

## MODES OF PRODUCTION IN COLONIAL MEXICO: THE CASE OF MORELOS

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### *I. Modes of Production in Colonial Mexico*

Following the decisive defeat of Tenochtitlan in August of 1521, Spaniards faced the formidable task of defining the relationship between colony and mother country. Often working at cross purposes, ambitious conquerors on the spot and crown representatives on both sides of the Atlantic fashioned a colonial system that imposed sweeping political, economic, social, and ideological transformations upon Mexico. Without question the destruction of the Aztec state and priesthood, the commandeering of Mexico's human and natural resources to serve metropolitan interests, and the devastating invasion of Old World microbes subjected sixteenth-century Mexicans to a process of change as bewildering as any experienced in human history. At the same time, however, less dramatic but equally important elements of continuity bound the pre-Hispanic past to the post-conquest future. Critical features of indigenous social organization remained substantially intact for at least the first several decades of Spanish rule and persisted in modified form for the duration of the colonial period.

One of the key elements of indigenous society that survived the transition to European domination was the mode of production. The Aztec empire was a tributary society, one in which primary producers retained access to the means of production and formal vestiges of a kin-based, "communal" system of social relations, while elites extracted surpluses from them through military or political coercion.<sup>1</sup> The Spanish state saw little reason to disturb these fundamental relations of production, which not only conformed to expectations drawn from experience with the tributary mechanisms of European feudalism, but

<sup>1</sup> For a discussion of tributary modes of production, see Eric Wolf, *Europe and the People without History*, University of California, Berkeley, 1982, p. 79-88 (Edición en México, Fondo de Cultura Económica, 1987); for an analysis of the "social-communal" relations of production that characterized pre-Hispanic Mesoamerica, see Brígida von Mentz, *Pueblos de indios, mulatos y mestizos, 1770-1870: Los campesinos y las transformaciones protoindustriales en el poniente de Morelos*, México, CIESAS, 1988, p. 21-28.

also served the king's desire to prevent the unruly conquerors of Mexico from enhancing their own power by gaining direct control over land and other key resources. At the same time crown officials found that they could not completely ignore the wishes of those who had risked their lives in a military campaign that had so spectacularly extended Spanish sovereignty.

A crucial component of the compromise that arose from these competing interests was the *encomienda*, which enabled both the Spanish state and politically favored *conquistadores* to draw resources from Indian communities in the form of tribute. Meanwhile, other non-economic mechanisms also governed the mobilization of Indian labor during the immediate post-conquest decades. Until the New Laws took effect at mid-century, Indian slavery endured in central Mexico and *encomenderos* legally commandeered the labor of their tributaries to assist them in building new homes and productive enterprises. At the same time Spanish missionaries used various means to persuade Indians to contribute their muscle-power to the construction of the churches and monasteries that symbolized European presence throughout Mexico. Beginning in the 1540s, moreover, crown officials revived the indigenous practice of forced labor drafts, organizing the *repartimientos* that marshaled Indian workers for a wide variety of tasks for nearly a century in central New Spanish and for much longer in frontier regions. Finally, on a much smaller scale, Indian *caciques* concurrently borrowed from established custom and exploited their newly sanctioned position as intermediaries in colonial government to extract surpluses from the *macehuales* in their pueblos. Although Indian peasants still retained direct control of the land they tilled, then, traditional usage and European innovation combined to alienate from them a portion of their labor and produce.<sup>2</sup>

Yet even during the sixteenth century processes were at work to complicate this relatively simple tributary model. At no time could the Spanish state prevent energetic Spaniards from appropriating lands for themselves. Beginning in the 1540s, moreover, the discovery of enormous silver deposits at Zacatecas and other northern sites further encouraged both the development of privately-owned estates to provision the mines and the appearance of wages as a means of luring manpower to the sparsely populated frontier. Persuaded by economic means to sell their labor, these workers represented a tenuous step toward a capitalistic mode of production. Yet they hardly constituted a true proletar-

<sup>2</sup> See Eric Wolf's discussion of the impact of Spanish colonialism on Latin America in *Europe and the People without History*, p. 131-157.

iat; in many places the terms of their compensation made them what Doris Ladd has called "cobeneficiaries in the industrial enterprise" of mining. In addition to their wages these workers received the ore they produced after fulfilling the daily quota demanded by their employers.<sup>3</sup> Moreover, certain northern agricultural districts continued to rely on slavery and the *encomienda* through the end of the seventeenth century and on forced labor drafts well into the eighteenth century.<sup>4</sup>

Changes in the Mexican economy and in its relations of production accelerated during the half-century after 1580. The epidemics of the 1570s brought the Indian population close to its nadir while leaving large tracts of vacant land available to would-be hacendados. Profits derived from mining and commerce funded the expansion of commercial agriculture. In the Valley of Mexico, for example, haciendas began producing maize for sale in the markets of the viceregal capital.<sup>5</sup>

While appropriating land once dedicated to peasant agriculture, haciendas also loosened the pueblos' hold on indian labor. At rates that varied widely from one part of New Spain to another, Indians sought permanent employment on the haciendas.<sup>6</sup> To be sure, many of those who left their villages for hacienda jobs did so for the seemingly "non-economic" motive of escaping the petty tyranny of their *caciques*. Nevertheless, to the extent that those *caciques* denied them access to sufficient lands for their support, we might say that economic concerns drove them to sell their labor. Meanwhile, hacendados also helped undermine the tributary relations of production of the early colonial period by pressing for an end to the agricultural *repartimiento* and the resulting freedom to recruit workers directly, without the intervention of local officials.<sup>7</sup> Like the mine workers of the north, then, these new hacienda laborers seem to have represented another small but perceptible shift toward capitalistic relations of production.

<sup>3</sup> Doris Ladd, *The Making of a Strike: Mexican Silver Workers' Struggles in Real del Monte, 1766-1775*, Lincoln, University of Nebraska Press, 1988, p. 118; see also Peter Bakewell, *Silver Mining and Society in Colonial Mexico: Zacatecas, 1546-1700*, Cambridge, Cambridge University Press, 1971 (Edición en México, Fondo de Cultura Económica, 1976).

<sup>4</sup> Susan M. Deeds, "Rural Work in Nueva Vizcaya: Forms of Labor Coercion on the Periphery", *Hispanic American Historical Review*, vol. 69, no. 3 (August 1989): 425-449; José Cuello, "The Persistence of Indian Slavery and Encomienda in the Northeast of Colonial Mexico, 1577-1723", *Journal of Social History*, vol. 21 (Summer 1988): 683-700.

<sup>5</sup> See Charles Gibson, *The Aztecs Under Spanish Rule. A History of the Indians of the Valley of Mexico, 1519-1810*, Stanford, Stanford University Press, 1964, p. 326 (Edición en México, Siglo XXI, 1967).

<sup>6</sup> James D. Riley, "Crown Law and Rural Labor in New Spain: The Status of Gañanes during the Eighteenth Century", *Hispanic American Historical Review*, vol. 64, no. 2 (May 1984), p. 259-285.

<sup>7</sup> Enrique Florescano, "The Formation and Economic Structure of the Hacienda in New Spain", in Leslie Bethell, ed., *The Cambridge History of Latin America*, Cambridge, Cambridge University Press, 1984, vol. II, p. 153-188.

If we look more closely at their working conditions, however, we can see various phenomena that clearly demonstrate the essentially non-capitalistic nature of labor recruitment and compensation in rural Mexico. The more fortunate of permanent hacienda residents were able to demand certain perquisites, including the supply of goods on credit and access to plots of land for their own subsistence, that bore little resemblance to the terms of compensation, directly related to inputs of labor, that prevail under capitalism. On many occasions government authorities upheld workers' claims to these entitlements.<sup>8</sup> To be sure, historians continue to debate whether the extension of credit to agricultural workers signified the superior bargaining power of workers or the ability of employers to bind their labor force in "debt peonage." But in either case, this form of labor recruitment and retention constituted a departure from purely capitalist labor relations.<sup>9</sup>

Moreover, despite earlier attempts to place limits on worker indebtedness, by the late seventeenth and early eighteenth centuries governmental actions joined forces with the hacendados in arresting the free movement of labor to and from the estates. The years from about 1650 to 1750 witnessed a deterioration of commercial agriculture in many regions of Mexico, tempting workers to abandon the haciendas.<sup>10</sup> A *real cédula* issued in 1687 therefore permitted hacendados to bind workers against their will, even if they owed nothing to their employers. In return, the landowners were expected to continue extending paternalistic benefits to their permanent employees. Evidently a major motivation behind this move was the crown's wish to fix these workers in a specific place, thereby insuring that they would continue to pay their tribute.<sup>11</sup> There was, after all, no guarantee that they would return to their communities of origin if they left the haciendas.

In other ways too the appearance and consolidation of haciendas failed to initiate a direct lineal movement away from the tributary mode of production. Most obviously, the Marquesado del Valle and other "feudalistic" institutions survived in rural Mexico the colonial

<sup>8</sup> Riley, "Crown Law and Rural Labor".

<sup>9</sup> For discussions of "debt peonage", see Enrique Florescano, "The Formation and Economic Structure of the Hacienda in New Spain", in Leslie Bethell, ed., *The Cambridge History of Latin America* (Cambridge, 1984), vol. II, p. 153-188; Gibson, *The Aztecs* . . . , p. 254-256.

<sup>10</sup> On agricultural conditions during this period, see, for example, Eric Van Young, *Hacienda and Market in Eighteenth-Century Mexico: The Rural Economy of the Guadalajara Region*, Berkeley, University of California Press, 1981, p. 117 (Edición en México, Fondo de Cultura Económica, 1989); William B. Taylor, *Landlord and Peasant in Colonial Oaxaca*, Stanford, Stanford University Press, 1972, p. 141; Enrique Florescano, *Precios del maíz y crisis agrícolas en México, 1708-1810*, México, El Colegio de México, 1969, p. 183; Cheryl English Martin, *Rural Society in Colonial Morelos*, Albuquerque, University of New Mexico, 1985, Chapter 4.

<sup>11</sup> Riley, "Crown Law and Rural Labor" . . .

period.<sup>12</sup> Moreover, during the course of the seventeenth and eighteenth centuries there developed complex sets of relationships between the estates and the Indian villages—relationships that both undermined and reinforced the tributary system established in the early decades of Spanish rule. Many Indians worked temporarily on the haciendas, returning to their villages when planting or harvesting was finished. Though they sold their labor to the haciendas, they used their earnings to meet their tribute obligations, increasingly paid in money rather than in kind, and to support community *fiestas* and other activities.

Many hacendados relied on heavily on such temporary workers, supplemented by a small cadre of permanent hacienda residents, to perform the bulk of labor on their estates. It therefore suited their interests to allow Indian villages to retain lands sufficient to support them during a portion of the year, but not enough to provide for all of their needs. Indian peasants could not subsist without some recourse to hacienda labor, and hacendados enjoyed access to readily available reservoirs of seasonal labor while escaping any responsibility to compensate these temporary workers during the off-season.<sup>13</sup>

Had truly capitalistic relations of production prevailed, of course, hacendados would not have worried about how workers supported themselves when their labor was not needed. They could have counted on a large pool of potential workers, continually compelled by sheer economic necessity to sell their services. In much of rural Mexico during the seventeenth and eighteenth centuries, however, patterns of resource allocation impeded the emergence of such a capitalistic labor market. Regardless of the boundaries set forth in its jealously-guarded *títulos*, the amount of land an estate could effectively appropriate for its own use remained limited by the state of agricultural technology, the size of local markets and available means of transport. In most places, therefore, the enduring though profoundly unequal symbiosis between haciendas and peasant villages owed as much to these structural barriers to hacienda expansion as to any calculated design of landowners. Meanwhile, the Spanish state for its own reasons provided the pueblos with a modicum of support in defending their lands.

As a result, in many parts of rural Mexico Indian communities retained access to the most important factor of production, even though, as Enrique Florescano reminds us, the Indian subsistence sector bore a

<sup>12</sup> Bernardo García Martínez, *El Marquesado del Valle: Tres siglos de régimen señorial en Nueva España*, México, El Colegio de México, 1969; B. von Mentz, *op. cit.*, p. 38-47, 91.

<sup>13</sup> John Tutino, "Creole Mexico: Spanish Elites, Haciendas, and Indian Towns, 1750-1810" (Ph. D. diss., University of Texas, 1976), p. 343-364; Tutino, "Hacienda Social Relations in Mexico: The Chalco Region in the Era of Independence", *Hispanic American Historical Review*, vol. 55, no. 3 (August 1975), p. 496-528.

heavy share of the cost of reproducing the temporary labor force on which the haciendas relied.<sup>14</sup> Meanwhile, in areas that lacked densely populated Indian villages, such as the Bajío, a thriving ranchero economy developed as cash-poor hacendados were forced to subdivide their estates during the late seventeenth and early eighteenth centuries.<sup>15</sup> For much of the colonial period, then, primary producers controlled significant portions of land. The minority who were landless became permanent hacienda residents, often enjoying at least rudimentary compensation even when they were not working but also deterred from seeking a better livelihood elsewhere. Though now substantially altered from its early colonial form, and hardly a happy outcome for the Indians of New Spain, a tributary mode of production endured in rural Mexico.

Scholars such as André Gunder Frank and Immanuel Wallerstein would argue that the presence of thriving merchant activity indicated that colonial Mexico had in fact become capitalistic, albeit as a backward "periphery" dependent on a European "core".<sup>16</sup> Without question Mexico's incorporation into Spain's mercantile empire created a market more independent from the political controls that characterized pre-Hispanic commerce, which in time brought a market commercialization of petty commodities in the countryside.<sup>17</sup> Indeed, colonial Mexico became what Brigida von Mentz has called "una sociedad sumamente mercantilizada", in which transplanted Spaniards pragmatically shed their cultural disdain for trade and spurned seigneurial privileges in favor of commercial opportunities.<sup>18</sup>

If, however, we adhere to a conceptual framework that defines as capitalist only those systems in which the preponderance of labor is mobilized by economic considerations, certainly New Spain displayed far more features of a tributary mode of production than of capitalism. Moreover, complex networks of trade are hardly incompatible with tributary systems. Eric Wolf has vividly demonstrated how merchants of early modern Europe often served to solidify tributary relationships in

<sup>14</sup> Florescano, "The Formation and Economic Structure of the Hacienda", p. 171.

<sup>15</sup> See, for example, David A. Brading, *Haciendas and Ranchos in the Mexican Bajío: Leon, 1700-1860*, Cambridge, Cambridge University Press, 1978, p. 149-162; John Tutino, *From Insurrection to Revolution in Mexico: Social Bases of Agrarian Violence, 1750-1940*, Princeton, Princeton University Press, 1986, p. 56-60.

<sup>16</sup> Immanuel Wallerstein, *The Modern World-System: Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century*, New York, Academic, 1974; I. Wallerstein, *The Modern World-System II: Mercantilism and the Consolidation of the European World-Economy, 1600-1750*, New York, 1980 (Edición en México, Siglo XXI, 1979-1984); André Gunder Frank, *Capitalism and Underdevelopment in Latin America: Historical Studies of Chile and Brazil*, New York, 1969.

<sup>17</sup> See, for example, the lament of the principales of Oaxtepec of 1580, in the *Relación de Oaxtepec*, in the Joaquín García Icazbalceta Collection, University of Texas Library, Austin, Texas; for a discussion of merchant activity during Aztec times, B. von Mentz, *op. cit.*, p. 21-28.

<sup>18</sup> B. von Mentz, *op. cit.* p. 46. 56.

Asia, Africa and Latin America. Offering a tempting array of imported merchandise in exchange for goods appropriated through non-economic mechanisms, merchants furnished powerful incentives for local tribute brokers to exact ever-increasing surpluses from their subjects, and more generally, for each component of local society to use whatever means it commanded to squeeze as much wealth as possible from groups beneath it. In short, writes Wolf, mercantile wealth "drew producers in different parts of the world into a common web of exchanges, adjusting existing relations of production to embrace commodity exchange, or subsidizing coercive arrangements for the production of commodities".<sup>19</sup>

Colonial Mexico's best illustration of the close connection between merchant activity and tributary relationships was the *repartimiento de mercancías*, in which local officials used their political power to force Indians to become producers of valued indigenous commodities and consumers of high-priced imported merchandise and of more prosaic items such as livestock.<sup>20</sup> Though perhaps the distinction mattered little to the Indians thus exploited, they were yielding their produce, rather than their labor, at below market value. The social relations of production therefore remained tributary.

The eighteenth century witnessed important economic and political changes that brought Mexico somewhat closer to a capitalistic mode of production. A crucial prerequisite for the transition to capitalism is the adoption of governmental policies that favor the interests of entrepreneurs. The Bourbon monarchs offered tax incentives and technical assistance that contributed to the revival of silver mining, which in turn triggered substantial growth in trade and commercial agriculture. Resulting increases in total tax revenues reduced the importance of tribute as a source of governmental income. Moreover, at rates that varied from one region of New Spain to another, population growth, the haciendas' renewed pressure on peasant landholdings, and the recurrent agricultural crises of the late colonial period increased the pool of workers dependent exclusively on selling their labor.<sup>21</sup>

In a recent article Margarita Menegus Bornemann also suggests that even the abolition of the *repartimiento de mercancías* in 1786, though

<sup>19</sup> Eric Wolf, *op. cit.*, p. 83-88, quotation, p. 86.

<sup>20</sup> Brian R. Hamnett, *Politics and Trade in Southern Mexico, 1750-1821*, Cambridge, Cambridge University Press, 1971. (Edición en México, Instituto Mexicano de Comercio Exterior, 1976); Margarita Menegus Bornemann, "Economía y comunidades indígenas: el efecto de la supresión del sistema de reparto de mercancías en la intendencia de México, 1786-1810", *Mexican Studies/Estudios Mexicanos*, University of California-Universidad Nacional Autónoma de México (Irvine), vol. 5, No. 2 (Summer 1989): p. 201-219.

<sup>21</sup> See, for example, Florescano, *Precios del maíz*.

usually seen as a boon to the indigenous population, may in fact have undermined rather than strengthened Indians' ability to support themselves. At least in the intendancy of Mexico, the principal product provided to Indians through the *repartimiento* was livestock, especially mules. In the years after 1786, peasant communities suffered severe shortages of livestock, which prevented them from transporting goods to regional markets. Moreover, those Indians who had heretofore worked as self-employed *arrieros* now found their economic possibilities seriously limited. As a result, many Indian communities experienced considerable privation in the decades following the abolition of the *repartimiento*. Certainly this impoverishment owed much to the lingering effects of the devastating agricultural crisis of 1785-86, but Menegus Bornemann's research shows that in certain respects the Bourbon reforms may have contributed to the creation of a rural proletariat in central Mexico.<sup>22</sup>

Abolition of the *repartimiento de mercancías* was, in theory, one phase of a comprehensive campaign to incorporate Indians more thoroughly into the colony's economy and society, which entailed in turn a step toward more capitalistic relations of production. In addition to promoting the teaching of Spanish, they advocated the abolition of tribute, hoping thereby to free additional resources for Indians to spend on manufactured goods. Moreover, beginning gradually in the eighteenth century and culminating in the promulgation of Viceroy Bernardo de Gálvez's *Bando de Gañanes* in 1785, government officials grew less tolerant of hacendados' power to bind workers permanently on their estates. In the view of key policy makers, such workers remained under the tyrannical control of their employers and isolated from the economic and cultural mainstream of colonial society. The changes of the late colonial period transformed the Indian worker into "effectively a free agent"; even those workers who remained on haciendas did so under conditions more "capitalistic", and certainly less paternalistic, than before.<sup>23</sup>

Despite these admittedly significant changes, the way was in no way yet open for a smooth transition to capitalism in eighteenth-century Mexico. Governmental support for capital never approached the level or consistency of that occurring contemporaneously in England. Though liberalizing trade within the empire, the Bourbon maintained monopolies, *alcabalas* and other critical impediments to the free movement of trade and resources. In other ways too government officials failed to extend a wholehearted embrace to capital; they were at times

<sup>22</sup> Menegus Bornemann, "Economía y comunidades indígenas".

<sup>23</sup> Riley, "Crown Law and Rural Labor..."; quotation, p. 279.



disposed to balance the interests of workers and management in key labor disputes,<sup>24</sup> and they still offered peasant communities some assistance in resisting the encroachments of land-hungry hacendados. Moreover, by supporting the mobility of Indian workers, the crown left them free to return to subsistence agriculture and artisan activities in the villages. Finally, despite the elimination of the *repartimiento de mercancías*, local officials continued to use non-economic measures to extract surpluses from peasants in the Mexican countryside,<sup>25</sup> while forced labor still supplied a significant portion of manpower for textile production and other enterprises. Although wage labor certainly figured more prominently in the late colonial economy than it had previously, we can hardly say that strictly economic stimuli yet served as the primary means through which social labor was mobilized.

## II. *The Case of Colonial Morelos*

Cortés estate and the few other early sugar haciendas that developed during the first half on the sixteenth century rented lands from indigenous communities and utilized the labor of Indian and black slaves and encomienda tributaries.<sup>26</sup> After 1580, however, sugar haciendas, and therefore the extent of outright landownership by non-Indians, expanded rapidly. Like their counterparts elsewhere in New Spain, these states soon attracted permanent Indian workers, often from neighboring high land communities, who preferred hacienda residence to the uncertainties of life in their native villages.<sup>27</sup>

Though substantially similar to patterns observed in other parts of Mexico, the development of rural society in Morelos also took on certain characteristics not always present in other regions. Most obviously, sugar producers utilized Afro-Mexican slaves more extensively than other hacendados. Moreover, although we lack detailed studies comparing the internal financial records of sugar estates with those other haciendas, it is likely that the sizable investments in equipment and irrigation works required for sugar production imposed a heavier burden of debt on these properties.<sup>28</sup> Obligated to pay greater amounts

<sup>24</sup> Ladd, *The Making of a Strike*.

<sup>25</sup> See, for example, Martin, *Rural Society*, p. 117.

<sup>26</sup> G. Michael Riley, *Fernando Cortés and the Marquesado in Morelos*, Albuquerque, University of New Mexico Press, 1973; Ward Barrett, *The Sugar Hacienda of the Marqueses del Valle*, Minneapolis, University of Minnesota, 1970, p. 11 (Edición en México, Siglo XXI, 1977); Martin, *Rural Society*, chapter 1.

<sup>27</sup> Martin, *Rural Society*, chapter 2.

<sup>28</sup> Gisela von Wobeser, *San Carlos Borromeo: Endeudamiento de una hacienda colonial (1603-1729)*, México, UNAM. Instituto de Investigaciones Históricas, 1980; Martin, *Rural Society*, p. 38-42.

of interest to ecclesiastical lenders, sugar hacendados may have felt greater incentive to garner additional profits by cutting wages and other production costs.

Finally, it is clear that from the start a strong element of antagonism characterized relations between the sugar haciendas and neighboring villages in the *tierra caliente* of Morelos. Even if in theory there were sufficient lands for the developing haciendas and the underpopulated villages, conflict quickly developed over water and over selected parcels of land that were particularly desirable for sugar cultivation and for Indian cash crop production.<sup>29</sup> Then too, from the early seventeenth century forward, the fertile soil and benevolent climate of Morelos had attracted significant numbers of non-Indians to the Indian pueblos. These newcomers engaged in small-scale commercial agriculture on plots of community land rented or otherwise acquired from Indian *caciques*.

Despite —or perhaps because of— the ambitious undertakings on the early hacendados, by the mid-seventeenth century the sugar industry of Morelos had entered a severe, century-long depression that eased tensions between haciendas and villages and aborted any movement toward capitalistic relations of production. Those hacendados who tried to continue sugar production often resorted to political mechanisms to attract workers. For example, they advanced money to Indian leaders, ostensibly to help them meet tribute obligations, in return for the *caciques*' promise to deliver stipulated quotas of workers to the haciendas. On other estates sugar cultivation ceased entirely, and resident workers simply turned to subsistence agriculture. Meanwhile, some hacendados leased portions of their land to *rancheros* or sharecroppers.<sup>30</sup>

The crisis of the sugar economy also generated important internal changes in the Indian communities, which expanded their production of irrigated cash crops, using land and water reclaimed from defunct haciendas. Some Indians rebuilt villages forcibly abandoned in the *congregaciones* of the early seventeenth century. At the same time large numbers of slaves and other erstwhile hacienda residents abandoned the estates to take up plots of land in the villages or to create new communities on the fringes of the haciendas. Finally, periodic migrations of Indians from adjacent highland regions, most notably following the *matlazahuatl* epidemic of 1737, increased the population of the villages and reinforced their identity as Indian communities.<sup>31</sup>

<sup>29</sup> Cheryl E. Martin, "Crucible of Zapatismo: Hacienda *Hospital* in the Seventeenth Century", *The Americas*, vol. 38 (1981): p. 31-43; Martin, *Rural Society*, p. 52.

<sup>30</sup> Martin, *Rural Society*, Chapters 3 and 4.

<sup>31</sup> *Ibid.*, Chapter 4.

After 1760 the sugar industry of Morelos entered a new period of expansion that mirrored the general economic development of New Spain during the late colonial period. Energetic new landowners invested profits derived from mining and trade in the creation of new sugar mills and the rebuilding of old ones. The revival of the sugar haciendas, together with the ever-increasing importance of the region as supplier of fruits, vegetables, and maize for the growing Mexico City market, once again intensified the competition for land and water in Morelos.<sup>32</sup>

Economic and demographic patterns in late colonial Morelos enabled sugar haciendas to move closer than ever before toward labor systems resembling those of capitalism. The virtual cessation of slave imports into Mexico in the mid-seventeenth century and the tendency of slaves to melt into the free population during the long depression of the sugar industry had brought the institution of slavery close to extinction. Forced to rely on paid workers even for the skilled tasks of sugar-making previously assigned to slaves, hacendados came to prefer wage laborers, who were, after all, easily dismissed at little cost to employers and therefore more tractable than slaves.<sup>33</sup>

At the same time, the villages of Morelos were becoming reservoirs of workers who had little choice but to sell their labor to the sugar hacendados or to smaller farmers. As migration into the *tierra caliente* continued, *caciques* became progressively less willing to allocate precious community lands to newcomers. Even the numerous Indian and mulatto descendants of those who had settled in the pueblos earlier in the eighteenth century found less land available for their own use. *Caciques* appropriated choice plots for their own ventures in commercial agriculture or leased them to hacendados or to the growing numbers of ambitious Spanish and mestizo *labradores* who lived in the area's most favorably situated villages. At the same time growing numbers of village dwellers, especially the mulattoes, may have lacked formal ties to the Indian leaders of the communities in which they lived. As a result, *caciques* neither held leverage over them nor served as brokers when they worked for the haciendas. These workers faced their employers on a one-to-one basis, accepting whatever terms they might individually negotiate. And because population increase and continued immigration had rapidly increased the supply of potential labor both on and off the haciendas, all workers found their bargaining power seriously diminished.<sup>34</sup> In short, writes Brígida von Mentz, Morelos had entered a

<sup>32</sup> Martin, *Rural Society*, Chapter 5.

<sup>33</sup> Martin, *Rural Society*, Chapter 6.

<sup>34</sup> Cheryl E. Martin, "Haciendas and Villages in Late Colonial Morelos", *Hispanic American Historical Review*, vol. 62, No. 3 (August 1982), p. 407-427.

phase of "protoindustrialization" by the final quarter of the eighteenth century.<sup>35</sup>

Obviously these trends worked to the economic advantage of the hacendados, who favored the presence of a large pool of available labor and were rapidly shedding any paternalistic concern for their workers during the off-season. When their labor needs were exceptionally heavy, late colonial hacendados could still rely on seasonal migrants from adjacent highland communities, with which they maintained a semblance of traditionally symbiotic relations. With neighboring villages in the warm lowland valleys, however, they found no such complementarity of interests. Land in the *tierra caliente* was simply too valuable to be left at the disposal of Indian peasants.<sup>36</sup>

Indeed, the sugar hacendados increasingly viewed the survival of autonomous peasant villages in the *tierra caliente* as an anachronistic inconvenience. Vowing that they would one day plant sugar cane in the very *plazas* of the pueblos, those landowners who took the trouble to articulate their vision of a preferred social order called for the abolition of the villages as landholding entities and the consequent conversion of the peasantry into a proletariat totally dependent on wages for subsistence.<sup>37</sup> Most notably in eastern Morelos, late colonial hacendados in fact succeeded in absorbing some villages into their domains.<sup>38</sup> In general, we may conclude that in Morelos relations of production verged closer to those of capitalism than in many other parts of Mexico during the late colonial period.

Two factors prevented the hacendados from achieving their designs more generally in the *tierra caliente*, however. The crown's lingering, though now very much attenuated, sensitivity for the needs of Indian villagers surely blunted the thrust of the planters' ambitions on some occasions. Much more importantly, however, the landowners' short-term interests precluded their acting in concerted fashion against the villages. Often several different hacendados and prosperous *labradores* might be competing for access to the same parcel of community land. In these instances Indian *caciques* assumed a key brokerage function, playing off the interests of rival agriculturalists against one another and awarding temporary control of coveted plots to the highest bidder at

<sup>35</sup> B. von Mentz, *op. cit.*, p. 51; for a general discussion of the concept of protoindustrialization in central Mexico, see Arij Ouweneel and Catrien C. J. H. Bijleveld, "The Economic Cycle in Bourbon Central Mexico: A Critique of the *Recaudacion del diezmo liquido en pesos*", *Hispanic American Historical Review*, vol. 69, No. 3 (August 1989), p. 479-530, p. 497-501.

<sup>36</sup> Martin, *Rural Society*, Chapter 7; Martin, "Haciendas and Villages".

<sup>37</sup> Martin, "Haciendas and Villages".

<sup>38</sup> Martin, *Rural Society*, p. 168-169.

any given time. Though hardly an ideal solution from an individual hacendado's point of view, such arrangements were preferable to any outcome which might permanently bestow a desired piece of land upon a rival.<sup>39</sup>

Local *labradores* shared the entrepreneurial aspirations and sociopolitical outlook of the hacendados, but found even stronger reasons to favor the status quo in land tenure patterns. As long as Indian *caciques* held the reins of formal political power and retained control over distribution of community lands, these small farmers could hope to bargain successfully for the continued renewal of their leases, while any permanent expansion of hacienda holdings would surely work to their disadvantage. Therefore *labradores* lent pragmatic support to colonial arrangements that promised protection for Indian lands. Meanwhile, income derived from rentals helped support community fiestas and litigation in defense of community lands.<sup>40</sup> Political and economic forces of the late colonial period, therefore, enabled the Indian communities of Morelos to survive as landholding entities.

### *III. Nineteenth-Century Morelos and the Gradual Transition to Capitalism*

The example of Morelos demonstrates the ways in which economics, politics and tradition combined to impede a thorough transition to capitalistic relations of production in colonial Mexico. I shall now turn to a brief discussion of the eventual steps toward that transformation in Morelos.

The coming of political independence combined with the circumstances outlined above to cut short the hacendados' drive to eliminate the corporate landholding villages of Morelos. The wars of independence inflicted serious damage on some haciendas in the region, and the economic and political chaos of the early national period thwarted the continued development of even those estates that emerged unscathed in 1821. As a result, peasants and *labradores* once again could recover use of land and water appropriated by hacendados in the late colonial era. Independence therefore postponed for at least a few decades any additional advance toward capitalistic relations of production.<sup>41</sup>

Independence also brought to the villages of Morelos important innovations in local government that were directly related to the political and economic changes of the late colonial era. Beginning with the abor-

<sup>39</sup> Martin, *Rural Society*; B. von Mentz, *op. cit.*, p. 111.

<sup>40</sup> B. von Mentz, *op. cit.*, p. 91.

<sup>41</sup> Florencia Mallon, "Peasants and State Formation in Nineteenth-Century Mexico: Morelos, 1848-1858", *Political Power and Social Theory*, vol. 7 (1988), p. 1-54.

tive implementation of liberal reforms emanating from Spain after 1808 and continuing more systematically after independence, many erstwhile Indian *cabeceras* transformed themselves into Spanish-style municipalities. As newly created municipal councils replaced the Indian cabildos that had hitherto constituted the sole organ of internal government in these communities, locally prominent *labradores* —whose informal political influence had been growing steadily from the mid-eighteenth century forward— finally gained the effective political forum denied them under colonial rule.<sup>42</sup>

Unlike the hacendados, who could draw on ties of trade, kinship and political association with at least the lower echelons of Mexico City's elites, these *labradores* were firmly rooted in the pueblos of Morelos. Local political struggles profoundly affected their interests, yet colonial institutions of government, founded on the anachronistic assumption of Indian pueblos isolated from non-indian interests, denied them any formal mechanism to air their grievances. For *labradores* independence brought welcome opportunities for the enfranchisement they had so long desired. Meanwhile, Indians often found themselves literally and figuratively less fluent in the new idiom of political practice and therefore marginalized in the power structure emerging in their communities.<sup>43</sup>

Brígida von Mentz has clearly outlined the countervailing pressures faced by these newly constituted municipalities. The liquidation of royal authority removed the paternalistic umbrella of colonial legislation that had helped protect village lands from hacienda encroachments. In many communities estate administrators and other "middle class" elements unabashedly partial to the hacendados gained access to formal political power. Meanwhile, the newly empowered *labradores* wavered in their vision of a preferred social order. Though increasingly sympathetic to the kind of rural entrepreneurship that accompanied the privatization of land, they hesitated to abandon completely their support of the corporate system of landholding that had for so long allowed them to coexist with the region's powerful hacendados. Especially in western Morelos, colonial patterns of village land tenure endured well into the nineteenth century.<sup>44</sup>

When the sugar industry entered a new period of revival that began in the 1840s, many villagers of Morelos once again stood in opposition to the hacendados' advances. In the 1850s, the peasants and *labradores* who now shared local political power lent strong support to the Revolu-

<sup>42</sup> Martin, *Rural Society*, Chapter 8; Peter Gerhard "La evolución del pueblo rural mexicano: 1519-1975", *Historia Mexicana*, vol. 24 (1975).

<sup>43</sup> B. von Mentz, *op. cit.*, p. 142-148.

<sup>44</sup> *Ibid.*, p. 65-68, 135-152.

tion of Ayutla, headed by the southern caudillo Juan Álvarez. The villagers sincerely believed that Álvarez's triumph would spell victory for the kind of popular liberalism, preeminently concerned with agrarian justice, voiced some forty years earlier by Miguel Hidalgo and José María Morelos. Ultimately, however, the liberals who seized control of the national government valued order over equity; the price of public tranquility was what Florencia Mallon has called "a Mexican liberalism devoid of all social content." The outlines of the *Pax Porfiriana* are therefore clearly discernible in the liberal government's move to stifle agrarian discontent in Morelos in the 1850.<sup>45</sup>

Acting under the optimistic hope that liberalism would help them resist the encroachments of land-hungry hacendados, the villagers of Morelos thus helped bring to power a regime that laid the legal basis for the extinction of their communities as autonomous landholders. In this and in other ways the sugar planters finally received the unequivocal government support so long denied them. The way was therefore open for Porfirian hacendados to expand their holdings at the expense of both peasants and *labradores* and to achieve what their late colonial forebears had envisioned a century earlier—a social order in which corporate villages had no place.

The increasing impoverishment of the pueblos combined with significant population growth to create, in at least some communities, a class of landless workers resembling a true proletariat. Like many other regions of Porfirian Mexico, Morelos witnessed a transition to relations of production more decidedly capitalistic than ever before. Dramatic as this transformation in the mode of production was, however, in many ways it simply represented the culmination of social processes long under way, most notably in the late colonial period.

<sup>45</sup> Mallon, *op. cit.*, quotation from p. 39.