Class, Ethnicity, and Community in Southern Mexico

Oaxaca's Peasantries

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Part I

Historical Foundations of Peasantries

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1

Peasantries in Colonial and Post-Independence Oaxaca (1520–1920)

A salient feature of Oaxaca's peasantries is their history of subjugation to Spanish imperialism, and, after the independence struggle between 1810 and 1821, their continuing subordination to white and *mestizo* (mixed race) society. The Spanish conquest, though largely peaceful in Oaxaca, destroyed many aspects of Indian social structure and political organization and disrupted traditional religion; led to cataclysmic population decline; and disturbed agricultural production, imposing trade to Europe—especially in cochineal—on to a subsistence-with-market base. Nevertheless, more than elsewhere in Mexico, Indian peasants in Oaxaca clung on to their lands (and their subsistence crops and animals), not only in the mountains, but in the Oaxaca Valley, too (Chance 1989; Taylor 1972).

Failure of the *hacienda* (landed estate) to develop in Oaxaca was due to the high-level, accidented nature of the terrain, and to the fact that wealth resided in cochineal production (cochineal is an insect which, when dried and crushed, produces a red dye), rather than in land ownership and use. Crucial to the cochineal industry was the persistence of the peasantry, and the requirement that the Indians had to pay tribute to the Spanish crown. Moreover, the system of *repartimiento* (labour draft), together with debt peonage, secured labour and its application to the *nopaleros* (cactus groves) which were the natural habitat of the cochineal insect (Taylor 1972, 147). Oaxaca City (Antequera) emerged as the regional–mercantile hub of the cochineal trade to Vera Cruz and Cádiz, and its townscape became studded with magnificent religious houses, which, collectively, became the largest Spanish landowners in Oaxaca by the end of the colonial period (Taylor 1972)

Current Oaxacan peasantries have their origins in ethnic-linguistic groups of the pre-Hispanic period, which were subjected, collectively, to differential incorporation into the colonial state of New Spain as Indians. They also experienced an enhanced degree of fragmentation, enjoined by the Spanish system of civil jurisdictions, though it has been claimed that, even prior to the conquest, the Zapotecs had already undergone a high degree of fission into small-scale communities (Carmagnani 1988, 68). Despite their domination by the

Catholic Church, the indigenous population sustained many of their religious beliefs and practices—Carmagnani associates the seventeenth and eighteenth centuries with the return of the pagan gods (1988)—and enjoyed their own distinctive forms of community organization (*pueblos de Indios*). Pre-Columbian religion and political organization, instead of being abandoned, were syncretized with European institutions and values, and practised by populations that retained their pre-conquest languages (Spores 1984*a*).

Almost three centuries after the conquest, the War of Independence swept away the regional economy based on cochineal (and textiles), for which Oaxaca City had been the pivot (Dahlgren 1990). Nevertheless, Oaxaca City became the state capital and seed-bed for the Liberal programme of national reform that was to lead to the break-up of landed corporations and the freeing of factors of production under the Presidencies of two of Oaxaca's most illustrious sons, Benito Juárez and Porfirio Díaz. The Porfirian project of state-led capitalism produced infrastructural and economic developments of only modest proportions in Oaxaca compared to the rest of Mexico.

Oaxaca's peasantries, though undoubtedly dominated socially and politically and exploited economically during the Porfiriato, retained much of their land and maintained their spatial distribution more or less intact. It was Church-held property that was sold to private individuals during the Porfiriato, especially that located in the Oaxaca Valley, rather than land belonging communally to the isolated peasant communities of upland basin and highland Indians. When Indian-owned property was privatized, it was in the tropical lowlands or on the mountain slopes adjoining them that the incursions were concentrated. Unlike the colonial *haciendas*, which had produced grain and meat for the domestic market plus some cochineal, the later nineteenth-century plantations concentrated on tropical crops for export.

The main themes of this chapter are the status of Oaxaca's Indian peasantries in relation to the colonial regional society, the various systems of land holding and production that operated, and the nature and role of the colonial and post-colonial state. Nevertheless, some preliminary appreciation must be given of the physical geography, which has played such a large part in the evolution of human activities in Oaxaca. The hostile environment goes a long way to explain both the nature and persistence of Oaxaca's peasantries, as well as the generally low levels of living they have achieved over time.

Physical Environment

Physiography

Oaxaca covers an area of 95,000 km.[2]. Most of the terrain is mountainous, with over 60 per cent of the state located at heights of more than 500 m. Elevations in excess of 2,000 m. are recorded in the Mixteca Alta (the Mixteca

Fig. 1.1 Oaxaca: relief

Baja and de la Costa are accidented but generally lower areas) in the west. Similar heights also characterize the Sierras Zapoteca and Mixe in the north, and the Sierra Madre del Sur, which borders the Pacific, to the south (Figs. 1.1 and 1.2). Within these east–west trending mountain complexes of metamorphic and igneous rocks and—in the Mixteca Alta—tertiary volcanics (Fig. 1.3), ridges and valleys run parallel like ramparts, and the highland areas are extremely inaccessible (place-name spellings follow Bradomin 1980).

Fig. 1.2 Oaxaca: regions and major towns

For example, 'until fairly recently, a journey from the interior of the Mixe region required several days to reach the nearest paved road. For the Mixe, travelling means fording swift streams and flooded areas fraught with venomous snakes, traversing muddy trails leavened with mule excrement and urine' (Lipp 1991, 195). While these circumstances are extreme, they could be matched, in modified form, by similar age-old obstacles to communications throughout the deeply dissected, high altitude zones of Oaxaca.

Three peripheral lowlands fringe Oaxaca's mountain mass. These are—the narrow coastal plain adjoining the Pacific (the *Costa Chica*), the broad and rolling Isthmus of Tehuantepec, and the Papaloapan Basin around Tuxtepec (Fig. 1.2). In addition, the extensive highland masses are separated from one another by *los valles centrales de Oaxaca*, called here the Central Valleys. As their name implies, the Central Valleys—of which the Oaxaca Valley in the Upper Atoyac Basin is the core (Fig. 1.4)—lie at the geographical heart of the state (Moguel 1979).

Fig. 1.3 Geology

Fig. 1.4 Place-names in Valley of Oaxaca (after Welte)

These major physical units have been used by Tamayo as the basis for his division of Oaxaca into eight regions: the Central Valleys, the Mixteca Alta and Baja, the Cañada (the trench separating the Mixteca from the Sierra), the Sierra, the Istmo, the Pacific Coast, and the Papaloapan Basin (Fig. 1.2). However widely used in Oaxaca, this topographic scheme makes the Mixteca Alta too extensive (to the west), does not identify the Mixteca de la Costa, and fails to include the very substantial range (the Sierra Madre del Sur) that divides the Central Valleys from the Pacific (Moguel 1979; Tamayo 1950).

The Oaxaca Valley features a great deal in this book and comprises three linked troughs—each 20 to 30 km. long, named after the main towns located within them. The Etla Valley is in the north-west, Tlacolula in the south-east, and the two-pronged valley (or Valle Grande) focusing on Zaachila and Zimatlan in the south-east and Ocotlán in the south (Fig. 1.4). Each valley was formed by Tertiary down-faulting, and the steep-sided boundary slopes have developed across hard, metamorphic rocks; the valley bottoms are broad and

flat and filled with alluvial deposits of Quaternary age (Escalante Lazúrtegui 1973).

The arms of the valley system are shaped like the blades of an aeroplane propeller, the hub of which is provided by an up-standing rock, capped by Monte Alban, a Zapotec ruin perched about 300 metres above the valley floor overlooking Oaxaca City, the state capital. Oaxaca City is situated where the Rio Atoyac is joined by its tributary, the Rio Salado, before draining south to the Pacific, and it occupies a central place that has been the key social, political, and economic location in Oaxaca since before the Spanish conquest of Mexico began in 1519.

Temperature and Vegetation Zones

Oaxaca state, though tropical in location, is characterized by three major temperature zones, each calibrated with altitude and giving rise to a distinctive vegetation: the *tierra caliente*, up to 1,000 m., the *tierra templada*, from 1,000 to 2,000 m., and the *tierra fría*, from 2,000 to 3,000 m. (Fig. 1.1). The original vegetation of the peripheral, hot lowlands was tropical rain forest, but that has mostly been stripped out for pasturage and cultivation (Aceves de la Mora 1976). The process has been going on for centuries. However, in the case of the plains to the north of the Sierra Mixe, the forest has been systematically cleared only since the late 1970s.

The most extensive temperate area (*tierra templada*)—so attractive to Spanish urban and rural settlement—is located in the Oaxaca Valley at about 1,500 m. An analogous intermontane basin occurs around Nochistlan in the Mixteca Alta, and many of the incised river valleys in the mountain areas share similar climatic conditions. These areas have been cleared of natural vegetation for many centuries, and have been cultivated intensively since pre-Hispanic times (Earle Smith Jr. 1976 and 1978).

In the cold mountains of the *tierra fría*, above the *tierra templada*, the temperature declines to low levels with altitude, and gives rise to pine and oak woodlands, and, above that, to mist forest (Bravo 1960). It is in these areas that the Indian populations have concentrated, and it is here, at high altitude, that much of their communal land is concentrated. Both the Zapotec and Mixtec were known as 'Cloud People', and many Indian communities continue to be located at or above the cloud line (Flannery and Marcus 1983).

Rainfall and Aridity

The Cañada, the Coixtlahuaca Valley (in the Mixteca Alta), the Oaxaca Valley, and the north-west to south-east trench running from Oaxaca City down to the Isthmus can be thought of as semi-arid, with rainfall averaging less than 800 mm. per year (Fig. 1.5). Here, a *mesquite* vegetation (cactus and thorn scrub) is characteristic irrespective of the temperature zone (Bravo 1960). The

Fig. 1.5 Oaxaca: rainfall

remainder of the state receives up to twice this amount of precipitation, though the highest peaks on the northern boundaries of the state record up to 2,000 mm. per year, and the plains adjoining the northerly state of Vera Cruz are wetter still.

The entire state of Oaxaca experiences a dry winter season and a wet summer. The latter is often punctuated by a hot dry spell, or *canícula*, which starts in early August and may run into September. However, the *canícula* can be short-lived, and when depressions coincide in the Pacific and the Gulf of Mexico, as they frequently do in August, Oaxaca can be buffeted and drenched by intense tropical storms, and flooding of the lowland areas can be a problem (Alvarez 1983). It was in part to control seasonal flooding of this kind, following the inundation of Tuxtepec in 1944, that the Papaloapan project was initiated from the 1950s onwards (García Hernández 1994).

Travel everywhere in Oaxaca can be hazardous in the wet season; afternoon storms rapidly displace clear sunny mornings, producing flash floods and setting landslides in motion. In the Sierra Madre del Sur, where constant bulldozing is necessary to keep open the highway to the coast, the Chatino communities, many of which are eight hours walk from a road, are particularly difficult of access until the autumn drought sets in. Similar treacherous conditions beset the traveller in the northern Sierra Zapoteca and Sierra Mixe, too.

Varied altitude and aspect give rise to important differences in rainfall over short distances. Additionally, at any one location, there is great variability from year to year, both with regard to total precipitation and its periodicity.

This applies not only to distinctions between peaks and valleys in the northern mountains, which are generally wet, but also to the comparatively homogeneous Oaxaca Valley. For example, Oaxaca City has an annual average precipitation of 650 mm., while Etla, with 662 mm., is wetter and Ocotlan, with 750 mm. is wetter still. The driest area is around Tlacolula, where the rainfall drops below 600 mm., surface drainage is sporadic, and the bed of the Rio Salado has been used for salt making. Higher parts of the Oaxaca Valley and the interfluves and valley sides have moderate frosts in January and February, but no snow, unlike the mountain ridges, where spring blizzards are a hazard (Lorenzo 1960).

Human Implications

Oaxaca's physical environment has provided more than the stage on which its human history has unfolded. Many aspects of the environment are deeply implicated in the *genres de vie* of the Oaxaca peasantry, as well as influencing modern development. For the Zapotecs of the first centuries BC and AD, the dryness of the Oaxaca Valley was mitigated by the possibility of organizing irrigation from the rivers and tapping the high water table of the valley bottoms, much as Oaxacan peasants do nowadays. A hydraulic civilization developed under the Zapotecs, which, though it eventually declined and was superseded by Mixtec rule, was to spawn one of the key elements among Oaxaca's peasantries (Blanton 1978; Blanton, Kowalewski, Feinman, and Appel 1981; Flannery and Marcus 1983; Marcus and Flannery 1996; Spores 1967 and 1984*a*).

Oaxaca's river valleys also provide routeways through what would otherwise be almost impenetrable highland terrain. North–south routes across the sierras have always been perilous, though the north-west to south-east alignment of the physiography has facilitated the link from Mexico City, via Puebla, Oaxaca City, Tehuantepec, and Chiapas to Guatemala (Fig. 1.1). A major problem is that the northern sierras form part of the continental divide, so that the drainage network is unintegrated and north or south flowing, and thus rarely conducive to easy state-wide communications.

Stony and eroded soils in the highland areas, together with thorny vegetation and cactus in the lower zones, means that only about 15 per cent of the land area of Oaxaca is cultivated, and, in recent years, the figure has been declining, largely because of out-migration. Of the portion tilled (much of it in shifting cultivation to permit a fallow period), only 6 per cent is irrigated and another 6 per cent is moist enough to use without dry farming (Ortiz Gabriel 1992). About 70 per cent of the cultivated area is under subsistence crops, notably maize, beans, and squash, though specialization does occur with altitude and by locality. Even in the Oaxaca Valley, the aridity of the Tlacolula arm has had a differentiating impact on human activity: this is the area in which artisan activities have been most intensively developed to supplement the agricultural cycle.

The rocks of the highland areas are, in places, rich in minerals, such as silver and copper, which have, from time to time over the centuries, been exploited commercially. On a more modest scale, in certain villages of the Oaxaca Valley, carefully selected metamorphic rocks are quarried and fashioned into the *metate* and *mano* (grindstone and roller) used to de-husk maize by Oaxacan peasants from Zapotec times to the present day (Cook 1982*a*). So arid, stony, and steep is the Oaxacan landscape, in general, that it is possible to travel tens of kilometres without seeing any sign of rural activity, let alone habitation. However, historically, during the *colonia*, the hardy *nopal* cactus, with its insect, the cochineal grub, was the key to Oaxaca's prominence as a source of red dye that created great wealth for its merchants.

Oaxaca's Language Groups

Although much of Oaxaca looks traditional and impoverished, it would be wrong to assume that it has always been a lagging region and 'culturally backward'. When the Spaniards had consolidated their conquest of the Aztecs and penetrated southwards in 1521 to what is now Oaxaca, they found the sites and artefacts of Zapotec and Mixtec 'high cultures'. The Oaxaca Valley contained the ceremonial centres at Monte Alban (by then in ruins), Zaachila, Mitla (in ruins), Lambityeco, Yagul (in ruins), and their satellite settlements. This political core region had developed over a period of more than two millennia.

Based on irrigation from the rivers and ground-water supplies of the valley floors, Monte Alban's complex exchange economy, which involved jewellery, woven goods, and pottery, had given rise to commercial tentacles that extended throughout Meso-America. Many scholars have sifted the archaeological evidence for the Zapotecs (Blanton 1978; Flannery and Marcus 1983; Marcus and Flannery 1996; Paddock 1970 and 1983). They show that the Oaxaca Valley was studded with semi-independent townships, linked by warfare, tribute, and trade. These townships were divided into two estates: a noble estate of *caciques* (rulers) and *principales* (tribute collectors, administrators, and priests); and a lower estate subdivided into *macehuales* (commoners), *mayeques* (lower class), and slaves (Chance 1986*a* and 1990*b*).

In the Mixteca Alta, however, there were no population clusters that would warrant the designation 'urban', although Coixtlahuaca, Teposcolula, Yanhuitlán, and Tlaxiaco had dispersed populations of around 10,000 each, distributed in nucleations with or without hamlets (Lind 1979; Spores 1967). Mixtec society before the conquest consisted of 'local kingdoms grouped into several semi-discrete valley or regional subcultures'; codices reveal that the royal families were highly interrelated (Romero Frizzi 1996), and that the rulers of Tilantongo represented the most honoured of the lineages (Spores 1967, 184).

After the fall of Monte Alban and its occupation by Mixtecs, the lord of Zaachila came to dominate much of the Oaxaca Valley, receiving tribute from Teitipac, Tlacolula, Mitla, Macuilxóchitl, Tlalixtac, and Chichicapa. However, a town could be subject to two different independent units; Ixtepei, in the Sierra Zapoteca, owed tribute to a local lord, as well as to the Zapotecs of Tehuantepec and the Mixtecs of Tututepec (Whitecotton 1977, 127).

Linguistic reconstruction provides the most precise guide to the entire set of ethnic groups in Oaxaca, their distribution and historical evolution prior to 1520. Eight of the major languages of Oaxaca belong to the Otomangean family, and they were (and are still) located in the centre, north, south, and west of the state (Fig. 1.6). Those that were concentrated solely in the east constituted separate families, such as the Chontal (Tequistlatec–Jicaque group), the Huave, and the Mixe and Zoque (Mixe–Zoque group) (Flannery and Marcus 1983; Josserand, Winter, and Hopkins 1984; and Suárez 1983). Five Otomangean language groups are of importance in Oaxaca: (1) Zapotecan (Zapotec and Chatino); (2) Mixtecan (Mixtec, Cuicatec, and Triqui; (3) Chinantecan (Chinantec); (4) Popolocan (Mazatec); (5) Amuzgo. The languages that were most closely related were located spatially adjacent to one another, and their proximity suggests that their separation from one another has been comparatively recent (Jossrand, Winter, and Hopkins 1984).

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Fig. 1.6 Oaxaca: language groups

Swadesh has pointed out that linguistic communities tend to develop regional variants; greater similarity can be seen between neighbouring dialects, but less similarity is evident when the geographical distance is increased or the degree of social interaction is reduced (1967, 79). This is the point of departure of glottochronology, a lexicostatistical method of classification that takes into account the fact that language affinity and similarity depend not only on how recently two languages were separated, but also on the amount of contact maintained during the period of separation and differentiation.

Marcus (in Flannery and Marcus 1983, 6) has compared the glottochronological evidence for the divergence of the Otomangeans with the archaeological record and recognized eight stages. Stage 1, around 10,000 BC, was a Paleoindian period in which it is possible that everyone spoke the same language—an antecedent of Otomangean, Mayan, and Utoaztecan. During stage 2, from 8000 to 5000 BC, proto-Otomangean—a tonal language—evolved, and was spoken by hunter-gatherers in Oaxaca and the states to the north. In stage 3, from 5100 to 4100 BC approximately, the Chinantec split off from the Mixtec–Zapotec group, and may have moved southwards to their present location in northern Oaxaca. Archaeologically, the Chinantla went on to diverge from the rest of the Otomangean area, with formative affinities to the Gulf Coast lowlands of Mexico.

Stage 4, from approximately 4100 to 3700 BC, was a period of major language change. The Popoloca-Mazatec group separated from the Mixtecan. As glottochronology suggests that Mixtec and Chatino are separated by fifty-seven minimum centuries, Marcus concludes that the Mixtec–Cuicatec and Zapotec–Chatino stems had begun to diverge by 3700 BC. The initial separation of the ancestors of the Mixtec and Zapotec took place during a period of preceramic hunting and gathering, with some slow evolution towards agriculture.

Stage 5, from 2100 to 1300 BC, was another period of linguistic change. Cuicatec is believed to have split off from Mixtec by 1300 BC, as did Amuzgo as early as 1700 BC, and speakers of both moved south. Triqui separated from the Costa Chica dialect of Mixtec by 2100 BC, but it is not known, archaeologically, when the Mixtecs reached the Pacific. The neighbouring Mixe and Zoque had begun their linguistic divergence by 1500 BC—thirty-five minimum centuries ago. Suárez (1983), however, comments that some researchers have assumed a relationship between Mixe–Zoque and Mayan, and that Huave is possibly linked to Mixe–Zoque rather than to Otomangean. It is probable that many of these linguistic separations were related to increasing population and to migratory shifts to new environments that accompanied the development of sedentary agriculture.

Stage 6, 400 BC to AD 100, witnessed the separation of Mazatec from Chocho-Popoloca between 400 and 300 BC and the divergence of Chatino from Zapotec in approximately AD 100. At about this time, the Chatino may have moved towards the Pacific coast. Internal divergences within Zapotec contin-

ued during stage 7, from AD 500 to 1000, perhaps correlated with the decline of Monte Alban, and the Miahuatlan and Sierra dialects separated from that of the Valley of Oaxaca. During the final stage, from AD 1200 to 1400, Isthmus Zapotec separated from Valley Zapotec (six to eight minimum centuries). This may reflect the Postclassic Zapotec expansion to the Isthmus of Tehuantepec, displacing the Huave and perhaps the Mixe as well, though Marcus observes that archaeological data suggest that the Zapotec had been there many centuries earlier. Marcus therefore underscores the glottochronologists' insistence that their dates represent 'minimum' centuries for separation.

The major ethnic-linguistic groups in Oaxaca have occupied their present approximate locations since before the conquest. Spanish *congregaciones* (concentrations of Indians to facilitate proselytization and conversion), where they occurred, plus the decimation of the population during the first century of the *colonia*, adjusted that pattern at a local scale without disturbing it in any fundamental way (Miranda 1968; Spores 1984*a*). Hence, social isolation at various scales has been crucial for linguistic splitting, for maintaining the geographical coherence of the major language groups, and for generating language differences over very small distances. In view of the enormous diversity of pre-Hispanic tongues, it is hardly surprising that the language of the conquerors, Spanish, became the common language—but very gradually, and, until the second half of the nineteenth century, only in the urban centres.

Conquest and Racial Stratification

Spanish expeditions and conquest, which, as elsewhere in Mexico, produced a racial stratification of whites over Indians, went largely uncontested by the Zapotecs and Mixtecs in and around the Central Valleys (Romero Frizzi 1996). However, Zapotecs, Chinantecs, and the Mixe in the northern sierras were not brought under control until the 1550s (Chance 1989, 16). Outright Indian resistance occurred at Tututepec near the Pacific, where the Mixtecs fought a fierce battle with the Spaniards (Fig. 1.7). One of the reasons for the alleged peaceful nature of the conquest was the fact that the Zapotecs were already paying tribute to the Aztecs, whom the Spaniards had defeated. The Aztecs had maintained a small garrison close to what became, under the Spaniards, Huaxyacac, later to be known as Antequera de Oaxaca and, more recently, as Oaxaca City (Chance 1986*a*).

One consequence of the peaceful conquest was that Zapotec and Mixtec nobles who accepted Roman Catholicism were incorporated into the white ruling class. *Caciques* (hereditary rulers or chiefs) became highly acculturated, dressed in a European, aristocratic manner, and spoke perfect Spanish. Unlike neighbouring Chiapas in the then Captaincy-General of Guatemala, culture and class in Oaxaca could transcend the barrier of race. So it was the non-noble Indians who composed the basis for Oaxaca's colonial peasantries.

Fig. 1.7 Late eighteenth-century place-names (with property of Cortes inset)

From the outset, the densely populated, fertile Valley of Oaxaca was a bone of contention. In 1532 a royal cedula was issued recognizing the urban status of Antequera, located on the eastern side of the Rio Atoyac, but much of the Oaxaca Valley on the west bank of the Atoyac was engrossed by the (absentee) Conquistador, Cortés. He established the Marquesado del Valle, with its four main settlements (the *cuatro villas del marquesado*) in San Pedro Apóstol Etla, Oaxaca del Marquesado, Cuilapan, and Santa Ana Tlapacoya (Fig. 1.7). Control of grants of land in this fertile strip running beneath the ruins of Monte Alban was to remain for three centuries a matter of dispute between Cortés and his heirs, the Spanish crown, and the city of Antequera (which was anxious to acquire cattle pastures). Cortés, however, was more concerned to collect tribute from the Indian villages of the Marquesado, than to develop the land commercially (García Martínez 1969), though a highly lucrative business was eventually developed on his cattle estates in Tehuantepec (Brockington 1989).

Outside the Central Valleys, the Zapotec, Mixtec, and other ethnic groups, such as the Mixe and Chatinos, were subordinated to the Spanish *peninsulares.* Spaniards began to take up land in the isthmus—where indigo became an important crop, the more fertile interior valleys, and the coastal plains, and to acquire *encomiendas* (land grants, with the right to assess tribute) and *repartimientos* (labour drafts) (Gerhard 1972). Relatively few *encomiendas* were granted to individuals, and the crown quickly recovered most of them (Olivera and Romero 1973). Cattle and sugar estates became established, depending on the potentialities of the environment. However, unlike other parts of Mexico, the great *hacienda* did not become a major feature of the colonial landscape of Oaxaca, and the Indian population retained most of its traditional lands (Taylor 1972). The highland areas of the Mixes and Chatinos were too deficient in resources and too isolated to attract Spanish settlement on a substantial scale. But, where agricultural land was of good quality, as in the Oaxaca Valley and the smaller valleys in the Mixteca Alta, the Indians held on to it with tenacity (Taylor 1972).

Indian Demographic Decline and Partial Recovery

Despite the endurance and tenacity displayed by the Indians, especially with regard to their occupation and control of land, the encounter between them and the Spaniards in New Spain, in general, and Oaxaca, in particular, was intensely traumatic. This is clearly demonstrated by the excessive mortality suffered by the population, estimates of which were put as high as 3 million (Miranda 1968) or 4 million (Münch 1978) at the conquest, though recent regional figures aggregate to approximately half of Spores's estimate of 1.5 million inhabitants (1967, 72). Epidemics of European diseases, especially measles and smallpox, coupled to forced labour and enforced cultural change,

lay at the root of the decimation of the Indian population, a demographic collapse of continental proportions, and one with severe social and economic consequences in Oaxaca.

Taylor records that the Oaxaca Valley, with an estimated Indian population of 350,000 on the eve of conquest, had suffered a decline to 150,000 inhabitants after the first fifty years of the colony. The population dropped further to between 40,000 and 45,000 at the end of the first century of Spanish settlement (Taylor 1972, 17–18). An even more cataclysmic decline for the indigenous population of the Mixteca Alta has been computed by Cook and Borah (Fig. 1.7), who estimated a population of 700,000 for 1520 and 57,000 for 1590 (1968, 32). More recent archaeological work suggests a lower figure for the Mixteca Alta of 250,000 to 300,000 at the conquest, and therefore a drop more consistent with that in the Oaxaca Valley (Spores 1984*a*, 96). It is likely that the pre-conquest population of Tehuantepec plummeted from about 50,000 to 6,000–7,000 in 1560 (Brockington 1989; Zeitlin 1984). Population decline in the remote northern sierras occupied by the Zapotecs, Chinantecs, and Mixe was less precipitate, and the Indian population fell from 96,000 in 1548 to 32,000 in 1568 and 21,000 in 1622 (Chance 1989, 62).

The Indian population began to recover, numerically, during the eighteenth century. Taylor provides Oaxaca Valley estimates of 70,000 for 1740 and 110,000 for the 1790s (1972, 18); and Cook and Borah calculate that the Mixteca Alta had about 50,000 inhabitants in the 1740s rising to 76,000 in 1803 (1968, 54–5). But it was not until the 1970s that the Oaxaca Valley was to record a population equivalent to that achieved before the conquest—and this figure took into account the rapid demographic expansion of Oaxaca City (Cook and Diskin 1976, 13). Even in the northern sierra, where the demographic collapse of the post-conquest period was less severe, the recovery was so slow that it was not until 1960 that pre-conquest population was once more matched (Chance 1989, 63). In Oaxaca as a whole, the likely population total as of 1520 was reached again in the late nineteenth century. So, labour was in short supply throughout the colonial and early independence period, especially on the estates, and black and mulatto slave labour was frequently used, especially in the tropical lowlands (Brockington 1989).

Colonial Population and Race Distribution

A guide to the size, distribution, and racial composition of the entire population of the Oaxaca Intendancy (Fig. 1.7) during the late colony is provided by the Revillagigedo census of 1793. Out of a total population of 411,336, 88 per cent were Indian, 6 per cent were Spanish/Creole, and 5 per cent mixed (*castas*), presumably mostly *mestizo* (Indian-white), but with some black elements (Hamnett 1971*a*, 188). Taylor mentions 16,767 free blacks and mulattoes in Oaxaca in the 1790s, with a small concentration of them in the Oaxaca Valley

(1972, 21). There were also slaves on the Pacific Coast's cotton and sugar plantations (Spores 1984; Rodríguez Canto 1996), and on the cattle ranches of the Marquesado del Valle at Jalapa del Estado in Tehuantepec, where race mixing was common (Brockington 1989). Racial exclusivity was more marked in Oaxaca than in Mexico as a whole at this time, since race mixing typified about 40 per cent of the population of New Spain according to the Noriega census of 1810, by which time blacks were disappearing as a recognizable category (Aguirre Beltrán 1984).

By far the largest settlement in 1793 was Antequera (Oaxaca City), which, with 19,069 inhabitants, was the third largest urban centre in New Spain after Mexico City and Puebla. It had just under 5 per cent of the Intendancy total, though almost half of all the Spaniards and white Creoles were located there—absentee landowners, administrators, doctors, lawyers, clergy, artisans, and manual labourers (Chance 1978). The segregation of whites from Indians, based on the urban residence of the former and the rural location of the latter, must account for the comparative absence of miscegenation in Oaxaca. Very different circumstances existed in the capital, Antequera, where Indians made up approximately one-quarter of the population and race mixing was common, but insufficient to undermine the rigidity of racial stratification and segregation (Chance 1978 and 1981).

Major concentrations of Indians occurred at Villa Alta, in the Sierra Zapoteca, where cochineal and textiles were produced (Chance 1989), and at Huajuapan and Teposcolula in the Mixteca Alta, where the cochineal industry was well developed (Romero Frizzi 1990*a*). Spaniards were thinly scattered throughout the rural areas, and numerous only in Teposcolula, Jicayán, Tehuantepec, and Juslahuaca (Juxlahuaca). These were the very same localities where the mixed population concentrated (Fig. 1.8). There was a strong association between the white Spanish and Creole population and the supply and marketing of cochineal or the development of ranching in the tropical lowlands. Likewise, the overall distribution of population coincided with the diagonal line of communication running from north-west to south-east across the Intendancy from Huajuapan via Antequera to Tehuantepec.

Indian Landholding

One of the consequences of the exploitation of the *nopales* (and the Indians that cropped them) was that land acquisitions were not needed to create *haciendas*. So Indian *caciques* retained, with royal assent, both their status and, to a large extent, their landholdings throughout the colonial period (Taylor 1972, 65). Although *caciques*' holdings were usually fragmented, they were often vast, protected by primogeniture (Spores 1984*a*), and retained their attached *mayeques* (serf-like peasants) (Waterbury 1975). The *cacicazgos* of Etla and Cuilapan were the largest estates owned by individuals, Indian or

Fig. 1.8 Race in eighteenth-century Oaxaca (from Hamnett 1971*a*)

Spanish, in the Central Valleys, and the sixteenth-century Mixtec *caciques* of Yanhuitlán, Tlaxiaco, Teposcolula, and Nochixtlan (Fig. 1.7) were valued at hundreds of thousands of pesos, much of it held in property (Spores 1984*a*).

Indian communities and individual peasants, while dominated politically and economically by the Spanish, also remained important landholders. This was universally the case in the arid highlands of the Mixteca Alta, where the *nopaleros* for cochineal were concentrated and small stock numbering 100,000 head were recorded—particularly sheep (Miranda 1990). However, Indian landholding also persisted in the valleys of the Mixteca Alta (Spores 1984*a*), as well as in the Central Valleys. Indians produced maize, beans, and squash for subsistence, and stock for skins and tallow (Chance 1986*a*). The Spanish government granted the Indian communities legal title to their original lands (*patrimonio primitivo*), and also gave them the right to receive additional grants from the crown (Waterbury 1975).

Indian peasants worked the best of the Central Valley's cropland in the sixteenth century—using oxen and the Spanish plough. In general, most Indians were still self-sufficient farmers on the eve of the independence movement in 1810 (Taylor 1972, 107). Indigenous communities were retained under crown administration, and only a handful became dependent on lands they did not own; three or four towns relied on Spanish *haciendas* for their basic needs; and the residents of several others sharecropped.

Taylor argues that the Indian peasant in the Oaxaca Valley in the eighteenth century had more individual and communal land at his disposal than his descendants were to have in the late twentieth century (1972, 107). This was largely because of the limited possibilities for land redistribution after the Revolution of 1910—due to population increase and the right of the 'small' owners (*pequeños propietarios*) to retain rump estates. A crucial factor influencing Indian retention of property was the existence, throughout the period of the colony, of an imperial legal system that recognized Indian land rights. Also important was the determination of the Indians to defend their individual and communal property at law, and the economic role they played in providing food, especially maize and wheat, for Antequera.

Haciendas

The development of *haciendas* in the Oaxaca Valley was a slow and fluctuating process, and involved a shift from cattle production in the sixteenth century to the more diversified output of cattle, maize, and wheat during the seventeenth. Smaller estates, known as *labores*, became common in the seventeenth century and expanded in the eighteenth, as a result of purchase by Spaniards from Indian nobles and the Indian community. Estate ownership was quite unstable, except where entailment (*mayorazgo*) applied. Property changed hands through sale rather than by inheritance (Taylor 1972).

Most Spanish landholdings in the Oaxaca Valley remained not only small, but also widely dispersed throughout the colonial period. Spaniards owned more valley lands in the seventeenth century than they did in the eighteenth: at most 'Spanish estates accounted for one-third of the land in Oaxaca, and the largest holdings were suited only to grazing' (Taylor 1972, 163). Outside of the Oaxaca Valley, extensive activities were also the norm among the Spaniards (Romero Frizzi 1990*a*). In the Mixteca Alta herds with thousands of head of small stock were moved across vast areas in the form of 'floating *haciendas*', the net result of which was the devastation of an already fragile and eroded environment (Pastor 1987).

The comparatively small scale of the private Spanish landed estate in the Oaxaca Valley was partly offset by the presence of the Catholic Church, which was the principal non-Indian landowner. Engrossing about one-fourth of the productive rural property in the Oaxaca Valley, the various Church groups between them controlled more land than all the other Spanish landholders combined. The monastery of Santo Domingo in Antequera was the largest single landowner, with over 20,000 acres spread across seven estates, while the convent of Santa Catalina de Sena owned 210 houses in Antequera and more than 70,000 pesos' worth of the best grazing and arable land. Although much ecclesiastical land was in fact underused, Church holdings in Oaxaca remained undisturbed into the independence period (Taylor 1972).

A similar situation obtained in the Mixteca Alta, where there was little evidence of Spanish usurpation of Indian land (Romero Frizzi 1990*a*). It was far more common for Indians to rent, rather than sell, farming or grazing land to Spaniards; and sales tended to involve house plots in Yanhuitlán, Teposcolula, Tlaxiaco, and Tamazulapan. If there was land acquisition by the Spaniards, it was the Dominicans in Yanhuitlán who were guilty (Spores 1984*a*). The overall pattern is faithfully captured in data compiled in 1810 that showed there were only 83 *haciendas*, 269 ranches, and 5 cattle estates in Oaxaca at that time, compared to 928 *pueblos* with peasant cultivators and artisans (Reina 1988).

Spanish Political and Religious Domination

The white conquerors imposed the political and religious institutions of Spain on to the indigenous population (Spores 1984*a*). Antequera became the centre of Spanish power, with an *alcalde mayor* and *corregidor*, who were magistrates and had the contradictory remit to collect Indian tribute (when *encomenderos* died without heirs) and impart justice to the indigenous population (Olivera and Romero 1973). Holders of these offices were also eventually located in the smaller settlements that the Spaniards had inherited from the pre-colonial period, many of which had, before the 1520s, been given Nahuatl (Aztec) names (Gerhard 1972). Nahuatl was widely used by scribes and, in the Indian

settlement of Jalatlaco, adjacent to Antequera, by Indians of all language-ethnic groups until the shift to Spanish was complete in the late eighteenth century (Chance 1978).

During the colonial period, a *pueblo de Indios* needed eighty tributaries (or about 360 inhabitants) to form an autonomous government (Pastor 1987). According to Taylor:

> The Crown encouraged the economic and social organization of colonial life around towns and villages. Peasants were required to form local governments to respond to royal orders, to collect taxes, to provide labour service, and to maintain a church, a community treasury, and sometimes a hospital. All of these institutions encouraged local people to think of themselves as a distinctive, separate community. Oaxaca is notorious for the atomization of social life in this period, with each little hamlet struggling to achieve the status of an independent head town. (1979, 23)

From the sixteenth century onwards, the Spaniards in Oaxaca set up *cabildos* (councils) in the indigenous communities to govern the locality under a system of indirect colonial rule (Carrasco 1963; Romero Frizzi 1975, 1). Each *república de Indios* (community) was turned into an inward-facing entity, divided off from its neighbours and separately integrated into the colonial system of administration via the *alcaldías mayores* and the *corregimientos*, located in the major settlements, such as Oaxaca City, Teposcolula, or Villa Alta. In the early years of the colony, the Indian *caciques* were in charge of local administration, but, later in the sixteenth century, they were replaced by elected officials, following Spanish usage (Romero Frizzi 1975). By the eighteenth century, *caciques* were often elected to *cabildos*, not because of their lineage, but because of their socio-economic standing.

As recognized social units under Spanish auspices, Indian villages were remodelled to have a rectangular grid of intersecting streets and building alignments, with the central plaza occupied by the Catholic church and the civil offices, plus their own inalienable communal lands and their own political organization based on colonial models. In 1810, 928 *pueblos de Indios* were enumerated within the Intendancy of Oaxaca, with an average population of 600 in each one (Hamnett 1971*b*, 52 n.). Community income and expenditure (the *caja de comunidad*) were recorded in an account book, and audited by Spanish officials; periodic scrutiny was essential, since it was from the village treasuries that tribute payments were made. These nuclear settlements, often with outlying dependencies, plus 'resource areas and farmlands, constituted the functioning native community in colonial Oaxaca' (Spores 1984*a*, 168).

The composition of the *cabildo* varied from place to place, but the most common form involved a *gobernador* (governor), with two *alcaldes* (judges), two *regidores* (councilmen), and a number of *alguaciles* or *topiles* (police and messengers) (Olivera and Romero 1973). By the late colonial period, the *caciques* remained socio-economically important only in the Central Valleys. Among Rincón Zapotecs, *principales* had usurped the political influence of the

caciques, but were under pressure from upwardly mobile *macehuales*, who gradually became prominent office-holders in local *cabildos* (Chance 1986*b*). It was not uncommon for different *cargo* duties to be ascribed to nobles and commoners (Chance 1989).

Reflecting on the colonial past in an essay published more than thirty years ago, de la Fuente linked community closure to boundary disputes with neighbours, almost always conceived as hostile. 'Each village is, as a matter of fact, like a small republic, at odds with the others because of various disputes—among which predominate disputes related to questions of land' (1965, 32).[1] In a similar vein, Chance has argued that his research in Villa Alta confirms that 'the landholding village—the pueblo—gained importance in the colonial period at the expense of ethnic and regional ties' (Chance 1989, 124). As early as the sixteenth century, Yanhuitlán, in the Mixteca Alta, was beset with boundary, resource, and market-day disputes involving its neighbours (Spores 1984*a*). Most enduring of all was a dispute with the subject community of Tecomatlán, which attempted to break away in the 1550s, giving rise to boundary and land conflicts that ran into the 1970s (Spores 1984*a*, 214).

Spanish imperial control was religious as well as political. Oaxaca was one of the great episcopal sees of New Spain, established with Antequera as its seat in 1535. The origins of the state of Oaxaca may be traced to the diocesan boundary of the bishopric (which extended north to the Gulf of Mexico), though the Intendancy boundary of 1786 (associated with the Bourbon reforms), accords even more precisely to the current federal unit (Fig. 1.7 and Fig. 1.1). In 1592, the Dominicans, who had first entered the area in 1528, established a province, also based on Antequera, overlapping to a large extent with the see. During the late sixteenth and seventeenth centuries Oaxaca came under the spiritual control of the Dominican Order, which, 'from its Baroque convents and churches, exercised a theocratic authority that virtually excluded the power of the Crown' (Hamnett 1971*a*, 1).

Accordingly, Oaxaca was a region where 'Castilian authority influenced and permeated already well-formed indigenous cultures, and where, gradually, not without resistance, and often by means of symbols and demonstrations, the religion brought by the friars exercised a mystical fascination . . .' (Hamnett 1971*a*, 1). The culture-contact of conquest and colonialism in this phase of the first encounter between Europeans and non-Europeans outside Europe, was, however, complex and syncretic. Superficially, the Indians fitted in with the requirements of the Spanish, supporting *cofradías* in the late seventeenth and eighteenth centuries to cover the food, supplies, and ritual costs (managed by a *mayordomo*) of Catholic feast-day celebrations (Chance and Taylor 1985). By 1802 there were around 800 confraternities in Oaxaca, many of them with large holdings in cattle and cochineal (Lavrin 1990, 225). According to Spores, 'the church more than any other institution served to integrate society across

[1] This and all subsequent Spanish quotations have been rendered into English by the author.

geographical, social and ethnic boundaries. Christian ideology offered an acceptable body of explanation, a psychological palliative, and hope and security in a life hereafter' (1984*a*, 149–50).

However, the Indians' isolation left them considerable discretion in social organization. They were subject to a certain amount of resettlement (*congregaciones*) in the *sierras*, though they tended to slip back to their original locations; in the Oaxaca Valley a major resettlement of Mixtecs took place around the open church at Cuilapan, which the Dominicans built for the specific purpose of conversion. But in reality, in Oaxaca, Indian rural communities held on to their lands from which they subsisted by producing the God-given triad of maize, beans, and squash; and they clung to their old gods (Carmagnani 1988), later grafting them on to the Catholic saints (Spores 1967, 25–6). In the mid-sixteenth century, the *cacique* of Yanhuitlán and several *principales* were brought before the Holy Inquisition for idolatry, heresy, human sacrifice-murder, cannibalism, clandestine burial, polygyny, and related crimes. There was at least some substance to the charges, even though no conviction was obtained (Spores 1984*a*, 150).

Greenberg's field experience in southern Oaxaca in the 1970s testifies to the enduring significance of the Indians' pagan beliefs and practices. 'It was only after extensive work that I realized that what I had perceived as "bones" were the flesh and blood of Chatino belief and that "Catholicism" had been completely reworked and resynthesized in terms of the pre-existing nexus of ritual and doctrines' (1981, 82). The links between land and subsistence cultivation, landscape features and belief systems, community and the Catholic fiesta system were created in the intercultural zone between Spaniard and Indian during the 300-year period of the colony. In Oaxaca, this nexus persists, despite many changes, to this day (Carrasco 1966; Marroquín 1989).

Cochineal and Textiles in the Mercantile Economy

Key contributions of the Indians to the mercantile economy of colonial Oaxaca were the production of silk, which dominated the output of the Mixteca, notably around Yanhuitlán, between 1540 and 1580 (Spores 1967; Chance 1986*a*), and cochineal, which was first exported to Spain in 1526 (Hamnett 1971*b*). Cochineal developed very rapidly as the European textile industry took off in the eighteenth century. In 1745, the Spanish crown awarded Oaxaca a monopoly over cochineal production; annual output between 1760 and 1810 oscillated in weight between 500,000 and 1,000,000 pounds (Hamnett 1971*a*, 169–70). At the mid-point of that period, 1786, Oaxacan cochineal accounted for about 6 per cent of the value of the entire Spanish–American trade registered at Cádiz (Hamnett 1971*a*, 174).

Early in the eighteenth century, more than half the agricultural labourers of Oaxaca were engaged in cochineal production. Major concentrations of

cochineal extraction were in the arid areas of the Mixteca, such as the Coixtlahuaca Valley, Tamazulapan, Yanhuitlán, Teposcolula, Juxlahuaca, and Nochistlan (Nochezli), around Ocotlán in the Central Valleys, and at Villa Alta in the Sierra Zapoteca. Cultivation of cochineal insects, which involved supervising their breeding, feeding on the *nopal* cactus, and harvesting by hand, was a labour-intensive activity and more likely to be carried out by Indian peasants and their families than by employees on *haciendas*. But the spread of cochineal production had negative consequences for the Indian population, since the cultivation of the *nopaleros* (cactus groves) led to the neglect of Indian subsistence crops—with dire consequences for nutrition.

In Oaxaca City, the focal point of cochineal exchange, merchants made up the majority of the élite (most of them *peninsulares*), though it also housed high government officials, senior clergy, and owners of the large estates. The demand for cheap cotton goods from Indians and the urban poor throughout New Spain also stimulated the city's clothing industry: by 1792, Oaxaca's *obrajes* had more than 500 cotton and silk looms. 'Oaxaca, because of these activities, was often considered by the Spanish Peninsular merchants and the Royal administrators there to be next in importance to the silver-mining regions of Guanajuato and Zacatecas' (Hamnett 1971*a*, 1–2).

Many of the indigenous crafts of the pre-conquest period continued in rural Oaxaca, notably the cotton-mantle industry of Villa Alta in the Sierra Juárez and Teotitlán del Valle in the Oaxaca Valley. But, after the expansion and subsequent decline of the silk industry during the sixteenth century, the cochineal, cotton, and cotton-mantle trades became the central activities of the indigenous population 'upon whose labours the Spanish element depended for their prosperity and political supremacy' (Hamnett 1971*a*, 1).

Indians were, however, the victims of trade monopolies, coercion, and exorbitant prices at the hands of the *alcaldes mayores*, who emerged as crucial middlemen between Indian suppliers of commodities and the local urban-based merchants. *Alcaldes mayores* issued cash, equipment, or supplies, also known as *repartimiento*, to the Indians on the account of merchants, or *aviadores*; in return, the Indians would repay their debt in goods such as cochineal, cotton, and cotton mantles. According to Hamnett (1971*a*, 6), 'this form of trading always denounced by the Crown and clergy (at least at the level of the episcopacy) and contrary to the Laws, occurred frequently in the province of Oaxaca, because of the demand for its products'.

An alternative interpretation has recently been advanced by Baskes, who concludes that 'Alcaldes Mayores did not have nor did they need, sufficient power to coerce Indians to participate in the market. Indians accepted *repartimientos* voluntarily, because that was the only way they could obtain credit in a high-risk situation' (Baskes 1996, 28). An even more unlikely scenario is advanced by Carmagnani. He suggests that traditional community leaders were able to adjust between the resources available to the community and the domestic units of which it was composed using the *caja de comunidad* and

cofradías (lay brotherhoods)—thus protecting the Indian communities from the logic of mercantile exploitation (Carmagnani 1988, 178).

However, at Villa Alta, cochineal was bought from the Indians for half the price that the *alcaldes mayores* could later command; likewise, cotton mantle fetched only half its ultimate market price, and two *repartimientos* had to be woven per month. In the face of such blatant forms of exploitation, a series of rebellions broke out in Oaxaca, following a peasant rising in Tehuantepec in 1660, where the Indians killed the *alcalde mayor* (Díaz-Polanco 1996). 'The movement spread across to Nejapa against the Alcalde Major's *repartimiento* for cochineal and cotton mantles. In Ixtepeji, the *alcalde mayor* was forced to flee as a result of a rising against his *repartimiento* for cochineal. Similar outbreaks occurred in Teutila and Teococuilco, in Villa Alta, and across to Huajuapan' (Hamnett 1971*a*, 13; Chance 1989).

Investigation by an imperial agent sent from Mexico City revealed the abuse; but putting a permanent stop to it was beyond the capacity of absentee authorities. *Repartimientos* limped on beyond the introduction of the Bourbon reforms at the end of the eighteenth century (Hamnett 1971*a*), although it was recognized that the lack of provision within the administrative system for payments to *alcaldes majores* encouraged their coercive tactics. Hamnett, in his exhaustive study of administration and trade in Oaxaca, added to the list of their misdeeds: 'the Alcaldes Mayores were in the habit of seizing Indian lands, planting them, and using the rightful owners as the labour force, paying them at a miserable rate. They appropriated the water supply—sparse enough in any case—for their own irrigation needs, to the detriment of other cultivators' (1971*a*, 51).

The cochineal trade, imposed on Oaxacan Indian peasants by Spanish merchants and officials, disturbed the original pattern of cyclical peasant markets (Spores 1984*a*), and replaced them with a dendritic system. A dendritic market system is characterized by peasant producers, who control their own means of production, but are subordinate to a commercial class that monopolizes the supply of manufactured goods (Greenberg 1981). Typically, an élite monopolizes the commercial centres (here notably Oaxaca City) and transport, and peasant participation as middlemen is low. This dendritic system was destroyed with Mexican independence, and the pre-Hispanic subsistence-orientated cyclical pattern, which had persisted among the peasantry, resurfaced (Feinman, Blanton, and Kowalewski 1984).

Sovereignty: Political and Economic Crises

The War of Independence broke out in 1810, and within just over a decade transformed New Spain into Mexico, the Oaxaca Intendancy into a state of the federal republic, and Antequera into Oaxaca City. An immediate consequence of the war, in Oaxaca, was that the cochineal trade was threatened, the white

peninsular merchants and administrative élite quit Antequera, and capital flight began.

The catalogue of Oaxaca's woes during the independence wars and after sovereignty in 1821, though by no means unique in Mexico, was a long one. Oaxaca's trade links to Spain and Europe via Vera Cruz were severed, and Oaxaca City's functions contracted to the level of the state, where the ecclesiastical role of the see continued, although there was no bishop between 1827 and 1842. The city was reduced to providing business and service functions for the slender number of urban residents and the impoverished and disheartened peasantry of the rural areas.

In the 1820s Guatemala replaced Oaxaca as the main supplier of European cochineal, though output continued at a reduced level, notably in Ocotlán and Ejutla, before disappearing at the end of the nineteenth century. Free trade virtually destroyed Oaxaca's textile industry; and manufacturing contracted to a narrow range of products destined for the local market—*aguardiente* (distilled alcohol), *pulque* (a fermented drink), and soap. In Oaxaca City, weaving, pottery, woodcarving, cabinetmaking, and metalworking survived, but at levels of productivity lower than in the eighteenth century (Berry 1981). Oaxaca's peasantries retrenched into an isolated world characterized by near self-sufficiency, and *haciendas* survived as producers of maize and wheat for the state capital.

Newly independent Mexico was essentially weak. Racked by political crises throughout its first fifty years of sovereignty, in 1848 the fledgling state suffered the calamity of losing half its territory to the USA. The main accomplishment in Oaxaca during the first two decades of independence was the creation, by the state legislature, of the Instituto de Ciencias y Artes, which opened in 1827, and was to become a training ground for local professional men and a seedbed of Mexican liberalism, federalism, and anticlericalism. Oaxaca's two most famous sons, and Mexico's most outstanding nineteenth-century presidents, Benito Juárez and Porfirio Díaz, held posts at the institute (Hamnett 1994).

Juárez became Governor of Oaxaca between 1848 and 1852, and concentrated on state infrastructure, such as bridge building and improvements to the road to Tehuacan via the Cañada, which led to Mexico City (Berry 1981). This was also the period in which the white-*mestizo* stratum began to exercise renewed control over the Indian population, which still made up almost 90 per cent of the Oaxaca total. As an expression of this reconfirmation of power, 300,000 hectares out of the 1,097,000 belonging to Indians were allegedly transferred to members of the dominant group around the middle of the century (Carmagnani 1988, 236).

Porfirian Political Control, the Economy, and the Revolution

Dying in office as president in 1872, Juárez was succeeded by Lerdo, but in 1876 Porfirio Díaz seized power, thereby initiating an elected dictatorship that lasted more than thirty years. Extensive fraud was used to maintain his permanent domination of elections; between elections, *rurales*, answerable directly to Díaz, controlled the countryside, using strong-arm tactics, and 'pacified' *haciendas* characterized by labour troubles—though debt peonage seems to have operated in a rather benign way in the Oaxaca Valley (Cassidy 1981). After the 1890s, compromise and conciliation provided a veneer for the more brutal aspects of the regime.

During the Porfiriato, Oaxaca's *municipios*, which, from the 1870s, had been grouped into twenty-five administrative *distritos*, were placed under *jefes políticos* loyal to Díaz. This did not stop their multiplication, as the 874 villages that operated systems of communal land tenure in the mid-nineteenth century attempted to secure administrative status in defence of their territory, but more from one another than from the *hacendados* (Ruiz Cervantes 1988*b*, 354). As early as 1822, there were 232 acknowledged *ayuntamientos constitucionales,* yet even settlements with fewer than 1,000 inhabitants—the demographic threshold for municipal recognition (Pastor 1987)—were reported to aspire to this status (Hensel 1997, 232). Their success may be judged by the fact that there were 452 *municipios* in 1883, 465 in 1891, and 1,131 in 1910 (Ornelas López 1987*b*), though the majority of the latter seem to have been *agencias municipales*. So the *pueblos de Indios* of colonial times gave way to *pueblos de ciudadanos* (communities of citizens) in independence.

Meanwhile, with the abolition of corporate property, *cofradías* lost control of their land, and the formerly separate civil and religious offices of colonial times were joined to form a ladder of esteem which adult men were expected to ascend during their lifetime. Chance and Taylor argue that 'the modern civil-religious hierarchy in peasant villages . . . is more a product of the 19th century than a colonial adjustment that crystallized in the early period of Spanish-Indian contact' (1985, 22).

During the Porfiriato, the colonial system of municipal government was elaborated into a more dictatorial process of regional control through the *jefes políticos*, though some isolated and resource-deficient communities at high altitude were able to seal themselves off from outside control. Other communities, especially those in the tropical lowlands, were opening to economic influences from the outside. Irrespective of locale, the principle of the *municipio libre* became an important plank of revolutionary reform after 1910, the main thrust of which was to outlaw re-election to the federal presidency.

Díaz was a devotee of the idea of material progress. Surrounded by a cabinet of *científicos*, he embarked upon a policy of state involvement in infrastructural improvements, often in partnership with foreign engineers and

investors. Even backward and isolated Oaxaca was eventually drawn into the programme of modernization, and Oaxaca's regional economy improved after the 1870s. Expansion of landed estates was modest by Mexican standards of the day, but improved communications and peaceful circumstances led to a general improvement in the economic climate (Chassen 1986).

Mines in the Sierra Juárez, principally La Navidad, at Chichicapan near Ocotlán, and near Tlacolula, some of which had been opened up in the late colonial period to break up the monopolies of the *alcaldes mayores*, received a new impetus during the Porfiriato. Investments came from both the USA and Britain, especially after the railway broke Oaxaca's isolation in the 1890s, and some local capitalists switched from cochineal to mining gold, silver, copper, and lead. Approximately half the Oaxacan bourgeoisie at the beginning of the twentieth century was of European origin and predominantly Spanish (Chassen1990*a* and *b*; Chassen and Martínez 1990).

The major achievement, and symbol, of the Porfiriato in Oaxaca, was the railway between Mexico City and Oaxaca City, via Puebla, which opened in 1892 (Fig. 1.1). The line was later extended to Tlacolula and to Ejutla via Zimatlán and Ocotlán. For the first time in almost 400 years, the isolation of Oaxaca, or at least its state capital and the Oaxaca Valley, had been broken. Cash cropping increased, *haciendas* expanded, and maize, beans, and beef began to be exported to other parts of Mexico. Oaxaca's peasantries, particularly those at high altitude, however, remained largely untouched (Chassen 1986).

The pace of economic growth in Oaxaca increased with the turn of the century. There was substantial foreign investment in mining and commercial agriculture, to the extent that Oaxaca ranked fifth out of the Mexican states as a recipient of US investment in Mexico in 1902. Between 1902 and 1907, US investment in mining (especially silver) in Oaxaca reached $10 billion, second only to the state of Guanajuato. In addition, a wide range of tropical cash crops was produced for the export market—coffee, tobacco, sugar, cotton, and India rubber (Garner 1995). By the outbreak of the Revolution in 1910, Oaxaca had 100 mines, mostly American owned, employing a substantial Indian labour force, and a metal foundry was on the point of opening in the state capital (Murphy and Stepick 1991*a*).

Improved economic conditions characterized Oaxaca City by the end of the nineteenth century. Foreign-owned enterprises manufactured beer, cigarettes and cigars, glassware, soap, hats, shoes, and matches, and there were sufficient numbers of American and British residents at the end of the Porfiriato to warrant publication of an English-language newspaper. With a population approaching 40,000, Oaxaca contained the local Porfirian élite of *hacendados*, mine-owners, lawyers, administrators, and *políticos*, who dominated an urban mass, engaged in marketing, manufacturing, and the provision of petty services, including domestic work. In Oaxaca City there was even a *fin de siècle* theatre (now the Teatro Macedoneo Alcalá) and casino (Esparza 1988).

Of great national significance, but of lesser importance for Oaxaca City, was the opening of the Port of Salina Cruz and the inauguration of the Ferrocaril Nacional de Tehuantepec in 1907 (Fig. 1.1). Completed by Pearson (later Lord Cowdray), a British engineer, more than twenty-five years after the first stretch of track had been laid, the trans-isthmus railway promised to become a lucrative inter-oceanic trade route under Mexican state-ownership. Moreover, it provided national control of a sensitive geopolitical gateway between the Gulf of Mexico and the Pacific. At the outset, 'every two hours a train entered or left with goods from all parts of the world' (Esparza 1988, 279). This rail link, however, was to be undermined within a decade by the outbreak of the Mexican Revolution (1910), and, even more devastatingly, by the opening of the Panama Canal under US protection (1914).

Despite the arrival of the railway in Oaxaca City via Etla, Oaxaca remained one of Mexico's states least affected by the Porfirian project of modernization. There was simply an insufficient material base on which it might operate; and such developments as did occur were barely in hand before the Revolution broke out. 'The numerous predictions in the 1860s and 1870s of a harvest of untold bounty were never fulfilled, and at the end of the Porfiriato both promoters and government were still speaking in terms of the potential rather than the proven wealth of the state's resources' (Garner 1995, 8). It is not surprising, therefore, that Oaxaca stood aloof from the 1910 Revolution against Díaz, as much as was possible, and in 1915, following a liberal, anti-centralist policy that had been tested and abandoned almost a century earlier—it seceded from Mexico.

The Oaxaca Sovereignty Movement was a loose coalition of urban *porfirístas*, *serrano caudillos*, and disaffected revolutionaries. In 1916, the Movement was defeated by the forces of President Carranza. The post of *jefe político* was abolished, and the land reform, enacted at the federal level in 1915 to return land to the communities, was enforced (Ruiz Cervantes 1988*b*, 390–1). The secessionists, mostly peasant *serranos*, withdrew into the Sierra Juárez and the Mixteca, from which they prosecuted a guerrilla war until 1919 (Garner 1985, 1988). In 1920, García Vigil was elected Governor of Oaxaca. Although Oaxaca was not completely pacified, he rewrote the state constitution, continued land redistribution to the landless, and attempted a tax reform, which brought him into conflict with the *caudillos* of the northern mountains who had led the secession (Ruiz Cervantes 1986).

Disgusted with the corruption of the post-revolutionary federal government, García Vigil withdrew recognition of it, thereby restating Oaxaca's sovereignty. In 1924, abandoned by the secessionist *caudillos*, he was executed, and Oaxaca was reabsorbed into Mexico as one of its least significant states. Lacking spokesmen with clout, and with no local issue of sufficient national importance to require attention, Oaxaca failed to excite the concern of the centralizing federal authorities for almost fifty years.

Population and Race in Independence

Oaxaca's demographic record reflected the economic setbacks of the post-independence decades. Its population of 417,000 in 1820 was barely more than in 1793, and a good deal less than in 1810, when the census recorded 596,000. By 1850, it was close to 500,000, yet it took another half-century to rise to one million. If demographic changes after independence may be described as gradual, alterations to the race hierarchy, too, were slight.

Independence abolished the formulaic socio-racial distinctions (*castas*) of the colonial period, which, anyway were collapsing nationally, if not in Oaxaca, under the increasing impact of miscegenation. It also abolished nobility among the Indians. What it did not do, however, was to eradicate the race- or colour-class stratification (although the presence and influence of whites clearly diminished—in 1857 there were only 156 Europeans in Oaxaca). Nor did it extend civil rights to the bulk of the Indians (87 per cent in 1857) or *mestizos* (12 per cent), who remained socially marginal, though numerically in the vast majority (González Navarro 1990*b*). The independence struggle had not involved a radical restructuring of society. It had been essentially a conflict between two white élites; between the *criollos* (American-born whites) who wanted independence from Spain, and the Spanish-born *peninsulares*, who were loyal to, and frequently officers of, the crown.

An example of the way in which race affected public life in the early independence period is provided by the Liberals, who dominated the Conservatives, politically, in Oaxaca throughout the first half of the nineteenth century. They were divided into radical and moderate factions, loosely associated with socially mobile *mestizos* and established white *criollos*, respectively. However, the fact that both Benito Juárez (a Zapotec from Gelatao) and Porfirio Díaz (of part Mixtec descent) were prominent in Oaxaca's politics and later became Presidents of Mexico, suggests that, as during the colony, educated and upper-class 'Indians' were able to advance. Both men subscribed to the liberal view that Indians were fundamentally obstacles to progress and needed to 'modernize' and become citizens—like themselves.

In short, a class stratification was emerging among Spanish speakers, from which monolingual Indian-language speakers (the majority in Oaxaca) were excluded. In 1878 it was judged that 76 per cent of the Oaxaca population spoke Indian languages, and that only one-third could communicate in Spanish (González Navarro 1990*b*). By 1890, 78 per cent of Oaxaqueños were Indian, while the 1910 census reported that 49 per cent were Indian-language speakers (Chassen 1986).

It followed that the obligations of the upper and lower classes to the independent state were markedly different. The burden of taxation fell on the upper classes, while *mestizos* and Indians suffered from recruitment into the

army and various work-gangs (Berry 1981). Poverty, land disputes, and struggles over access to the salt ponds gave rise to Indian rebellions in the Isthmus in the 1830s and 1840s, while vagabondage, overlapping with armed uprisings in Tlaxiaco, Putla, and Juxtlahuaca, was a major problem in the Mixteca in the 1840s and 1850s (Reina 1988*c*). Indian oppression persisted until the Revolution, when new political dispensations affected Oaxaca's indigenous population and its peasantries. The indigenous population then became a marginal population to be integrated, the peasants a sector to be reinforced and expanded.

Indian Landholding during the Porfiriato

In general, the Oaxacan Indian communities at high altitude kept control of such lands as they needed after 1810. This generalization also applied, but to a lesser extent, in the Oaxaca Valley, where just over one-third of all proprietors established between 1889 and 1903 (37,533 for the entire state) were concentrated, though the new units in the Oaxaca Valley were comparatively small properties, averaging only 47 hectares (Cassidy 1981). The largest privatizations of property occurred in the Cañada and Tuxtepec (2,493,000 ha.) and in the Isthmus and on the Pacific (1,714,000 ha.), giving rise to vast estates and medium-sized or small *ranchos* (Esparza 1988, 290). Elsewhere, but especially in the *sierras*, the Indians maintained their traditional economy; in the Central Valleys they continued to focus on the Oaxaca City market.

By the early 1900s, the social and economic contradictions associated with the large landed estate and its converse, landlessness, were not so extreme in Oaxaca as elsewhere in Mexico. Nevertheless, a substantial number of peasants were employed as day labourers or debt peons, especially at the sowing and harvest seasons, and sharecropping in the Oaxaca Valley was common (Cassidy 1981). The physical isolation of the state and its lack of resources meant that the expropriation of land had not reached such extreme conditions as it had in Mexico as a whole, where more than 90 per cent of the rural population were said to be landless. For example, in the notorious sugar-producing state of Morelos, *haciendas* averaged 5,000 hectares by the early 1900s and accounted for 44 per cent of all agricultural units. In Oaxaca, there was no land monopoly on this scale. Waterbury calculates that only 14 per cent of landholding units were in *haciendas* in 1910, and less than 15 per cent of the population resided on them (compared to 24 per cent in Morelos) (1975).

The Reform of Corporate-held Land

One of the objects of the Liberal Reform was to free the factors of production from 'colonial' constraints. Corporations, notably the Catholic Church and

communal landholders (though neither Lerdo nor Juárez had anticipated that Indian communities would be affected), were to conform to the Ley Lerdo of 1856, and to divest themselves of real estate. In central Oaxaca in the early 1860s, more than 1,400 properties—mostly ecclesiastical—were released for sale, but they were predominantly urban, and by 1867 half still remained on the market. Half the ecclesiastical properties sold off in central Oaxaca went to professionals, bureaucrats, and merchants, one-third to persons of unknown social origin, and one-third to Indians (Berry 1981).

In localities more distant from the state capital, it seems that the process of disamortization was weak (Esparza 1988). Berry mentions that at least 647 properties were disentailed outside the Central District but within the state of Oaxaca by 1876, several of which were owned by ecclesiastical institutions and located near Teposcolula, in the Mixteca Alta (Berry 1981). But the pace of sales was slow. The depressed national economy, the shortage of local capital for investment, the heavy taxes imposed on land to sustain the various wars, and the isolation of Oaxaca, whose roads were notoriously treacherous and unfrequented, were major reasons for the lack of investors.

Disentailment of civil properties outside the Central District numbered 604 between 1856 and 1876. The principal concentrations were in Zimatlán (180), Ocotlán (94), Miahuatlan (30), Etla (22), Ejutla (19), and Tlacolula (10) in the Central Valleys, followed by Teposcolula (83), Tlaxiaco (15), and Jamiltepec (61) in the Mixteca Alta and Baja, and Villa Alta (28) and Ixtlán (27) in the Sierra Zapoteca. Few sales were noted for Yautepec (10) and Tlacolula (10), and virtually no sales were recorded in the isolated districts of Huajuapan, Choapan, Tehuantepec, Pochutla, Cuicatlán, Coixtlahuaca, and Juquila. None whatsoever was registered in Juchitán, Silcayoapan, Tuxtepec, and Nochixtlan (Berry 1981, 182–3). So, Indian communities at high altitude in Oaxaca kept their lands. Isolated and lacking in resources, their property held few attractions for the capitalist class, whether Mexican or foreign, in the second half of the nineteenth century.

Although the Porfiriato did not transform rural landholding in the *sierras* after 1880, there was penetration by large and medium-sized properties into the tropical lowlands of the state. This occurred especially around Tuxtepec and in the Cañada, where half of Oaxaca's land redistribution of the period 1889 to 1903 took place. But the process also affected the Isthmus of Tehuantepec and the Pacific Coast, which, together, accounted for a further one-third of land appropriations, and the Central Valleys, where one-tenth of the total reallocation by area during this period was located (Esparza 1988, 290).

Following the Ley de Baldíos (1863) and the Ley de Colonización (1875), incentives were offered to foreigners willing to invest in idle or abandoned land. In response to this legislation, nine substantial coffee estates were set up near the Pacific Coast from the 1880s, the specific intention being to replace cochineal as an export crop (Hernández Díaz 1992*a*). These expropriations, which involved Chatino communal land, coupled to the imposition of high

personal taxes, led to Chatino revolts in 1875, 1879, and 1896 (Hernández Díaz 1992*a*).

The most notorious example of foreign investment in the tropical lowlands of Oaxaca occurred in the tobacco plantations at Valle Nacional near Tuxtepec. One estate, cut out from communal property belonging to the Chinantec, was the focus of an investigation in 1911 (Turner 1969, 54–67). Here the imported labour, organized by the *jefe politíco* and allied recruiters (*enganchadores*), included Yaqui Indians from the north of Mexico. 'The slavery of Valle Nacional is merely peonage, or labour for debt, carried to the extreme, although outwardly it takes a slightly different form—that of contract labour' (Turner 1969, 57). Circumstances such as these were widespread in southern Mexico at the end of the Porfiriato, though Valle Nacional, with over 15,000 debt peons in its neighbourhood, was an extreme case within Oaxaca (Chassen 1986).

Esparza estimates that, by the end of the Porfiriato, more than half of the land area of Oaxaca, most of it in the *tierra caliente*, had been privatized along lines encouraged by the Reforma, but less than 8 per cent was cultivated. Most redistributed land was valued at one peso a hectare, and only 8 per cent went to *hacendados* (1988, 290). As late as 1913 there were only 225 *haciendas* in Oaxaca (92 in the Central Valleys, 56 at Tuxtepec, 22 in the Isthmus, 30 in the Cañada, and 14 on the Pacific) (Ruiz Cervantes 1988*b*, 348). Six of the *haciendas* of over 5,000 hectares were concentrated in the Isthmus of Tehuantepec near Juchitán, where cattle and a variety of tropical crops were produced, 7 were around Tuxtepec, and 10 in the Oaxaca Valley (Ruiz Cervantes 1988*b*, 347–8). Some *haciendas* in the Central Valleys had major concentrations of population, such as Santa Gertrudis and San José la Garzona (Progreso), each of which housed more than 1,000 residents (Welte 1978).

Oaxaca lacked 'land and labour' revolutionaries and reforming capitalists. But this must not obscure the fact that labourers on the *haciendas* suffered long hours of work and poor pay, sometimes doled out in kind—as maize (Ruiz Cervantes 1988*b*, 348–9). Conditions were particularly exploitative on the new tropical plantations (many of which were owned by foreigners), where the export crops, especially tobacco, coffee, cotton, and sugar, were competing on volatile world markets. Even in the Oaxaca Valley, where there was the largest concentration of *haciendas*, many communities undergoing population increase were becoming land hungry. It was there that the great houses of the landed estates were almost universally destroyed during the revolutionary struggle.

Conclusion

The history of the Oaxaca peasantry during the colonial and immediate post-independence periods is one of demographic collapse and slow recovery; of

peasant persistence and struggle against the large estate in the face of the Spanish conquest, the Ley Lerdo, and the Porfiriato. If peasantries persisted, it was, however, as a dominated Indian category, in which their subordinate position was maintained by tribute and tithes during the colony, and, subsequently by taxes, tithes, debt peonage, sharecropping, and poor wages, to which were added racial and cultural discrimination.

Oaxaca City had played a key role in the extraction of surplus value from the Indian hinterland through the cochineal trade to Cádiz and the colonial *repartimiento*. Independence destroyed both tribute and the *repartimiento*, and released Oaxaca's peasantries from those particular forms of domination. Gradual population recovery, coupled to the slow pace of estate-formation during the late nineteenth century, enabled the peasantries of Oaxaca to remain somewhat intact—though isolated, self-sufficient, and politically and economically dominated—at the end of the Porfiriato. Oaxaca's small farmers had survived long enough to become the local and substantial basis for the reinforcement and reconstitution of peasantry promised by the Mexican Revolution.

6

Ethno-Linguistic Groups
The Quest for Identity

Oaxaca's peasantries are diverse, not only in socio-economic terms, but also ethno-linguistically. Oaxaca is one of the most multi-ethnic states in Mexico, if language is taken as a cultural marker. A little under half the population speaks a pre-Columbian language, and there are sixteen different major linguistic groups. Chance, reporting on the Villa Alta area of the Sierra Zapoteca, notes, 'the district's five basic ethno-linguistic groups have of course persisted until the present time, but only as rather vague, language-based reference groups as far as the people themselves are concerned' (1989, 124). In addition there are, within some languages, such as Zapotec, which is spread across the various altitudinal zones in the centre of the state and the Isthmus of Tehuantepec, important dialect differences that make for mutual unintelligibility between adjacent communities (Rendón 1995).

As a consequence of linguistic pluralism and Spanish colonialism, coupled to state penetration since the Revolution, Spanish has become the common language and bilingualism has spread. Most Oaxacan Indian-language speakers have some facility in Spanish, and the younger generations are often fluent in both Spanish and their home language. Diglossia is common, with speakers moving between languages within the span of a sentence or two.

Indian-language speakers remain marginalized within the socio-spatial structure of Oaxaca society, both at the state level and in the Central Valleys (Chapter 2). They are among the poorest of Oaxaca's citizens in material terms, the least educated, the most rural, the most deficient in technical and mechanical development. Located at high altitude, they have been the last communities to be touched by modernization. However, they are not totally isolated; they are migrants to Mexico's cities and to the USA, where they perform both agricultural and industrial labour, and work in kitchens and on construction sites.

So, many migrants have developed multiple identities as, say, Mixtecs, Oaxacans, Mexicans; and their travels to the USA may have added some English to their language repertoire, yet reinforced, rather than diminished, their Indian identity. Even where migration has played a small role, as it has until recently among the Chatinos, neither the growth of the market economy nor social differentiation within the group has necessarily entailed loss of ethnic identity (Hernández Díaz 1992*a*).

The cultural difference between the ethnic groups, leaving aside language, is slight, though Mazatecs do practise polygamy, 20 per cent of men having had more than one wife at a time (Boege 1988, 63). Rather, it is the historical relationship between the language group and its territory that sets one ethnie apart from another. A core element in the construction of ethnic identity, within the framework of peasant maize cultivation, is the idea of work. Among the Mazatecs, for example, it is not a question of any kind of work but of 'work in the forest' which is crucial; it implies a special relationship between people and the environment. Cultivating the land is not simply an economic act; it synthesizes centuries of experience in the management of the particular region with which the specific ethnic group associates itself and is associated (Boege 1988). Echoes of this idea appear throughout the ethnographic literature on Oaxaca: 'the ever-recurring and eternal rhythms of planting and harvesting and of prayer and toil are the pulse that ticks in the veins of the Mixe' (Lipp 1991, 195).

Non-Indians, however, focus not on ethnicity but on national society. Since the Revolution, Mexicans have considered their country to be a *mestizo* society. The term *mestizo*, which in colonial and early independence years was used to designate offspring of mixed—white and Indian—race, has been used as a cultural category since 1920, implying an hispanized Mexican. Hispanized Mexicans are 'the nation of bronze', and while Indian historic figures are lauded, contemporary Indians stand outside the pale of national society.

The designation of Mexico as a *mestizo* nation, with an aspiration to a homogeneous national culture, has been a government project designed and implemented by anthropologists and archaeologists and presided over by the PRI. Speaking a pre-Columbian language is, therefore, usually a crucial cultural marker in Mexico: it is, in general, *the* key indicant of who is or is not an Indian. This alerts us to the peculiar nature of Oaxacan society, since almost 20 per cent of all Mexican indigenous-language speakers live in the state.

Although Indians, defined linguistically, are fewer than 10 per cent of the Mexican population, they account for almost 40 per cent in Oaxaca. There is, then, a distinction between the Mexican national social stratification, which is class based but has marked racial/cultural correlations (white/Indian) at the extremes of the social scale, and hinges on occupation, education, and wealth, and that of Oaxaca. About 60 per cent of the Oaxacan population is *mestizo*, in a cultural sense, but more than one-third form an enclave inside the class hierarchy because it speaks an Indian mother tongue. Ricardo and Isabel Pozas characterize Indians as having an *intraestructura* (intrastructure), based on language, the family, land, and community, which the remainder of Mexican society lacks (1978, 35). In Oaxaca, Indians form an ethnic segment, or more accurately a series of ethno-linguistic segments, which are not only inside, but also the bottom layer of, the class structure of *mestizo* society.

This chapter begins with the problem of defining who is or is not Indian in the context of colonial race mixing between whites, blacks, and the indigenous

population. Emphasis is given to contexts in which Oaxacan Indians have been able to redefine themselves, culturally, as *mestizos*, and to those in which an ability to speak an Indian language is, or is not, an indicator of Indian identity. The focus is then shifted to the distribution of the major pre-Columbian language groups of Oaxaca, and the role of landholding as an underpinning to ethnicity. Cityward migration is shown to hasten Indian acculturation, or 'passing', expressed in language shift and clothing change (*cambio de indumentaria*).

Indians are not only the bottom stratum of the Oaxaca peasantry, but are generally described as lacking a class structure. This classlessness is changing under the influence of economic development, especially where export crops such as coffee are involved. In some regions there is also an ethno-linguistic pecking order among the Indian groups, and, in the Isthmus of Tehuantepec, Zapotec is widely spoken among the commercial and cultural élite—against the expected trend. Where Indians have been subject to blatant exploitation, social movements have sometimes been launched against *mestizo* society in an attempt to redress the imbalance, often in the form of messianic movements.

Increasingly, Indians are taking the initiative and making demands for the recognition of their cultural difference, even if the objective measurement of that difference is fading in the face of Mexican modernization. Crucial recent changes have involved the founding of Indian organizations and journals as expressions of a resurgent identity. In 1992, on the 500th anniversary of the encounter between Columbus and the Indian population of the Caribbean, Article 4 of the Mexican constitution was reformed to express the ethnic plurality of the nation. This is an important, if belated and reluctant, response to a situation of '*mestizo*-conformity' which has existed throughout the PRI period of government. Article 4 affirms:

> The Mexican nation has a multi-cultural composition sustained originally in its Indian communities. The law will protect and promote the development of their languages, cultures, usages, customs, resources and specific forms of social organization, and will guarantee to their members effective access to the jurisdiction of the state. In the judgements and agrarian procedures in which they take part, their legal practices and customs will be taken into account in terms established by law. (Clavero 1994, 189)

Article 16 of the Oaxaca constitution has recently been reformed to be consistent with Article 4. 'The state of Oaxaca is sustained in the presence of its 16 indigenous groups. The law will establish the means to preserve indigenous cultures' (Gijsbers 1996, 84–5).

Race and Ethnicity

The main social issue among Oaxaca's peasants is not racial, but linguistic or ethnic, though it does have race (and class) overtones. Describing parts of

Mexico reminiscent of Oaxaca, Aguirre Beltrán explored the names given to the two main cultural categories and concluded that the term *mestizo* is adequate for non-Indians, though local terms are more likely to be used in practice. The term *ladino*, so common in Guatemala and Chiapas, is not heard in Oaxaca.

In the inter-cultural regions of the centre and south of the country, Mexicans call themselves people of reason, respectable people, neighbours, toffs, well-manered, or some such designation. They give the Indians the name of natural ones, country people, mad ones, or some other that might make visible the difference between European ethnic origins and those of the original Americans. Like *ladinos* these Mexicans also consider themselves descendents of the Spaniards and take extreme care to make strangers aware that they are not Indians. In all cases when they are questioned explicitly whether they consider themselves *mestizos*, only the educated ones, that is the intellectuals or persons who have had contact with the large urban centres, agree that they are. But most are ignorant of the term or give it another name. (Aguirre Beltrán 1970, 140)

Mestizaje in Oaxaca is a metaphor for 'passing' from one linguistic–cultural category to another. Aguirre Beltrán notes that 'the Mexican of to-day says he is a *mestizo* and defines *mestizaje* not as a simple process of racial amalgamation, but essentially, as added processes of acculturation and social integration' (1970, 140). However, where black traits are prominent in the population, as they are in the fishing communities on the Pacific Coast, they have been treated neither like Indians as 'naturales' nor like other Spanish speakers as 'gente de razón', but as 'gente de media razón' (people of half-reason). Moreover, they are frequently stereotyped as violent (Flanet 1977).

In most parts of Oaxaca, none the less, ethnicity is transactional, in the sense that the boundary between *mestizos* and Indians is fluid. This is not everywhere the case in Meso-America, and Colby and van den Berghe have been at pains to contrast the rigidity of the boundary in Guatemala, its malleability in Chiapas, and its flexibility elsewhere in Mexico. They add, 'Mexicans . . . view the country's population as consisting of a culturally homogeneous group of hispanized mestizos' (1961, 788).

Remaining an Indian in Oaxaca, therefore, depends largely on the maintenance of a linguistic boundary marker by the individual and the community in which he or she lives, although there are other indicators of Indian culture. An obvious external expression of Indian cultural difference from the *mestizo* peasant is the clothing of the Indian populations. Typically, this involves the wearing of traditional garments (*traje tradicional*), such as white cotton shirts and trousers and leather sandals for men, and colourful woven and embroidered *huipiles* (tops) and cotton or wool skirts (depending on the altitude of the group) and going barefoot (or wearing plastic sandals) for women. In the *tierra caliente* on the Pacific, Mixtec women used to wear nothing over their breasts unless they went to market, in which case they would put on a cotton *huipil* (Tibón 1961 reissued 1981). Traditional garments are unique in colour and

design for each language group, but local variants may occur at the community level, much as a specific dialect is often peculiar to a *municipio*.

In the Oaxaca Valleys, assert Cook and Joo, 'the informed outside observer is hard-pressed to distinguish between mestizo and Zapotec non-language forms of ethnocultural expression' (1995, 36), though that hardly invalidates language as *the* vehicle for a specific ethnic identity. Ultimately, being Indian hinges on individual and group self-evaluation and its acceptance by others. *Mestizos* in Jamiltepec speak Mixtec to pursue commercial contacts with local Indians, but they do not conceive themselves, nor are they thought by others, to be Indian (Bartolomé and Barabas 1982; Hernández Díaz 1992*a*).

Zapotec speakers in the Tlacolula Valley do not consider themselves to be Indians, merely peasants (Cook and Diskin 1976). Here Zapotec speakers who also converse in Spanish refer to their mother tongue as *idioma* or *dialecto*, and think of their ancestors not as Zapotecs but as *nuestros antepasados* (Cook and Joo 1995, 37). Additionally, women from the communities around Tlacolula wear the traditional Zapotec blouse, but there seems to be a strong collective wish among them and their menfolk to differentiate themselves from the *sierra* Indians and the pejorative stereotypes attached to them.

Indian Language Groups

The proportion of Oaxaca's population (of 5 years or more) able to speak pre-Columbian languages declined from 54.9 per cent in 1940 to 41.6 per cent in 1980 and 39.1 per cent in 1990. Simultaneously, indigenous monolingualism dropped from 17.5 in 1940 to 11.1 per cent in 1980 and 6.4 per cent in 1990, and suggests that passing has taken place. In addition, the contraction in Indian-language speakers must, in part, be due to death or out-migration from Oaxaca. Against this trend, but as a result of population growth, the absolute number of Indian-language speakers in Oaxaca (just over 1 million) is now larger than the entire population of the state in 1900.

Pre-Columbian language speakers in Oaxaca may be divided into two groups on the basis of their size in 1990. The first has more than 20,000 speakers in each group aged over 5 years—Zapotecs, Mixtecs, Mazatecs, Mixes, Chinantecs, and Chatinos; the second fewer than 20,000 speakers—Cuicatecos, Huaves, Zoques, Triquis, Chontales, Chochos, Amuzgos. In addition, there are three very small groups—Nahuas, Ixcatecos, and Tacuates. Among the larger groups, bilingualism was most common among the Zapotecs (84.5 per cent) and the Mixtecs (77.8 per cent), and lowest among the Mazatecs (66.25 per cent) and Chatinos (63.95 per cent). In the small groups, bilingualism was most frequent among the Zoques (96.0 per cent) and Cuicatecos (88.0 per cent) and rarest among the Triquis (64.1 per cent). Both the Chatinos and the Triquis are unusual in their linguistic homogeneity, their greater sense of ethnic identity than is common among the other groups, and their history of oppression by *mestizos*.

While the Zapotecs occupy the Central Valleys adjacent to the ruined ceremonial city of Monte Alban, the neighbouring Sierra Juárez and Sierra de Miahuatlan, and the Isthmus of Tehuantepec, the Mixtecs are confined to the western sections of the state—the Mixteca Alta, Baja, and de la Costa (Fig. 6.1). Mazatecs, Chinantecs, and Mixes occupy the mountainous northern rim of the state, the north-facing slopes, and adjacent plains—the outer arc to the Sierra Zapoteca, though each group is spatially separated from the others, as they are also from the Zapotecs.

Chatinos and Chontales are located in enclaves in the southern Sierra Madre del Sur: Chatinos lie between the southern Zapotecs and the Mixtecans of the Costa Chica; Chontales are islanded among Zapotecs. Enclavism also characterizes the smallest language groups: Cuicatecos are sandwiched between the Mixtecs, Mazatecs, Chinantecs, and Zapotecs; Huaves and Zoques occupy Pacific Coast concentrations in the Isthmus of Tehuantepec; Triquis, Chochos, Amuzgos, Nahuas, Tacuates, and Ixcatecs are islanded among Mixtecs on the western limits of the state. There is a tendency for those groups that are nearest spatially to be linked linguistically, though small differences in dialect may make communication difficult, even *within* linguistic groups.

Information about three settlements close to Ocotlán in the southern portion of the Central Valleys clarifies the problem of mutual intelligibility among Zapotec speakers (Fig. 1.4). 'Yatzeche can understand the variety of Ocotlán, and speakers of Tilquiapan can understand the variety of Yatzeche, but speakers of Tilquiapan and Ocotlán do not understand each other' (Suárez 1983, 15). As a result of problems of mutual incomprehensibility of this kind, Suárez proposes that Zapotec contains 38 subgroups of speakers, Mixtec 29, Chinantec 14, Mixe 11, Mazatec 6, and Chatino 5 (1983, 18). As many as 100 mutually unintelligible linguistic varieties may be spoken in Oaxaca (Suárez 1983, 16).

Two further aspects of the major language distributions require underlining. First, there is a strong association between the retention of pre-Columbian languages and peasant communities living at high altitude, though the altitudinal aspect breaks down among the lowland Isthmus Zapotec. Second, there is comparatively little interdigitation among the groups. Although only the Mixe are neatly enclosed within a single district, each major language or ethnic group has 'its territory', and the larger ones, especially the Zapotecs, Mixtecs, Mazatecs, Mixes, Chinantecs, and Chatinos, are able to live substantially within their own communities. If they mix with outsiders, it is more likely to be with *mestizos* than with other Indians.

Linguistic segregation on this scale has facilitated language retention, especially among the larger groups, for the Indian community forms, in the majority of cases, the unique social space for the circulation of the local language and, in consequence, the sole possibility to legitimize its presence and functionality (Lewin 1986). The smaller groups, in comparison, are under threat of

Fig. 6.1 Oaxaca: population of 5 years and over who speak an Indian language, by district, 1990

extinction unless bilingualism becomes the norm, or, like the Triquis, they isolate themselves, or are isolated, from the mainstream (Bartolomé and Barabas 1996; Ruiz López 1993).

'Usos y Costumbres'

In mid-1995, the Oaxaca government, under pressure from the indigenous groups, revised its electoral legislation to allow 408 (or just over 70 per cent) out of the 570 *municipios* to opt to carry out their elections to political *cargos* through community assemblies (Maldonado Alvarado 1996). This adoption of 'usos y costumbres' (traditional usages and customs), is distinct from having secret ballots for political parties, as did the other 162 (Fox and Aranda 1996, 20). Four *municipios* had their results annulled, in at least one instance because the PRI wanted a balloted election, while the community attempted to use its all-male assembly to keep the PRI out.

The introduction of 'usos y costumbres' has, in general, been a means of marginalizing the influence of party politics and other forms of factionalism at the level of the community. In addition, it can also be taken as an approximate guide to those communities that consider themselves to be Indian in a cultural sense. *Municipios* operating 'usos y costumbres' concentrate in the sparsely peopled, central highland areas of the state, surrounding the Central Valleys; in the Central Valleys, they congregate towards the valley sides (Fig. 6.2).

'Usos y costumbres' is an expression of an Indian, corporate, cultural, and material existence, which enjoins the sharing of language, land, male assembly, *cargo*, festival, and *tequio*. These features of Indianness are experienced and expressed at the community level, not at the scale of the language or ethnic group. Not surprisingly, 'usos y costumbres' characterize communities where, in 1970, more than 60 per cent of the population over 5 years spoke an indigenous language (Fig. 2.2). These indigenous characteristics coincide with areas occupied now, and in the past, by the Zapotecs of the Central Valleys and northern and southern *sierras*, by the Mixtecs of the Mixteca Alta, and by the Mazatecs, Cuicatecs, Chinantecs, Mixes, and Chatinos (Fig. 6.1).

Conversely, 'usos y costumbres' are not practised in the *tierra caliente*, and are notably absent from the Tuxtepec area, the Mixteca Baja and Mixteca de la Costa, the Pacific coastal plain, and the Isthmus of Tehuantepec. In short, 'usos y costumbres' do not typify the tropical lowlands, which once belonged to Indian communities but were distributed as large-scale properties after the nineteenth-century reform. However, these areas were reallocated to peasants under local pressure after the Revolution. In the Central Valleys, electoral ballot remains the norm in the modernized valley bottoms following the main roads. Electoral ballots are also held in communities along the principal regional routes leading out of Oaxaca City through the Etla Valley and running north-east towards Puebla via the Cañada or the Mixteca Alta.

Fig. 6.2 Oaxaca: municipal elections held by 'usos y costumbres', 1995

A sample of twenty communities used by Cook and Joo to study 'Indian identity' was taken from the Tlacolula and Ocotlán arms of the Central Valleys, which, unlike the Etla Valley, do not have a long history of hispanization. Here, nine of the eleven Zapotec-speaking communities (defined by Cook and Joo 1995, 40, table 1) operated 'usos y costumbres' in 1995, as did five of the seven *mestizo* communities and both communities categorized as transitional. There is a strong tendency for communities that are Zapotec speaking to use 'usos y costumbres', while those that are *mestizo* or ambiguous may also adopt 'usos y costumbres' to redefine themselves as indigenous. That is totally consistent with current ethnic movements in Oaxaca, where the absence of traditional culture is by no means a handicap for groups that wish to reinvent themselves as Indian.

Most of Oaxaca's district head-towns are culturally *mestizo* and use the ballot, but there remain six—San Juan Bautista Coixlahuaca, Santiago Choapam, Ixtlán de Juárez, San Ildefonso Villa Alta, San Carlos Yautepec, and Santiago Zacatepec Mixe—where indigenous languages prevail and assemblies are still held. Moreover, 'usos y costumbres' characterize all the *municipios* except the head-towns in the districts of Tlacolula, Cuicatlán, and Nochistlan. A transitional stage applies in some *municipios*, such a Tlacolula, where town centres engage in electoral party politics, and Zapotec-speaking outlying settlements operate community assemblies (Fox and Aranda 1996, 20).

Language Shift and Clothing Change

An important factor in individual Indians passing into the *mestizo* population has been the role played by various agents of the government. Rural teachers, agricultural technicians, and state officials have all had an influence on inter-ethnic interaction and on the linguistic–demographic balance between Indians and *mestizos*. The role of the INI, founded in 1948 and with fourteen co-ordinating centres in the Indian regions of Oaxaca since 1975, has been significant in mediating between *mestizos* and Indians. It has also played an important role in breaking down the isolation of the Indian groups through its programmes of road building and Spanish-language teaching (Infante Cañibano 1998). However, there is evidence to suggest that the INI has encouraged neither self-help nor participation, and that its benefits have, for a variety of reasons, favoured only a minority of the community (Infante Cañibano 1998).

The Indian marker to loose its significance most quickly in Oaxaca was ethnic clothing. In the late 1950s, Drucker discovered that only 11 per cent of the Indian families in Jamiltepec on the Costa Chica of the Pacific coast had members who had given up traditional costume (*revistidos*) in favour of *mestizo* dress. Most of them were literate and had a family history of bilingualism (Drucker 1963). Since Drucker's research, it is clear that the process of clothing change and assimilation to the *mestizo* stratum has become dissociated, as

she herself predicted (Drucker 1963). The sheer numbers—especially of men—involved in clothing change in Oaxaca have rendered it of little social significance as a differentiator, leaving language (and, more recently, identity) as the vital—but increasingly fluid—boundary marker.

There has been a noticeable change since 1960 in the degree of commercialization among Indian peasants, especially in the high-altitude communities producing coffee. Commentators have drawn parallels between conditions among the Triqui and the Chatinos with regard to their integration into the cash economy, their reinforced social subordination, and loss of individual language and communal ethnic traits (Hernández Díaz 1992*a*). In the community of Tlacotepec, between 1930 and 1980, Chatino was virtually displaced by Spanish (Hernández Díaz 1992*a*). A less extreme situation has developed in Yalálag in the Sierra Zapotec, where only 3 per cent of the population spoke Spanish in 1900. Around 1940, a generation after the Revolution ended, the figure was only 20 per cent (de la Fuente 1977*a*); yet by 1990, the census showed that barely 20 per cent of Yalaltecos were unable to speak Spanish (high though that figure was by Oaxacan and Mexican standards).

Unless Indians accept that *mestizaje* is synonymous with proletarianization, a major challenge for them is not merely to cope with bilingualism followed by 'language shift', but to achieve sufficient socio-economic mobility to make the effort to cross into the *mestizo* population worth while. *Mestizos* place a high value on wealth and property, esteem commerce and denigrate manual labour, especially agriculture, and emphasize competitiveness and authoritarianism. All these orientations are totally at variance with values formerly held dear in Indian communities.

Why, on the other hand, would Indians wish to maintain their ethnic identity, when it carries the stigma of *natural*, and puts them at such an economic and cultural disadvantage? Indians live out a large part of their lives in isolated rural communities, at some distance from those who can exploit them. Speaking an Indian language is crucial to community membership, which determines a range of benefits (and obligations) of a corporate kind.

Equality, equivalence, and an emphasis on reciprocity characterize Indian communities, from which differentiation is—at least theoretically—banned. So, in aggregate, Indians prize agricultural labour in the *milpa* (maize field), and stress the community at the expense of the individual: they enjoy social security and eschew social mobility—assuming it can be obtained. Above all, they insulate themselves from social subordination to *mestizos* by orientating their lives towards involvement and co-operation with one another. At least, this is what they may once have done.

Ethnicity and Migration

If low rural educational standards have been no barrier to mobility and migrant absorption in the urban labour force (Chapter 5), nor have the plural ethno-linguistic categories of the Oaxacan population. Although almost 40 per cent of Oaxacans speak one of a great variety of pre-Columbian languages, they have never, since 1930, accounted for more than 15 per cent of the inhabitants in Oaxaca City (according to the census), and the vast majority of them are competent in Spanish. The proportion of the population of Oaxaca City aged over 5 who could speak a pre-Columbian language increased from 3.2 to 6.4 and 13.4 per cent in 1960, 1970, and 1980. This is a clear indication of the impact of rural–urban migration, though the proportion dropped to less than 10 per cent in 1990.

In 1980, there were 21,000 non-Spanish speakers in the *municipio* of Oaxaca de Juárez (the figure was 6,500 in 1970), but only 15,000 in 1990. Most used their Oaxacan tongue—predominantly Zapotec or Mixtec—only occasionally, so prevalent was language 'shift' to Spanish among migrants.

> Spanish, even if it is only rudimentary and full of grammatical errors and slang, is taken up as quickly as possible and becomes the language of the home. Migrants want to be certain their children learn the city language, and their ethnic identity is saved for the trips back to the village. There they can speak their native tongue and enjoy their Indian heritage without suffering the condescension of urban Mexicans. (Murphy and Stepick 1991*a*, 129)

The definition of race and ethnicity in Oaxaca City is more elusive than that of class. Yescas Peralta claimed that, in the late 1950s, 90 per cent of the population were *indígenas*, 6 per cent *mestizos*, and 4 per cent white (1958, 771). He was clearly using these terms as racial not cultural categories. No one in recent years has attempted a racial classification of the city's population, but the proportion of whites has almost certainly declined under the influence of heavy cityward migration, while the same process has strengthened the Indian presence.

Writing about Oaxaca City in 1966, and drawing particular attention to the abandonment of 'Indian' clothing as a means to passing into the *mestizo* population, Hayner noted:

> Although some of the 'Indians' in the suburbs and a few in the outlying villages have helped their children to advance through education, most of them retain a substantial proportion of pre-Columbian culture traits. Attitudes are so strong against fellow campesinos who change their ancient apparel or improve their living conditions that they are regarded as traitors to their class and are forced to leave their native villages. It is only in the towns that men of the lower class have been able to wear shoes, drill pants, sack coats, or European-style felt hats. (1966, 49)

Change of clothing (*cambio de indumentaria*) in the urban areas has often gone hand in hand with language shift, and the wearing of Western fashions is

now as widespread among the urban lower class as the speaking of Spanish. Working on San Juan Chapultepec, Graedon claimed that one-quarter of her sample of adults were bilingual, mostly in Spanish and Zapotec or Mixtec, but with a few speakers of Mixe, Chinantec, Mazatec, and Chatino as well. Yet, she concludes:

Household heads are almost never monolingual because of the necessities of making a living in a Spanish-speaking city. A handful of women speak little or no Spanish, relying upon their husbands to speak for the household when necessary. Few people speak Indian languages outside the household, except with close kin; only neighbours from one of the three well-represented villages are likely to use their common language in public, and even then may become embarrassed if they are overheard. Language is the most obvious marker of Indian ethnicity in the city, and most families do not encourage the children to learn and speak the lower-status language. The few who do attempt to teach the children the family tongue are unlikely to succeed in a nearly monolingual environment. Nine-tenths of the children are monolingual in Spanish, and bilingual children use Spanish with their peers in preference to the language spoken at home. (Graedon 1976, 133)

As the more impoverished environments are the major source areas of Oaxaca's out-of-state emigrants, it follows that the indigenous populations of the Mixteca and Sierra Zapoteca—Mixtecs, Zapotecs, Chinantecs, Mixes, and Triquis—are prominent in the current streams of migration to the US–Mexican border and to the USA. The movement focuses on the agribusiness activities and urban service centres of California, but also spreads north to Washington, Oregon, and the Pacific Coast of Canada, and east to Miami and New York. Many of these indigenous workers are, or have been, undocumented and liable to exploitation by Americans and other Mexicans. Moreover, they leave behind communities typified by a lack of male adults (though this is difficult to detect in the *de jure* census) and a decaying agricultural system.

One of the positive consequences of this migration, however, has been the formation of indigenous migrant organizations, some of which have drawn on their ethnic identity as well as their experience of labour disputes in Oaxaca and other parts of Mexico. Prominent among such organizations is El Comité Cívico Popular Mixteco, which was founded in Baja California in 1981 and is active in San Diego County and other parts of California. The Zapotec organizations, though ethnic at base, are more specific to the *municipio* in which the migrants originated. For example, Tlacolula, in the Central Valleys, has given rise to a migrant organization in Los Angeles. It has been active in support of the political 'left' in the parent *municipio*, and has lobbied the Mexican Consulate in Los Angeles as well as the governor of Oaxaca (Sarmiento Sánchez 1992).

Indian Subordination?

While Oaxaca's *mestizos* are stratified by class, Indians, almost all of whom are peasants, are often depicted as unstratified. *Mestizos* form a social and cultural section in the society that is superior to Indians; this distinction is especially marked if it involves the *mestizo* middle class and Indian peasants. However, there is no watertight barrier between *mestizo* peasants and Indian peasants in Oaxaca, though each group tends to occupy a different ecological zone. For example, the wetter, more affluent Etla arm of the Central Valleys is notably Hispanized and *mestizo*; so, too, are the tropical lowlands on the periphery of the state. However internally unstratified each Indian ethno-linguistic group has been, historically, there is nevertheless an ethnic pecking order in many regions of Oaxaca, with the Zapotec often playing leadership or brokerage roles.

The following section examines *mestizo* domination of rural Indians, but also shows that social movements have taken place among Indians to redress their status as an underclass. Against the stereotype of Indian subordination, the socially superior status of some Zapotecs has to be acknowledged, together with the privileged position of Zapotec as a language. The Zapotec language has been the basis for literary and political movements of a regional nature in the Isthmus of Tehuantepec, and Zapotec-speaking weavers in the Oaxaca Valley have drawn upon their ethnic identity as a source of artistic inspiration.

Mestizo Dominance

The sociological and anthropological literature on Oaxaca is replete with reference to *mestizo* dominance at all scales, whether the focus is Oaxaca City, where it is almost total, or small communities, whose *mestizo* residents are a mere handful. A typical observation is the following which refers to the Mazatec tropical lowlands, where, in the context of resettlement, 'mestizo shopkeepers have acquired control of the best land and dominate the economic life of the community' (Partridge, Brown, and Nugent 1982, 258). Given the complexity and fragmented nature of the community structures and ecology of Oaxaca, however, Hernández Díaz's observation bears quotation:

> Even if it is certain that in general terms the relations which are established between Indians and non-Indians (*mestizos*, Spaniards, people of reason . . .) are asymmetrical, where the Indians are the social sector dominated, subjugated, exploited, marginalised, stigmatised, it is also certain that these processes are not by any means homogeneous. Very much to the contrary, they acquire their specificity through multiple and varied factors that intervene in the nature of the inter-ethnic contact. Thus we have communities where the contact with national society has not been with numerically important sectors, however, the effects of the contact have been highly complicated and totally transforming of Indian organization. (1986, 314)

A typical example of Indian exploitation is provided by the involvement of the Chatinos in the coffee industry of the Pacific Coast:

> On the coffee estates the Chatinos together with *mestizos* share the same social position in terms of class. They are all peasants who temporarily migrate to work in the coffee estates. Hence there exists no difference up to this point between Indian and non-Indian peasants. But on arriving at the estate each has a different treatment. Non-Indians always have the possibility of eventually occupying positions a bit superior to the rest, such as that of watchman or yard boy. The Chatinos are exploited both because it is on their communal lands that the whites have set up their large estates, and because they are used as cheap labour. They are cheated both in the accounting of their work and in the payment made. (Hernández Díaz 1986, 314)

Sometimes the hierarchical relationship between *mestizos* and Indians is mitigated by ties of *compadrazgo* (ritual co-godparenthood), but these, too, invariably involve asymmetrical relationships, with *mestizos* making short-run, small-scale contributions to their *compadres* and *commadres*, but invoking substantial—often non-financial—support in return on a continuing basis.

Indian Protest

It is not surprising that those groups that have the longest and bitterest history of exploitation and abuse in Oaxaca—the Triqui (Amnesty International 1986), and the most violent experience of federal government interference—the Mazatec and Chinantec—should have been involved in social movements against authority. The state itself, rather than individual oppressors, was the appropriator of 50,000 hectares located to the west of Tuxtepec, adjacent to the Alemán Dam, leading to the forced resettlement of about 20,000 people between 1949 and 1952 (McMahon 1973). In the area to be flooded, Mazatecs, who accounted for 96 per cent of the population, owned 21,000 hectares. An additional 30,000 hectares were in the hands of *metizos*, who made up the remainder.

The failure of the Papaloapan Commision to acquire sufficient land and provide appropriate infrastructure and compensation led to a catastrophe for the Mazatec. Two thousand families struck out on their own and disappeared from the record. The remainder, despite the involvement of the Instituto Nacional Indigenísta, suffered hardship, community collapse, and class subordination in the resettlement zones, two of which were located in Oaxaca, close to Tuxtepec (Ballesteros, Edel, and Nelson 1970; Partridge, Brown, and Nugent 1982).

While many Mazatec protested by escaping, subsequent government action in the Papaloapan Basin has provoked a reaction of despair among the neighbouring Chinantec at Cerro de Oro (Miguel de la Madrid Dam). The Chinantec, fearful that another bout of forced resettlement to make way for a further dam project was but a euphemism for proletarianization and ethnocide, created a messianic protest movement in the 1970s to voice their fierce

opposition to the scheme (Barabas and Bartolomé 1973; Barabas 1977; Bartolomé and Barabas 1990).

On 12 December 1972, the Virgin of Guadelupe appeared in a cave on the hillside overlooking the dam; allegedly, she asked the president and priests of the *municipio* to speak with her. This apparition developed into a cult centred on pieces of wood found at the site. The pieces of wood have been carried in procession, and the cave in which 'God's engineer' appeared has become a centre for Chinantec pilgrims. 'The incipient messianic movement', wrote Barabas and Bartolomé, 'has accomplished what politicians, engineers, businessmen, and false mediators have tried to prevent; the unity of the Chinantec people in the face of pressures from the regional and national society' (1973, 15). The project was not completed until the end of the 1980s, and involved the displacement of more than thirty communities with 26,000 inhabitants. Most of them were resettled in the state of Vera Cruz, some of them hundreds of kilometres from their native villages (Bartolomé and Barabas 1990, vol. ii; 1996; 1997).

A rather more traditional form of oppression obtains among the Triqui in the Mixteca Alta and Baja. Here they are spread across the various climatic zones and three districts, but dominate only one *municipio*. The Movimiento de Unificación de Lucha Triqui (MULT) was founded in 1981 and has involved the three Triqui communities in the Mixteca Baja located around Putla. These communities have experienced intense population pressure. They are often at war with one another, and in semi-permanent conflict with the neighbouring market centres of Putla, Chicahuaxtla, and Tlaxiaco. They suffer depredations against their communal lands; exploitation through the price offered for their coffee, which they have traded for guns and liquor (Tibón 1981 originally 1961); and linguistic and cultural disparagement (though there is now a Triqui-Spanish dictionary (Good 1979))—all at the hands of their urban–*mestizo* neighbours (García Alcaraz 1973).

Many Triqui from the Mixteca Alta around Chicahuaxtla have migrated to the comparative safety of Oaxaca City since the late 1970s, where they weave and sell artisanal goods in a small open-air market. However, the majority of the small Triqui-speaking community (approximately 12,900) still live in Mixteca, where they maintain their struggle against their oppressors, occasionally breaking out in violence.

Zapotec Superiority

Relations between the various ethnic groups are in many cases slight and frequently egalitarian. This applies between Chatinos and Mixtecs and Chatinos and Zapotecs, the Chatinos referring to the latter as people of a different language, but without any pejorative qualification. Mixtecs and Chatinos mix at *fiestas* in the Mixteca Baja, while Mixtecs, Mazatecs, Cuicatecs, and Chinantecs meet at Catholic festivals and markets in the northern highlands.

The relations these groups develop are cordial, and in addition to the interchange of goods, they function to transmit news and meetings between acquaintances and friends (Ravicz 1965).

In contrast, inequality characterizes the relations of highland Zapotec and the Mixe, as it does also the contact between Mixtecs and the Triqui. Nahmad reports that Zapotecs refer to the Mixe as idle, ignorant, and uncivilized (1965). Further information about the hierarchical relations between the Zapotec and Mixe are exposed by Nahmad:

> Relations between Zapotecs and Mixes are equivalent to the relations that in other regions of refuge the Indians have with *ladinos*, *mestizos*, or people of reason. (1965, 91–2)

> The characteristic method of exploiters in other Indian zones is naturally put into effect in this region: loans and advances in cash against the harvest, at prices previously fixed, the high prices of goods, switched scales, the use of co-godparenthood as a means to enlace emotionally relations that are apparently social and religious, and that are deep down economic. These subtle methods, that bind a person, operate daily between the Mixes in their relations with the Zapotecs. (1965, 53)

De la Fuente reports, in a similar vein, that Zapotec disparagement of Mixes was extended to Chinantecs (1977*a*).

In the Isthmus of Tehuantepec, Zapotecs control the production and consumption of the Huaves via the markets in Salina Cruz, Tehuantepec, and Juchitán, and the Zoques through Matias Romero and Niltepec. But Zapotec domination is not only economic:

> The acquisition of Zapotec language, clothing and festivities by Zoques and Huaves is not merely an economic phenomenon, but one of cultural domination because of the role they play as reference points. (Hernández Díaz 1986, 307)

In fact, isthmus Zapotecs tend to consider themselves different from *mestizos* and 'indios', the latter being treated as poor and marginalized (Hernández Díaz 1992*a*).

Zapotec as a Prestigious Language

Zapotec's prestige as a language goes back to pre-colonial times. It has been remarkably well preserved in the Isthmus of Tehuantepec—notably in Juchitán, where it is still the everyday language of the local élite. It is also the vehicle for a substantial literature and for cultural protest movements involving local history and poetry (de la Cruz 1984; Campbell *et al.* 1993)—much of it carried in the journal, *Guchachi' Reza.* Juchitán's neighbour and rival, Tehuantepec, is, in contrast, a typical *mestizo* town, and pitted against it on most issues, contemporary or historical. The inhabitants of Juchitán are mostly Zapotec speaking, proud to be Juchitecos, and resent Spanish-speaking officials whether from Oaxaca or Mexico City. Their distinctive ethnic identity enabled an amalgam of radical groups, based on the Coalición

Obrero-Campesino-Estudiantil del Isthmo (COCEI), to supplant the PRI in the government of the *municipio* in the early 1980s, until they were driven from office in November 1983.

Class and Ethnicity

Ricardo and Isabel Pozas's (1978) contention that Mexico has a hierarchical class structure related to a capitalist mode of production typical of the Third World seems to apply well at the national level. However, I lay greater emphasis than they do on the phenotypical correlation between éliteness and whiteness or lightness, and vice versa. Their discussion of the Indians as an *intraestructura*, or an enclave, within the class structure conforms somewhat to my own interpretation, except that Indians are not simply peasants and culturally different. Rather they are culturally different and form an enclave in the peasantry, subdivided into ethno-linguistic categories. The situation appears caste-like, but turns out to be more malleable.

The Indians' position is determined first and foremost by their peasant status, but it is their cultural characteristics, that make them such prime targets for stereotyping and exploitation. Ethnic pluralism seems to be highly relevant to this discussion, since it separates class issues from those of culture and race, and enables us to envisage Oaxaca's Indians as class and culturally determined. However, they are often exploited in economic terms as well as being culturally dominated and disparaged, and so some aspects of their subordination take on class characteristics.

That ethno-linguistic pluralism in Oaxaca has broader social structural implications than simply being an expression of an individual's lifestyle is due to the corporate nature of the Indian communities and the way in which their social solidarity, as Indians, is expressed in the holding of, and access to, land. It is at the level of the *municipio,* therefore, rather than that of the entire ethnie, which is a linguistic category rather than a functioning group, that ethnicity is constructed.

Oaxaca's social structure is composed of two major socio-cultural sections: *mestizo* and Indian, the former being slightly the larger of the two and growing at the expense of the latter through modernization, migration, education, and the national language policy of Hispanization. The *mestizo* section is both urban and rural and is class stratified, with a rural peasantry and an urban middle class as well as a proletarian/marginal population. The Indian section is almost entirely rural, and is generally looked down upon by the *mestizo* section that controls the state capital and most of the smaller towns, notably the principal settlements of the ex-*distritos*. *Mestizos* dominate governmental and educational functions and the major commercial transactions that occur in towns and the larger villages. Nevertheless, levels of material life are little different among the Indian and *mestizo* peasantries, which, between them, account for over 80 per cent of the Oaxaca population.

The Indian section is not class stratified, except where Indian middlemen have emerged, though evidence for rich individual Indians goes back decades (Malinowski and de la Fuente 1982). In some areas there is an ethnic pecking order among the different language groups based on prestige and power, and expressed in commercial exploitation resembling that exacted by *mestizos*. That apart, the Indian section is not internally class stratified to any great degree, and the municipal components into which each ethnie is subdivided have, historically, emphasized ritual expenditure as a levelling device. It is the value of social equality lived out at low levels of living within landholding corporate communities that gives the linguistically defined Indian section its coherence and marks it off from *mestizo* Oaxacan—and national—society.

Clearly, most of these processes of cultural-linguistic domination and—among the *mestizos*—class differentiation, have their roots deep in the colonial period. Oaxaca City might be diagnosed as a *mestizo* control point for the entire state, surrounded by a Hispanized aureole in the Central Valleys and, at a greater distance, by an Indian hinterland or region of refuge (Aguirre Beltrán 1973)—mostly at high altitude. From this hinterland, it might be argued, surplus value is being extracted by the market mechanism. Indeed, there is evidence for this in the coffee industry and other profitable peasant activities. The failure of peasant markets to operate, in this simple way has, however, been discussed in Chapter 4. Here I want to concentrate on two topics only: the Hispanization of the Central Valley region, and the permeability of the *mestizo*–Indian barrier.

The Central Valleys have been Hispanized by contact with Oaxaca City and by the influence of the colonial Marquesado of Cortes, which spread from the western edge of the colonial capital into the Etla and Zimatlan arms of the valley system. It is here that modern developments—including education, land reform, and migration—have encouraged *mestizaje* in a rural context. The pottery-making village of Atzompa exemplifies this process (Hendry 1957). Here Zapotec was allegedly still spoken in 1940, but has now quite disappeared. However, information about 'usos y costumbres', shows that male elective assembly was used there in 1995, in preference to the ballot. So the argument about the adoption of 'usos y costumbres' as a means of recuperating ethnic identity in the Tlacolula and Ocotlán arms of the Central Valley may be applicable in Atzompa as well.

The net consequence is that Oaxaca City is surrounded by an aureole of *mestizo* communities that are extremely well integrated into the market and represent commercialized peasant communities that are certainly not culturally exploited (Cook and Joo 1995). But Oaxaca City functions in a dominant way *vis-à-vis* the highland Indian communities, either directly, through government, the law (Parnell 1988), and commercial transactions—often based on the sale of manufactured goods—or indirectly via smaller towns in the Oaxaca settlement hierarchy such as Putla or Tlaxiaco.

The permeability of the boundary between *mestizo* and Indian, expressed by language shift over time at the state level, and, in Oaxaca City, through migration followed by language change, has made the cultural sections more voluntaristic than ever before. Moreover, bilingualism among the Indians has made them more self-confident and able to fend off exploitation and more capable of expressing their identity beyond their municipal boundaries. The growth of ethnic organizations in the last decade or two is testimony to these changes, and, ironically, has been made feasible by the Indians' ability to read, write, and publish in Spanish—as well as by their experience of migration to distant border regions and the USA. Changes in the national political situation have also facilitated ethnic awareness among the linguistic-indigenous groups in Oaxaca.

Ethnic Organization

Revindications by Indians in Mexico (and throughout the Americas) were launched by the International Work Group for Indigenous Affairs' 'Declaration of Barbados on Native Rights' in the early 1970s (IWGIA 1971). This was followed in Mexico by the 1975 Patzcuaro Conference on indigenous issues. Presided over by President Echeverría, it was organized by the Secretaría de Reforma Agraria, the INI, and the Confederación Nacional Campesina (all essentially agencies of the PRI).

One of the principal achievements of Patzcuaro was the establishment of a Consejo Nacional de Pueblos Indígenas (CNPI), which at first was docile but then adopted an increasingly intransigent, anti-PRI stance at the 1977 and 1979 meetings. The CNPI promoted Supreme Councils to give a regional voice to each ethno-linguistic group. These developments spawned a number of ethnic movements in Oaxaca, and facilitated the publication of ethnic journals, such as the (Spanish-language) *El Topil*, voice of the Asamblea de Autoridades Zapotecas y Chintecas de la Sierra (AZACHIS).

Also founded during the Echeverría administration was the Alianza Nacional de Profesionales Indígenas (ANPIBAC), again with government involvement. This association of 2,000 bilingual teachers claimed to represent fifty-six ethnic groups at the national level, and took as its objective the development of a bilingual and bicultural educational project with an emphasis first and foremost on the culture of the group in question. Education was to be a means to reinforce ethnic identity. Although ANPIBAC argued that indigenous communities were being destroyed by capitalism, they did not seek to overturn it; rather they sought 'a place in the federal political arena, insisting that their objective was to maintain the specific forms of life, culture and identity of the indigenous population' (Hernández Díaz 1993, 49).

Important in the formulation of new strategies for the Indians was the *corriente crítica* (critical current) developed by certain anthropologists and intellec-

tual Indian leaders during the 1970s and 1980s. They have rejected (like the 'Indianists' before them) the *indigenísmo* of the anthropological and political establishment, who assumed the assimilation of Indians and their disappearance into national society. Rather, they have argued in favour of *indigenismo radical* or *indianismo*, according to which Indian ethnic groups will endure, and should be allowed to return to the civilizatory projects interrupted by the Spanish conquest.

Accordingly, they demand respect for the rights of Indians to be different, and recognition of Indian languages as official languages (Spanish, Zapotec, and English are now used to label the archaeological remains at major sites in the Central Valleys of Oaxaca). Acknowledgement and respect for ancestral cultures, and conditions for the technical maintenance of ancestral and/or traditional production are additional aspects of their platform (Hernández Díaz 1993, 45–6). Language, religion, history, and lifestyle have been deployed in various combinations to guarantee or extend ethnic rights at the state and federal levels. Ethnicity has been used to justify rights and claims, and as a motive for mobilization (Hernández Díaz 1993, 47).

In Oaxaca, during the 1980s, the most important ethnic organizations in Oaxaca were the Coalición Obrero Campesino Estudiantil del Istmo (COCEI) based on Juchitán, in the Isthmus of Tehuantepec, and the Movimiento de Unificación y Lucha Triqui (MULT) in the Mixteca Alta. Also of significance were the Comité Organizador y de Consulta para la Unión de los Pueblos de la Sierra Norte de Oaxaca (CODECO) in the Sierra Juárez, the Comité de Defensa y Desarrollo de los Recursos Naturales y Humanos de la Región Mixe (CODREMI) in the Sierra Mixe, and the Organización para la Defensa de los Recursos Naturales de la Sierra Juárez (ODRENASIJ) in the Sierra Juárez. ODRENASIJ, CODECO, and CODREMI were essentially regional organizations, representing twenty 'comunidades indigenas' in the case of the two former and thirteen in the case of CODREMI.

By 1996, ODRENASIJ was defunct (Maldonado Alvarado 1996), but two new new ethnic organizations had been created: the Frente Unico de Presidentes Municipales Indígenas de la Sierra Mazateca (FUPMISM) and the Organización de Autoridades Comunales y Municipales de la Triqui Alta (OACYMTA). Also formed in recent years have been the Asamblea de Autoridades Mixes (ASAM)—an adjunct of CODREMI, Servicios del Pueblo Mixe, the Unión de Comunidades de la Zona Norte del Istmo (UCIZONI) in the Isthmus of Tehuantepec, the Unión de Comunidades Indigenas de la Costa 'Cien Anos de Soledad' (UCI) on the Pacific Coast, the Union de Comunidades Indigenas de la Región Istmo (UCIRI) in the Isthmus, la Asamblea de Autoridades Chinantecas y Zapotecas de la Sierra (ASAZCHIS) in the Sierra Norte. There is scarcely an area of Oaxaca notable for the persistence of indigenous language groups that now lacks some form of ethnic movement.

Each group focuses on the issues that are most relevant to itself, and has alliances with either intellectuals (CODREMI, CODECO, and ODRENASIJ),

or peasants and proletarians (COCEI and MULT), or the rural poor (UCIRI and UCI). All envisage their struggle as part of the larger indigenous issue in Oaxaca and Mexico. Indeed, the demands are very similar from one group to the other. These include, accurate demarcation of territorial boundaries; regulation of the extraction of natural resources, especially forestry; expulsion of the Summer Institute of Linguistics, which has introduced Protestantism and schism to many communities (the Summer Institute was banned from Mexico in the late 1970s but never left).

Other preoccupations include recognition of traditional methods of electing municipal leaders (though this implies the disenfranchising of the female population); respect for municipal autonomy; provision of public services; and elimination of local and regional *caciques* (bosses). Removal of government employees who are dishonest or incompetent; provision of credit for agricultural workers; and freeing of indigenous political prisoners, are additional demands (Hernández Díaz 1993, 51).

FUPMISM, for example, was founded in 1993, and brings together the presidents of eleven *municipios* where Mazatec (and some Nahuatl) is spoken. Its objectives have been to improve public services and economic output, to consolidate the traditional *cargo* system, and to discuss the autonomy of the area—in the sense of wishing to exclude political parties from elections, which should, instead, be by 'usos y costumbres'. Realizing that, with the expiry of the (municipal) presidential period in 1995, FUPMISM would be in danger of disappearing, the Consejo Indigena Regional Autónomo de la Mazateca was formed in March 1995, in the presence of 600 delegates from nine *municipios* and fifty-five *agencias municipales* (Maldonado Alvarado 1996).

In 1995, OACYMTA was created by the Triqui communities of Chicahuaxtla and its four *agencias de policía*, in collaboration with Yosonduchi, an *agencia municipal* of Putla. In furtherance of the goal of achieving greater autonomy, through the reorganization of local government units along ethnic lines, a government official and the president of Putla were held hostage for several days in Chicahuaxtla. San Andrés Chicahuaxtla has become the centre for Triqui cultural revival: recovery of group historical memory and defence of traditional rights have been identified as key issues, together with what are seen as vital issues for the Triqui—communal assembly and the *cargo* system (Maldonado Alvarado 1996).

Conclusion

Oaxaca is divided socially into two cultural sections, the numerically larger *mestizo*, the smaller Indian. *Mestizos* are ranked by class and live in urban settlements, peasant villages, and the modernized rural areas, notably where there are large estates, sugar mills, or oil refineries, which give them access to many of the material benefits of modern life. They disparage Indian culture and values,

rurality and poverty, all of which are set in a context of physical isolation, often associated with areas of high altitude. Indians are essentially classless and emphasize the corporateness of their peasant lives at the municipal level.

Indians are not a cohesive group, but are subdivided linguistically in complex ways not only into many major languages, but also into dialect islands within those tongues. No language group has achieved internal organization, though several are well on the way to doing so. Whitecotton's observation about the Zapotec, that the term has been 'more of an artefact of external observers than a meaningful unit for the people to whom it has been applied' (1977, 271), was, until recently, applicable to all linguistic-ethnic groups in Oaxaca.

Indians endure peasant isolation as a collectivity, from which individuals can escape at will—but at their peril—into the *mestizo* section of society, a process which usually involves language shift, migration, urbanization, and proletarianization or marginalization. Only recently have ethnic movements developed with the intention of reconstructing identities at an ethno-regional level, seizing control of the management of local resources for their own benefit, and thus elaborating a proactive policy for the development of Indian Oaxaca. In some cases, migration to the USA has encouraged the sense of ethnic identity beyond the confines of the *municipio*.

Ethnic movements in Oaxaca are not free from problems. The only ethnic political boundary in existence is that surrounding the Mixe district, which has been notorious for its historic manipulation by *caciques*; otherwise, ethnic groups and district boundaries are by no means concordant. Even more problematic is the fact that, while the majority of Oaxacans are peasants, and the vast majority of Indians are peasants, not all peasants are Indians; many non-Indians have problems similar to those who consider themselves 'indigenous'.

Finally, the very isolation of the Indian communities in the past has ensured their survival. Yet the pro-development strategy adopted by many Indian groups may lead to their being drawn into the mainstream of Mexican life more rapidly and fully than under the PRI's indigenist policy, so that a new and more terminal process of de-Indianization may occur. An opposing argument can, however, be constructed. The determination of the Indian groups, and especially their young, educated leaders, to organize for their own benefit, and the speed with which they have responded, via 'usos y costumbres', to recover control over their community, where that has been necessary, suggests a different outcome.

Although Oaxaca's ethno-linguistic groups have begun to reclaim their regional identity and their capacity to act in an organized way, the fundamental social unit of peasant Oaxaca remains the *municipio*. Speaking about male migrants in Oaxaca City, Murphy and Stepick note that, if they 'have an identity other than Mexican, it is first with the village they come from and secondly with the language they speak—not as Indians' (1991*a*, 129). Accordingly, it is to social organization at the micro-level of the village or *municipio* that attention is turned in the following chapter.

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