

Confederate colonization of Mexico

Roberto Casellas*

I have seen or imagined a great empire beyond the river; the river they call El Grande.

Joseph Shelby

The following is the account of an intriguing historical event that could have changed the course of our relations with the United States. The monumental historical work, *Mexico over the centuries*, devotes only a few lines to the subject: "Let us examine the means by which Maximilian and his allies attempted to stave off the storm in the North...They naturally thought of creating a barrier against the United States by colonizing the South; in other words, they would introduce an army into the South disguised as settlers.

"It is just possible, said Marshall Bazaine to the Archduke Maximilian...that once Confederate General Slaughter, in command of Brownsville, becomes aware of his party's defeat and President Jefferson Davis' capture by the Union Army, he may lay down his arms as have the other southern generals. However, given Mexico's proximity, they may well be tempted to take refuge across the river."

The book goes on to point out that this would have been dangerous for Mexico since it could have seriously complicated matters with the United States.

Southern colonization of Mexico was a short-lived event, given little attention by historians, and of which I was unaware until I came across Daniel O'Flaherty's *Undefeated Rebel*, a biography of Confederate General Joseph Shelby, based on the campaign diary of Major John Newman Edwards, who accompanied him on his Mexican adventure.

It is clear that General "Joe" Shelby was a pillar of the Confederacy during the War of Secession, as much for his

bravery as a soldier as for embodying the quintessential Southern lifestyle and the inherent romanticism of the time, particularly in that part of the United States.

It is difficult to think of any other reason for his determination not to lay down his arms, knowing that Lee had done so at Appomattox, and lead volunteers from his former Missouri Cavalry Division to offer their services indiscriminately to either Juárez or the Second Mexican Empire.

Born in 1830 to Kentucky aristocrats, Joseph Orville Shelby soon moved to Missouri, where he married and inherited a fortune from his father. He increased his inheritance still further by cattle-raising and lumbering along the banks of the Missouri River.

However, the 1854 Kansas-Nebraska Act allowing those territories to be colonized, affected the slave economy that had made the Shelby firms so prosperous. Thousands of colonists from the North set off towards the new lands, threatening to flood the entire West, make it abolitionist and provide greater support for abolitionism in Washington through their representatives in Congress.

A clash between the Missouri minority and the Yankee majority was inevitable, and it began when Southerners tried to rig Kansas elections to prevent the colonists from electing their own representatives and thereby control them.

It was then that Shelby first took up arms in a series of skirmishes, known as the Frontier Wars, that served to stir up the passions which led to civil war in 1861.

Shelby's performance during this conflict and the subsequent war was outstanding: no other Confederate officer covered as much territory or took part in as many battles. He was, in the words of his enemies, "The best cavalry general the South ever had." In fact, following the battle of Second Newtonia, the last fought west of the Mississippi and won by Shelby, General Sterling Pierce, former governor of Missouri and Shelby's superior, said this of him: "I regard him as the best cavalry officer I have ever known."

An impatient Shelby spent the last winter of the war (1864-65) stationed at Pittsburgh, Texas, with his cavalry division. News of the South's surrender reached him there and it was then that he hatched his great plan.

Figuring that many Confederate soldiers from Lee and Johnson's armies would prefer to join him rather than live under enemy rule, Shelby thought he could offer either Maximilian or Juárez an army of one hundred thousand veterans who, together with a similar number of Mexican soldiers, would threaten the Union government with an indefinite war, which neither Lincoln nor the war-weary northerners were prepared to face.

Peace would then have to be negotiated and a vast new empire in the Southwest and Mexico would be open to immigration by advocates of slavery. It would be a revival

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of the proud South and the lifestyle that went with it. "The Yankees can keep their black republic," he used to say. "We're going to have a bigger and better Confederacy in the Southwest."

A plan such as this implied a considerable lack of knowledge of Mexican history and completely overlooked its inhabitants' deeply nationalistic character. It was therefore unlikely to succeed and a more rational mind would have considered it further before trying to put it into practice, but not this swashbuckling character, unhampered by intellectual baggage, for whom audacity had been the keynote of existence.

"Boys," he said to his men, "the war's over and you can go home. But I'm not going back. Across the Rio Grande lies Mexico. Who's going to follow me there?"

Several hundred soldiers stepped forward. Five hundred, according to Major Edwards, although it is difficult to say exactly, because many others joined up later and some withdrew. A sergeant brought out the division's torn old banner and stuck its staff into the ground. Struggling to control his voice, Shelby noted that although

the flag was in shreds and the red had faded, the blue stripes still blazed with the white stars of hope.

The next day, a new brigade marched south under Shelby.

They carried enough weapons because the blockades at Galveston and Matamoros had created an ample supply of French and Austrian artillery in Texas. Shelby was thus able to assemble ten new Napoleon Howitzers, two thousand Enfield rifles, forty thousand rounds of ammunition, pistols, cartridges and five hundred sabres. Each man already carried a Sharpe carbine and one hundred and twenty rounds of ammunition. They found plenty of food and other supplies in an abandoned railway carriage on the way to Waco.

However, it should not be thought that Shelby intended to live off plunder and loot. On the contrary, one of his first acts was to rid Houston of its outlaws, and later Austin and Wakahachie. In Austin, a group of bandits, led by the notorious Captain Rabb, was intent on stealing the Confederate gold and silver left in the custody of Governor Murrah. Having thwarted their attempts, after a bloody fight in which all the bandits and some of his own men

were killed, Shelby refused to accept one cent of the sum offered by the governor to cover back pay for his men. "We know what the world would think," he explained, at the foot of the steps to the Texas Capitol. "We won't take the money. We're the last of our race. Let's be the best, too." Loved and respected, the general was always right in the eyes of his men, who cheered him wholeheartedly.

Shelby soon gave another example of his Quixotic behavior in the presence of former Confederate General Edmund Kirby Smith, whom Shelby himself had deposed before his big decision, when a group of officers resolved to continue fighting. Upon arriving in San Antonio, he learned that his former superior was hiding in the city under an assumed name. Shelby and his men serenaded the general to make amends, first singing "Hail to the Chief" under his window, followed by "Dixie" and an ovation, until the humiliated general appeared with tears in his eyes.

Shelby spent a few days in San Antonio, working out the details of his next expedition, while his men amused themselves with money they received from the local merchants, who were



Jorge González Camarena, Benito Juárez.

delighted by the safety their presence afforded in those troubled post-war days.

In early July, Shelby and his troops embarked on an uneventful journey from San Antonio to Eagle Pass. There, before the Río Bravo (or Grande), a simple ceremony took place in which the Missouri Cavalry Division's flag, wrapped around the black feather that had once graced the former general's hat, were forever submerged in the waters of the river. No one thought fit to make a speech, so none was made.

Placing his cannons on the river bank in full view of the Piedras Negras garrison, Shelby sent one of his lieutenants to parley with Coahuila Governor Viesca, who commanded two thousand men in the city. Once the meeting was arranged, Shelby crossed the river.

No one knows exactly how the conversation went, but Shelby must have set forth his case in roughly these terms: "The war in the United States is over and Secretary of State Seward is calling for the French troops to leave Mexico. If they don't, there will be another United States intervention and it will be 1848 all over again. You can avoid this by enlisting Confederate men to reinstate Benito Juárez as President of the Republic."

Apparently, Shelby also put forth the strange argument that his proposal had the support of the Yankee government itself, since they thought it preferable to win an undeclared war against the French than a formal one.

Given the governor's position and conditions prevailing in the land, with General Díaz cut off in the South and Juárez sheltering at the border, there is no doubt that Viesca accepted and offered Shelby military command of Coahuila, Nuevo León and Tamaulipas, reserving civil government for himself.

Shelby, however, thought his men also had the right to express their preference and allowed them to vote on this, but not before he had made it clear that he supported Juárez. Before reaching this conclusion, he no doubt waged a difficult internal struggle, in which his adventurous side came to the fore.

When, however, after long debate, his companions decided they had been through enough trial, dust and tribulation, and preferred to savor the delights of the new Mexican Empire, Shelby gave in readily and, in an about-face, agreed to put himself at the service of Maximilian.

"If that is your answer," he said, "it is mine too. We start marching to Monterrey at four o'clock tomorrow afternoon. You have chosen the Empire, which may be the right decision. Be that as it may, your destiny is my destiny, and our fortunes are one and the same."

Viesca was forced to accept this new decision philosophically, since his forces could not have prevented the Confederate advance, and being a practical man, he offered to buy the cannons, on the grounds that they would



Maximilian I, Emperor of Mexico. Lithography by Nargeot / Printed by Ch. Chardon.

be a nuisance and that the men would need money for their long journey.

The operation was carried out, in spite of a fight over some horses, which left dead and wounded on either side. Their spirits cooled, relieved of their cannons and other equally cumbersome weapons, the troops went on their way to Monterrey.

However, this soon turned out to be little more than a brief respite, since the rest of the journey to the capital of Nuevo León was plagued with incidents, the first of which was an ambush by eight hundred men, whom Edwards did not hesitate to call guerrillas and bandits, and which caused the death of more than fifty of the invading party.

From then on, in the face of continuing hostility, the men began to take reprisals, until Shelby issued the following warning, "There are signs among you of poor discipline... fight those who attack you, but I do not wish to see a single hand raised against a noncombatant Mexican. We may be invaders but we are not murderers. Anyone who steals, insults women or takes unfair advantage of unarmed or old men...will be treated as though he were the enemy."

His words carried an implicit threat of death and no one dared reply. Nevertheless, a journey like theirs, to which they had no right at all, across a country in the throes of war, was bound to have consequences, and so it was that in Paso de Palmas, north of Lampazos, they were again attacked by guerrillas, who were drawn by the foreigners' fine horses and weapons, to say nothing of their other possessions.

Having fought off this latest attack by killing the ringleaders, the brigade continued its journey to Lampazos, where another, although smaller, incident occurred after a young Mexican challenged one of the soldiers to a knife duel for attempting to kiss his sister when she was alone.

Although apologies were made, the unhappy incident ended with the death of the injured party, going down in history as yet another futile death resulting from an exaggerated sense of honor. The killer, in turn, died in the next skirmish.

In Monterrey at last, Shelby reported to Colonel Jeanningros, who commanded a military stronghold with five thousand troops, including four



J. Vennerson of Richmond.

Robert E. Lee.

regiments of the Foreign Legion, the Third Zouaves, and two from the Mexican Imperial Army, constituting the Empire's northernmost line of defense.

O'Flaherty's book vividly describes the city's execution wall, dark red with the blood of men, including French soldiers shot for paltry barracks offences, and portrays Colonel Achilles Dupin as a sadist with a questionable past who cut off the hands of Juarez' supporters to discourage them from ever taking up arms again against the Empire. He once hanged a landowner because it was a pity that one of his trees had never borne "fruit."

As they approached Monterrey, Shelby sent Jeanningros a message couched in these terms, "General, I have the honor to inform you that I am but a mile away. Preferring exile to surrender, I have come to put myself at the service of His Majesty, the Emperor Maximilian. Is there to be peace or war between us? If the former, I shall cross your lines, demanding the courtesy owed one soldier by another. If the latter, I propose to attack you without more ado. Respectfully, Jos. O. Shelby."

Jeanningros hastily replied that he would be well received by both himself and the Emperor, as the first North American soldier to join their ranks.

Shelby and his men spent several days in Monterrey, enjoying the hospitality of the French; the book recounts the French colonel's opinion of Maximilian, "...more of a scholar than a king, he is a fine botanist, a poet at times, and a traveler who collects curiosities and writes books, a saint with wine and a sinner with tobacco, he adores his wife and has more faith in destiny than in a well-trained battalion. He is a good Spaniard in everything but treason

and deceit; an honest, persistent man who is sincere and has a good heart.

"He has too great a faith in the liars who surround him and too pure a heart for what he has to do. He cannot kill like we French. He is not a diplomat. In a nation of thieves and murderers, he goes devoutly to mass, makes donations to hospitals, says his prayers and sleeps the sleep of the just in Chapultepec Palace. His days are numbered and all the power in France will not suffice to keep the crown on his head, even if he manages to keep his head on his shoulders."

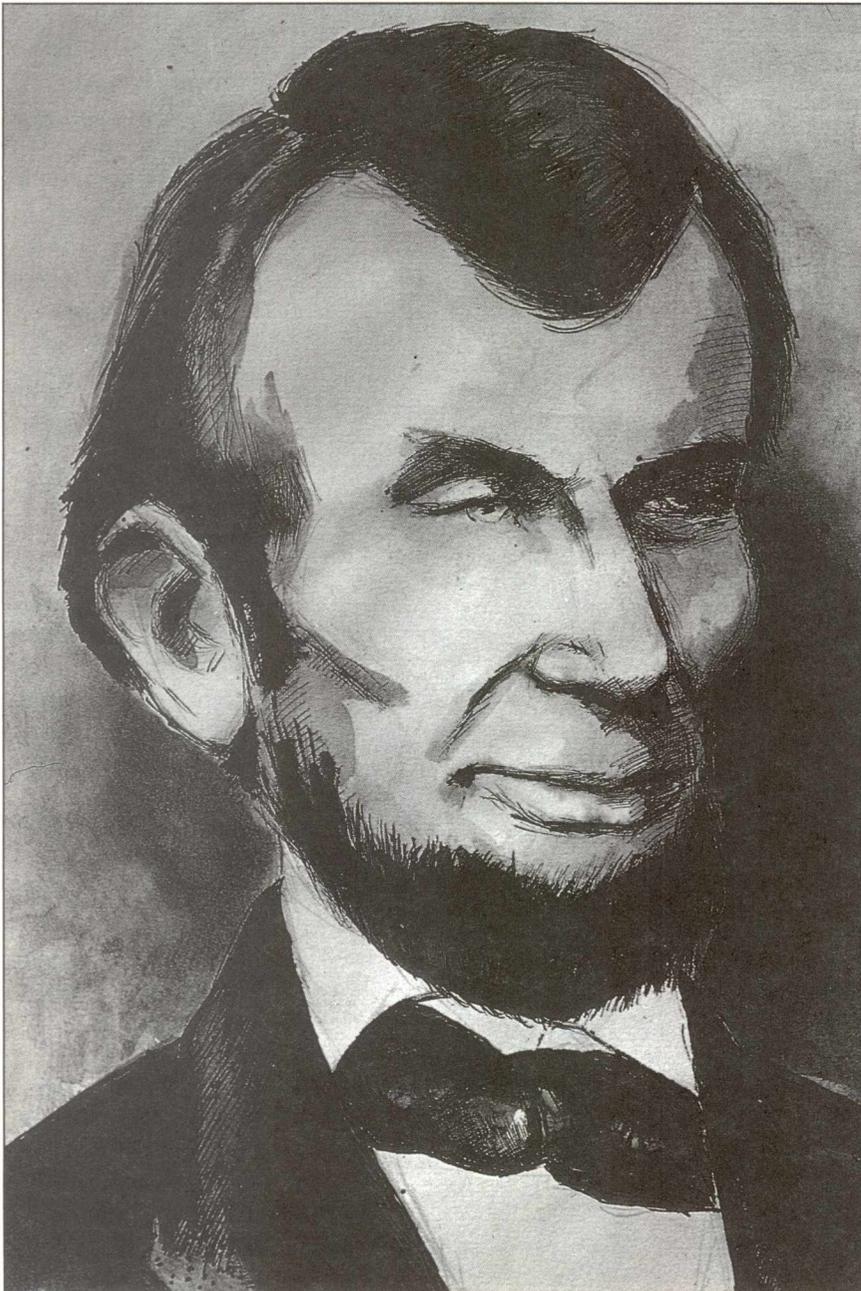
On their way to Guaymas or Mazatlán, where Shelby intended to set up a bridgehead for soldiers emigrating south to support Maximilian, he and his men reached Parras.

Colonel Depreuil, commanding the 52nd Regiment of the Line, regarding Shelby's men as little more than looters, gave them a cooler welcome than his companion in arms at Monterrey.

Besides, he thought their presence might cause even greater friction with the Union troops at the border, and said as much to Marshal Bazaine, who agreed and sent instructions to Shelby to carry on to the capital where he could report to Maximilian.

On the way to Mexico City, the Confederates missed no opportunity to prove their chivalry, this time by saving a beautiful young, Mexican-American maiden held prisoner in a fortress-hacienda by a villain, and killing both her captor and all his men. Inés Walker, the lady in question, once she had recovered from the terrors of captivity, joined the soldiers on their journey south. O'Flaherty makes no further mention of her.

The former cavalry division's last act of war took place at Matehuala in August 1865, and consisted of relieving Major Pierron's besieged regiment of the line. With this magnificent feat behind them, Shelby and his men reached Mexico City that same month and were ceremoniously received by a battalion of Chasseurs d'Afrique that Bazaine had sent specially for the purpose.



Abraham Lincoln (india ink painting by the author of the article).

The meeting with the Emperor took place in a small reception room at the National Palace, with Maximilian flanked by Bazaine and the Count of Noué, who acted as interpreter, even though Maximilian understood English. Shelby was accompanied by Commodore Maury, the first cartographer to chart ocean currents, General Magruder and Major Edwards.

Maximilian received them simply and warmly. Shelby explained his plan and offered to enlist up to forty thousand Confederate troops and supervise the Imperial army, so that the departure of the French army would cause no inconvenience. He assured them that the United States government would have no objection, adding that, with his support, he saw no reason why relations between the Imperial government and that of United States should not improve.

The Archduke did not reply directly and withdrew, but Noué gradually gave them the negative verdict: Maximilian could not afford to depend on such a large foreign army.

"So I gathered," said Shelby, simply.

"How?" asked Noué.

"I never saw his face light up. He has faith but no enthusiasm, and what a man in his situation needs is not only that, but boldness."

In the ensuing conversation, Shelby told the interpreter about his experiences along the journey, making it clear that there was no support for the Empire anywhere in Mexico.

"As sure as there's snow on Popocatepetl, Juárez lives in his people's hearts."

Shelby and his men then proceeded to discuss countless plans, but in fact, as soon as the Emperor's reply became known, the iron brigade ceased to exist. Bazaine, relieved to see a potentially troublesome group disintegrate so peacefully, gave each of the men fifty dollars' worth of gold to go their separate ways.

Some of the men joined the Zouave regiments and were sent back to Monterrey. Others, like Shelby and the aforementioned General Pierce, also exiled in Mexico, planned to set up a farming community, taking advantage of the Imperial Decree of September 5, 1865, which allowed freedom of religion and other benefits, such as the right to bring in former black slaves as paid laborers. They chose several thousand acres of land, abandoned because of the war, around Córdoba, Veracruz. There, they founded an exact replica of a Southern town, which they named Carlota, in honor of the Empress. As a result of publicity in the United States, particularly in the South, and in spite of US government prohibition, it attracted several hundred settlers who traveled by boat to Veracruz, by train to Paso del Macho, whence they reached Carlota by stagecoach or horseback.

By late September of that year, there were already ninety-eight Confederate families in the area. Shelby, who



General François Bazaine Achille.

had bought a farm called Santa Ana, began to prosper as a farmer once more, and decided to bring his wife and family to Mexico. He had also set up a mule-drawn freight wagon service between Paso del Macho and Mexico City.

The colony thrived. In a press interview in the spring of 1866, General Pierce declared that he was already exporting coffee to the value of \$25,000 as well as other products, and that the other settlers, who now numbered almost five hundred, were also prospering. All was peace and progress... or so it seemed.

However the settlers' domineering attitude toward the natives became increasingly obvious, and caused considerable resentment, which in turn provoked an attack by the nearest Juarist Commander, Colonel Figueroa. While the French were distracted, Figueroa devastated the area and took thirty hostages. When these and the other settlers returned, they found that nine months' work had been laid waste and that Carlota had been razed. Even though the French sent their forces to capture Figueroa, who was eventually arrested and executed, this was the end of the colony.



General Elie Frédéric Forey.

The few who had settled in the area around Córdoba were not disturbed, and continued to live there, but most went back to the United States. Undeterred, Shelby tried to set up another colony, this time near the banks of the Tuxpan River, confident that its distance from trouble spots and the lack of communications would allow him to live in peace.

With the help of a sizable French garrison, he soon started work again and even began building a railway-line between Tampico and Veracruz, which involved coping with financial hardship, bad weather, and epidemics that ravaged his men. Once the garrison was called back to Mexico, two thousand of Porfirio Díaz' men marched in to the cry of "death to the gringos" and put an end to the new project.

Shelby's last act of war was in defense of his freight wagons, which he had drawn up in a circle, in true western style. Under attack by General Escobedo's troops, north of San Luis Potosí, the man who had so often risked his life was saved once again by the timely intervention of his French allies. After their withdrawal from Mexico, Maximilian called Shelby to him and asked:

"How many Americans are left?"

"Not enough for a bodyguard."

"I need twenty thousand."

"Begging Your Majesty's pardon, you need forty thousand, but I can't depend on numbers now, only on your men's devotion. There is only one of me, but I am at your service."

Edwards recounts that Maximilian, who was extremely moved, dismissed Shelby and awarded him the Golden Cross of the Order of Guadalupe.

That is, in broad terms, the story of this extraordinary man's Mexican adventure. Shelby's own words, set down by his faithful Major Edwards, (later director of Mexico's first English-language newspaper, *The Mexican Times*, and then one of the great American journalists of the 19th century), best describe his spirit—daring, romantic, Quixotic—misguided and incapable of understanding the extent to which events had changed in the course of his own lifetime.

Back again in the United States, forever restless, Shelby tried railway building, mining, agriculture and other activities, all with indifferent results. He saw his house go up in flames and once more almost lost his life in the midst of a frenzied crowd. He had done more in his life than a dozen men before age finally forced him to settle down.

He was briefly in the limelight again as a flamboyant, chief witness at the robbery trial of Frank James, who with his brother Jesse had served under Shelby during the war.

Shelby died in Kansas City on February 13, 1897, surrounded by his beloved family, and was buried in Forest Hill Cemetery, with full military honors and the respect of his fellow citizens. We can only speculate on what might have happened to this deluded romantic if he had served Juárez rather than Maximilian. Although it is unlikely that his settlers' project could ever have been carried out on the grandiose scale that he would have wished, he and his men could have made a pleasant niche for themselves in the Republic, which, once restored, amply rewarded those who had served it well.

His project, on a more modest scale, might just have been unofficially supported by Lincoln, as Shelby himself maintained until his death. Or so he was assured by his cousin, Frank Blair, the President's adviser, whose house is now used to receive distinguished foreign visitors to Washington.

Lincoln may well have encouraged this project, albeit as a means of ridding himself of a potential troublemaker, so as to achieve peace in the land more quickly.

Finally, I wish to thank my friend Robert W. Crawford in Washington D.C., a scholar of Confederate history and Shelby's fellow countryman, for his help in tracing these events ❧