# Paths to Independence: Mexico's Wars, Politics, and Nation-Building

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# Introduction

This book tells the story of Mexico’s long and uneven passage from colonial crisis to a fragile republican order between 1808 and 1857. It approaches independence not as a single rupture enacted by a handful of great men, but as a braided series of military campaigns, elite bargains, and local political experiments shaped by regional diversity and international pressures. The chronological frame—beginning with the imperial crisis of 1808 and closing with the constitutional and political transformations that culminated in 1857—allows us to trace continuities of violence, negotiation, and institution-building that conventional narratives often compress or ignore.

My central argument is straightforward: independence and the first Mexican republic emerged from the interaction of three sets of forces—local insurgencies that remade social relationships and mobilized new actors; elite negotiations that turned battlefield advantage into institutional arrangements; and international constraints and opportunities that structured choices at sea and on the frontier. Military events mattered not only for the territorial control they produced but because they created

the conditions for political experiments—local juntas, provisional governments, military-civic pacts, and constitutional contests—that shaped the first decades of independent Mexico. Reading campaigns and negotiations together, and foregrounding provincial variation, reveals political logics obscured by national myths.

A deliberate feature of this book is its attention to lesser-known figures and regional case studies. While canonical names—Hidalgo, Morelos, Iturbide, Santa Anna—appear where they belong, many chapters follow actors who have received less sustained attention in English-language and nationalist historiography: municipal leaders who brokered truces, provincial officers who adapted insurgent practice to frontier conditions, women who organized relief and intelligence networks, Afro-Mexican and Indigenous leaders who negotiated citizenship in new registers of power. These focal points make clear that independence was not a monolithic success story but a contested process in which meaning and authority were constantly renegotiated.

Methodologically the book practices an analytic narrative: it reconstructs sequences of events, choices, and consequences while interpreting motives and constraints through archival evidence. The narrative draws on military orders, municipal minutes, wills, correspondences, contemporary newspapers and pamphlets, and surviving local records—sources that illuminate both the decisions of elites and the experiences of communities. Where possible, chapters pair battlefield or campaign accounts with the political deliberations that followed, showing how military outcomes translated into constitutional projects, municipal reform, or renewed conflict. The result is plural scales of analysis: close readings of campaigns and parishes alongside synthetic chapters that link regional patterns to national trajectories.

The chapters are arranged to balance chronological progression with thematic and regional attention. The opening chapters (1–6) set the international and imperial context, the outbreak of rebellion, and early patterns of mobilization. Middle chapters (7–16) examine the interplay of warfare and politics—royalist strategies of reconciliation, transatlantic interventions, elite bargaining, and the emergence of competing constitutional solutions. Chapters 13–15 offer intensive regional studies (Veracruz, Oaxaca, Yucatán) that exemplify how local structures shaped responses to national moments. The final third (17–25) traces fiscal, social, and institutional struggles—the role of the military and clergy, questions of race and gender, the politics of centralism and federalism, foreign interventions and territorial loss—and closes by reflecting on memory and the making of independence myths in political culture up to the constitutional turning point of 1857 (February 5, 1857).

Why end in 1857? The date marks more than the promulgation of a new constitution; it signifies a culmination of debates and conflicts—over federalism, secular authority, military prerogatives, and citizenship—that had been fermenting since 1808. By following the arc to 1857 the book shows how early wars and negotiations set institutional patterns and political habits that would condition mid-nineteenth-century

reform and revolution. The endpoint also lets us reassess familiar periodizations: independence is not merely a single year (1821) but a cluster of processes whose full political expression—and whose contradictions—unfolded over decades.

Finally, this book aims to speak both to specialists and to general readers interested in how nations are made. Scholars will find detailed archival case studies and a synthetic argument that reconnects military history with constitutional and social analysis. General readers will find a narrative that privileges human choices, contingent outcomes, and the varied landscapes—urban plazas, mountain passes, coastal ports—in which politics was forged. Above all, Paths to Independence insists that the story of Mexican independence is plural, contested, and regionally variegated: a history of wars that produced politics, and politics that remade the meanings and boundaries of nationhood.

# CHAPTER ONE: The Atlantic Shock: 1808 and the Crisis of the Spanish Empire

The year 1808 was, for the Spanish Empire, a bit like a particularly bad Monday morning after a rather raucous weekend. Things were already a bit wobbly, but then Napoleon decided to play kingmaker, and the whole edifice shuddered. For centuries, Spain had managed a vast overseas empire, its wealth fueling European power struggles and its cultural influence stretching across continents. Yet, by the dawn of the nineteenth century, the empire was a complex tapestry of distant loyalties, economic dependencies, and simmering resentments, all held together by the thread of the monarchy.

When news of events across the Atlantic reached the Viceroyalty of New Spain, it wasn't just a political tremor; it was a profound ideological earthquake. The long-reigning Bourbon dynasty, particularly under Charles IV and his son Ferdinand VII, had been attempting a series of reforms. These "Bourbon Reforms" aimed to centralize power, extract more revenue from the colonies, and rationalize administration. While some of these measures boosted colonial economies and improved infrastructure, they also alienated powerful Creole elites who saw their traditional influence eroded and felt increasingly exploited.

The imperial system was, in essence, a balancing act. The Crown claimed absolute authority, but in practice, a vast network of local power brokers—audiencias, viceroys, bishops, and powerful families—exercised significant autonomy. This was particularly true in New Spain, the wealthiest and most populous of Spain's American possessions, where a burgeoning Creole identity, distinct from peninsular Spaniards, had been steadily developing. They felt themselves to be both Spanish and distinct, rooted in American soil.

The cracks in this system became undeniable in 1808. Napoleon Bonaparte, ever the disruptor, decided to intervene in Spain's internal affairs. Ostensibly mediating a dispute between Charles IV and Ferdinand VII, he instead orchestrated a maneuver that saw both monarchs abdicate. In their place, Napoleon installed his own brother, Joseph Bonaparte, on the Spanish throne. This was not merely a change of monarchs; it was an unprecedented assault on the legitimacy of the entire imperial order.

The news arrived in New Spain via ships that docked in Veracruz, bringing with them not just dispatches but also a palpable sense of confusion and dread. The reaction was immediate and varied. For many, the idea of a French usurper on the Spanish throne was anathema, a violation of divine right and traditional law. Loyalty to Ferdinand VII,

the "Desired One," became a rallying cry. But behind this unified front of loyalty, deeper questions began to stir. If the king was imprisoned, who held legitimate authority?

In the absence of a recognized monarch, the concept of popular sovereignty, long dormant in Spanish political thought, began to resurface. According to traditional Spanish legal theory, in the absence of a king, sovereignty reverted to the people, who then had the right to form governing bodies, or *juntas*, to administer in his name. This principle, while ostensibly conservative and aimed at preserving the monarchy, held revolutionary implications for the colonies. It implicitly suggested that the authority of the viceroy and other royal officials derived not just from the king, but also from the consent of the governed.

In Mexico City, the news sparked a furious debate within the *Real Audiencia*, the high court and governing council, and among the city's intellectual and political elites. The viceroy, José de Iturrigaray, found himself in an unenviable position. He was a royal appointee, but the source of that appointment was now unclear. Should he recognize Joseph Bonaparte? Should he await instructions from a deposed king? Or should he somehow take matters into his own hands?

The Creole elite, sensing an opportunity to assert greater autonomy, began to advocate for the establishment of a provisional *junta* in Mexico City, similar to those forming in Spain. Their argument was rooted in the aforementioned traditional Spanish legal theory: with the king absent, sovereignty reverted to the people of New Spain, who could then govern themselves in Ferdinand's name. This proposal, however, was met with fierce opposition from the peninsular Spaniards, who were generally more conservative and saw such a move as a dangerous step towards outright independence.

The peninsulars, many of whom held key positions in the colonial administration and military, feared losing their privileged status. They argued that any legitimate authority must emanate directly from Spain, even if that Spain was under duress. To them, the formation of a local *junta* smacked of rebellion and an abandonment of imperial loyalty. The divide between Creoles and peninsulars, a long-standing fault line in colonial society, suddenly became a chasm.

Viceroy Iturrigaray, perhaps hoping to navigate these treacherous waters, initially appeared open to the Creole proposition of a *junta*. He convened meetings with prominent citizens and deliberated on the best course of action. His perceived willingness to entertain the idea of local governance, however, only inflamed the anxieties of the peninsular faction, who interpreted it as a sign of weakness or, worse, complicity in a burgeoning independence movement. They saw the viceroy as a potential traitor.

The tension reached a boiling point. On the night of September 15, 1808, a group of peninsular conspirators, led by Gabriel de Yermo, a wealthy merchant, took matters into their own hands. They stormed the viceregal palace, arrested Iturrigaray and his family, and seized power. This audacious coup d'état, carried out with the support of elements within the military and the *Audiencia*, effectively shut down any immediate possibility of a Creole-led provisional government.

The conspirators then installed Pedro de Garibay, an elderly field marshal, as the new viceroy. This act was a clear assertion of peninsular dominance and a rejection of Creole aspirations for greater self-governance. While framed as a defense of the legitimate king and the integrity of the empire, it sent a chilling message to the Creole population: their political ambitions would be suppressed, even by force. The peninsulars believed they had successfully quelled a nascent rebellion, but in reality, they had only succeeded in driving Creole discontent underground, where it would simmer and eventually boil over.

The coup of 1808 in Mexico City was a pivotal moment, perhaps even more significant in its long-term consequences than the initial news of Napoleon's usurpation. It demonstrated that dialogue and political evolution within the existing imperial framework were, for the time being, impossible. The peninsular elite had drawn a line in the sand, and in doing so, had inadvertently accelerated the very process of separation they sought to prevent. The legitimacy of Spanish rule, already shaken by the absence of the king, was further eroded by this internal act of violence and usurpation.

Beyond the immediate political machinations, the events of 1808 had a profound psychological impact. The authority of the Crown, once sacrosanct and distant, now seemed vulnerable and contested. The idea of a king, the ultimate symbol of unity and order, being deposed by a foreign power, and then his representatives in the colonies being overthrown by local factions, shattered long-held assumptions about stability and the divine order of things. For the inhabitants of New Spain, it was a sudden plunge into an uncertain world.

The various regions of New Spain reacted differently to the unfolding crisis. While Mexico City was the epicenter of political intrigue, the provinces, with their diverse economies, social structures, and indigenous populations, also grappled with the implications. In some areas, loyalty to Ferdinand VII was genuinely fervent, fueled by religious devotion and a fear of French anti-clericalism. In others, the political vacuum presented opportunities for local strongmen and disaffected groups to assert their own interests.

The seeds of future conflicts were sown in this chaotic year. The Creole resentment over their exclusion from political power deepened. The military, which had played a

crucial role in the coup, realized its own burgeoning influence in political affairs. And the sheer audacity of challenging viceregal authority, even if done in the name of loyalty, set a dangerous precedent. The genie of political instability, once out of the bottle, would prove exceedingly difficult to put back in.

Across the Atlantic, Spain itself was engulfed in its own struggle for survival. The Spanish people rose up against the French occupation, forming numerous local *juntas* that eventually coalesced into a Supreme Central Junta, claiming to govern in Ferdinand's name. This body, constantly on the run from French forces, struggled to exert authority over the fragmented Spanish territories, let alone the vast overseas empire. Its legitimacy was constantly questioned, adding another layer of confusion to the already complex situation in the Americas.

These developments in Spain further complicated matters for New Spain. While the Supreme Central Junta eventually invited American representatives to participate, their numbers were disproportionately small compared to those from peninsular Spain, reinforcing the Creole perception of being treated as second-class subjects. This further fueled arguments for greater autonomy and a more equitable share of power within the empire. The very concept of representation, a cornerstone of nascent modern political thought, became a battleground.

Economically, the crisis also had immediate ramifications. Trade routes were disrupted, and the flow of goods and silver between Spain and its colonies became erratic. This forced New Spain to look inward, developing local industries and fostering internal trade networks. While this provided some economic resilience, it also weakened the colonial economy's ties to the metropolis, further loosening the bonds of empire. The economic rationale for remaining a colony began to erode for many.

The events of 1808 were not a declaration of independence, but they were undeniably the prelude. They exposed the fragility of the imperial system, highlighted the deep divisions within colonial society, and introduced radical new ideas about sovereignty and legitimate authority. The old order, based on a distant king and a hierarchical administration, had been irrevocably shattered. What would replace it remained to be seen, but the path towards independence, however winding and violent, had been decisively set in motion. The Atlantic shock had cracked the foundations, and the subsequent chapters would detail the collapse and the arduous process of rebuilding.

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