

Project description: Mestizo as a Transimperial Categorization in the Early Modern Greater Caribbean and Mexico City – by Prof. Dr. Sarah Albiez-Wieck

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Introduction

When Columbus first arrived in the Caribbean in 1492, ancestry played an important role in empires on both sides of the Atlantic. From the Iberian Peninsula, the idea of “purity of blood” (“limpieza de sangre”) was imported; a concept that privileged people based on their supposedly “pure” Christian descent and discriminated against converts of Jewish or Muslim origin. In many American societies, people were organized in units of corporate descent and in the pre-Hispanic empires, the nobility put emphasis on the genealogy of their lineages.

This emphasis on ancestry reflects in the creation of the Spanish term *mestizo* which referred mostly to the descendants of conquerors and Indigenous peoples. It was not created immediately, since during the first years of the European conquest, the offspring of conquerors and Indigenous peoples were assigned to either their father’s or mother’s categorization. Once mestizo had been created as a concept, it quickly began to imply a specific legal and fiscal status. Throughout the colonial period, the categorization was passed on to other empires in the Americas, and it became increasingly racialized. It served to manage and control social order in colonial societies, but it did so differently across empires and from region to region. In the Americas, all European empires employed the term in its translation to Portuguese (*mestiço*), French (*métis*), or Dutch (*mesties*); in the British empire the French term was sometimes used. It also was employed in territories outside the Americas, and also beyond the early modern period, including the Italian Empire. In many postcolonial nation states, the term and concept continue to be highly relevant, and references to its early modern origins are often enunciated but rarely analyzed critically.

Existing scholarship indicates that the term was first used in late medieval Spain but only acquired its later meaning in early colonial Spanish America. From there, it was probably spread to other European colonies in the Americas, but also to Asia. For example, the term appears as early as 1596 in Portuguese-ruled India. However, I still do not know exactly how and why the term was used and spread. The proposed project aims to investigate how, when and why this process took place.

The project focuses on the Americas, particularly on the Greater Caribbean, where the European conquest of the bi-continental landmass began, and is extended to northeastern Brazil due to Dutch influence there. Furthermore, Mexico City, the capital of the viceroyalty of New Spain will be examined as a major hub of colonial power, with part of the New-Spanish territory also being part of the Greater Caribbean. Additionally, it was one of the most global and cosmopolitan cities of the time (López 2021). Its predecessor Tenochtitlan had been one of *the* major pre-Hispanic centers of power. Its Indigenous inhabitants therefore were in a different position to negotiate the status of their offspring in comparison to many Caribbean islands. The selection of the area of study permits encompassing perspectives on both colonial centers and peripheral areas and to investigate the dynamics between them. The project focuses on the period from 1492 to the 1820s, when most European colonies in the Americas gained their independence, though the main focus lies on the earlier periods of colonial rule; which, however, vary significantly in chronology according to the respective colony. For consistency, the Spanish variant of the term

mestizo is used throughout the text. The transimperial approach on which this project is based emphasizes the cross-border connections and transfers. In combination with this, Watson's concept of legal transplants provides a valuable framework for analyzing the transfer of the mestizo categorization as a legal construct across different colonies (Pihlajamäki 2024; Watson 1993). Thereby, it promises to yield a unique transimperial history of the term mestizo which can serve as a methodological model for the study of similar categorizations beyond the early modern Americas and to reconsider traditional boundaries of area studies.

State of the art and preliminary work

As many scholars have pointed out, the idea of racialization and the development of modern racism were partly influenced by the conquest of the Americas and debates about miscegenation. Some authors (Hannaford 1996, 6,191; Plümecke 2014, 69–70) have argued that it was tied to the Enlightenment and that the birth of modern racism can be located in 1684 when *the Nouvelle division de la terre par les differents espèces ou race qui l'habitent* was published (first anonymously) by François Bernier (1684). Many Enlightenment authors discussed American populations in deliberations about racialization, as the current GloVib project led by Adrian Masters (2023) is studying.

When analyzing the process of racialization of the categorization mestizo, and in line with my previous publications, I advocate for looking at terms from the sources describing these types of categorizations to avoid anachronisms; in order not to speak about ethnicity or racism when they had not yet fully developed in their modern form. For Spanish America, *calidad* ('quality') was a key term. To define a person's *calidad*, imprecise criteria related to ancestry, social reputation, (im)purity, and religious norms were used; at the same time, *calidad* implied a legal and fiscal status (Albiez-Wieck 2013, 2021, 2022b). Similar terms and concepts in non-Spanish colonies shall be given special relevance during the study to understand conceptions that varied or were similar in nature, including indigenous terminology (cf. Candela 2026). What I am also trying to avoid is what Brubaker (2009) has called "groupism"; in order not to homogenize the mestizos as a group.

With respect to terminology, I would also like to point out that the nouns denominating the processes of miscegenation, such as *mestizaje/mestiçagem/métissage* (with no equivalent in Dutch and English), are deeply marked by academic and social developments that occurred after the independence of most colonies in the Americas, even though it is used in many scholarly texts about the colonial period. Stolcke (2008, 20) was one of the first to call for its use to be abandoned for the colonial era for being anachronistic; a call that has been substantiated by Zermeño (2008, 80). Thus, I prefer to speak of "mixture" or miscegenation instead of *mestizaje* – of course, always highlighting that something like pure racialized groups cannot have any biological basis nor can, therefore, "mixed" ones.

The significance of the mestizo categorization has long been acknowledged in scholarship. Within studies of the Americas, considerable attention has been given to the colonial application of the term, particularly within the Spanish empire. In contrast, research on its use in the Portuguese, French, and Dutch colonial contexts, as well as in the postcolonial societies that followed, has been comparatively limited or more recent. This historiographical imbalance leaves key questions unexplored: For instance, the ways in which the mestizo categorization emerged and circulated between different colonial spaces, its occasional decline in usage, most notably in Dutch postcolonial regions, and the reasons behind its widespread adoption in some parts of an empire

but not others remain underexamined. Understanding these patterns can offer deeper insights into the shifting dynamics of racialized categorization and social hierarchy in colonial contexts. For colonial Spanish America, the works on mestizos that exist are numerous, and just a few examples which tend to be widely quoted can be mentioned here (Rappaport 2014; Chance 1979; Stolcke 2008; Ares Queija 2004). Only a few studies, however, investigate the origins of the mestizo categorization.

Gil (1997) has studied some of the earliest examples of sexual intercourse between conquerors and indigenous women, such as the violation of a Carib woman by the Genoese Michele da Cuneo who participated in Columbus' second voyage (cf. also Gerbi 1986, 34). According to Gil (1997, 15) the earliest known mestizo, the son of the Spanish conqueror Pedro Gutiérrez lived only a few months. In 1514, King Ferdinand authorized Spanish-Indigenous marriages, though mestizos needed a special license to enter the Iberian Peninsula. This very insightful article, however, represents no systematic investigation into the origin of the mestizos in the Caribbean nor is it in any way transimperial in nature. However, it makes Santo Domingo a promising case study to dig deeper with respect to the earliest mestizos. Since Santo Domingo was part of the Viceroyalty of New Spain, it later had institutional links to its capital Mexico City which were furthermore intensified through the vibrant connections via the port of Veracruz (Clark 2023). Previous research on Mexican-Caribbean networks would make this a possible avenue for knowledge transfer about mestizos (Cachero and Rodríguez-Modroño 2022).

Regarding mestizos in early modern French dominions in the Americas, the state of research remains highly uneven (Schaub 2020; Lehmkuhl 2016). In the context of the emergence of a distinct mestizo (*métis*) community in Canada in the late 18th and early 19th centuries, some studies have explored their origins, which trace back to the early 17th century (Ens and Sawchuk 2015). There is a significant research gap concerning the French territories in the Caribbean (e.g. Saint Domingue, Guadeloupe, Martinique) and South America (French Guiana and France Antarctica, the short-lived colonial enterprise in the Guanabara-bay in Brazil, cf. Hupfeld 2007). This can be explained, in part, by the fact that there, the Indigenous population was decimated considerably by the colonizers and was soon outnumbered by African individuals and their offspring due to the transatlantic slave trade. As a result, research predominantly focused on relationships between colonizers and enslaved Africans, with their descendants often categorized differently (e.g. *mulâtre*). While mestizo in most colonies denoted the offspring of Europeans and Indigenous people, in French Guadeloupe, a mestizo (*métis*) specifically referred to the child of a white person and a mulatto at the end of the 18th century (Régent 2004). What remains unclear is to what extent these categorizations were influenced by the transimperial transfer of the mestizo concept and when it happened. The earliest known French mentions of the term mestizo (*métis*) date to 1664 in Guadeloupe and Martinique (Régent 2013, 68) and as late as 1731 in Louisiana (Vidal 2014, 136). In Canada, it seems to have been used since the 18th century (Brown 1996, 20). In both cases, there is proof of much earlier cases of Indigenous-European relationships, but it is unclear why the term was introduced so late.

With respect to Brazil, the research decreases when going back in time. I know that the term mestizo (*mestiço*) was first used in the 16th century, and there is evidence of the name of a few early mestizos, generally the children of conquerors and Indigenous women, present among others in the mid-16th-century account by Hans Staden (Metcalf 2005, 79-85; Schwartz 1992). After a few decades, the mestizos started playing a key role as intermediaries or "go-betweens" in trade and administration, contributing to the survival of the Portuguese colonial empire

(Bethencourt 2021; Alves Carrara 2011; Metcalf 2005). Accordingly, previous research also interprets miscegenation as a deliberate strategy by Lisbon to consolidate its presence in the colonies despite its small population (Barreto Xavier 2015; Vale de Almeida 2007). This included “mixed” marriages, which were widespread at the time and increased in importance following the Pombaline reforms of the late 18th century (Losada Moreira 2015). The situation in Brazil is important for my project insofar as part of its northeastern territory became a Dutch colony during part of the 17th century. In Dutch Brazil, also called New Holland, Dutch men seem to have married many (catholic) Portuguese women (Rose 2023, 23), which makes a transmission of the term in this context probable.

The Dutch Empire’s Western colonial practices are often overlooked compared to those of its Eastern counterparts, but they are important in understanding the broader ideology of empire in the Dutch context (Groenewoud 2021). The division of East and West was embodied in the separation of the East India Company (VOC) and the West India Company (WIC). The former was considered to hold a lot more wealth and importance than the latter, which was strongly related to the way both East and West were perceived (Rose 2023; Oostindie and Paasman 1998; Oostindie 2005). Concerning mestizos during the early modern age, there is only one major pioneering study by Rose (2023), which compares the Dutch West and East Indies. Since her work examines colonial marriage laws, it is an important point of reference for the project.

Besides publications, four major ongoing collaborative research projects connected to the project’s research questions must be mentioned: The fact that they exist shows the worldwide and *longue durée*-relevance of the topic. Scholars from almost all these projects have been contacted and successfully invited to joint academic events. However, most of them have the 19th and 20th centuries as their prime period of research. Besides, their research objectives and design differ significantly from my project. The Italian scholar Valentina Fusari recently launched the REDMIX project, an interdisciplinary study uniting anthropology and demographic analysis to explore the histories of people of “mixed” ancestry in the Red Sea region from the 1800s to the 2000s. While my project decisively distances itself from Fusari’s through its different temporal (early modern) and geographical (the Americas) focus, the two projects agree that studying the discourses on “mixedness” in the constraints of the national entity can no longer yield groundbreaking results. The EUROMIX Research Project at the Faculty of Law of the Vrije Universiteit Amsterdam examines the legal regulation and implications of “inter-racialized” relationships in modern Europe. It mostly looks at laws surrounding “mixture” today. My project partly shares this interest in legal regulation and the contestations and can draw some inspiration from the already finished PhD projects and previous publications (e.g. Hart 2019; Franco and Mustafa 2019). The French historian Françoise Blum is currently directing the project *Être métis·se dans les empires*, which explores the discourses surrounding “mixture” in European empires during the 19th and 20th centuries. My project sets itself apart not only through its distinct temporal and geographical focus but especially through its transimperial approach. For Germany, the project “Global entanglements and racial categorizations: the Iberian roots of German racial thought (16th-20th century)” (GloVib) has to be mentioned. It is led by Adrian Masters and shows that the discussion about miscegenation and racialization in the Americas influenced German 19th-century notions of racism. Therefore, my project constitutes a chronological antecedent to the GloVib project.

With respect to my own preliminary work on the topic, I would like to highlight a one-year project funded by the University of Münster’s “Laboratory of Ideas” (*Ideenlabor*). Four student assistants

worked together with me on identifying gaps in research and suitable source material. Together with the research assistants employed in the project, we wrote an historiographical article to be published in the E-Journal for Portuguese History with the title “Mestizo as a transimperial categorization in the early modern America”. Another crucial milestone of the project was a workshop that took place in Münster in February 2025, where the topic was discussed with experts in the field, such as Frédéric Régent, Sophie Rose, Nicola Camilleri, Valentina Fusari and Capucine Boidin. The workshop contributed to a planned cooperation with the GloVib project in Trier mentioned earlier, as Adrian Masters and his team were also present. Moritz Herrmann, Postdoc in his team, was additionally my co-organizer of a joint panel on mestizos at the 2025 Conference of the Association of German Historians (*Historikertag*) in Bonn.

Last but not least, it has to be mentioned that over the past years, I have conducted extensive research on the topics of legal and social categorizations in colonial Spanish America and, to a much lesser degree, the Philippines, including mestizos. My research has focused on the mestizo as a legal and fiscal categorization and how it was defined in legislation and negotiated in petitions. Closely related to this have been my studies on how Indigenous migrants were legally categorized in a colonial context and how these categorizations influenced their belonging; always taking into account the voices of those categorized (Albiez-Wieck 2022b; Albiez-Wieck and Gil Montero 2020; Albiez-Wieck 2018, 2017b, 2017a). Marriage records are another source that I have analyzed in this respect (Albiez-Wieck 2022a). Besides, I have studied European travel reports from the early modern Americas, analyzing how Europeans described themselves and others and how this was entangled with *calidad* (Albiez-Wieck and Gil Montero 2023; Gil Montero and Albiez-Wieck 2019; Albiez-Wieck and Gil Montero 2022). Also, discourses connected to theories of racism in the writings of the most famous European traveler, Alexander von Humboldt, were a topic of my research (Albiez-Wieck 2023) as well as biologist racism, gender and mestizos in colonial Philippine photography (Albiez-Wieck 2025). One of my earliest publications based its analysis on missionary reports (Albiez 2009) – adding another kind of source to the long list of source types that I have experience with and that will be used in the proposed project. Furthermore, many of my studies had a focus on comparisons and/or entanglements. Another guiding line of my research has been the interest in processes of social differentiation and social categorizations more generally, which allows me to amply contextualize the study of the categorization mestizo (Albiez-Wieck 2015, 2016, 2013, 2020).

Objectives and work programme

This project aims to investigate mestizo as a transimperial categorization, shaped by both the mobility of people and ideas, as well as the local conditions in which it was negotiated. Rather than examining it as a fixed legal categorization imposed by colonial authorities, the project explores mestizo as a fluid and contested concept that evolved through cross-border encounters, competing colonial projects, and the agency of various actors. I argue that mestizo was not merely a tool of colonial governance but a site of negotiation, shaped as much by imperial strategies as by the actions of those who lived within, challenged, or redefined its boundaries.

To test the transimperial nature of the mestizo categorization, this project will trace its conceptual and legal transfer across different colonial empires. This includes analyzing how mestizo was defined and redefined in legal codes, how it functioned in court cases and petitions, and how its meaning shifted when territories changed hands. Through this approach, the project aims to investigate how different colonial regions functioned as **transimperial spaces** where competing

forces shaped the meaning and application of the term *mestizo*. More importantly, the project examines how and why **transimperial agents** (especially missionaries, conquerors and colonial administrators) transferred, adapted, and/or resisted the *mestizo* categorization. By following these actors, the project moves beyond empire-centered narratives to trace how *mestizo* developed at the intersections of different legal systems, social orders, and local negotiations. At the same time, legal texts themselves were highly mobile. Norms, decrees, and classifications travelled between imperial centers and colonies, where they were translated, adapted, or contested. This mobility offers crucial insights into *mestizo* as a **legal transplant**.

At the core of my analysis stands the **gendered nature** of the *mestizo* categorization. The term was not a neutral label but one shaped by strongly gendered ideas and anxieties surrounding sexuality, reproduction, kinship, and inheritance. Paternal recognition often determined rights and opportunities, as well as social roles. The archival record overwhelmingly reflects male-centered perspectives, leaving many of these dynamics obscured. One of the aims is to foreground these silences by critically engaging with missionary accounts, lawsuits over inheritance and legitimacy, and governmental records to uncover women's agency and legal strategies.

By placing **mestizo and Indigenous agency** at the center of this analysis, the project aims to examine how and why individuals and communities strategically navigated, resisted, and redefined *mestizo* status, whether by leveraging legal petitions, rejecting imposed identifications, or using alternative kinship structures to shape their social positioning. This allows us to move beyond Eurocentric histories of legal imposition and instead investigate *mestizo* categorization as something that was actively shaped in everyday life.

Tracing the origins and development of racialized discourses of "mixedness" contributes to broader debates on the historical roots of **racialized ideologies**. The *mestizo* categorization was a key mechanism through which colonial authorities sought to define social hierarchies, regulate inclusion and exclusion, and enforce systems of increasingly racialized governance. Through an analysis of debates surrounding purity and impurity, I explore how the categorization *mestizo* was strategically employed by colonial authorities and by individuals seeking to navigate complex social landscapes. This perspective allows us to deconstruct the colonial legacies that continue to shape political, social, and cultural debates today.

To achieve these objectives, this project employs an integrated transimperial methodological framework that draws on legal, social, and gender history. Moving beyond static comparisons of different empires, it examines how the *mestizo* categorization evolved through cross-imperial exchanges, missionary networks, shifting political control, and the circulation of legal knowledge. By investigating how colonial subjects shaped legal categories through petitions, court cases, and everyday acts of social negotiation, it aims to reveal how *mestizo* was not a fixed legal categorization but a dynamic and contested identification, shaped at the intersections of imperial governance, gendered hierarchies, and local agency.

While previous projects often focused on region-specific intra-imperial case studies, this project stands out for its creative integration of a **transimperial perspective**. The project tackles both the synchronic transimperial dimension, i.e. transimperial exchange through migration, knowledge transfer, and transfer of texts, and the diachronic dimension, i.e. the chronological sequence of different imperial powers in one space. Thereby, it aims to shed light on the interconnected nature of empires, highlighting how racialized discourses surrounding *mestizos* were not confined to a single imperial narrative but evolved through the continuous exchange of ideas, people, and practices between different empires present in the Greater Caribbean and Mexico City. It

integrates approaches from Indigenous history, gender history, social, and legal history in order to achieve a comprehensive understanding of the concept *mestizo* with the aspiration to potentially explain global developments regarding the transmission, application, and contestation of legal and social categorizations. It also connects to the very broad historiography on the emergence of racialization and racism (e.g. Hannaford 1996; Nirenberg 2023; Hering Torres 2011) and critical “mixed-race” studies which, however, tend to have a less historical and more demographical and sociological focus (e.g. Childs 2018; Törngren, Irastorza, and Rodríguez-García 2019).

Research Objectives and Research Questions

An overarching question concerns the debates and discourses surrounding the *mestizos* and the question of how they contributed to the broader process of racialization in the Greater Caribbean and Mexico City. I anticipate that different facets of these questions will be answered within the following three clusters of research questions and objectives.

- Research Question and Objective 1 (EMERGENCE and LEGAL TRANSPLANT): The project asks how, when and where the categorization *mestizo* developed. It examines the discourses and concepts that have directly or indirectly contributed to the emergence. It hypothesizes that *mestizo* as a colonial legal categorization emerged in the Spanish Caribbean and soon thereafter New Spain, and spread across the Americas through transimperial networks, where it was adapted to local political, legal, and social contexts. It assumes that the concept was disseminated via **legal texts**. Therefore, it is necessary to study the circulation of these documents within administrative, ecclesiastical, and educational systems.
- Research Question and Objective 2 (TRANSFER): A key research question is how, when and why the term disseminated transimperially across European-occupied territories. It is a prime objective to trace the actors that contributed to the spread across empires of the term and concept of *mestizo* in the Greater Caribbean and Mexico City, revealing transimperial networks of knowledge transfer. It starts from the assumption that **transimperial agents**, such as missionaries, traders, travelers, conquerors, and administrators, played a central role in the dissemination of the term *mestizo*. Their mobility across colonial boundaries facilitated the transfer and negotiation of the concept within diverse colonial societies, thus shaping its evolution in the Americas.
- Research Question and Objective 3 (APPLICATION AND NEGOTIATION): Besides the mobility of the categorization, I would also like to know how it was experienced, contested and negotiated by people categorized as *mestizos* and *mestizas* on the ground. Based on my previous work and historiography, I postulate that the *mestizo* status was actively negotiated by individuals and communities, with some embracing, contesting, or strategically using the classification to navigate legal, social, and economic opportunities.

Since understanding the emergence and initial transfer of the concept is a major goal of the project, the initial stages of colonization in the respective colonial spaces will be privileged over the final phases of the colonial period when both avenues of knowledge transfer and transimperial mobilities started shifting due to the Atlantic Revolutions (cf. e.g. Biersack, 2024 and Jan Jansen’s ERC project on “Atlantic Exiles” as well as his DFG network project “Ambiguity and Disambiguation of Belonging”). If the development of the project makes it possible, however, the change of the categorization over time shall also be addressed.

Work programme and research methods

Timeline and Geographic Focus

The early modern Americas, and especially the **Greater Caribbean** provide an ideal testing ground for examining the transimperial nature of the categorization *mestizo* which existed to a certain degree in all European colonies in the Americas. The region – as a digital map the project plans to elaborate aims to demonstrate – was shaped by cultural entanglements, territorial transfers and cross-border interactions that necessitated legal, social, and cultural adaptations. The constant movement of people, laws, and ideas created spaces where racialized categorizations, including *mestizo*, were continuously shaped, contested, and redefined. In addition, the project will consider **Mexico City** as a colonial center in which power and belonging were negotiated with particular intensity, and without which the categorization of the *mestizo* cannot be fully understood. The research period starts in **1492**, when European expansion into the Americas was initiated. The **1820s** mark the endpoint, coinciding with the wave of independence movements that reshaped many former colonies and led to the fragmentation of European control over the region, while US dominance very slowly started to emerge.

One of the most striking features of the Greater Caribbean was the degree of imperial overlap and cross-border circulation that shaped colonial societies. Encompassing both the Caribbean islands and parts of the mainland territories bordering the Caribbean Sea – including part of New Spain – this region forms the geographical core of this project, complemented by Mexico City as a global urban hub. Rather than viewing the Greater Caribbean as a strictly maritime space, I adopt a broader interpretation that includes mainland regions with direct economic, political, and social ties to the Caribbean. This region was marked by overlapping imperial claims, shifting borders, and sustained encounters between competing European powers. Approximately twenty colonies in the Greater Caribbean changed hands between the empires at least once, with several undergoing multiple transitions. These transfers created zones of legal pluralism, where different imperial legal systems clashed, coexisted, and shaped one another. Warfare, piracy, trade, and smuggling brought diverse actors into contact, facilitating legal, cultural, and economic exchanges (Rupert 2012). As a result, individual territories were not simply shaped by one power at a time but rather through layered histories of governance, negotiation, and adaptation, making the Greater Caribbean a quintessential transimperial space.

Different forms of transimperial contact happened between a variety of actors, such as conquerors, missionaries, smugglers, traders, etc. By focusing on these overlapping imperial claims, shifting borders, and the circulation of laws and people, this project moves beyond traditional empire-centered studies to reveal how the *mestizo* categorization was shaped through negotiation, resistance, and adaptation across imperial boundaries. The Greater Caribbean thus serves not only as a geographic focus but also as a conceptual framework, allowing us to investigate *mestizo* as a fluid, evolving, and contested transimperial categorization.

The project will create a **georeferenced digitalized map** of the study region using QGIS, with the support of the Information Processing Supply Unit 1 - Humanities (IVV1) at the University of Münster. It will integrate historical cartography and data to trace the mobility of *mestizos*, including friars, administrators, and families, and relevant legal texts across colonial territories. This instrument, pivotal for the project, will visually represent the entangled and transimperial nature of the emergence and circulation of the term and concept *mestizo* and will also showcase selected sources. Towards the end of the project, the digitalized map will be made publicly available online

with a long-time storage after the finalization of the project. This, together with its interactive and adaptable format, will ensure its relevance for future research studies on the region. The accessibility of the map as a medium will also guarantee its usefulness as a didactic resource for fostering the growth of the public history of mestizos. The flexibility of QGIS will also facilitate future modifications and expansions, allowing both scholars and teachers to contribute new data and insights over time.

Due to its focus on a broad region, its *longue durée* approach and the aim of doing a systematic study including three broad, yet closely interrelated research objectives, two PhD students have to be contracted in order to help me carry out the project. I have translated the research questions and objectives into three working packages, including one for each PhD student. Together, they form a cohesive conceptual framework for investigating the transimperial entanglements of the mestizo categorization in the Greater Caribbean and Mexico City. Each work package addresses a distinct dimension of the topic, reconstructs various perspectives through different, yet overlapping sources, and employs diverse methodological approaches, thereby contributing to a comprehensive answer to the overarching research questions. Key information from Spanish, Portuguese, French, and Dutch sources which will be collected in a joint database, building on an already initiated joint bibliographical database in Citavi. A research assistant will support all research and dissemination activities, especially the set-up of the interactive online map which showcases selected sources and connections.

Work package 1: EMERGENCE AND LEGAL TRANSPLANT (Project leader, Prof. Dr. Sarah Albiez-Wieck): Origins and Legal Transplants in Conquest, Administration and Education.

As the project leader, my research will focus on a systematic exploration of the first mentions and the characteristics of the term mestizo in the various colonial environments, building on and systematically expanding the work by scholars such as Gil (1997). I will do that by following the steps of the respective first conquerors, their sex and marriage partners (voluntary and forced) and their offspring, trying to find out how each of them framed and categorized themselves and their biological and social family members. Sources which will be helpful when doing this are petitions and reports of merits and services as well as correspondence with royal administrators, trading companies or the respective Crowns directly.

Another avenue I will follow and which is complementary to work package 2 is to trace knowledge transplant via educational institutions and the people who studied there, especially mestizos, but also colonial administrators who crossed imperial borders. The chronology of the first universities is very diverse, and in almost all regions, the first educational institutions were run by missionaries, most of them Catholic. Spanish America was clearly the spearhead with regard to education and the establishment of universities, and it shall be investigated whether they influenced the developments in other colonies. Special emphasis will be given to Mexico City because the earliest educational institutions emerged there. First of all, the School (*Colegio*) of Tlatelolco, initially run by Franciscans and later by Nahuas played a key role in the education of Nahua elites within the classical canon of European universities of the time. Some of its professors were French and Italian (Gómez Canedo 1982, 171) – following their traces could unveil further transimperial knowledge transfer. In 1551, the first two Universities on American soil were founded by Philipp II, in Lima and Mexico City; the latter opening its doors in 1553. While the *Colegio de Tlatelolco* was supposed to be open only for Indigenous nobles, the University admitted not only Spaniards but also mestizos (Dumont 2016, Gómez Canedo 1982). A recent article by Mendieta García (2020) suggests that mestizo Diego de Valadés was probably

first a student and later a teacher at Tlatelolco. He would be one example of a mestizo whose academic and social trajectory as well as his positioning would be insightful to follow. In Mexico City, there was even a specific school for mestizos, the *Colegio de San Juan de Letrán*, established in 1547 (González González 2021), and the *Colegio de la Caridad* had already opened its door to *mestizas* in 1533 (Barreto Ávila 2024, 171).

Besides analyzing the knowledge acquired by and transferred with the help of mestizos and mestizas, this work package also analyzes the mestizo as a legal transplant. There has been done some work on traders and the transplant of commercial law in the early modern period which can serve as a model to follow (Gialdroni et al. 2020). Therein, it has to be taken into account that the process of legal translation is also a social and cultural process, as Foljanty (2015) has pointed out. Before being able to study the legal transplant in detail, it will be necessary to identify the legal texts colonial administrators, judges, and missionaries used. This can be done by looking at the quotations in their texts but also at their libraries, building on studies of colonial libraries in the Americas (van Groesen 2017), a topic deeply entangled with that of educational institutions (Suárez Rivera 2022). Mexico City is the earliest space of book circulation and also their printing, with the first printing shop opening in 1538 or 1539. It was owned by the German Hans Kromberger and run by the Italian Giovanni Paoli; indicating the cosmopolitanism of the enterprise. Despite the rapid flourishing of local print culture, books from Europe continued to be imported (Donahue-Wallace 2021, 378-383). They were brought not only by Spanish but also Flemish, Italian, French, and English sailors, conquistadors, travelers, merchants, and, most importantly, missionaries to the Americas. From within the Americas, Mexico City (and later Lima) became the prime origin of printed materials brought to other places of the Americas, where printing presses were established much later (Nesvig 2011).

Work Package 2 - TRANSFER (PhD1, NN): Transimperial agents – Mestizos in the context of Catholic missions with a focus on the French Greater Caribbean

The global imperial expansion of the early modern period gave rise to vast ocean-spanning networks in which missionaries emerged as key agents of mobility and knowledge production. Moving between continents and frequently across imperial borders, missionaries operated within transimperial religious networks that connected different colonial spaces and metropolitan centers (Lamotte 2024). In the course of their activities, they encountered, interpreted, and engaged with diverse racialized concepts and discourses, which were reflected in the documents they produced, such as church registers and correspondence.

This work package will focus on the Franciscan order, the first to arrive in the Americas with Columbus's ships. Taking into account the Capuchins, a branch of the Franciscan order particularly active in the French colonies, the order formed a deeply interconnected religious network covering both New Spain and most Caribbean colonies, providing an especially suitable lens for examining transimperial transfers (Christensen 2018; Peabody 2004; Grunberg et al. 2013). Moreover, mestizos themselves sought membership in convents across imperial divides (Cobo Betancourt 2012; Masters 2018) and participated in the negotiation of their categorization. By reconstructing cases like this, the project aims to offer insight into how increasingly racialized hierarchies were enforced within a transimperial connected Catholic order, and how mestizo friars leveraged their status to contest or circumvent them.

To explore these intertwined perspectives, the project will draw on a range of sources, including missionary reports, personal correspondence, and church registers, among others. A particularly valuable source will be applications submitted by mestizos seeking entry into the Franciscan order

or petitions appealing to secular authorities. Additional material from both missionary and colonial archives (e.g., the *Archivio Storico Propaganda Fide* and the *Archives nationales d'outre mer*), including private correspondence between friars, will shed light on their spatial and social mobility, while administrative records produced by colonial officials will illuminate the bureaucratic and legal frameworks that shaped opportunities for people categorized as mestizos. By examining religious policies across the Caribbean, the project aims to uncover entangled processes of racialization as well as the institutional and interpersonal networks that influenced ecclesiastical and social mobility for “mixed” populations.

Work Package 3: APPLICATION AND NEGOTIATION (PhD 2, NN): Local Practices Concerning Social and Legal Categorizations with a focus on Dutch Brazil

Despite emerging as a colonial concept, the label mestizo did not rise in isolation from those deemed part of this societal categorization (DuVal 2008; Boidin 2008; Rose 2023). This work package explores how individuals and communities navigated, contested, and redefined racialized classifications in their everyday lives, treating colonial society itself as a transimperial space shaped by overlapping legal, social, and political influences. Instead of focusing solely on the regulation of the mestizo status by colonial authorities, this project emphasizes its practical application, investigating how colonial subjects interacted with, resisted, or strategically used legal frameworks on the ground (Albiez-Wieck 2022b). For this reason, this work package differs from the others in centering around a localized case study on Dutch Brazil.

It places particular emphasis on how gender structured legal definitions, social mobility, and the boundaries of racialized categorizations (Aram 2025; Brown 1996; McClintock 1995; Stoler 2002; Rose 2023). Concentrating on mestizo children and families and their ability (or inability) to contest their classification and the legal mechanisms available to them provides crucial insights into how racialized policies operated in practice. By reading “along the archival grain”, legal records, petitions, lawsuits, population registers, and other reports of colonial administration will be examined, tracing moments of contestation, adaptation, and negotiation within the colonial system (Stoler 2009). Petitions will be especially relevant, since they were an important element that shaped legal systems, as Masters (2018) and myself (Albiez-Wieck 2022b) have shown for the Spanish Empire.

A promising key site for the investigation in work package three is Dutch Brazil (Nieuw Holland, 1630–1654), where Dutch rule overlapped with existing Portuguese and Indigenous legal structures. While mestizos in Portuguese Brazil have been studied primarily as intermediaries in colonial society (Bethencourt 2021; Alves Carrara 2011; Metcalf 2006), little attention has been paid to how the mestizo categorization functioned under Dutch rule. In the Dutch-controlled northeastern coast of Brazil, different Indigenous groups employed diverse legal and social strategies in response to colonial power, including alliance, resistance and retreat.

Although geographically part of South America, Dutch Brazil was deeply connected to the Caribbean through transimperial circuits of governance, trade, and legal exchange. Like the islands, it was a contested space where multiple imperial projects overlapped and interacted, shaping legal and social classifications. This entanglement was reinforced by mutual dependencies, for example, the Portuguese relied on Dutch vessels because of their lack of sufficient warships to protect trade routes (Poettering 2019). While Spanish “purity of blood”, which regulated social hierarchy based on purity of ancestry, had no direct equivalent in Dutch colonies, similar concerns over legitimacy and belonging were documented through notarial and

administrative records (Mol 1995; Heijmans and Rose 2023). By documenting social belonging in baptismal registers, legitimacy acts, and manumissions, these documents functioned as instruments of racialized governance, delineating who could claim certain rights, privileges, or exclusions. Examining these records allows us to trace how legal belonging and racialized status were shaped through negotiation, adaptation, and contestation across colonial borders. Situating Dutch Brazil within a Greater Caribbean framework enables us to move beyond empire-centered studies and reveal how the mestizo categorization was not simply imposed but actively contested and transformed in shifting colonial landscapes.

Working together as a team at the University of Münster

The project will be carried out at the University of Münster where I hold a Chair in Latin American History. Within the history department, there are professors working on almost all other empires that were present in the Americas, whom I can easily consult for specific questions regarding the other empires. Furthermore, I am a co-speaker of the recently founded Centre for Empire Studies: (Post)colonial Histories and Global entanglements. This makes the University of Münster the ideal environment to carry out the project.

To ensure a continuous exchange and close collaboration, the research team will meet in a bi-weekly *jour fixe* to discuss the progress and to work on the jointly elaborated digital map. Over the entire course of the project, the project leader will play a crucial role in ensuring that all work packages are cohesively integrated within a comprehensive theoretical and methodological framework.

Output

There will be two main types of output for the project: The first type consists of a substantive number of scholarly publications, first and foremost two monographs resulting from the PhD theses, to be published with reputable university presses. These will be complemented by approximately four articles in peer-reviewed and open access journals, about half of them by the project leader. Some of them will be published in a joint special issue on the topic to whom other scholars will also be invited to contribute.

The second type will consist of a joint digital database and an interactive online map of the transimperial trajectory of mestizos in the Americas, including selected digitized sources. This will visualize the results of the projects as well as their methodology in order to serve as a methodological inspiration for similar studies in the future. Since the project is focusing on the Greater Caribbean and Mexico City, the planned conference deliberately aims to exchange ideas with experts researching the categorization mestizo in other geographical regions. This exchange will then be recorded in the mentioned special issue. The project conference will be organized together with the GloVib project. I will furthermore plan a series of events for the wider public in Münster.

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