompted by the Peninsular War, Bolívar began his campaign for independence in 1808. The campaign for the independence of New Granada was consolidated with the victory at the Battle of Boyacá on 7 August 1819. He established an organized national congress within three years. Despite a number of hindrances, including the arrival of an unprecedentedly large Spanish expeditionary force, the revolutionaries eventually prevailed, culminating in

the victory at the Battle of Carabobo in 1821, which effectively made Venezuela an independent country.

Following this triumph over the Spanish monarchy, Bolívar participated in the foundation of the first union of independent nations in Latin America, Gran Colombia, of which he was president from 1819 to 1830. Through further military campaigns, he ousted Spanish rulers from Ecuador, Peru, and Bolivia, the last of which was named after him. He was simultaneously president of Gran Colombia (present-day Venezuela, Colombia, Panama and Ecuador), Peru, and Bolivia, but soon after, his second-in-command, Antonio José de Sucre, was appointed president of Bolivia. Bolívar aimed at a strong and united Spanish America able to cope not only with the threats emanating from Spain and the European Holy Alliance but also with the emerging power of the United States. At the peak of his power, Bolívar ruled over a vast territory from the Argentine border to the Caribbean Sea.

Bolívar is viewed as a national icon in much of modern South America, and is considered one of the great heroes of the Hispanic independence movements of the early 19th century, along with José de San Martín, Francisco de Miranda and others.

Towards the end of his life, Bolívar despaired of the situation in his native region, with the famous quote "all who served the revolution have plowed the sea". In an address to the Constituent Congress of the Republic of Colombia, Bolívar stated "Fellow citizens! I blush to say this: Independence is the only benefit we have acquired, to the detriment of all the rest."

Family history

Origin of Bolívar surname

The surname *Bolívar* originated with aristocrats from Ziortza-Bolibar (Spanish: Puebla de Bolívar), a small village in the Basque Country of Spain. Bolívar's father came from the female line of the Ardanza family. His maternal grandmother was descended from families from the Canary Islands.

16th century

The Bolívars settled in Venezuela in the 16th century. Bolívar's first South American ancestor was Simón de Bolívar (or Simon de Bolibar; the spelling was not standardized until the 19th century), who lived and worked from 1559 to 1560 in Santo Domingo (present-day Dominican Republic) where his son Simón de Bolívar y Castro was born. When the governor was reassigned to Venezuela by the Spanish Crown in 1569, Simón de Bolívar went with him. As an early settler in Spain's Venezuela Province he became prominent in the local society, and he and his descendants were granted estates, encomiendas, and positions in the local cabildo. When Caracas Cathedral was built in 1569, the Bolívar family had one of the first dedicated side chapels. The majority of the wealth of Simón de Bolívar's descendants came from their estates. The most important was a sugar plantation with an encomienda that provided the labor needed to run the estate. Another portion of the Bolívars' wealth came from silver, gold, and copper mines. Small gold deposits were first mined in Venezuela in 1669, leading to the discovery of much more

extensive copper deposits. From his mother's side (the Palacios family), Bolívar inherited the Aroa copper mines at Cocorote. Native American and African slaves provided the majority of the labor in these mines.

17th century

Toward the end of the 17th century, copper mining became so prominent in Venezuela that the metal became known as *cobre Caracas* ("Caracas copper"). Many of the mines became the property of the Bolívar family. Bolívar's grandfather, Juan de Bolívar y Martínez de Villegas, paid 22,000 ducats to the monastery at Santa Maria de Montserrat in 1728 for a title of nobility that had been granted by King Philip V of Spain for its maintenance. The crown never issued the patent of nobility, and so the purchase became the subject of lawsuits that were still in progress during Bolívar's lifetime, when independence from Spain made the point moot. (If the lawsuits had been successful, Bolívar's older brother, Juan Vicente, would have become the Marquess of San Luis and Viscount of Cocorote.) Bolívar ultimately devoted his personal fortune to the revolution. Having been one of the wealthiest persons within the Spanish American world at the beginning of the revolution, he died in poverty.

Early life

Childhood

Simón Bolívar was born in a house in Caracas, Captaincy General of Venezuela, on 24 July 1783. He was baptized as

Simón José Antonio de la Santísima Trinidad Bolívar y Palacios. His mother was María de la Concepción Palacios y Blanco, and his father was Colonel Don Juan Vicente Bolívar y Ponte. He had two older sisters and a brother: María Antonia, Juana, and Juan Vicente. Another sister, María del Carmen, died at birth.

When Bolívar was an infant, he was cared for by Doña Ines Manceba de Miyares and the family's slave, Hipólita. A couple of years later, he returned to the care of his parents, but this experience would have a major effect on his life. His father died before Bolívar's third birthday of tuberculosis, and his mother died when he was almost nine.

After his mother's death, Bolívar was placed in the custody of an instructor, Miguel José Sanz, but this relationship did not work out and he was sent back home. He went on to receive private lessons from the renowned professors Andrés Bello,

Guillermo Pelgrón, Jose Antonio Negrete, Fernando Vides, Father Andújar, and Don Simón Rodríguez, formerly known as Simón Carreño. Don Simón Rodríguez became Bolívar's teacher, friend and mentor.

He taught him how to swim and ride horses, as well as about liberty, human rights, politics, history, and sociology. Later in life, Rodríguez was pivotal in Bolívar's decision to start the revolution, instilling in him the ideas of liberty, enlightenment, and freedom.

In the meantime, Bolívar was mostly cared for by his nurse, his slave Hipólita, whom he saw as both a mother and a father.

Youth

When Bolívar was fourteen, Don Simón Rodríguez was forced to leave the country after being accused of involvement in a conspiracy against the Spanish government in Caracas. Bolívar then entered the military academy of the Milicias de Aragua. In 1800, he was sent to Spain to follow his military studies in Madrid, where he remained until 1802. Back in Europe in 1804, he lived in France and traveled to different countries. While in Milan, Bolívar witnessed the coronation of Napoleon as King of Italy (a kingdom in personal union with France in modern northern Italy), an event that left a profound impression on him. Even if he disagreed with the crowning, he was highly sensitive to the popular veneration inspired by the hero.

Political and military career

Venezuela and New Granada, 1807–1821

Prelude, 1807–1810:

Bolívar returned to Venezuela in 1807. After a coup on 19 April 1810, Venezuela achieved *de facto* independence when the Supreme Junta of Caracas was established and the colonial administrators were deposed. The Supreme Junta sent a delegation to Great Britain to get British recognition and aid. This delegation presided by Bolívar also included two future Venezuelan notables Andrés Bello and Luis López Méndez. The trio met with Francisco de Miranda and persuaded him to return to his native land.

First Republic of Venezuela, 1811–1812

In 1811, a delegation from the Supreme Junta, also including Bolívar, and a crowd of commoners enthusiastically received Miranda in La Guaira. During the insurgence war conducted by Miranda,

Bolívar was promoted to colonel and was made commandant of Puerto Cabello the following year, 1812. As Royalist Frigate Captain Domingo de Monteverde was advancing into republican territory from the west, Bolívar lost control of San Felipe Castle along with its ammunition stores on 30 June 1812. Bolívar then retreated to his estate in San Mateo.

Miranda saw the republican cause as lost and signed a capitulation agreement with Monteverde on 25 July, an action that Bolívar and other revolutionary officers deemed treasonous. In one of Bolívar's most morally dubious acts, he and others arrested Miranda and handed him over to the Spanish Royal Army at the port of La Guaira.

For his apparent services to the Royalist cause, Monteverde granted Bolívar a passport, and Bolívar left for Curaçao on 27 August. It must be said, though, that Bolívar protested to the Spanish authorities about the reasons why he handled Miranda, insisting that he was not lending a service to the Crown but punishing a defector.

In 1813, he was given a military command in Tunja, New Granada (modern-day Colombia), under the direction of the Congress of United Provinces of New Granada, which had formed out of the juntas established in 1810.

Second Republic of Venezuela (1813–1814) and exile

This was the beginning of the Admirable Campaign. On 24 May, Bolívar entered Mérida, where he was proclaimed *El Libertador* ("The Liberator").

This was followed by the occupation of Trujillo on 9 June. Six days later, and as a result of Spanish massacres on independence supporters, Bolívar dictated his famous "Decree of War to the Death", allowing the killing of any Spaniard not actively supporting independence. Caracas was retaken on 6 August 1813, and Bolívar was ratified as *El Libertador*, establishing the Second Republic of Venezuela. The following year, because of the rebellion of José Tomás Boves and the fall of the republic, Bolívar returned to New Granada, where he commanded a force for the United Provinces.

His forces entered Bogotá in 1814 and recaptured the city from the dissenting republican forces of Cundinamarca. Bolívar intended to march into Cartagena and enlist the aid of local forces in order to capture the Royalist town of Santa Marta. In 1815, however, after a number of political and military disputes with the government of Cartagena, Bolívar fled to Jamaica, where he was denied support.

After an assassination attempt in Jamaica, he fled to Haiti, where he was granted protection. He befriended Alexandre Pétion, the president of the recently independent southern republic (as opposed to the Kingdom of Haiti in the north), and petitioned him for aid. Pétion provided the South American leader with a multitude of provisions consisting of ships, men and weapons, only demanding in return that Bolívar promise to

abolish slavery in any of the lands he took back from Spain. The pledge would indeed be upheld, and the abolition of slavery in the liberated territories would be regarded as one Bolívar's main achievements.

Campaigns in Venezuela, 1816–1818

In 1816, with Haitian soldiers and vital material support, Bolívar landed in Venezuela and fulfilled his promise to Pétion to free Spanish America's slaves on 2 June 1816.

The Expedition of the Keys was led by Bolívar and fought for Venezuela in the east, while the Guyana Campaign started in the west and was led by Manuel Piar.

In July 1817, on a second expedition, he captured Angostura after defeating the counter-attack of Miguel de la Torre. However, Venezuela remained a captaincy of Spain after the victory in 1818 by Pablo Morillo in the Second Battle of La Puerta (es).

After capturing Angostura, and an unexpected victory in New Granada, Bolívar set up a temporary government in Venezuela. This was the start of the Third Republic of Venezuela. With this Bolívar created the Congress of Angostura which following the wars would establish Gran Colombia, a state which includes today's territories of Colombia, Ecuador, Panama, and Venezuela.

To honor Bolívar's efforts to help Venezuela during its independence movement, the city of Angostura was renamed to Ciudad Bolívar in 1846.

Liberation of New Granada and Venezuela, 1819–1821

- On 15 February 1819, Bolívar was able to open the Venezuelan Second National Congress in Angostura, in which he was elected president and Francisco Antonio Zea was elected vice president. Bolívar then decided that he would first fight for the independence of New Granada, to gain resources of the viceroyalty, intending later to consolidate the independence of Venezuela. The campaign for the independence of New Granada, which included the crossing of the Andes mountain range, one of history's great military feats, was consolidated with the victory at the Battle of Boyacá on 7 August 1819. Bolívar returned to Angostura, when congress passed a law forming a greater Republic of Colombia on 17 December, making Bolívar president and Zea vice president, with Francisco de Paula Santander vice president on the New Granada side, and Juan Germán Roscio vice president on the Venezuela side.

Morillo was left in control of Caracas and the coastal highlands. After the restoration of the Cádiz Constitution, Morillo ratified two treaties with Bolívar on 25 November 1820, calling for a six-month armistice and recognizing Bolívar as president of the republic. Bolívar and Morillo met in San Fernando de Apure on 27 November, after which Morillo left Venezuela for Spain, leaving La Torre in command. From his newly consolidated base of power, Bolívar launched outright independence campaigns in Venezuela and Ecuador. These campaigns concluded with the victory at the Battle of Carabobo, after which Bolívar triumphantly entered Caracas on

29 June 1821. On 7 September 1821, Gran Colombia (a state covering much of modern Colombia, Ecuador, Panama, and Venezuela) was created, with Bolívar as president and Santander as vice president.

Ecuador and Peru, 1822–1824

- Bolívar followed with the Battle of Bombona and the Battle of Pichincha, after which he entered Quito on 16 June 1822. On 26 and 27 July 1822, Bolívar held the Guayaquil Conference with the Argentine General José de San Martín, who had received the title of "Protector of Peruvian Freedom" in August 1821 after partially liberating Peru from the Spanish. Thereafter, Bolívar took over the task of fully liberating Peru.

The Peruvian congress named Bolívar dictator of Peru on 10 February 1824, which allowed him to reorganize completely the political and military administration. Assisted by Antonio José de Sucre, Bolívar decisively defeated the Spanish cavalry at the Battle of Junín on 6 August 1824. Sucre destroyed the still numerically superior remnants of the Spanish forces at Ayacucho on 9 December 1824.

According to British historian Robert Harvey:

Bolívar's achievements in Peru had been as staggering as any in his career of a year, from holding a strip of the country's north coast while himself nearly moribund, he and Sucre had taken on and defeated an army of 18,000 men and secured a country the size of nearly all of Western Europe...the investment of personal energy, the distances covered and the

four army expeditions across supposedly impassable mountain ranges had qualified him for superhuman status...His stamina and military achievements put him at the forefront of the global heroes of history. Writing to United States Secretary of State John Quincy Adams in 1824, United States Consul in Peru William Tudor stated: Unfortunately for Peru, the invaders who came to proclaim liberty and independence were cruel, rapacious, unprincipled and incapable. Their mismanagement, their profligacy, and their thirst for plunder soon alienated the affections of the inhabitants.

Even though Bolívar condemned the corrupt practices of the Spanish, he ordered some churches stripped of their decorations. On 19 March 1824, José Gabriel Pérez wrote to Antonio José de Sucre about the orders given to him by Bolívar; Pérez talked about "all the ordinary and extraordinary means" that should be applied to assure the subsistence of the patriot army. Indeed, Pérez said that Bolívar issued instructions to take from churches "all golden and silver jewels" in order to coin them and pay war expenditures. Days later, Bolívar himself said to Sucre that there would be a complete lack of resources unless severe actions were taken against "the jewels of the churches, everywhere".

Consolidation of independence, 1825–1830

Republic of Bolivia

On 6 August 1825, at the Congress of Upper Peru, the "Republic of Bolivia" was created. Bolívar is thus one of the few

people to have a country named after him. Bolívar returned to Caracas on 12 January 1827, and then back to Bogotá.

Bolívar had great difficulties maintaining control over the vast Gran Colombia. In 1826, internal divisions sparked dissent throughout the nation, and regional uprisings erupted in Venezuela. The new South American union had revealed its fragility and appeared to be on the verge of collapse. To preserve the union, an amnesty was declared and an arrangement was reached with the Venezuelan rebels, but this increased the political dissent in neighboring New Granada. In an attempt to keep the nation together as a single entity, Bolívar called for a constitutional convention at Ocaña in March 1828.

Struggles inside Gran Colombia

Bolívar thought that a federation like the one founded in the United States was unworkable in the Spanish America. For this reason, and to prevent a break-up, Bolívar sought to implement a more centralist model of government in Gran Colombia, including some or all of the elements of the Bolivian constitution he had written, which included a lifetime presidency with the ability to select a successor (although this presidency was to be held in check by an intricate system of balances).

This move was considered controversial in New Granada and was one of the reasons for the deliberations, which took place from 9 April to 10 June 1828. The convention almost ended up drafting a document which would have implemented a radically federalist form of government, which would have greatly

reduced the powers of a central administration. The federalist faction was able to command a majority for the draft of a new constitution which has definite federal characteristics despite its ostensibly centralist outline. Unhappy with what would be the ensuing result, pro-Bolívar delegates withdrew from the convention, leaving it moribund.

Two months after the failure of this congress to write a new constitution, Bolívar was declared president-liberator in Colombia's "Organic Decree". He considered this a temporary measure, as a means to reestablish his authority and save the republic, although it increased dissatisfaction and anger among his political opponents. An assassination attempt on 25 September 1828 failed (in Spanish it is indeed known as the *Noche Septembrina*), thanks to the help of his lover, Manuela Sáenz. Bolívar afterward described Manuela as "Liberatrix of the Liberator". Dissent continued, and uprisings occurred in New Granada, Venezuela, and Ecuador during the next two years.

Bolívar initially claimed to "forgive" those who were considered conspirators, members of the "Santander" faction. Eventually, though, he subjected them to court martial, after which those accused of being directly involved were executed, some without having their guilt fully established. Santander, who had known in advance of the conspiracy and had not directly opposed it because of his differences with Bolívar, was condemned to death. Bolívar, though, commuted the sentence.

After, Bolívar continued to govern in a rarefied environment, cornered by fractional disputes. Uprisings occurred in New Granada, Venezuela, and Ecuador during the following two

years. The separatists accused him of betraying republican principles and of wanting to establish a permanent dictatorship. Gran Colombia declared war against Peru when president General La Mar invaded Guayaquil. He was later defeated by Marshall Antonio José de Sucre in the Battle of the Portete de Tarqui, 27 February 1829. Sucre was killed on 4 June 1830. General Juan José Flores wanted to separate the southern departments (Quito, Guayaquil, and Azuay), known as the District of Ecuador, from Gran Colombia to form an independent country and become its first President. Venezuela was proclaimed independent on 13 January 1830 and José Antonio Páez maintained the presidency of that country, banishing Bolívar.

Dissolution of Gran Colombia

For Bolívar, South America was the fatherland. He dreamed of a united Spanish America and in the pursuit of that purpose he not only created Gran Colombia but also the Confederation of the Andes whose aim was to unite the aforementioned with Peru and Bolivia. Moreover, he promoted a network of treaties keeping the newly liberated South American countries together. Nonetheless, he was unable to control the centripetal process which pushed outwards in all directions.

On 20 January 1830, as his dream fell apart, Bolívar delivered his final address to the nation, announcing that he would be stepping down from the presidency of Gran Colombia. In his speech, a distraught Bolívar urged the people to maintain the union and to be wary of the intentions of those who advocated for separation. (At the time, "Colombians" referred to the

people of Gran Colombia (Venezuela, New Granada, and Ecuador), not modern-day Colombia):

Colombians! Today I cease to govern you. I have served you for twenty years as soldier and leader. During this long period we have taken back our country, liberated three republics, fomented many civil wars, and four times I have returned to the people their omnipotence, convening personally four constitutional congresses. These services were inspired by your virtues, your courage, and your patriotism; mine is the great privilege of having governed you.

The constitutional congress convened on this day is charged by Providence with the task of giving the nation the institutions she desires, following the course of circumstances and the nature of things.

Fearing that I may be regarded as an obstacle to establishing the Republic on the true base of its happiness, I personally have cast myself down from the supreme position of leadership to which your generosity had elevated me.

Colombians! I have been the victim of ignominious suspicions, with no possible way to defend the purity of my principles. The same persons who aspire to the supreme command have conspired to tear your hearts from me, attributing to me their own motives, making me seem to be the instigator of projects they themselves have conceived, representing me, finally, as aspiring to a crown which they themselves have offered on more than one occasion and which I have rejected with the indignation of the fiercest republican. Never, never, I swear to you, has it crossed my mind to aspire to a kingship that my enemies have fabricated in order to ruin me in your regard.

Do not be deceived, Colombians! My only desire has been to contribute to your freedom and to be the preservation of your peace of mind. If for this I am held guilty, I deserve your censure more than any man. Do not listen, I beg you, to the vile slander and the tawdry envy stirring up discord on all sides. Will you allow yourself to be deceived by the false accusations of my detractors? Please don't be foolish!

Colombians! Gather around the constitutional congress. It represents the wisdom of the nation, the legitimate hope of the people, and the final point of reunion of the patriots. Its sovereign decrees will determine our lives, the happiness of the Republic, and the glory of Colombia. If dire circumstances should cause you to abandon it, there will be no health for the country, and you will drown in the ocean of anarchy, leaving as your children's legacy nothing but crime, blood, and death.

Fellow Countrymen! Hear my final plea as I end my political career; in the name of Colombia **I ask you, beg you, to remain united**, lest you become the assassins of the country and your own executioners.

Bolívar ultimately failed in his attempt to prevent the collapse of the union. Gran Colombia was dissolved later that year and was replaced by the republics of Venezuela, New Granada, and Ecuador. Ironically, these countries were established as centralist nations, and would be governed for decades this way by leaders who, during Bolívar's last years, had accused him of betraying republican principles and of wanting to establish a permanent dictatorship. These separatists, among them José Antonio Páez and Francisco de Paula Santander, had justified their opposition to Bolívar for this reason and publicly

denounced him as a monarch. Some of them had in the past been accused of plotting against Bolívar's life (Santander, who governed the second centralist government of New Granada, was associated with the September Conspiracy [es]).

José María Obando, the first President of the Republic of New Granada (that succeeded the Gran Colombia), had been directly linked to the assassination of Antonio José de Sucre in 1830. Sucre was regarded by some as a political threat because of his popularity after he led a resounding patriot victory at the Battle of Ayacucho, ending the war against the Spanish Empire in South America. Bolívar also considered him his direct successor and had attempted to make him vice president of Gran Colombia after Francisco de Paula Santander was exiled in 1828.

Aftermath

For the rest of the 19th century and into the early 20th century, the political environment of Latin America was fraught with civil wars and characterized by a sociopolitical phenomenon known as *caudillismo*, which became very common in Venezuela, especially after 1830.

Indeed, such struggles already existed shortly after the patriot victory over the loyalists because the former Spanish colonies created new nations that proclaimed their own autonomous states, which produced military confrontations with political conspirations that sent some of the former independence heroes into exile. Moreover, there were attempts by the Spanish monarchy to reconquer their former settlements in the Americas through expeditions that would help the remaining

loyalist forces and advocates. However, the attempts generally failed in Venezuela, Perú and Mexico; thus, the loyalist resistance forces against the republic were finally defeated.

The main characteristic of *caudillismo* was the arrival of authoritarian but charismatic political figures who would typically rise to power in an unconventional way, often legitimizing their right to govern through undemocratic processes. These *caudillos* maintained their control primarily on the basis of their personalities, as well as skewed interpretations of their popularity and what constituted a majority among the masses. On his deathbed, Bolívar envisaged the emergence of countless *caudillos* competing for the pieces of the great nation he once dreamed about.

Final months and death

- Saying that "all who served the revolution have plowed the sea", Bolívar finally resigned the presidency on 27 April 1830, intending to leave the country for exile in Europe. He had already sent several crates containing his belongings and writings ahead of him to Europe, but he died before setting sail from Cartagena.

It is said that before Simón Bolívar died, he declared that "America is ungovernable." Bolívar was a man who had seen the negative in things. This negativity may have grown from the distances that had separated the large continent or from the differences in the cultures, languages, ethnicities and the races of the people. Another factor could have been from the lack of political unity, but it is unclear what had led him to

being pessimistic. These factors had caused Bolívar to put his hope on hold of uniting the sovereign territory. Old colonial cities had been separated and new trading centers were separated by great geographical features such as mountains, high deserts and arid plains. These were all factors in which played a role and were responsible for the broken states during a time where wars of independence had risen.

On 17 December 1830, at the age of 47, Simón Bolívar died of tuberculosis in the *Quinta de San Pedro Alejandrino* in Santa Marta, Gran Colombia (now Colombia). On his deathbed, Bolívar asked his aide-de-camp, General Daniel F. O'Leary, to burn the remaining extensive archive of his writings, letters, and speeches. O'Leary disobeyed the order and his writings survived, providing historians with a wealth of information about Bolívar's liberal philosophy and thought, as well as details of his personal life, such as his long love affair with Manuela Sáenz. Shortly before her own death in 1856, Sáenz augmented this collection by giving O'Leary her own letters from Bolívar.

Bolívar's remains were buried in the cathedral of Santa Marta. Twelve years later, in 1842, at the request of President José Antonio Páez, they were moved from Santa Marta to Caracas, where they were buried in the cathedral of Caracas together with the remains of his wife and parents. In 1876, he was moved to a monument set up for his interment at the National Pantheon of Venezuela. The *Quinta* near Santa Marta has been preserved as a museum with numerous references to his life. In 2010, symbolic remains of Bolívar's later-years lover, Manuela Sáenz, were also interred in Venezuela's National Pantheon.

In January 2008, then-President of Venezuela Hugo Chávez set up a commission to investigate theories that Bolívar was the victim of an assassination. On several occasions, Chávez claimed that Bolívar was in fact poisoned by "New Granada traitors". In April 2010, infectious diseases specialist Paul Auwaerter studied records of Bolívar's symptoms and concluded that he might have suffered from chronic arsenic poisoning, but that both acute poisoning and murder were unlikely. In July 2010, Bolívar's body was ordered to be exhumed to advance the investigations. In July 2011, international forensics experts released their report, claiming there was no proof of poisoning or any other unnatural cause of death.

Private life

Marriage

In 1799, following the early deaths of his father Juan Vicente (dead since 1786) and his mother Concepción (who died in 1792), Bolívar traveled to Mexico, France, and Spain, at the age of 16 years, to complete his education. While in Madrid during 1802 and after a two-year courtship, he married María Teresa Rodríguez del Toro y Alaiza, who was to be his only wife. She was related to the aristocratic families of the marquis del Toro of Caracas and the marquis de Inicio of Madrid.

Eight months after returning to Venezuela with him, she died from yellow fever on 22 January 1803. Bolívar was so devastated by this loss that his relatives feared for his life. He swore never to marry again, a promise he kept. Years later

Bolívar would refer to the death of his wife as the turning point of his life. Indeed, in 1828, he told Louis Peru de Lacroix, a biographer of Bolívar who served as one of his generals, the following words:

You then [...] got married at the age of 45; [...] I was not even 18 years old when I did the same, and I was not even nearly 19 years old when I was widowed; I loved my wife dearly, and her death made me swear not to get married again, and I kept my word.

Look the way things are: if I were not widowed, my life would have maybe been different; I would not be the General Bolívar nor the Libertador, though I agree that my temper is not suitable for being the landlord of San Mateo.

Not surprisingly, Spanish historian Salvador de Madariaga refers to the death of Bolívar's wife as one of the key moments in Hispanic America's history. In 1804, he traveled again to Europe in an attempt to ease his pain and began falling into a dissolute life.

It was then that he met again with his old teacher Simón Rodríguez in Paris, who little by little was able to transform his acute depression into a sense of commitment towards a greater cause: the independence of Venezuela. He lived in Napoleonic France for a while and undertook the Grand Tour. During this time in Europe,

Bolívar met the intellectual explorer, Alexander von Humboldt in Rome. Humboldt later wrote: "I was wrong back then, when I judged him a puerile man, incapable of realizing so grand an ambition."

Affairs and lovers

Bolívar had several love affairs. Most of them lasted just a short time. Historians, scholars and biographers often agree with the names of the most prominent women who stood with Bolívar, such as Josefina "Pepita" Machado, Fanny du Villars and Manuela Sáenz.

Manuela Sáenz was the most important of those women. She was more than a lover in Bolívar's later life; she became a trustworthy confidant and advisor. Moreover, Manuela saved Bolívar's life during the September Conspiracy of 1828 in which Bolívar was about to be killed. During this assassination attempt, Manuela diverted the assassins and thus gave Bolívar enough time to escape from his room.

Bolívar and Manuela met in Quito on 22 June 1822 and they began a long-term affair. The relationship was controversial at the time, because Manuela was already married to James Thorne, but they became estranged in 1822 due to irreconcilable differences. The emotional ties between Manuela and Bolívar were strong, and Manuela attempted suicide when she received the news of Bolívar's death.

Despite sometimes living in the same South American cities (such as Bogotá, Quito and Lima), Bolívar and Manuela did not always have a face-to-face relationship. This romance was clear in their letters, but few of them have survived. Most of her letters were destroyed after Manuela's death. Contrary to the arguments exposed by Heinz Dieterich, Carlos Álvarez Saá, and a book edited by *Fundación Editorial El Perro y la Rana*

publishing house in 2007, several letters attributed to both Bolívar and Manuela are intentional forgeries.

In his *Memoirs of Simón Bolívar*, Henri La Fayette Villaume Ducoudray Holstein, he has been called a "not-always-reliable and never impartial witness", described the young Bolívar, who was attempting to seize power in Venezuela and New Granada in 1814–1816. Ducoudray Holstein joined Bolívar and served on his staff as an officer during that period.

He describes Bolívar as a coward who repeatedly abandoned his military commission in front of the enemy and also as a great lover of women who was accompanied at all times by two or more of his mistresses during the military operations. He would not hesitate to stop the fleet transporting the whole army and bound for Margarita Island during two days to wait for his mistress to join his ship. According to Ducoudray Holstein,

Bolívar behaved essentially as an opportunist preferring intrigues and secret manipulation to an open fight. He was also deemed incompetent in military matters by systematically avoiding any risks and permanently being anxious for his own safety.

In the *Diario de Bucaramanga*, Bolívar's opinion of Ducoudray is presented when Louis Peru de Lacroix asked who had been Bolívar's *aides-de-camp* since he had been general; he mentioned Charles Eloi Demarquet and Ducoudray. Bolívar confirmed the first but denied the second, saying that he had met him in 1815 and accepted his services and even admitted him to his General Staff, but "I never trusted him enough to make him my *aide-de-camp*; to the contrary, I had a very

unfavorable idea of his person and his services." He stated that Ducoudray's departure after only a brief stay had been a "real pleasure."

Relatives

Bolívar had no children, possibly because of infertility caused by having contracted measles and mumps as a child. His closest living relatives descend from his sisters and brother. One of his sisters died in infancy. His sister Juana Bolívar y Palacios married their maternal uncle, Dionisio Palacios y Blanco, and had two children, Guillermo and Benigna. Guillermo Palacios died fighting alongside his uncle Simón in the battle of La Hogaza on 2 December 1817. Benigna had two marriages, the first to Pedro Briceño Méndez and the second to Pedro Amestoy. Their great-grandchildren, Bolívar's closest living relatives, Pedro, and Eduardo Mendoza Goiticoa lived in Caracas as of 2009.

His eldest sister, María Antonia, married Pablo Clemente Francia and had four children: Josefa, Anacleto, Valentina, and Pablo. María Antonia became Bolívar's agent to deal with his properties while he served as president of Gran Colombia and she was an executrix of his will. She retired to Bolívar's estate in Macarao, which she inherited from him.

His older brother, Juan Vicente, who died in 1811 on a diplomatic mission to the United States, had three children born out of wedlock whom he recognized: Juan, Fernando Simón, and Felicia Bolívar Tinoco. Bolívar provided for the children and their mother after his brother's death. Bolívar was especially close to Fernando and in 1822 sent him to study

in the United States, where he attended the University of Virginia. In his long life, Fernando had minor participation in some of the major political events of Venezuelan history and also traveled and lived extensively throughout Europe. He had three children, Benjamín Bolívar Gauthier, Santiago Hernández Bolívar, and Claudio Bolívar Taraja. Fernando died in 1898 at the age of 88.

Personal beliefs

Politics

Bolívar was an admirer of both the American Revolution and the French Revolution. Bolívar even enrolled his nephew, Fernando Bolívar, in a private school in Philadelphia, Germantown Academy, and paid for his education, including attendance at Thomas Jefferson's University of Virginia. While he was an admirer of U.S. independence, he did not believe that its governmental system could work in Latin America. Thus, he claimed that the governance of heterogeneous societies like Venezuela "will require a firm hand".

Bolívar felt that the U.S. had been established in land especially fertile for democracy. By contrast, he referred to Spanish America as having been subject to the "triple yoke of ignorance, tyranny, and vice". If a republic could be established in such a land, in his mind, it would have to make some concessions in terms of liberty. This is shown when Bolívar blamed the fall of the first republic on his subordinates trying to imitate "some ethereal republic" and in the process, not paying attention to the gritty political reality of South

America. Among the books accompanying him as he traveled were Adam Smith's *The Wealth of Nations*, Voltaire's *Letters* and, when he was writing the Bolivian constitution, Montesquieu's *The Spirit of the Laws*. His Bolivian constitution placed him within the camp of what would become Latin American conservatism in the later nineteenth century. The Bolivian constitution intended to establish a lifelong presidency and a hereditary senate, essentially recreating the British unwritten constitution, as it existed at the time.

According to Carlos Fuentes:

How to govern ourselves after winning independence. It can be said that the Liberator exhausted his soul trying to find an answer to that question... Bolívar tried to avoid the extremes that would overwhelm Spanish America all along the nineteenth century and part of the twentieth. Tyranny or anarchy? 'Do not aim at what is impossible to attain, because in the quest for liberty we may fall into tyranny. Absolute liberty always leads to absolute power and among these two extremes is social liberty'. In order to find this equilibrium, Bolívar proposed a 'clever despotism', a strong executive power able to impose equality there where racial inequality prevailed. Bolívar warned against an 'aristocracy of rank, employment and fortune' that while 'referring to liberty and guarantee' it would just be for themselves but not for levelling with members of lower classes'... He is the disciple of Montesquieu in his insistence that institutions have to be adapted to culture.

- —□ *El Espejo Enterrado, México, Fondo de Cultura Económica (1992), p. 272*

Freemasonry

Similarly to some others in the history of American Independence (George Washington, Miguel Hidalgo, José de San Martín, Bernardo O'Higgins, Francisco de Paula Santander, Antonio Nariño, and Francisco de Miranda), Simón Bolívar was a Freemason.

He was initiated in 1803 in the Masonic Lodge Lautaro, which operated in Cádiz, Spain. It was in this lodge that he first met some of his revolutionary peers, such as José de San Martín.

In May 1806 he was conferred the rank of Master Mason in the "Scottish Mother of St. Alexander of Scotland" in Paris. During his time in London, he frequented "The Great American Reunion" lodge in London, founded by Francisco de Miranda. In April 1824, Simón Bolívar was given the 33rd degree of Inspector General Honorary.

He founded the Masonic Lodge No. 2 of Peru, named "Order and Liberty".

Legacy

Political legacy

Due to the historical relevance of Bolívar as a key element during the process of independence in Hispanic America, his memory has been strongly attached to sentiments of nationalism and patriotism, being a recurrent theme of rhetoric in politics. Since the image of Bolívar became an important part to the national identities of Venezuela,

Colombia, Panama, Ecuador, Peru and Bolivia, his mantle is often claimed by Hispanic American politicians all across the political spectrum.

In Venezuela, Bolívar left behind a militarist legacy with multiple governments utilizing the memory, image and written legacy of Bolívar as important parts of their political messages and propaganda. Bolívar disapproved of the excesses of "party spirit" and "factions", which led to an anti-political environment in Venezuela. For much of the 1800s, Venezuela was ruled by *caudillos*, with six rebellions occurring to take control of Venezuela between 1892 and 1900 alone. The militarist legacy was then used by the nationalist dictatorship of Marcos Pérez Jiménez and more recently the socialist political movement led by Hugo Chávez.

Monuments and physical legacy

The nations of Bolivia and the Bolivarian Republic of Venezuela, and their respective currencies (the Bolivian boliviano and the Venezuelan bolívar), are all named after Bolívar. Additionally, most cities and towns in Colombia and Venezuela are built around a main square known as Plaza Bolívar, as is the case with Bogotá.

In this example, most governmental buildings and public structures are located on or around the plaza, including the National Capitol and the Palace of Justice. Besides Quito and Caracas, there are monuments to Bolívar in the Latin American capitals of Lima, Buenos Aires, Havana, Mexico City, Panama City, Paramaribo, San José, Santo Domingo and Sucre. In Bogotá, the Simón Bolívar Park has hosted many concerts.

Outside of Latin America, the variety of monuments to Simón Bolívar are a continuing testament to his legacy. These include statues in many capitals around the world, including Algiers, Bucharest, London, Minsk, Moscow, New Delhi, Ottawa, Paris, Prague, Port-au-Prince, Rome, Sofia, Tehran, Vienna and Washington, D.C. Several cities in Spain, especially in the Basque Country, have constructed monuments to Bolívar, including a large monument in Bilbao and a comprehensive Venezuelan government-funded museum in Cenarruza-Puebla de Bolívar, his ancestral hometown. In the US, an imposing bronze equestrian statue of Simón Bolívar stands at the southern entrance to Central Park at the Avenue of the Americas in New York City which also celebrates Bolívar's contributions to Latin America. In New Orleans, the Simon Bolivar Monument at Canal and Basin Streets was a gift to the American city from Venezuela in 1957. The Bolivar Peninsula in Texas; Bolivar County, Mississippi; Bolivar, New York; Bolivar, West Virginia; Bolivar, Ohio; and Bolivar, Tennessee are also named in his honor.

Monuments to Bolívar's military legacy also comprise one of Venezuelan Navy's sail training barques, which is named after him, and the USS *Simon Bolivar*, a *Benjamin Franklin*-class fleet ballistic missile submarine which served with the U.S. Navy between 1965 and 1995.

Minor planet 712 Boliviana discovered by Max Wolf is named in his honor. The name was suggested by Camille Flammarion. The first Venezuelan satellite, Venesat-1, was given the alternative name Simón Bolívar after him.

His birthday is a public holiday in Venezuela and Bolivia.

In popular culture

Bolívar has been depicted in opera, literature, film, and other media, and continues to be a part of the popular culture in many countries. In 1883, to celebrate 100 years since his birth, the Italian musician Nicolò Gabrielli composed the triumphal march *Simón Bolívar* and dedicated it to then president of Venezuela Antonio Guzmán Blanco. In 1943 Darius Milhaud composed the opera *Bolívar*. He is also the central character in Gabriel García Márquez's 1989 novel *The General in His Labyrinth*, in which he is portrayed in a less heroic but more humane manner than in most other parts of his legacy. In 1969, Maximilian Schell played the role of Simón Bolívar in the film of the same name by director Alessandro Blasetti, which also featured actress Rosanna Schiaffino. Bolívar's life was also the basis of the 2013 film *Libertador*, starring Édgar Ramírez and directed by Alberto Arvelo. In an episode of the Spanish TV series *The Ministry of Time*, "Tiempo de ilustrados (Time of the Enlightened)", the time agents help him win the heart of his future wife, as this was considered fundamental for Bolívar to fulfil his destiny. Later in the second season of the series the time agents will find him again in 1828 (two years before his death) to avoid his murder, planned by Santander's followers. As of 2019, a Netflix series has been released depicting Bolívar's life and the major events surrounding it. The Netflix series is a Colombian production with Spanish as the main language. The town of Bolivar, TN was named after Bolívar.

In May 2020, he was released as the playable leader of Gran Colombia in Civilization VI's New Frontier Pass. His leader

ability allows the recruitment of "Comandante Generals," which are real-life generals who served with him, such as José Antonio Páez, Antonio José de Sucre, and Francisco de Paula Santander.

Francisco de Miranda

Sebastián Francisco de Miranda y Rodríguez de Espinoza (March 28, 1750 – July 14, 1816), commonly known as **Francisco de Miranda** (American Spanish pronunciation: [f•an•sisko ðe mi••anda]), was a Venezuelan military leader and revolutionary. Although his own plans for the independence of the Spanish American colonies failed, he is regarded as a forerunner of Simón Bolívar, who during the Spanish American wars of independence successfully liberated much of South America. He was known as "The First Universal Venezuelan" and "The Great Universal American".

Miranda led a romantic and adventurous life in the general political and intellectual climate that emerged from the Age of Enlightenment that influenced all of the Atlantic Revolutions. He participated in three major historical and political movements of his time: the American Revolutionary War, the French Revolution and the Spanish American wars of independence. He described his experiences over this time in his journal, which reached to 63 bound volumes. An idealist, he developed a visionary plan to liberate and unify all of Spanish America, but his own military initiatives on behalf of an independent Spanish America ended in 1812. He was handed over to his enemies and four years later, died in a Spanish prison.

Early life

Miranda was born in Caracas, Venezuela Province, in the Spanish colonial Viceroyalty of New Granada, and baptized on April 5, 1750. His father, Sebastian de Miranda Ravelo, was a Spanish immigrant from the Canary Islands who had become a successful and wealthy merchant, and his mother, Francisca Antonia Rodríguez de Espinoza, was a wealthy Venezuelan. Growing up, Miranda enjoyed a wealthy upbringing and attended the finest private schools. However, he was not necessarily a member of high society; his father faced some discrimination from rivals due to his Canarian roots.

Education

Miranda's father, Sebastian, always strove to improve the situation of the family, and in addition to accumulating wealth and attaining important positions, he ensured his children a college education. Miranda was first tutored by Jesuits, Jorge Lindo and Juan Santaella, before entering the Academy of Santa Rosa.

On January 10, 1762, Miranda began his studies at the Royal and Pontifical University of Caracas, where he studied Latin, the early grammar of Nebrija, and the Catechism of Ripalda for two years. Miranda completed this preliminary course in September 1764 and became an upperclassman. Between 1764 and 1766, Miranda continued his studies, studying the writings of Cicero and Virgil, grammar, history, religion, geography and arithmetic.

In June 1767, Miranda received his baccalaureate degree in the Humanities. It is unknown if Miranda received the title of Doctor, as the only evidence in favor of this title is his personal testimony stating he received it in 1767, at age 17.

Issues of ethnic lineage

Beginning in 1767, Miranda's studies were disrupted in part due to his father's rising prominence in Caracas society. In 1764, Sebastian de Miranda was appointed the captain of the local militia known as the Company of the White Canary Islanders by the governor, José Solano y Bote. Sebastian de Miranda directed his regiment for five years, but his new title and societal position bothered the white aristocracy (the Mantuanos). In retaliation, a competing faction formed a militia of its own and two local aristocrats, Don Juan Nicolas de Ponte and Don Martin Tovar Blanco, filed a complaint against Sebastian de Miranda.

Sebastian de Miranda requested and was granted honorary military discharge to avoid further antagonizing the local elite, and spent many years attempting to clear the family name and establish the "purity" of his family line. The need to establish the "cleanliness" of the family bloodline was important to maintain a place in society in Caracas, as it was what allowed the family to attend university, to marry in the church, and to attain government positions. In 1769, Sebastian produced a notarized genealogy to prove that his family had no African, Jewish or Muslim ancestors, according to the records in the National Archive of Venezuela. Miranda's father obtained a blood cleanliness certificate, which should not be confounded with the blood nobility certificate.

In 1770, Sebastian lost his family's rights through an official patent, signed by Charles III, which confirmed Sebastian's title and societal standing. The court ruling, however, created an irreconcilable enmity with the aristocratic elite, who never forgot the conflict nor forgave the challenge, which inevitably influenced subsequent decisions by Miranda.

Voyage to Spain (1771–1780)

After the court victory of his father, Miranda decided to pursue a new life in Spain, and, on January 25, 1771, Miranda left Caracas from the port of La Guaira for Cadiz, Spain, on a Swedish frigate, the Prince Frederick. Miranda landed at the Port of Cadiz on March 1, 1771, where he stayed for two weeks with a distant relative, Jose D'Anino, before leaving for Madrid.

In Madrid

On March 28, 1771, Miranda travelled to Madrid and took an interest in the libraries, architecture, and art that he found there. In Madrid, Miranda pursued his education, especially modern languages, as they would allow him to travel throughout Europe. He also sought to expand his knowledge of mathematics, history, and political science, as he aimed to serve the Spanish Crown as a military officer. During this time, he also pursued genealogical research of his family name to establish his ties to Europe and Christianity, which was especially important to him after his father's struggles to legitimize their family line in Caracas.

It was in Madrid that Miranda began to build his personal library, which he added to as he traveled, collecting books,

manuscripts and letters. In January 1773, Miranda's father transferred 85,000 reales vellon (silver coins), to help his son obtain the position of captain in the Princess's Regiment.

Early campaigns

During his first year as a captain, Miranda traveled with his regiment mainly in North Africa and the southern Spanish province of Andalusia. In December 1774, Spain declared War with Morocco, and Miranda experienced his first combat during the conflict.

While Miranda was assigned to guard the stations of an unwanted colonial presence in North Africa, he began to draw connections to the similar colonial presence in Spanish South America. His first military feat took place during the Siege of Melilla, held from December 9, 1774, to March 19, 1775, in which the Spanish forces managed to repel the Sultan of Morocco Mohammed ben Abdallah. However, despite the actions taken and danger faced, Miranda did not get an award or promotion and was assigned to the garrison of Cadiz.

Despite Miranda's success in the military, he faced many disciplinary complaints, ranging from complaints that he spent too much time reading, to financial discrepancies, to the most serious disciplinary charges of violence and abuse of authority. One of Miranda's well-known enemies was Colonel Juan Roca, who charged Miranda with the loss of company funds and brutalities against soldiers in Miranda's regiment. The account of the dispute was sent to Inspector General O'Reilly and eventually reached King Charles III, who ordered Miranda to be transferred back to Cadiz.

Missions in America (1781–1784)

The American Revolution

Spain became involved in the American Revolutionary War in order to expand their territories in Louisiana and Florida and to seek a recapture of Gibraltar. The Spanish Captain-General of Louisiana, Bernardo de Gálvez, in 1779 launched several offensives at Baton Rouge and Natchez, securing the way for the reconquest of Florida.

Spanish forces had begun mobilising to support their American allies, and Miranda was ordered to report to the Regiment of Aragon, which sailed from Cadiz in spring of 1780 under Victoriano de Navia's command. Miranda reported to his chief, General Juan Manuel Cagigal y Monserrat, in Havana, Cuba. From their headquarters in Cuba, de Cagigal and Miranda participated in the Siege of Pensacola on May 9, 1781, and Miranda was awarded the temporary title of lieutenant colonel during this action. Miranda also contributed to the French success during the Battle of Virginia Capes when he helped the Comte de Grasse raise needed funds and supplies for the battle.

The Antilles

Miranda remained prominent while in Pensacola, and in August 1781, Cagigal secretly sent Miranda to Jamaica to arrange for the release of 900 prisoners-of-war, see to their immediate needs, and acquire auxiliary vessels for the Spanish Navy. Miranda was also asked to perform espionage work while

staying with his British hosts. Miranda managed to perform a successful reconnaissance mission and also negotiated an agreement dated November 18, 1781, that regulated the exchange of Spanish prisoners. However, Miranda also entered into a deal with a local merchant, Philip Allwood. Miranda agreed to use the ships he had purchased during his stay in Jamaica to transport Allwood's goods back to Spain to sell them. Upon his return, Miranda was charged with being a spy and smuggler of enemy goods. The order to send Miranda back to Spain pursuant to the judgment of February 5, 1782, of the Supreme Inquisition Council failed to be met due to various faults of form and substance in the administrative process that caused the order to be questioned and, in part, by Cagigal's unconditional support of Miranda.

Miranda participated in the Capture of the Bahamas and carried news of the island's fall to Gálvez. Gálvez was angry that the Bahamas expedition had gone ahead without his permission, and he imprisoned Cagigal and had Miranda arrested. Miranda was later released, but this experience of Spanish officialdom may have been a factor in his subsequent conversion to the idea of independence for Spain's American colonies. The efficiency demonstrated by Miranda in the Bahamas led Cagigal to recommend that Miranda be promoted to colonel under the command of the General Commander of the Spanish forces in Cuba, Bernardo de Gálvez, in St. Domingue, which the Spanish American authorities referred to Guarico. This should not be confused with the current Guárico State located today in central Venezuela.

At that time, the Spaniards were preparing a joint action with the French to invade Jamaica, which was a major British

stronghold in the region, and Guárico was the ideal place to plan these operations, being close to the island and providing easy access for troops and commanders. Miranda was seen as the right person to plan operations because he had firsthand knowledge of the disposition of the troops and fortifications in Jamaica. However, the Royal Navy decisively defeated the French fleet at the Battle of the Saintes, so the invasion did not materialise and Miranda remained in Guarico.

Exile in the United States

With the failure of the invasion of Jamaica, priorities for the Spanish authorities changed, and the process of the Inquisition against Miranda gained momentum. The authorities sent Miranda to Havana to be arrested and sent to Spain. In February 1783, Minister of the Indies José de Gálvez sent the Captain General of Havana, Don Luis de Unzaga y Amézaga to arrest him. The information of his impending arrest reached Miranda in advance. Aware that he would not be given a fair trial in Spain, Miranda managed, with the help of Cajigal and the American James Seagrove, to slip away on a ship bound for the United States, arriving at New Bern, North Carolina on July 10, 1783. During his time in the United States, Miranda made a critical study of its military defenses, demonstrating extensive knowledge of the development of American conflict and circumstances.

While there, Miranda prepared and fixed a correspondence technique, used for the rest of his journey: he would meet people through the gift or loan of books, and examine the culture and customs of the places through which he passed in a methodical way. Passing through Charleston, Philadelphia,

and Boston, he dealt with different characters in American society. In New York City he met the prominent and politically connected Livingston family. Apparently Miranda had a romantic relationship with Susan Livingston, daughter of Chancellor Livingston. Although Miranda wrote to her for years, he never saw her again after leaving New York.

During his time in the United States, Miranda met with many important people. He was personally acquainted with George Washington in Philadelphia. He also met General Henry Knox, Thomas Paine, Alexander Hamilton, Samuel Adams, and Thomas Jefferson. He also visited various institutions of the new nation that impressed him such as the Library of Newport and Princeton College.

In Europe (1785–1790)

Kingdom of Great Britain

On December 15, 1784, Miranda left the port of Boston in the merchant frigate *Neptuno* for London and arrived in England on February 10, 1785. While in London, Miranda was discreetly watched by the Spanish, who were suspicious of him. The reports highlight that Miranda had meetings with people suspected of conspiring against Spain and people considered among the eminent scholars of the time.

Prussia

The first secretary of the U.S. embassy, Colonel William Stephens Smith, whom Miranda knew from his stay in New York, came to England at around the same time. The US

Ambassador was John Adams. Miranda visited them many times and continued the conversations about independence he had had with General Washington, Jefferson, Hamilton, Knox, among many other patriots in Philadelphia, New York, and other cities. Miranda and Smith decided to travel to Prussia to attend military exercises prepared by King Frederick the Great of Prussia. Bernardo del Campo, Ambassador of Spain in the British capital since 1783, kept Miranda entertained with the idea that the King was close to resolve his situation. In fact, he was keeping Miranda under surveillance. When Miranda announced his sudden trip to continental Europe, he "gladly" gave Miranda a letter of introduction to the Minister (ambassador) of Spain in Berlin who would be in charge of reporting frequently to Madrid. James Penman, an English businessman whom Miranda had befriended in Charleston, was responsible for keeping his papers while he traveled.

However, the Spanish ambassador had secretly intrigued to have Miranda arrested when he reached Calais, France, where he could be handed over to Spain. The plan fell apart because the Venezuelan and his friend went on 10 August 1785 to a Dutch port (Hellevoetsluis) instead.

Sweden

Between September and December 1787 Miranda traveled through Sweden, and he also visited Norway. Miranda arrived in Stockholm on September 21, 1787 from Saint Petersburg, and he stayed in the city until September 24, returning on October 3 and then staying for almost a month until November 1. He carried a letter of recommendation from empress Catherine the Great and was also shown support from

the Russian ambassador in Stockholm Andrey Razumovsky. Through these connections he was invited to Stockholm Palace and an audience with king Gustav III on October 17. However, the Spanish ambassador in Stockholm, Ignacio de Corral, demanded that Miranda should be extradited in December, at which time he had already left. He did not win support for his cause, but he later published excerpts from his journal about his experiences in Sweden. When visiting Gothenburg he had an affair with Christina Hall, the wife of one of the wealthiest merchants of Gothenburg John Hall. He also visited the family's country retreat, Gunnebo House, on the outskirts of the city.

Russia

Miranda then travelled throughout Europe, including present-day Belgium, Germany, Austria, Hungary, Poland, Greece and Italy, where he remained for over a year. After passing through Constantinople, Turkey, he visited the court of Catherine the Great, who was visiting Kiev and the Crimea. In Crimea, Miranda was received by the influential Prince Potemkin and later on, when the Empress arrived, he was introduced to her. His sojourn in Russia took much longer because of the unexpected hospitality and attention received by the Court and the empress. When she realized the dangers surrounding him, particularly the Inquisition order for his apprehension, she decided to protect him at all cost. She instructed all Russian ambassadors in Europe to assist him in any form and with great care, in order to protect him from the persecution in place. She extended him a Russian passport. He was also introduced to the King of Poland with whom he exchanged many intellectual and political views on America and Europe.

The King invited him to Poland. In Hungary he stayed in the palace of Prince Nicholas Esterházy, who was sympathetic to his ideas, and wrote him a letter of recommendation to meet the musician Joseph Haydn.

Attempts to abduct Miranda by the diplomatic representatives of Spain failed as the Russian Ambassador in London, Semyon Vorontsov, declared on August 4, 1789, to the Secretary of State for Foreign Affairs, Francis Osborne, 5th Duke of Leeds, that Miranda, although a Spanish subject, was a member of the Russian diplomatic mission in London.

Miranda made use of the Spanish–British diplomatic row known as the Nootka Crisis in February 1790 to present to some British Cabinet ministers his ideas about the independence of Spanish territories in America.

Miranda and the French Revolution (1791–1798)

Starting in 1791, Miranda took an active part in the French Revolution as *marechal de camp*. In Paris, he befriended the Girondists Jacques Pierre Brissot and Jérôme Pétion de Villeneuve, and he briefly served as a general in the section of the French Revolutionary Army commanded by Charles François Dumouriez, fighting in the 1792 campaign of Valmy.

The Army of the North commanded by Miranda laid siege to Antwerp. Miranda failed to take Maastricht in February 1793 and was first arrested in April 1793 on the orders of Antoine Quentin Fouquier-Tinville, Chief Prosecutor of the Revolution,

and accused of conspiring against the republic with Charles François Dumouriez, the renegade general. Though indicted before the Revolutionary Tribunal – and under attack in Jean-Paul Marat's *L'Ami du peuple* – he and his lawyer Claude François Chauveau-Lagarde conducted his defence with such calm eloquence that he was declared innocent.

However, Marat denounced Chauveau-Lagarde as a liberator of the guilty. Even so, the campaign of Marat and the rest of the Jacobins against him did not weaken. He was arrested again in July 1793 and incarcerated in La Force prison, effectively one of the ante-chambers of death during the prevailing Reign of Terror. Appearing again before the tribunal, he accused the Committee of Public Safety of tyranny in disregarding his previous acquittal.

Miranda seems to have survived by a combination of good luck and political expediency: the revolutionary government simply could not agree on what to do with him. He remained in La Force even after the fall of Robespierre in July 1794, and was not finally released until January of the following year. The art theorist Quatremère de Quincy was among those who campaigned for his release during this time. Now convinced that the whole direction taken by the Revolution had been wrong, he started to conspire with the moderate royalists against the Directory, and was even named as the possible leader of a military coup. He was arrested and ordered out of the country, only to escape and go into hiding.

He reappeared after being given permission to remain in France, though that did not stop his involvement in yet another monarchist plot in September 1797. The police were

ordered to arrest the "Peruvian general", as the said general submerged himself yet again in the underground. With no more illusions about France or the Revolution, he left for England in a Danish boat, arriving in Dover in January 1798.

Expeditions in South America (1804–1808)

Diplomatic negotiations, 1804–1805

In 1804 with informal British help, Miranda presented a military plan to liberate the Captaincy General of Venezuela from Spanish rule. At the time, Britain was at war with Spain, an ally of Napoleon. Home Riggs Popham was commissioned by prime minister Pitt in 1805 to study the plans proposed by Miranda to the British Government, Popham then persuaded the authorities that, as the Spanish Colonies were discontented, it would be easier to promote a rising in Buenos Aires. Disappointed by this decision in November 1805, Miranda travelled to New York, where he rekindled his acquaintance with William S. Smith to organize an expedition to liberate Venezuela. Smith introduced him to merchant Samuel Ogden.

Venezuela and the Caribbean, 1806

- Miranda then went to Washington for private meetings with President Thomas Jefferson and Secretary of State James Madison, who met with Miranda but did not involve themselves or their nation in his plans, which would have been a

violation of the Neutrality Act of 1794. In New York Miranda privately began organizing a filibustering expedition to liberate Venezuela. Along with Colonel Smith he raised private funds, procured weapons, and recruited soldiers of fortune. Among the 200 volunteers who served under him in this revolt were Smith's son William Steuben and David G. Burnet, who would later serve as interim president of the Republic of Texas after its secession from Mexico in 1836. Miranda hired a ship of 20 guns from Ogden, which he rechristened *Leander* in honor of his oldest son, and set sail to Venezuela on 2 February 1806.

In Jacmel, Haiti, Miranda acquired two other ships, the *Bee* and the *Bacchus*, and their crews. It was in Jacmel on March 12 that Miranda made and raised on the *Leander*, the first *Venezuelan* flag, which he had personally designed. On April 28, a botched landing attempt in Ocumare de la Costa resulted in two Spanish *garda costas*, *Argos* and *Celoso*, capturing the *Bacchus* and the *Bee*. Sixty men were imprisoned and put on trial in Puerto Cabello accused of piracy. Ten were sentenced to death, hanged and dismembered in quarters. One of the victims was the printer Miles L. Hall, who for that reason has been considered as the first martyr of the printing press in Venezuela.

Miranda aboard of the *Leander* escaped, escorted by the packet ship HMS *Lilly* to the British islands of Grenada, Trinidad, and Barbados, where he met with Admiral Alexander Cochrane. As Spain was then at war with Britain, Cochrane and the governor of Trinidad Sir Thomas Hislop, 1st Baronet agreed to provide some support for a second attempt to invade Venezuela.

The *Leander* left Port of Spain on 24 July, together with HMS *Express*, HMS *Attentive*, HMS *Prevost*, and HMS *Lilly*, carrying General Miranda and some 220 officers and men. General Miranda decided to land in La Vela de Coro and the squadron anchored there on 1 August. The next day the frigate HMS *Bacchante* joined them for three days. On 3 August, 60 Trinidadian volunteers under the Count de Rouveray, 60 men under Colonel Dowie, and 30 seamen and marines from HMS *Lilly* under Lieutenant Beddingfelt landed. This force cleared the beach of Spanish forces and captured a battery of four 9- and 12-pounder guns; the attackers had four men severely wounded, all from HMS *Lilly*. Shortly thereafter, boats from HMS *Bacchante* landed American volunteers and seamen and marines. The Spanish retreated, which enabled this force to capture two forts mounting 14 guns. General Miranda then marched on and captured Santa Ana de Coro, but found no support from the city residents. However, on 8 August a Spanish force of almost 2,000 men arrived. They captured a master of transport and 14 seamen who were getting water, unbeknownst to Lieutenant Donald Campbell. HMS *Lilly* landed 20 men on the morning of 10 August; this landing party killed a dozen Spaniards, but was able to rescue only one of the captive seamen. Colonel Downie and 50 men were sent, but the colonel judged the enemy force too strong and withdrew. When another 400 men came from Maracaibo, General Miranda realized that his force was too small to achieve anything further or to hold Coro for long. On August 13, Miranda ordered his force to set sail again. HMS *Lilly* and her squadron then carried him and his men safely to Aruba.

In the aftermath of the failed expedition, the Marquis Casa de Irujo, Spanish minister in Washington, denounced the United

States support given to General Miranda to invade Venezuela in violation of the Neutrality Act of 1794.

The Municipal Council of Caracas indicted Miranda *in absence* charged him as pirate and traitor condemned to death penalty. The Colonel Smith and Ogden were indicted by a federal grand jury in New York for piracy and violating the Neutrality Act of 1794. Put on trial Colonel Smith claimed his orders came from President Thomas Jefferson and Secretary of State James Madison, who refused to appear in court. Both Colonel Smith and Ogden stood trial and were found not guilty.

Project to attack Venezuela, 1808

Miranda spent the next year in Trinidad as host of governor Hyslop waiting for reinforcements that never came. On his return to London, he was met with better support for his plans from the British government after the failed invasions of Buenos Aires (1806–1807). In 1808 a large military force to attack Venezuela was assembled and placed under the command of Arthur Wellesley, but Napoleon's invasion of Spain suddenly transformed Spain into an ally of Britain, and the force instead went there to fight in the Peninsular War.

The First Republic of Venezuela (1811–1812)

Return to Venezuela

Venezuela achieved *de facto* independence on Maundy Thursday April 19, 1810, when the Supreme Junta of Caracas

was established and the colonial administrators deposed. The Junta sent a delegation to Great Britain to get British recognition and aid. This delegation, which included future Venezuelan notables Simón Bolívar and Andrés Bello, met with and persuaded Miranda to return to his native land. In 1811 a delegation from the Supreme Junta, among them Bolívar, and a crowd of common people enthusiastically received Miranda in La Guaira. In Caracas he agitated for the provisional government to declare independence from Spain under the rule of Joseph Bonaparte.

Miranda gathered around him a group of similarly minded individuals and helped establish an association, *la Sociedad Patriótica*, modeled on the political clubs of the French Revolution. By the end of the year, the Venezuelan provinces elected a congress to deal with the future of the country, and Miranda was chosen as the delegate from El Pao, Barcelona Province. On July 5, 1811, it formally declared Venezuelan independence and established a republic. The congress also adopted his *tricolor* as the Republic's flag.

Decay of the First Republic of Venezuela

Crisis of the Republic

The following year Miranda and the young Republic's fortunes turned. Republican forces failed to subdue areas of Venezuela (the provinces of Coro, Maracaibo and Guyana) that had remained royalist. In addition, Venezuela's loss of the Spanish market for its main export, cocoa, caused an economic crisis,

which mostly hurt the middle and lower classes, who lost enthusiasm for the Republic. Finally a powerful earthquake and its aftershocks hit the country, which caused large numbers of deaths and serious damage to buildings, mostly in republican areas.

It did not help that it hit on March 26, 1812, as services for Maundy Thursday were beginning. The Caracas Junta had been established on a Maundy Thursday April 19, 1810 as well, so the earthquake fell on its second anniversary in the liturgical calendar. This was interpreted by many as a sign from Providence. It was explained by royalist authorities as divine punishment for the rebellion against the Spanish Crown.

The archbishop of Caracas, Narciso Coll y Prat, referred to the event as "the terrifying but well-deserved earthquake" that "confirms in our days the prophecies revealed by God to men about the ancient impious and proud cities: Babylon, Jerusalem and the Tower of Babel". Many, including those in the Republican army and the majority of the clergy, began to secretly plot against the Republic or outright defect. Other provinces refused to send reinforcements to Caracas Province. Worse still, whole provinces began to switch sides. On July 4, an uprising brought Barcelona over to the royalist side.

Miranda's dictatorship

Neighboring Cumaná, now cut off from the Republican center, refused to recognize Miranda's dictatorial powers and his appointment of a commandant general. By the middle of the month, many of the outlying areas of Cumaná Province had also defected to the royalists. With these circumstances a

Spanish marine frigate captain, Domingo Monteverde, operating out of Coro, was able to turn a small force under his command into a large army, as people joined him on his advance towards Valencia, leaving Miranda in charge of only a small area of central Venezuela. In these dire circumstances Miranda was given broad political powers by his government.

Defeat of the Republican army

Bolívar lost control of San Felipe Castle of Puerto Cabello along with its ammunition stores on 30 June 1812. Deciding that the situation was lost, Bolívar effectively abandoned his post and retreated to his estate in San Mateo. By mid-July Monteverde had taken Valencia and Miranda also saw the republican cause as lost. He started negotiations with royalists that finalized an armistice on July 25, 1812, signed in San Mateo. Then Colonel Bolívar and other revolutionary officers claimed his actions as treasonous.

The arrest of Miranda

Bolívar and others arrested Miranda and handed him over to the Spanish Royal Army in La Guaira port. For his apparent services to the royalist cause, Monteverde granted Bolívar a passport, and Bolívar left for Curaçao on 27 August. Miranda went to the port of La Guaira intending to leave on a British ship before the royalists arrived, although under the armistice there was an amnesty for political offenses. Bolívar claimed afterwards that he wanted to shoot Miranda as a traitor but was restrained by the others; Bolívar's reasoning was that, "if Miranda believed the Spaniards would observe the treaty, he

should have remained to keep them to their word; if he did not, he was a traitor to have sacrificed his army to it."

By handing over Miranda to the Spanish, Bolívar assured himself a passport from the Spanish authorities (passports which, nevertheless, had been guaranteed to all republicans who requested them by the terms of the armistice), which allowed him to leave Venezuela unmolested, and Miranda thought that the situation was hopeless.

Last years (1813–1816)

Miranda never saw freedom again. His case was still being processed when he died in a prison cell at the Penal de las Cuatro Torres at the Arsenal de la Carraca, outside Cádiz, aged 66, on July 14, 1816. He was buried in a mass grave, making it impossible to identify his remains, so an empty tomb has been left for him in the National Pantheon of Venezuela.

Miranda's ideals

Political beliefs

Miranda has long been associated with the struggle of the Spanish colonies in Latin America for independence. He envisioned an independent empire consisting of all the territories that had been under Spanish and Portuguese rule, stretching from the Mississippi River to Cape Horn. This empire was to be under the leadership of a hereditary emperor called the "Inca", in honor of the great Inca Empire, and would

have a bicameral legislature. He conceived the name *Colombia* for this empire, after the explorer Christopher Columbus.

Freemasonry

Similarly to some others in the history of American Independence (George Washington, José de San Martín, Bernardo O'Higgins and Simón Bolívar), Miranda was a Freemason. In London he founded the lodge "The Great American Reunion".

Personal life

After fighting for Revolutionary France, Miranda finally made his home in London, where he had two children, Leandro (1803 – Paris, 1886) and Francisco (1806 – Cerinza, Colombia, 1831), with his housekeeper, Sarah Andrews, whom he later married. He had a friendship with the painter James Barry, the uncle of the surgeon James Barry; Miranda helped to keep the secret that the latter was biologically female. According to historian Linda de Pauw, "Miranda was an ardent feminist, named women as his literary executors, and published an impassioned plea for female education a year before Mary Wollstonecraft published her famous *Vindication of the Rights of Women*."

Legacy and honours

- An oil painting by the Venezuelan artist Arturo Michelena, *Miranda en la Carraca* (1896), which portrays the hero in the Spanish jail where he died, has become a graphic symbol of Venezuelan history,

and has immortalized the image of Miranda for generations of Venezuelans.

- In France, the name of Miranda remains engraved on the Arc de Triomphe of Paris, which was built during the First Empire, and his portrait is in the Palace of Versailles. His statue is in the Square de l'Amérique-Latine in the 17th arrondissement.
- Miranda's name has been honored several times, including in the name of the Venezuelan state, Miranda (created in 1889), a Venezuelan harbour, Puerto Miranda, a subway station and an important main avenue in Caracas, as well as a number of Venezuelan municipalities named "Miranda" or "Francisco de Miranda".
- Both Caracas airbase and a Caracas park are named after him.
- The Order of Francisco de Miranda was established in the 1930s.
- In 2006, Venezuela's Flag Day was moved to the 3rd of August, in honor of Miranda's 1806 disembarkation at La Vela de Coro.
- One of the Bolivarian missions, Mission Miranda, is named after him.
- Miranda's life was portrayed in the Venezuelan film *Francisco de Miranda* (2006), as well as in the unrelated film *Miranda Returns* (2007).
- Pensacola, Florida, has a square named after him.
- There are statues of Miranda in Paris, Bogotá, Caracas, Havana, London, Philadelphia, Patras (Greece), Pensacola (USA), São Paulo (Brazil), St. Petersburg (Russia), Cadiz (Spain), Puerto de La Cruz (Spain), and Valmy (France).

- The house where Miranda lived in London, 27 Grafton Street (now 58 Grafton Way), Bloomsbury, has a blue plaque that bears his name, and functions today as the Consulate of Venezuela in the United Kingdom.
- In 2016 the Municipal Council of Caracas, approved the agreement in relief to Miranda and acquit him of charges of treason, piracy, including the death penalty, imposed by the colonial councilors in 1806 after failed expedition to liberate Venezuela from Spanish rule. During the commemoration of his bicentennial dead, the Executive conferred the post-mortem Chief Admiral degree on Francisco de Miranda.
- The Venezuelan Remote Sensing Satellite-1 (VRSS-1), launched in 2012, was named after him.