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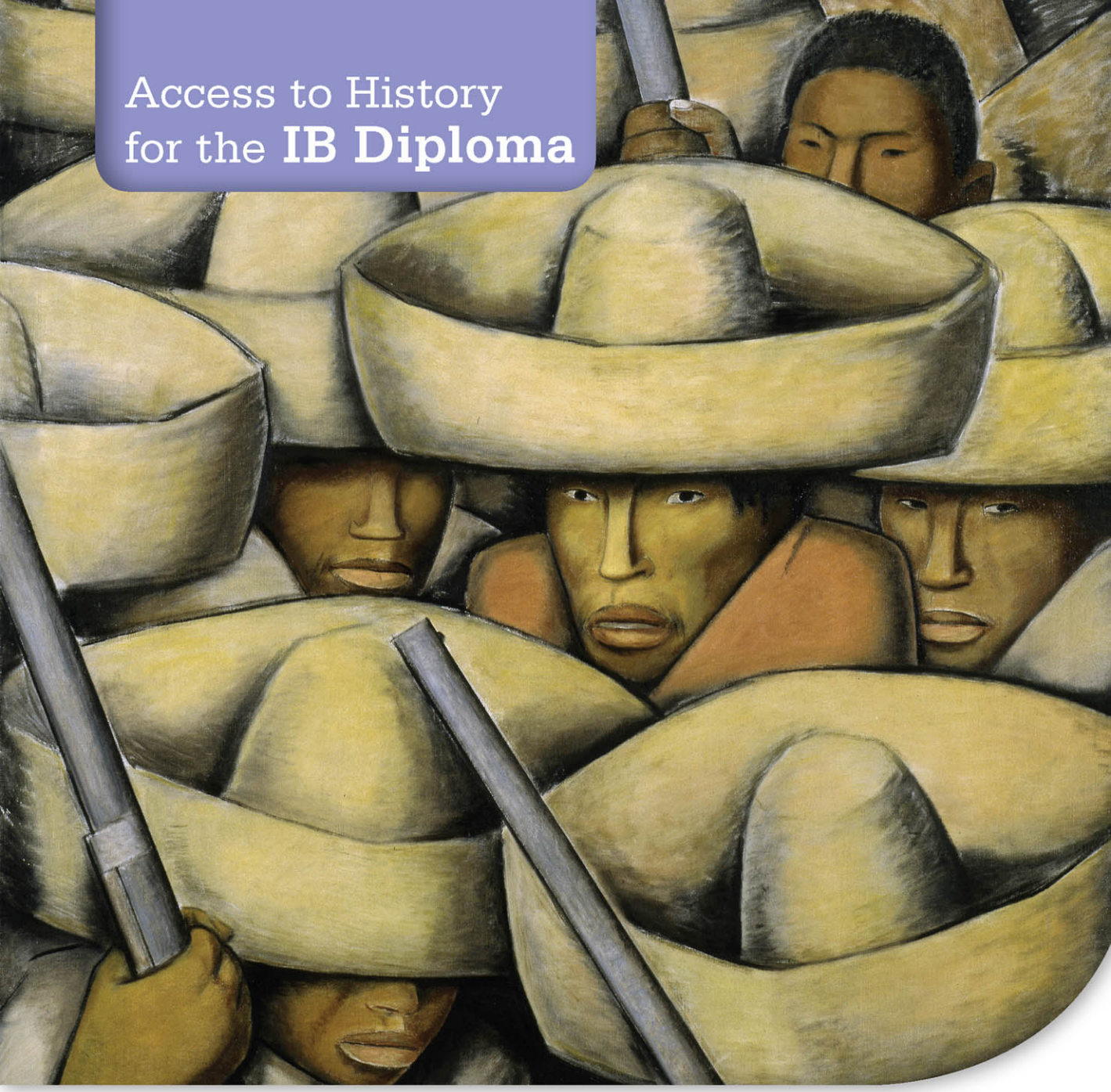

The Mexican Revolution 1910–40

Philip Benson
Yvonne Berliner

HODDER EDUCATION

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Contents

Dedication

Keith Randell (1943–2002)

The original *Access to History* series was conceived and developed by Keith, who created a series to 'cater for students as they are, not as we might wish them to be'. He leaves a living legacy of a series that for over 20 years has provided a trusted, stimulating and well-loved accompaniment to post-16 study. Our aim with these new editions for the IB is to continue to offer students the best possible support for their studies.

Introduction

This book has been written to support your study of HL option 3: Aspects of the history of the Americas: The Mexican Revolution 1910–40 of the IB History Diploma Route 2.

This introduction gives you an overview of:

- the content you will study for The Mexican Revolution 1910–40
- how you will be assessed for Paper 3
- the different features of this book and how these will aid your learning.

1 What you will study

This book focuses on what led to the Mexican Revolution, the major events and participants of the conflict and its social, political and economic impact. The long and violent revolution had disparate causes, both regional and national, and like other twentieth-century revolutions, it took many years before the goals of the Revolution were realised, even if only partially. Nonetheless, the Mexican Revolution did spawn one of the most progressive constitutions and significant land and educational reforms. It also served as a model for the nationalization of key resources for other Latin American countries and inspired artists, writers and musicians to assume political roles.

The book:

- begins by discussing the causes of the Mexican Revolution, with a focus on the regime of Porfirio Díaz (1876–1910) and how several of his policies led to the collapse of traditional Mexican politics (Chapter 1)
- examines in detail the Revolution and its leaders; the ideological foundation of each leader and the degree to which each was successful is explored, and the Constitution of 1917 is also studied (Chapter 2)
- details the construction of the post-revolutionary state from 1920–34; several presidents slowly and methodically tried to institutionalize the Revolution – the successes and failures of their political, social and economic programs are explored; additionally, the Catholic peasant uprising known as the Cristero Revolt is detailed (Chapter 3)
- analyses the significant changes that took place under the presidency of Lázaro Cárdenas from 1934–40; land reform, educational initiatives and the nationalization of key industries are examined (Chapter 4)
- inserts the Mexican Revolution in the international context, 1910–40, and examines the nature of foreign intervention in Mexico during the Revolution, from Germany, the USA, Argentina, Brazil and Chile (Chapter 5)

- discusses the impact of the Revolution on women, the arts, and José Vasconcelos' educational reforms (Chapter 6).

2 How you will be assessed

The IB History Diploma Higher Level has three papers in total: Papers 1 and 2 for Standard Level and a further Paper 3 for Higher Level. It also has an internal assessment that all students must do.

- For Paper 1 you need to answer four source-based questions on a prescribed subject. This counts for 20 per cent of your overall marks.
- For Paper 2 you need to answer two essay questions on two different topics. This counts for 25 per cent of your overall marks.
- For Paper 3 you need to answer three essay questions on two or three sections. This counts for 35 per cent of your overall marks.

For the Internal Assessment you need to carry out a historical investigation. This counts for 20 per cent of your overall marks.

HL option 3: Aspects of the history of the Americas is assessed through Paper 3. You must study three sections out of a choice of twelve, one of which could be the Mexican Revolution 1910–40. These sections are assessed through Paper 3 of the IB History diploma, which has 24 essay questions – two for each of the twelve sections. In other words, there will be two specific questions that you can answer based on the Mexican Revolution 1910–40.

Examination questions

For Paper 3 you need to answer three of the 24 questions. You could either answer two on one of the sections you have studied and one on another section, or one from each of the three sections you have studied. So, assuming the Mexican Revolution 1910–40 is one of the sections you have studied, you may choose to answer one or two questions on it.

The questions are divided up into twelve sections and are usually arranged chronologically. In the case of the questions on the Mexican Revolution, you should expect numbers 11 and 12 to be on this particular section. When the exam begins, you will have five minutes in which to read the questions. You are not allowed to use a pen or highlighter during the reading period. Scan the list of questions but focus on the ones relating to the sections you have studied.

Remember you are to write on the history of the Americas for Paper 3. Read the questions very carefully and be sure to stick to the time frame if specified. Do not write about the US–Mexican War, for example, when answering questions about the Mexican Revolution.

Command terms

When choosing the three questions, keep in mind that you must answer the question asked, not one you might have hoped for. A key to success is understanding the demands of the question. IB History questions use key terms and phrases known as command terms. The more common command terms are listed in the table below, with a brief definition of each. More are listed in the appendix of the IB History Guide.

Examples of questions using some of the more common command terms and specific strategies to answer them are included at the end of Chapters 1–6.

Command term	Description	Where exemplified in this book
Analyse	Investigate the various components of a given issue	Pages 106–108
Assess	Very similar to evaluate. Raise the various sides to an argument but clearly state which are more important and why.	Pages 214–216
Compare and contrast	Discuss both similarities and differences of two events, people, etc.	Pages 78–80
Discuss	Provide a balanced overview which covers a broad range of different factors and arguments	Pages 172–174
Evaluate	Make a judgement while looking at two or more sides of an issue	Pages 35–37
To what extent	Discuss the various merits of a given argument or opinion	Pages 137–138

Answering the questions

You have 2 hours and 30 minutes to answer the three questions or 50 minutes on each. Try to budget your time wisely. In other words, do not spend 75 minutes on one answer. Before you begin each essay, take 5–7 minutes and compose an outline of the major points you will raise in your essay. These you can check off as you write the essay itself. This is not a waste of time and will bring organization and coherence to what you write. Well-organized essays that include an introduction, several well-supported arguments and a concluding statement are much more likely to score highly than essays that jump from point to point without structure.

The three essays you write for Paper 3 will be read by a trained examiner. The examiner will read your essays and check what you write against the IB mark scheme. This mark scheme offers guidance to the examiner but is not comprehensive. You may well write an essay that includes analysis and evidence not included in the mark scheme and that is fine. It is also worth remembering that the examiner who will mark your essay is looking to

reward well-defended and argued positions, not to deduct marks for misinformation.

Each of your essays will be marked on a 0–20 scale, for a total of 60 points. The total score will be weighted as 35 per cent of your final IB History. Do bear in mind that you are not expected to score 60/60 to earn a 7 at the Higher Level; 37–39/60 will equal a 7. Another way of putting this is that if you write three essays that each score 13, you will receive a 7.

Writing essays

In order to attain the highest mark band (18–20), your essays should:

- be clearly focused
- address all implications of the question
- demonstrate extensive historical knowledge
- demonstrate knowledge of historical processes such as continuity and change
- integrate your analysis
- be well structured
- have well-developed synthesis.

Your essay should include an introduction in which you set out your main points. Do not waste time copying the question but define the key terms stated in the question. Best essays probe the demands of the question. In other words, there are often different ways of interpreting the question.

Next, you should write an in-depth analysis of your main points in several paragraphs. Here you will provide evidence that supports your argument. Each paragraph should focus on one of your main points and relate directly to the question. More sophisticated responses include counter-arguments.

Finally, you should end with a concluding statement.

In the roughly 45 minutes you spend on one essay, you should be able to write 3–6 pages. While there is no set minimum, you do need explore the issues and provide sufficient evidence to support what you write.

At the end of chapters 1–6, you will find IB-style questions with guidance on how best to answer them. Each question focuses on a different command term. It goes without saying that the more practice you have writing essays, the better your results will be.

The appearance of the examination paper

Cover

The cover of the examination paper states the date of the examination and the length of time you have to complete it: 2 hours 30 minutes. Please note that there are two routes in history. Make sure your paper says Route 2 on it. Instructions are limited and simply state that you should not open it until told to do so and that three questions must be answered.

Questions

You will have five minutes in which to read through the questions. It is very important to choose the three questions you can answer most fully. It is quite possible that two of the three questions may be on the Mexican Revolution 1910–40, especially after mastering the material in this book. That is certainly permissible. After the five minutes' reading time is over, you can take out your pen and mark up the exam booklet:

- Circle the three questions you have decided to answer.
- Identify the command terms and important points; for example, if a question asked 'Compare and contrast the social and economic policies of President Obregón and President Calles', underline 'compare and contrast' and 'social and economic policies'. This will help you to focus on the demands of the question. Be sure to discuss both specific social and economic policies of these two Mexican presidents. How were their policies similar and different?

For each essay take 5–7 minutes to write an outline and approximately 43–45 minutes to write the essay.

3 About this book

Coverage of the course content

This book addresses the key areas listed in the IB History Guide for Route 2: HL option 3: Aspects of the history of the Americas: the Mexican Revolution 1910–40. Chapters start with an introduction outlining key questions they address. They are then divided into a series of sections and topics covering the course content.

Throughout the chapters you will find the following features to aid your study of the course content:

Key and leading questions

Each section heading in the chapter has a related key question, which gives a focus to your reading and understanding of the section. These are also listed in the chapter introduction. You should be able answer the questions after completing the relevant section.

Topics within the sections have leading questions that are designed to help you focus on the key points within a topic and give you more practice in answering questions.

Key terms

Key terms are the important terms you need to know to gain an understanding of the period. These are emboldened in the text the first time they appear in the book and are defined in the margin. They also appear in the glossary at the end of the book.

Sources
Throughout the book are several written and visual sources. Historical sources are important components in understanding more fully why specific decisions were taken or on what contemporary writers and politicians based their actions. The sources are accompanied by questions to help you dig deeper into the history of the Mexican Revolution 1910–40.

Key debates
Historians often disagree on historical events and this historical debate is referred to as historiography. Knowledge of historiography is helpful in reaching the upper mark bands when you take your IB History examinations. You should not merely drop the names of historians in your essay nor regurgitate views of historians. You need to understand the different points of view for a given historiographical debate and weave these into your essay. There are a number of debates throughout the book to develop your understanding of historiography.

Theory of Knowledge (TOK) questions
Understanding that different historians see history differently is an important element in understanding the connection between the IB History Diploma and Theory of Knowledge. Alongside some of the debates is a Theory of Knowledge-style question that makes that link. Each question is followed by a list of possible tie-ins with other areas of knowledge and ways of knowing.

Summary diagrams
At the end of each section is a summary diagram that gives a visual summary of the content of the section. It is intended as an aid for revision.

Chapter summary
At the end of each chapter is a short summary of the content of that chapter. This is intended to help you revise and consolidate your knowledge and understanding of the content.

Examination guidance
At the end of Chapters 1–6 are:

- examination guidance on how to answer questions, accompanied by advice on what supporting evidence you might use, and sometimes sample answers designed to help you focus on specific details
- examination practice in the form of Paper 3-style questions.

End of the book
The book concludes with the following sections:

Timeline
This gives a timeline of the major events covered in the book, which is helpful for quick reference or as a revision tool.

Glossary
All key terms in the book are defined in the glossary.

Further reading
This contains a list of books, films and websites which may help you with further independent research and presentations. It may also be helpful when further information is required for internal assessments and extended essays in history. You may wish to share the contents of this area with your school or local librarian.

Internal assessment
All IB History diploma students are required to write a historical investigation that is internally assessed. The investigation is an opportunity for you to dig more deeply into a subject that interests you. This gives you a list of possible areas for research.

CHAPTER 1

The regime of Porfirio Díaz and the background of the Mexican Revolution

Profound social revolutions are rare. They involve a transformation of politics and values, the restructuring of the economy and the redistribution of wealth, status and opportunities. The Mexican Revolution includes many of these characteristics. This chapter investigates the causes of the Mexican Revolution by closely examining the regime of Porfirio Díaz from 1876 to 1910.

You need to consider the following key questions throughout this chapter:

- What were the main characteristics of Mexico in the early twentieth century?
- How did Porfirio Díaz consolidate his power in Mexico?
- How did various social groups relate to the Díaz regime?
- What were the effects of the Díaz regime's emphasis on economic progress?

1 Mexico in the early twentieth century

Key question: *What were the main characteristics of Mexico in the early twentieth century?*

This section is a brief introduction to Mexico.

Mexico is located in North America and includes a variety of habitats and features, from the tropical rainforests of the Yucatán peninsula, to the desert basins of Sonora, to the snowy peaks of the Sierra Madre mountains. It has two long coastlines: the Pacific Ocean to the west, and the Gulf of Mexico and the Caribbean Sea, gateways to the Atlantic Ocean, toward the east. To the north, Mexico shares a 3200 km or 2000 mile border with the United States, and to the south borders with Guatemala and Belize. As it faces the Pacific Rim, Mexico is prone to earthquakes, which have caused devastating damage in the recent and distant past.

SOURCE

Map of Mexico

How did Mexicans live in the early twentieth century?

KEY TERM

Mestizo A person of European and Indian (Native American) ancestry.

Haciendas Vast tracts of privately owned land that produced cash crops and employed many landless peasants.

Sharecroppers Tenant farmers living on and farming a landowner's land.

Company store A store selling dry goods and other necessities to workers who worked for the mining company or *hacienda*. Workers paid in tokens had to buy their provisions from here. This was a typical form of worker exploitation; employers controlled prices and discounted as much as they wanted from wages.

The socio-economic make-up of Mexico

For centuries, most Mexicans have lived in the central region and the neighboring mountains. This is also the most important agricultural area. The population of Mexico is 60 per cent ***mestizo***, 30 per cent Indian, 9 per cent European, and 1 per cent other. Although the main language spoken is Spanish, about a third of the population also speaks *Náhuatl*, *Maya*, or other Indian languages. Nearly 90 per cent of the population is Roman Catholic.

By the end of the nineteenth century, the population of Mexico was growing fast. Between 1875 and 1910, it grew from 8.3 million to 15.1 million. As the twentieth century loomed, the socio-economic make-up of the country was stark; only 1 per cent of Mexican society was wealthy and just 8 per cent was in the middle class. The overwhelming majority was poor: they were agricultural workers in the ***haciendas***, **sharecroppers**, miners, soldiers, small merchants and factory workers. There were also many beggars.

Agricultural workers

These were mostly illiterate, landless peasants who worked for low wages within the *hacienda* system. In 1910, 81 per cent of all Mexicans were illiterate and living conditions were poor. Workers were often dependent on the landowners and indebted to the *hacienda* or mining **company store**. The mortality rate for children under five was 36.8 per cent, but 50 per cent of babies under one died of diseases such as malaria, yellow fever and whooping cough.

Urban workers

As factories, especially textile factories, grew around urban centers, workers hoping for better wages and living conditions moved to the cities. The textile mills and tobacco enterprises hired a growing number of women, as wages were so low that two incomes were required for families to survive. Even so, by 1910 only 15 per cent of the Mexican labor force was female, though they were more successful in careers like teaching, where women comprised 64 per cent.

Mexican Indians

Mexican Indians fared increasingly worse as the twentieth century began. In the north of Mexico, military actions succeeded in controlling uprisings and forcibly dispersing Indian populations who then lost most of their ancestral communal lands (***ejidos***). This did not occur as much to the central and southern Indian communities, who were far more numerous although still subject to racism. By 1900, the Mexican government felt that **cultural assimilation** into *mestizo* and white society was the best way to incorporate Indian communities into the Mexican nation. This included teaching them Spanish, so that by 1910 only 13 per cent spoke Indian languages.

Political structures

Mexico ostensibly had a **republican** form of government administered by the liberal constitution of 1857. The government was divided into the customary three branches: **executive, judiciary and legislative**. Men could vote, although in practice many rural citizens were unable to do so as they could not travel to voting polls due to labor constraints, or they did not have faith in the election results.

What was the political structure of Mexico in the early twentieth century?

Presidential powers

From 1867, the end of the turbulent period of foreign invasions and civil war, the power of the executive was increased. The president could now rule by decree if needed, and held the power to remove and appoint state governors. The power of the presidency grew at the start of the ***Porfiriato*** in 1877, when General Porfirio Díaz became President (see page 13). He changed the constitution to allow presidents to serve more than two terms and be re-elected. Díaz's practice of handpicking governors, legislators and even a presidential successor, became known as ***dedazo***. This practice was entrenched in Mexican politics for a great part of the twentieth century. Under Díaz, the country appeared to be a democracy with elections and separate powers, but in reality it was a dictatorship.

KEY TERM

Ejidos Land communally owned by Indian tribes. Colonial Spain and Mexican governments had acknowledged their rights to it until the mid-nineteenth century.

Cultural assimilation A government policy that aimed to make an ethnic group (in this case, the Mexican Indians) forget the cultural and ethnic roots that distinguished them from the mainstream.

Republican A form of government ruled by its citizens through representatives. The representatives may or may not include all citizens, however.

KEY TERM

Executive, judiciary and legislative The branches of a democracy that run a republic, preferably in an equal balance of power of the three branches. The legislative creates laws and policies, the judiciary applies these and the executive enforces these.

Porfiriato The period of the Porfirio Díaz regime between 1876 and 1910, also known as the Porfirian Era.

Dedazo A reference to the word for 'finger' in Spanish, *dedo*, that describes when a politician handpicks a successor.

Links with the Church

Mexican governments had enforced the separation of the Roman Catholic Church and the State, and passed laws against the Church owning land and monopolizing education in the 1850s. Yet by the early twentieth century most of these laws, though still extant, were not enforced. In rural Mexico, the parish priest remained a voice of authority in villages and large towns alike. Most of the Mexican population accepted the revival of Church power and influence. The Church gradually became a powerful political supporter of the Díaz regime.

What economic development did Mexico show in the early twentieth century?

Economic development

At the beginning of the twentieth century, Mexico was primarily a rural and agrarian nation producing **cash crops** for export, such as cotton and rubber, sugar cane in Morelos, ***henequén*** in the Yucatán peninsula, and tobacco in Oaxaca. The country also had valuable mineral resources in the north, such as silver, copper and gold, as well as oil in the Gulf of Mexico area.

Industry was a growing economic sector, employing 600,000 workers by 1910. The cotton textile industry was the most important, and the labor unrest within it was one of the catalysts for the Revolution.

KEY TERM

Cash crops Agricultural products grown at a large scale to sell for profit.

Henequén Plant in the agave family grown for its string fiber and used in making rope and twine.

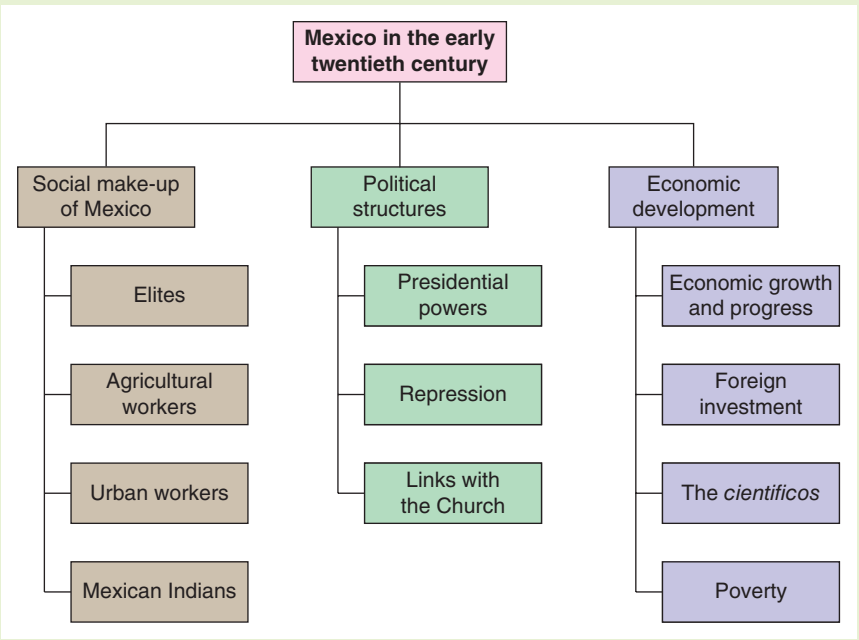
Growth and foreign investment

By the early 1900s, the Mexican economy had grown due to rising demand for commodities, natural resources and products from the industrialized European countries and the USA. Mexico's newly built railroads (see page 27) helped meet this demand by transporting the products of mines and farms to borders and ports. This also increased custom receipts, adding to the treasury to finance more modernization projects. Parts of Mexico were modernized by electrification of cities, and installation of telegraph lines, and so attracted investment.

In 1870, the gross domestic product (GDP) of Mexico had been 27.6 per cent of the United States. By 1910 it was 34.1 per cent. This growth, however, reflected the enrichment of Mexican and foreign investors, particularly the USA. US citizens possessed Mexican farms, ranches, mines, oil fields and industries, and US investors built railroads and telegraphs. As they acquired influence, they provoked resentment among Mexicans, which would surface in the early twentieth century and add fuel to the ensuing revolution.

The cost of growth

The urban middle class showed some growth, with roles in commerce, banking and law, but this did not reflect the reality of the majority of Mexicans. They continued to labor under increasingly poor conditions for low wages. The cost to Mexico's lower classes was particularly dramatic in the agricultural sector. Vast landholdings for plantations producing cash crops were sold to landowners, and displacing peasants, sharecroppers and Indian communities.



SUMMARY DIAGRAM

Mexico in the early twentieth century

This resulted in mass migration from the countryside to the cities in search of better conditions, especially to Mexico City, Guadalajara, Puebla and Monterrey.

2 Porfirio Díaz and his influence in Mexico

Key question: How did Porfirio Díaz consolidate his power in Mexico?

Mexico suffered many upheavals in the middle of the nineteenth century, including civil war, a US invasion, amassing a large foreign debt and dealing with foreign occupation by France. Porfirio Díaz rose in the ranks of the Mexican military during some of these conflicts. In 1867 he ran for president against the beloved liberal Benito Juárez, and lost by a wide margin. In 1871 Díaz ran again but Juárez won, again, although by a very narrow margin. Juárez died shortly after his inauguration and Supreme Court Chief Justice Sebastián Lerdo de Tejada succeeded him. Despite the liberal legacy of Juárez's fourteen years in power, notably the **anticlerical 1857 Constitution**, no legislation had truly enforced this and Mexicans were increasingly discontented.

KEY TERM

Anticlerical Of a policy (anticlericalism) that verbally and sometimes physically attacks the established Church (in this case, the Roman Catholic Church), including its priests, churches, schools and properties.

1857 Constitution Liberal constitution defending individual rights, especially through the judiciary, and supporting the separation of powers, but reducing the power of the executive.

Rise to power

How did Porfirio Díaz rise to power in 1876?

In 1876 Díaz ran for president once more. This time though, he had consolidated his power base:

KEY TERM

Caudillos Local strongmen or rural leaders who could command an armed force.

Authoritarian Form of government stressing authority at the expense of individual freedoms.

- Chief Justice Lerdo de Tejada had not treated the army and the Church well, so they turned to Díaz.
- Díaz had gathered monetary and armaments support in the USA while organizing an army in Texas.
- Díaz also appealed to entrepreneurs and ***caudillos*** who supported him in return for favors.

In the event, Díaz staged a military revolt against Lerdo's government that forced Lerdo's resignation.

Díaz's growing authority

Díaz called for elections at the end of 1876, which he won unopposed as a military hero. Thus began his increasingly **authoritarian** government of Mexico for the next 34 years, as he sought to tackle Mexico's grave challenges. Díaz knew that the country was bankrupt and its people were poor, uneducated and exploited. He realized it would take much to modernize Mexico so that it could support economic development with its attendant structures, like railroad, shipping and telegraphs. Additionally, banditry was rampant – regional governors and strongmen needed to be brought into the national government to maintain rural peace and progress. To change these conditions, Díaz would continue to strengthen the office of the Presidency and consolidate his power.

How did Porfirio Díaz consolidate power?

Maintaining power

Díaz's first term, 1876–80

Díaz had been elected in 1876 on the 'no re-election' slogan, as his opponent Lerdo de Tejada (see page 13) sought re-election which, at the time, was unconstitutional. So when his own presidential term was up, Díaz complied with the law and handpicked a successor he could control. Manuel González was a lesser-known army general who owed Díaz his position and so would do what Díaz wanted. González won the election and remained President from 1880 to 1884.

González as President, 1880–84

Through González, Díaz continued to rule from the Cabinet. He was particularly keen on improving Mexican infrastructure, and promoted building railroads between Mexico and the USA. Building more railroads with foreign investment improved Mexican transportation, but Díaz also used the nation's economic assets for his own political cause, strengthening political power in the executive – i.e. his own presidency – while weakening the legislative branch. This means the office of the presidency became stronger and Congress became weaker.

Díaz as President again, 1884–1910

Díaz returned to the presidency in 1884 and amended the constitution to allow consecutive re-election. He also:

- used rigged elections and **clientelism** to control individual state political machines, such as governorships
- used the army and ***rurales*** to control the population in the early 1900s
- controlled elections to ensure he would stay President
- appointed governors, members of Congress, and ***jefes políticos***, all of whom could purchase public lands, start businesses that would be protected by government tariffs or tax breaks, and mediate foreign interests; they could also buy and resell government railway and public works concessions to foreigners.

Díaz sought to guarantee his own prolonged political permanence by becoming crucial to economic progress and attracting foreign capital. During the election campaign, a government-controlled Mexico City newspaper wrote 'The capitalists and great bankers of the world will find in the re-election [of Díaz] another proof of the stability of Mexican political institutions as well as of the sane judgment of the Mexican people.' US Historian Jonathan Brown has a harsher commentary below.

SOURCE A

Excerpt from 'Domestic Politics and Foreign Investment: British Development of Mexican Petroleum, 1889' by Jonathan C. Brown, found in *The Business History Review*, Vol. 61, No. 3, Autumn, 1987, published by The President and Fellows of Harvard College, Cambridge, MA, pages 393–4. Brown is associate professor of history at the University of Texas at Austin, Texas.

Díaz made certain that both army and police officers were indolently corrupt. Paramilitary thugs harassed opposition politicians; newspapers were subsidized by the government. Corruption, patronage, and government contracts strengthened Díaz's political power and the centralization of the state, both of which depended upon economic expansion, which, in turn, relied on foreign investment. While the liberals under Díaz encouraged investment, one should not conclude that foreign capitalists received carte blanche to manipulate the Mexican economy and to pursue their own profits. Díaz's political goals also had to be served.

KEY TERM

Clientelism A political patronage system that relies on personal favors from a political leader and the loyalty of those granted the favors or positions.

Rurales The Mexican mounted rural guard, or police force, which was especially powerful during the Díaz regime.

Jefes políticos District political chiefs or state strongmen who were loyal to Díaz.

What does Source A say about some of the methods Díaz used to consolidate power? ?

Manipulating Mexican politics

How did the Díaz regime manipulate politics?

Throughout his long tenure in power, Díaz prided himself in maintaining the appearance of a republican government. In practice, his government was a **dictatorship**. The ***científicos*** around him justified his system of governing Mexico, comparing Díaz to a Roman emperor who knew full democratic rights would lead to **anarchy**, but respected constitutional formalities and electoral laws. He held controlled elections on a regular basis, yet centralized and kept all the political power himself.

KEY TERM

Dictatorship Form of government with all the power resting on one person or small group.

Científicos Mexican intellectuals, technocrats and influential politicians during the Díaz regime.

KEY TERM

Anarchy A state of chaos and disorder as a result of a lack of government institutions to control people.

KEY TERM

Bicameral A Congress made up of two houses, usually a Senate and a Chamber of Deputies or Representatives.

Constitutional reform

Mexico had a **bicameral** Congress when Díaz assumed the Presidency provisionally in 1877. Congress voted to support Díaz as constitutional president, at which time he formed his Cabinet. Elections in Congress took place every two years, alternating between the two chambers, the Senate and the House of Deputies, but often Díaz would simply appoint members he knew were loyal to him. Díaz regularly delivered a report to Congress on the state of the nation. He proposed laws that were always passed; for example, for appropriation of funds and to build railroads. He also urged Congress in 1877 to pass a constitutional reform to prohibit re-election. A president could not be elected for a second term.

In 1887 Díaz urged Congress to reform the constitution once again to allow for one re-election of the president and state governors. The Congress obliged, as always, and Díaz was re-elected in 1888 until 1892. In 1890, in contrast to 1877, Congress passed another constitutional reform that allowed presidential re-election indefinitely, as long as the president received a majority of the votes. Naturally, this always happened with Díaz. Later, in 1904, Congress voted to extend the presidential period by two years, and to add the office of a vice-president. In 1905 the Mexican Congress, in a solemn ceremony, awarded Porfirio Díaz the Order of Military Merit.

? By meeting with his Cabinet, how does Source B show Díaz using the trappings of republican government?

SOURCE B

An illustration of Jose de la Cruz Porfirio Díaz, President of Mexico (1876–1880 and 1885–1911), meeting with his Cabinet members in the National palace in Mexico City. Entitled: 'The Official Life of the President of the Republic in the City of Mexico.' From sketches by Harry Ogden, c. 1890.

Mexican legislators in the Congress met regularly to pass legislation, but if Díaz did not see fit to enforce these laws, they would remain unenforced; for example, the new congress in 1877 passed laws reinforcing the separation between Church and state, such as the Church was forbidden to acquire property. Yet Díaz did not wish to create social unrest in his deeply Catholic country – which could destabilize the investment climate he wanted to create to modernize Mexico – so the federal government did not enforce the laws, and then assigned the blame for this to negligent state and local governments.

When Díaz wanted to enforce a law, he knew he could count on the *rurales*.

The *rurales*

Díaz had observed Mexican political behavior and was particularly affected by the excesses of mid-nineteenth century liberal governments. He thought Mexicans were too anarchic to wield political power and had to be led with 'Peace, order and progress'. Only then, he felt, could Mexico advance and evolve to a point of political maturity. To keep order in such an authoritarian state, he relied on the secretary of war, the army, the **secretary of the interior** and the *rurales*.

The *rurales*, created in 1861 to control **banditry**, were modeled on the Spanish Civil Guard. They were the preferred method of dealing with internal turmoil, rather than the military, as they answered directly to Díaz. Once in power, Díaz made sure they were large enough and equipped enough to handle their assignments. *Rurales* were paid better than the army and were organized as a mounted police force, in eleven military-style corps of 300 men each. They were also used as guards on trains and escorts for transporting money. They patrolled the country, passed on information to local and national authorities, and repressed peasant and worker resistance, either by sheer presence or with violence. The *rurales* sought out and crushed any opposition to Díaz, and used coercion and intimidation to influence elections. Order, if necessary, was imposed by force, in practice with Díaz's belief in '***pan o palo***'.

The well-armed and mounted *rurales* were feared in the countryside for their high-handed ways. In fact, they were given freedom to apply ***ley fuga***. The longer Díaz remained in office, the more corrupt the *rurales* became, beating anyone who crossed them, often hiring relatives or friends and attracting increasingly crude thugs to their ranks. By the end of the Díaz regime, they were no longer an effective force in controlling opposition.

KEY TERM

Secretary of the interior Cabinet member in charge of government administration, as well as co-ordinating security forces, such as the ***rurales***, to preserve the national government.

Banditry The practice of forming groups of armed outlaws and thieves to plunder and steal, especially in the countryside.

Pan o palo Spanish for 'bread or big stick', essentially 'the carrot and stick' way of coercing support.

Ley fuga A law used by dictators allowing police and military forces to shoot suspects in the act of escaping custody.

Díaz was an expert manipulator of the local, state and national powers in Mexico. He consolidated his power by keeping these influential people close, in a government rife with clientelism.

Díaz's patronage system

Díaz carefully bound power-mongers in Mexico, from the local, state and national levels to his own person, in an elaborate patronage system. He neutralized would-be opponents by providing government positions as personal favors. He co-opted local rural leaders, army generals, senators, deputies, judges and any other visible and powerful Mexicans to his side, and rewarded them for their loyalty in a classic case of clientelism. State governors were all Díaz loyals who owed their positions to the president and were willing to accept Díaz directives on dealing with state affairs.

This system worked well and even controlled most of the opposition. If influential enough, many intellectuals were in Díaz's coterie of *científicos*, or at least hired as speech-writers or writers of decrees. Even the press was controlled, as journalists could be (and were) imprisoned for creating unrest for what the law called 'psychological crime'. Díaz also had the government purchase about 50 per cent of the newspapers and magazines, thereby controlling their output and eventually outselling competitors.

This web of control was highly dependent on Díaz himself, who was very adept at running his political machine while keeping appearances by extolling Mexico as a modern republic. This façade was increasingly apparent and abhorrent as the years passed.

Paternalism

As his years in power evolved, Díaz controlled important institutions in Mexico: the Church, the military, and the ***hacendados***. He became convinced that social order was more important than individual freedoms to achieve economic growth for Mexico. He felt Mexicans needed a **paternalistic** figure to guide them and thus he justified his authoritarian government.

KEY TERM

Hacendados Large landowners – the rural elite – who were able to increase their landholdings greatly during the Porfirian era and grow cash crops for export.

Paternalistic A form of treating people similar to the way a parent treats a small child, making decisions for them and disciplining them to improve their behavior.

Democracy A representative form of government that involves all of its citizens, without exclusions, who are able to rule through majority vote.

What took place at the Creelman interview?

The Creelman interview

As Mexican presidential elections loomed in 1910, all eyes were on the aging Díaz. He would be 80 years old in 1910. Would he step down? Would he choose a vice-presidential running mate to succeed him in case of death? Or would he back a handpicked successor, like in 1880?

Díaz showed little respect for Mexico's democratic institutions and no faith in the Mexican people to understand and practice **democracy**. Perhaps the clearest synthesis of Díaz's views of Mexicans is found in the interview he gave to US journalist James Creelman, in 1908, when he felt certain of his power.

This famous interview is a long (47-page) chatty article with many photographs (52) and running commentary by the author as well as Díaz. It was published in New York in Pearson's Magazine, a magazine with articles in arts, politics and literature, which existed between 1899 and 1925. It was very popular for its long illustrated articles on interesting, exotic topics, or photo essays as they are now known.

James Creelman, a Canadian-born US citizen, was a seasoned reporter who was proud to call himself a '**yellow journalist**'. In 1908 he traveled to Mexico City to interview the aging Díaz. Creelman traveled from New York after making previous arrangements for the interview with the Mexican government, and was rewarded by getting the scoop that Díaz would not be running for re-election.

KEY TERM

Yellow journalism
Reporting events in periodical publications with a view to create sensationalism or expose dramatic events and ultimately attract readers and sell more newspapers or magazines.

SOURCE C

Excerpt from 'President Díaz: Hero of the Americas' by James Creelman, *Pearson's Magazine*, Vol. XIX, No. 3, March 1908, pages 273–7. Accessed on 7 January 2013 at http://historicaltextarchive.com/sections.php?action=read&artid=138. Creelman was a Canadian-born US journalist sent to Mexico to interview Díaz in 1908.

'But you have no opposition party in the Republic, Mr. President. How can free institutions flourish when there is no opposition to keep the majority, or governing party, in check?'

'It is true there is no opposition party. I have so many friends in the Republic that my enemies seem unwilling to identify themselves with so small a minority. I appreciate the kindness of my friends and the confidence of my country; but such absolute confidence imposes responsibilities and duties that tire me more and more.

'No matter what my friends and supporters say, I retire when my present term of office ends, and I shall not serve again. I shall be eighty years old then.

'My country has relied on me and it has been kind to me. My friends have praised my merits and overlooked my faults. But they may not be willing to deal so generously with my successor and he may need my advice and support; therefore I desire to be alive when he assumes office so that I may help him.'

He folded his arms over his deep chest and spoke with great emphasis.

'I welcome an opposition party in the Mexican Republic,' he said. 'If it appears, I will regard it as a blessing, not as an evil. And if it can develop power, not to exploit but to govern, I will stand by it, support it, advise it and forget myself in the successful inauguration of complete democratic government in the country.'

'It is enough for me that I have seen Mexico rise among the peaceful and useful nations. I have no desire to continue in the Presidency. This nation is ready for her ultimate life of freedom …'

What does Source C reveal about the upcoming political activity and elections in 1910? ?

? How does Díaz characterize the Mexican people as political actors in Source D?

SOURCE D

Excerpt from 'President Díaz: Hero of the Americas' by James Creelman, *Pearson's Magazine*, Vol. XIX, No. 3, March 1908, pages 273–7. Accessed on 7 January 2013 at http://historicaltextarchive.com/sections.php?action=read&artid=138. Creelman was a Canadian-born US journalist sent to Mexico to interview Díaz in 1908.

'I believe democracy to be the one true, just principle of government, although in practice it is possible only to highly developed peoples. (…) Here in Mexico we have had different conditions. I received this Government from the hands of a victorious army at a time when the people were divided and unprepared for the exercise of the extreme principles of democratic government. To have thrown upon the masses the whole responsibility of government at once would have produced conditions that might have discredited the cause of free government. Yet, although I got power at first from the army, an election was held as soon as possible and then my authority came from the people. (…) I have waited patiently for the day when the people of the Mexican Republic would be prepared to choose and change their government at every election without danger of armed revolutions and without injury to the national credit or interference with national progress.'

What happened to cause the demise of Díaz's power?

The beginning of the end

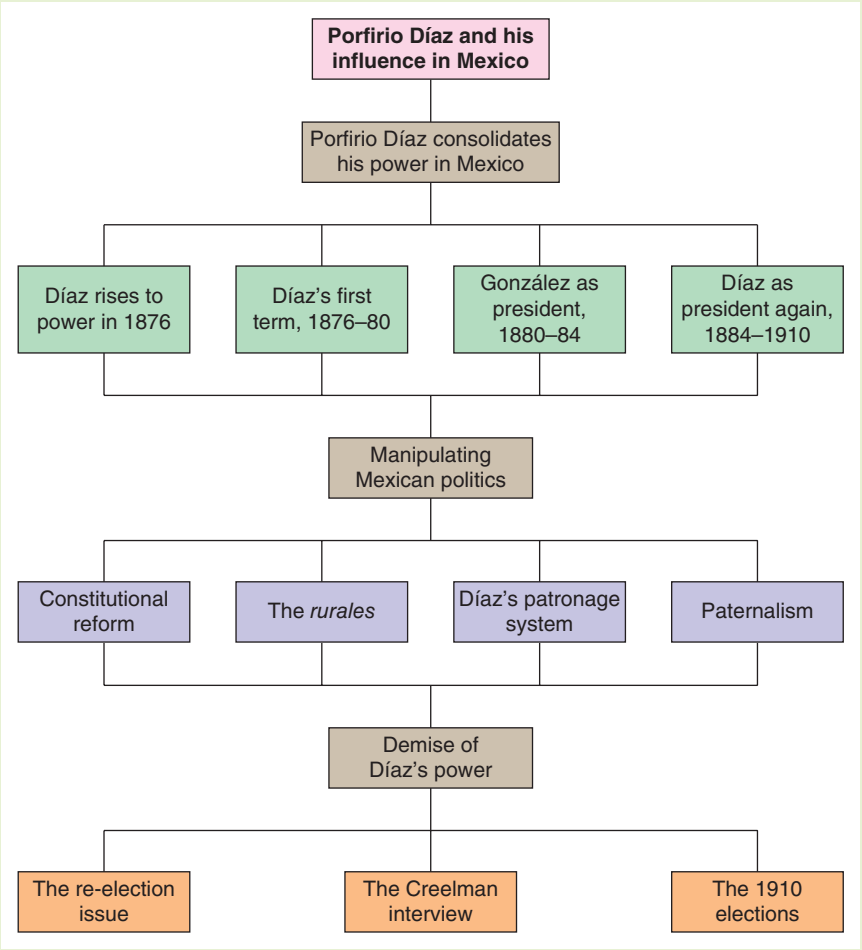
The 1910 elections

As the 1910 elections approached, Díaz was confident in his mandate. For the first time since colonial times, Mexico had a budget surplus. He himself was in excellent health despite being nearly 80 years old. The deputies and senators in Congress were an increasingly elderly group of influential men, but they were loyal to Díaz. His confidence was apparent in the Creelman interview in 1908.

The news that Díaz had said he would not seek re-election this time and would allow opposition parties took Mexico by storm. It stimulated the formation of new parties for the elections coming up in 1910, so that serious contenders could run. One such person was a landowner from Chihuahua in the north of Mexico, Francisco Madero, who formed the National Anti-re-electionist Party in 1909 and announced he was running for the election in 1910. Díaz began to regret his comments to James Creelman and quickly decided to run again for president. He also jailed Madero. Unsurprisingly, Díaz became president once again in 1910.

Unperturbed, Díaz began his eighth term at 80 years old, concentrating on celebrating the upcoming centennial celebration of Mexico's independence from Spain in 1810. The idea was to invite foreign dignitaries and show

Mexicans, and the world, that Mexico was a modern nation, with a sound economy and a stable political climate for investment – thanks to his long regime. However, Madero would soon write a rousing call to arms and revolution (see page 41). The restive Mexican peasants and factory workers, as well as the increasingly disaffected intellectuals and middle class, took up Madero's call. Díaz would be forced to resign and go into exile by May of 1911.



SUMMARY DIAGRAM

Porfirio Díaz and his influence in Mexico

3 Social groups during the Díaz regime

Key question: How did various social groups relate to the Díaz regime?

Groups influential in Díaz's inner circles of power, both national and foreign, created stark social conditions for those excluded.

What effect did this group have on Díaz and on Mexico?

The role of the *científicos*

The *científicos* and Díaz

As Díaz sought to modernize Mexico, he surrounded himself with experts, entrepreneurs, landowners and **technocrats**, especially between 1888 and 1904. These people had the expertise and influence he needed to achieve this goal, and justified this goal through the philosophy of **Positivism**. Naturally, this group of *científicos* was amply rewarded with political influence. Díaz and his entourage embraced Positivism and believed that Mexico could only progress through technology and science. Many *científicos* provided the capital toward creating this modern nation, but they strongly urged Díaz to invite foreign investors as well.

Intellectuals also found a place in the *científicos.* Mexican historian Enrique Krauze comments that Díaz easily co-opted them into his government by giving them insignificant posts and following his adage: 'This rooster wants corn.' By this he meant that giving the intellectuals minor posts would make them feel involved with the government and provide them with an income. Díaz brought these intellectuals into his circle by 'throwing them some grains'.

The *científicos* and Mexico

As the Díaz regime entered the twentieth century, frustrated middle-class professionals saw the *científicos* as stopping their own advancement within the power system. Some *científicos* were willing to allow the middle-class professionals in; others were not. Díaz and the more stubborn *científicos* felt that a repressive political system was the only way to control the Mexican populace. **Social mobility** could not be sanctioned because it might lead to the Mexican public wanting more power for themselves.

Furthermore, the *científicos* refused to acknowledge the social cost to the vast majority of Mexicans who did not share in the acquisition of wealth. At the same time, they admitted that progress was advancing at a far slower rate than they had thought.

KEY TERM

Technocrats A group of technical experts, such as engineers, bankers and economists. In this case, they wanted to modernize Mexico.

Positivism The views of French sociologist Auguste Comte, which stressed the power of science and technology in modern progress.

Social mobility A society whereby people are free to move upward in social class; for example, from the lower classes to the middle class, through educational and work opportunities.

Natural selection In order to survive as a species, organisms adapt to the environment by selectively reproducing traits that increase their strength.

How did Social Darwinism affect the Díaz regime?

Social Darwinism

The 'New Mexican'

British naturalist Charles Darwin published his *Origin of the Species* in 1859, where he propounded the idea of evolution by **natural selection**. British

philosopher Edmund Spencer later popularized the expression 'survival of the fittest' as applied to human populations, some of which he observed were strong and imposed their culture over ones that were deemed inferior. These ideas were widely propagated and discussed all over the world, including, of course, Mexico.

Vicente Riva Palacios, one of the *científicos*, added a local interpretation to these ideas. He heralded the concept of a 'New Mexican' as a product of the mix of Spaniards and Indians, the *mestizo*, in which the dominance of the superior traits of the Spanish emerged triumphant over the subordinate Indian cultural qualities (though he thought the Indians contributed a superior physique). However, Riva Palacios never used the word *mestizo* in his writings, perhaps to avoid a sense of unity among Mexicans.

A popular view at the time was that Indians and Afro-Mexicans held the country back from modernity with their traditional dress and culture. This idea was upheld during the Díaz regime as it aligned with Díaz's views of progress.

Mexican Indians

How did the Díaz regime treat Mexican Indians?

The Yaquis and the Mayas

Although Porfirio Díaz was a *mestizo* himself, like a great part of the Mexican population, he did not stress his Indian ancestry and had strong opinions about Indians. He described them as mostly 'docile and grateful, except for the Yaquis and Mayas'. These two Indian nations had resisted conversion to Christianity from colonial times. They also lived in areas that were not mixed with Spaniards, so had remained ethnically and culturally distinct.

The Yaquis, in the northwest of Mexico, had been fighting the Mexican government periodically since 1824. Díaz sent the army in retaliation, and sent funds and agricultural implements to turn them into peaceful farmers, but they would not be co-opted. They felt they had a right to their communally owned land, and rejected individual property, government assistance and the intervention of the Church. In 1902, Díaz's army killed Yaquis, including women and children, then deported the survivors from northwest Mexico to the Yucatán in the southeast of Mexico. They would become slave workers in plantations.

The Mayas, living in the southern state of Chiapas and the Yucatán peninsula, had been fighting sporadically since 1848, but Díaz often sent the army to destroy villages, food supplies and rebellion headquarters. Many Mayas were also transported as forced labor to other parts of Mexico.

Reasons for revolution

The struggle for land control, inextricably tied to different Indian communities, was a key issue in the Mexican revolution. Community lands had been legally owned by Mexican Indians since colonial times in the sixteenth century, and lost in the second half of the nineteenth century. The

KEY TERM

Expropriate When the state takes away property from landowners, with or without compensation.

Indian communal lands were lost mostly by being **expropriated** by the government for railroad development. They were then either given to railroad companies as a form of payment, or sold to large landowners or *hacendados*, who bought the lands from the government. Sometimes Indian villages or small landowners were pressured with strong-arm tactics and threats to sell to *hacendados*.

The ancient Indian was hallowed as a statue in Mexico City and in Aztec and Mayan ruins, but the modern Indian was not even allowed to wear traditional dress in Mexico City. When Indians rebelled, they were violently repressed. By the beginning of the 1900s, landless peasants, mostly Indian and *mestizo*, were more than eager to join the forces against Díaz. Their source of unity was not their Indian heritage, but poverty.

How did the rural and urban elites support Díaz?

The role of rural elites *(hacendados)* and urban elites

The rural elite

Repressing peasants

The *hacendados*, encouraged by Díaz's promotion of railroad development, continued to expand their land as railroads took their products to ports and markets. The Díaz government accelerated land surveys to sell off public lands formerly owned by Indian and village communities. By 1899, a third of Mexico's territory had been surveyed. Surveyors were compensated with land and could buy at low prices. This created a real-estate boom in land sales. By 1910, 54 per cent of Mexico was owned by large landowners, with a further 20 per cent owned by smaller landowners. Only 6 per cent of the land was in the hands of peasant communities. Fully 95 per cent of peasant farming families in the countryside were landless by 1910. The *hacendados* also used strong-arm tactics by taking over water sources and communal lands to grow sugar, particularly in Morelos. Some communities did defend themselves by proving legal tenure to the land, but this was not the norm.

KEY TERM

Debt peonage Farm or mine workers who are forced to work in one *hacienda* or mine in order to pay off acquired debts.

Rancheros Large landowners who raised cattle and other animals, mostly for export, and profited from the Porfirian era.

The *hacendados* exploited the landless peasants in many ways, as sharecroppers, renters, **debt peonage** and even slavery. As the Porfirian era entered the twentieth century, these agricultural workers' wages and working and living conditions continued to worsen. In contrast, land ownership became more concentrated in the hands of *hacendados* and ***rancheros***. As landowners received support from the Díaz regime and population grew to supply unskilled labor, rural poverty allowed *hacienda* owners to mistreat unskilled agrarian workers, who:

- could be hired or fired at will, which often created extended family misery
- were paid extremely low wages and forced to spend these at the *hacienda* or company store, often accumulating debts for necessities like cloth, medicine and even basic foodstuffs

- could also be detained and asked to provide evidence of being gainfully employed, and were subjected to convenient vagrancy laws that allowed them to be inducted into the military or transported to *haciendas* in need of labor.

Money-making exports

The rural elite concentrated on producing products for export, as new markets abroad provided lucrative opportunities. The production of staple food crops like beans, corn and peppers remained the same through the Porfirian era, but the production of agricultural products for export (mainly *henequén*, tropical fruits, rubber, tobacco, sugar and cotton) rose by 200 per cent. Ranchers exported pigs, cattle and dairy products.

Legislation

Controlling the labor population was of course in the interest of the landowning elite and was often accomplished by heavy involvement in politics. This led to ***caciquismo*** as a way to consolidate local power, respect and political influence in the Porfirian government. Thus the powerful *hacendados* and *rancheros* could sway agrarian legislation, taxes, import and export tariffs and government agricultural credits in their favor, and use their weight in influencing social and labor conflicts to their advantage.

A particularly glaring inequity stemmed from low land taxes, based on outdated assessments of properties for tax rates, which the Díaz government had not changed and which rural elites supported. *Hacendados* also commanded the greatest share of credit. Bankers and merchants favored them not only for agricultural investments in irrigation, transportation and industrial infrastructure (for example, sugar refineries and processing plants) but also for ostentatious consumption, such as building elegant houses or going on costly European voyages.

KEY TERM

Caciquismo Political practice promoted by Díaz, whereby local, mostly rural, leaders were co-opted to support his government and rewarded with economic and political privileges.

The urban elite

The urban elite of cities like Mexico City, Puebla and Guadalajara lived in French-style mansions. They were bankers, industrialists, high-up Díaz government officials, technocrats or *científicos*, and *hacendados* who owned city homes. The lawyers and government agents of the Díaz regime were also an up-and-coming upper-middle class who lived in cities, though they were excluded from the urban elite.

They read and discussed the ideas of the times, such as Positivism and Social Darwinism. Living in modern sections of Mexico City insulated them from the grinding poverty of some sectors of the city and of the Mexican countryside. They attended the opera and visited the Palace of Fine Arts. They often undertook tours of Europe to immerse themselves in the culture and fashions there.

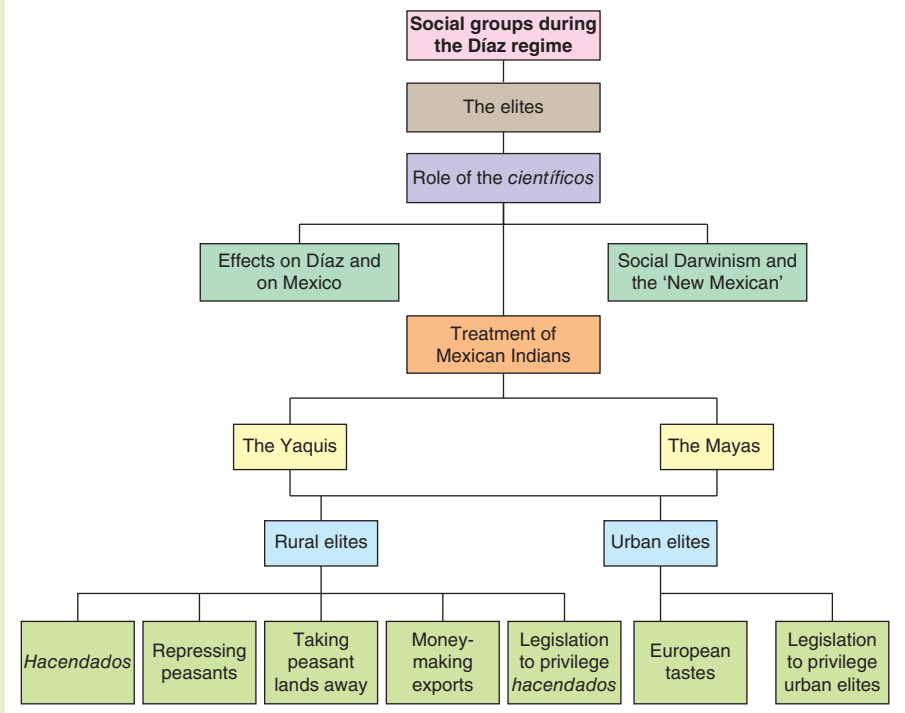
Disaffection in Mexico City

By 1900, there was increasing disaffection among the elites in Mexico, in part due to external reasons such as the global recession, and because it was becoming clear that Díaz was aging, along with the politicians and influential power brokers around him in Mexico City.

Mexico City – a beacon of progress?

Although Mexico was still 70 per cent rural in 1910, Díaz wanted to make Mexico City a showcase of modernity and progress. A major undertaking, achieved with foreign investment and engineers, was the construction of the Mexico City drainage system. It became a symbol of the nation's economic progress, improving sewage elimination as well as draining swamps to control flooding and malaria. There were also clean streets as well as a water supply, street lighting, a railroad station, telephones, telegraph and a post office. Díaz also embellished the city to dazzle foreigners by erecting statues to Mexican heroes, from the last Aztec emperor Cuauhtémoc to the heroes of the wars of independence, as well as the former Liberal President Juárez.

However, Díaz and his close political and economic allies were increasingly isolated from the Mexican populace in the rest of the country.



SUMMARY DIAGRAM

Social groups during the Díaz regime

4 Economic aspects of the Díaz regime

Key question: What were the effects of the Díaz regime's emphasis on economic progress?

This section will look at how the Díaz regime controlled the labor force, and how this and foreign investment was key to the industrial development of Porfirian Mexico.

The development of industries and railroads

How did industries and railroads affect Mexico's economic development?

Industries

SOURCE E

Excerpt of a table found in 'Structural Change Early in Development: Mexico's Changing Industrial and Occupational Structure from 1895 to 1950' by Donald B. Keesing, *Journal of Economic History*, Vol. 29, No. 4, December 1969, page 724. Keesing was a professor at Stanford University, California, when writing this article. He later worked at the World Bank for twenty years.

Mexico 1895: sectoral distribution of the labor force (per cent of total)	
Agriculture	66.5
Manufacturing	11.5
Commerce	16.0
Mining	1.8
Construction	2.3
Transportation	1.6
Others	0.3
Total	100

What areas of the economy absorbed most of Mexican labor, according to Source E? Why did Díaz want to change this?

Under the Díaz regime, employers only had one law to follow – this forbade slavery, murder and corporal punishment. Rules about wages, labor conditions and humane treatment were left to employers, and the results were dictated by the need to increase profits at all costs, with an unlimited supply of agrarian workers. It was usual to treat these workers with condescension, in a paternalistic manner, when Díaz was president.

Railroads

Starting in 1880, with Díaz's strong support of foreign investment, Mexico's railways multiplied from the central valley to the seaports, then towards the US border. There were 1086 km of railways in 1880. By the end of the Díaz regime in 1911, there were 19,205 km.

Contracts with railroad builders included clauses to ensure they hired local populations for the work required, and even established set wages to keep costs low for the investors. The railroad investors were also granted a twenty-year tax exemption, as well as exemption from import tariffs for construction materials.

US domination

The US and British firms that built and ran the railroads in Mexico also received enormous land and funding subsidies from the government to spur their investment (see page 29). Through geographical proximity, US investment dominated the railroad, mining and public utility industries. These industries required fuel, particularly oil. US capitalists made their way into ventures in the northern Mexican states, such as Chihuahua and Sonora. By the 1880s, US-built railroad companies connected central Mexico with northern Mexico and the United States, and took Mexican workers to US worksites all along the borderlands. As the railways appeared at mining, agricultural and ranching areas, they became a much-resented symbol of US domination.

Consequently, Díaz's finance secretary, José Yves Limantour, started to buy railroads to secure a national railway system under government ownership. Between 1902 and 1910, Limantour borrowed funds from France to purchase majority stock in separate lines. Ultimately, he merged 60 per cent of Mexico's steam railways into the government-owned *Ferrocarriles Nacionales de Mexico*, or National Railroad of Mexico. This railway nationalization was as much a political as an economic measure.

The strong impulse to advance Mexican transportation firmly inserted Mexico in the international economic system. On a local level, however, it changed and sometimes disintegrated traditional rural life by accelerating land acquisition and taking over village and communal lands. This certainly contributed to the revolt among landless peasants.

Díaz was also able to better control more parts of rural Mexico through the railroads by quickly sending soldiers to control strikes and rebellions. Parallel telegraph lines helped improve communications with outlying areas. Later, during the Revolution, the railroad was used by revolutionary armies to militarize the country, thus becoming one of their icons.

What was the role of foreign investment in Mexico?

Foreign investments

Foreign investors in Mexico were interested in long periods of political stability so that their investments and profits would stay safe. Díaz obliged and offered them tariff protection, access to political insiders and generous tax benefits. Díaz created these conditions with his iron rule of Mexico, causing rapid economic development with increasing amounts of foreign capital. Mexican national income increased at an annual rate of 2.3 per cent between 1877 and 1910. By 1911, the country had attracted an estimated US$1.7 billion in direct investment and foreign loans.

SOURCE F

Percentages of foreign investment in Mexico in 1911 found in *The Mexican Revolution* by Adolfo Gilly, translated by Patrick Camiller, published by The New Press, New York, 2005. Gilly is a historian from Argentina, but has lived and taught in Mexico since 1979. He writes from a Marxist perspective.

Mexico 1911: Areas of foreign investment distribution (per cent of total)	
Railroads	33.2
Mining	27.1
Petroleum	24
Public Debt (loans)	14.6
Electricity	7
Agriculture	5.7
Banking	4.9
Processing	3.9
Commerce	3.6

What areas showed the bulk of foreign investment in Mexico in 1911 in Source F? How does this reflect Díaz's support for foreign investment?

US versus European investment

The US and British firms that built and ran the railroads in Mexico also received enormous land and funding subsidies from the government to spur their investment. US investors made up 38 per cent of foreign investment from 1900 to 1910, while European investors made up 62 per cent.

Of the European investors, 90 per cent were British and French, with Germany following. Mexico was Germany's biggest trade partner in 1910 and Mexico exported 13 per cent of its resources to Germany. Germany provided 10 per cent of Mexican imports, notably glassware, musical instruments, chemical products, electronics, toys and other manufactured goods. German steel for railroad tracks and wheels was also vital to the growing Mexican railroad industry. By 1905, German exports to Mexico exceeded those from Britain. These facts would later have an important impact on **geopolitical** pressures during the First World War.

KEY TERM

Geopolitical Geographic and economic importance of a country in the world political stage.

Still, no European nation could control as large a part of the Mexican market as the USA, who by sheer proximity and population, in addition to capital, dominated imports and exports to and from Mexico.

SOURCE G

Excerpt from 'The Germans in Mexican Trade and Industry during the Díaz Period' by Warren Schiff, found in *The Americas*, Vol. 23, No. 3, January 1967, page 290. The late Professor Schiff taught Latin American History at the College of the Holy Cross, Worcester, Massachusetts.

President Porfirio Díaz himself, wary of the preponderant American influence and specifically desirous of having the Deutsche Bank and Krupp develop coal and iron deposits in the State of Oaxaca, remarked in 1906 that German finance was too reserved, particularly in regard to industrial investments. It appeared that the

How does Source G provide an alternative perspective to the study of the foreign investment climate of Porfirian Mexico?

Germans were only slowly gaining confidence in Mexico's political and business climates. Even during a supposedly stable period, such phenomena as exchange fluctuations, widespread corruption within the government, and favoritism for the French and the Americans by highly placed public servants were threats.

The oil industry

The development of the Mexican oil industry bears testimony to Díaz's political manipulation. Díaz, mindful of US dominance in the railway system, preferred engaging Britain to develop the oil industry. Díaz intentionally used the British to thwart US investors and engineers, who already dominated the mining and railway industries, and chose a British firm to build the modern port and dockyards in Veracruz. In this case, the Díaz government purposely gave the deal to British engineers, even though the USA had bid lower.

In 1906, a British engineering company was given the largest oil concession by the Mexican government: a 50-year contract covering all national land, lakes and lagoons in the state of Veracruz. However, the oil company developing the oil had to register as a Mexican company, not an overseas one. This made Mexico an oil exporter to the US Gulf and Atlantic states, and to Canada, Europe and Latin America. Production increased from 3.6 million barrels in 1910 to 12.6 million in 1911.

Overall, foreign investment played a very important role in providing Mexico with the trappings of a modern twentieth-century nation by:

- building railways
- generating electricity
- setting up telegraph communications
- creating modern processing industries, particularly in textiles, but also in the steel industry
- producing petroleum fuel.

Even so, foreign investment, whether US or European, began to upset many Mexicans. About 20,000 US and 15,000 British, among other foreigners, managed thriving ventures. Foreign employees usually worked as skilled workers with the highest wages. During the economic crisis of 1906, graffiti all over the country declared 'Mexico for the Mexicans', an opinion shared by the Mexican **proletariat** and **bourgeoisie**.

KEY TERM

Proletariat Term referring to the working class, mostly urban factory workers.

Bourgeoisie The middle class, with ideals of accumulation of capital at the expense of the working class.

How did labor unions evolve during the Díaz regime?

Labor unions

When the industries Díaz supported grew larger as Mexico entered the twentieth century, workers became increasingly conscious of their poor labor conditions and wages. The Díaz regime repressed labor unions, but workers still managed to stage nearly 250 strikes between 1876 and 1911. Textile workers held the most strikes during the *Porfiriato* (75), while railroad workers held 60 strikes. Other strikes for improved conditions were by tobacco-industry workers, miners, tram workers and bakers.

Types of workers

Textile labourers

As the most important sector of Mexico's growing industry, the cotton textile workers led many strikes that helped create the conditions for revolution. Porfirio Díaz offered industry owners full support in putting down demonstrations and strikes by sending in *rurales* and, when necessary, the military to control striking laborers.

SOURCE H

Excerpt from 'Authority Re-Seated: Control Struggles in the Textile Industry during the Mexican Revolution' by Jeffrey Bortz, found in *Labor History*, Vol. 44, No. 2, 2003, published by Routledge, pages 172–3. Bortz teaches Latin American History at Appalachian State University, Boone, North Carolina.

Owners of cotton textile factories, like other Mexican industrialists, believed that they needed to exercise their authority in order to keep an inherently lazy and irresponsible working class in its place. Two owners wrote a letter to the Labor Office in 1912 that expressed those feelings, reporting that mill hands commonly came to work late, often drunk (which would explain their lateness), and frequently left early to drink or party. They claimed that 'operarios' [workers] wasted materials, did not clean their machines, and often spent much of the day reclining on the looms and carders (machinery used to process cotton) rather than working. 'Many who are on a fixed wage spend the better part of the day in the bathrooms, sometimes smoking, sometimes chatting, often sleeping.' By and large, Mexican owners believed that their workers lacked 'modern work habits, which could only be enforced on them through rigorous hiring criteria and strict discipline.'

What does Source H reveal about industry owners' opinions of Mexican factory workers? ?

Some of the working conditions in the textile industry included fines that the workers were given if they broke tools, spoiled textiles, interrupted work or did not clean machines according to the rules. During the *Porfiriato*, these employers often fired Mexican industrial workers when they complained about arbitrary fines, low wages or long work hours to their supervisors or managers. Workers were powerless to counteract these fines, which created a growing sense of dissatisfaction and certainly gave impetus to the start of the Revolution.

Female factory workers

Female workers were occupied in tasks such as tobacco processing and clothing production. These were included in union grievances, but the working circumstances of street vendors, tortilla makers and ***tamaleras***, who aided industrialization by producing and distributing goods and services (like food), were not.

KEY TERM

Tamaleras Women who made and sold Mexican fast food consisting of steamed cornmeal flour with spicy meat, wrapped in corn-husks.

KEY TERM

Anarchism Political movement advocating an end of government institutions in favor of free associations of individuals.

Communism Political movement advocating the elimination of private property and state control of the economy, as well as the dictatorship of the proletariat (workers).

Socialism Political movement advocating communism as a political end, but conceding that before reaching it, there could be some private property and a partial control of the economy by the state.

Unions

As industries and railways grew, so did the number of workers and their grievances. Textile workers, miners and railroad workers began to get organized. Marxist historian Adolfo Gilly says that the '*Porfiriato* saw the consolidation of the youngest and most modern class in Mexico: the proletariat.' As workers grew in number, they changed from agrarian peasants to conscious industry workers, aware of wage disparities and unfair, unsafe labor conditions. They were also influenced by news of workers rising up in the USA and overseas, as well as the ideas of **anarchism**, **communism** and **socialism**.

Railway unions

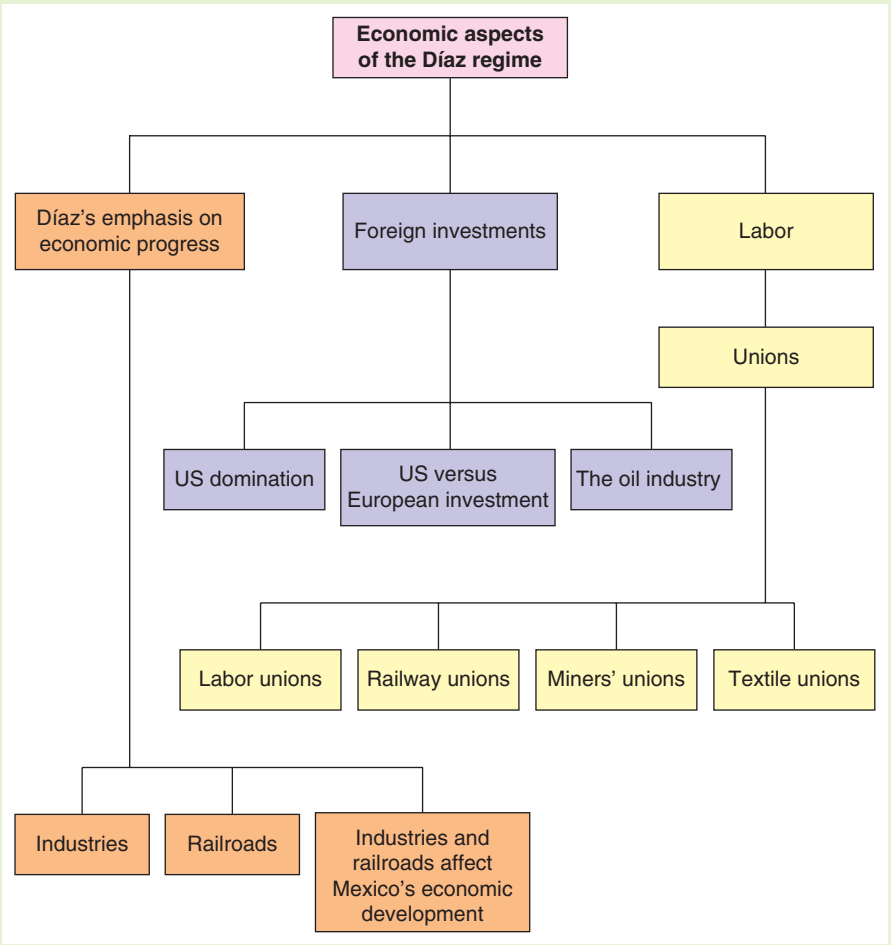
Although the first workers union, the *Gran Círculo de Obreros* (Great Workers Group), was established as early as 1872, it had disintegrated by the 1890s. This was due to government repression and the large numbers of workers who favored more specialized unions. In 1887, the Society of Mexican Railwaymen was formed, though the Díaz regime did its best to suppress it. By 1904, all railway associations merged into the powerful Grand Mexican League of Railway Employees.

Miners' unions

In 1906, the miners' union in the US-owned Cananea copper mine in Sonora declared a strike, protesting the wage differences between Mexican and US nationality miners (3.5 pesos versus 5 pesos a day), among other grievances. The US owner of the mine and the governor of Sonora called on Arizona Rangers, a volunteer law-enforcement company from the bordering US state of Arizona, to suppress the striking miners. Ultimately, the *rurales* controlled the unrest. Violent clashes left six US and 23 Mexican miners dead. This caused protests all over the country.

Textile unions

By early 1907, textile workers in three different sites were on strike, asking for better wages and working hours and safer conditions. Díaz sent in the army. The strike was violently crushed and the workers were forced to return to work, having achieved nothing. These strikes radicalized labor unions and created an agitated social sector of factory and mine workers who were more than willing to join the landless peasants in revolution by 1911.



SUMMARY DIAGRAM

Economic aspects of the Díaz regime

5 Key debate

Key question: *To what extent can Porfirio Díaz be blamed for the start of the Mexican Revolution?*

To conclude this chapter, here is a brief historiographic review of the *Porfiriato* and how far we can say that he was to blame for the start of the Mexican Revolution. Mexican historian Enrique Krauze has remarked on Díaz's strong belief that the only possible relationship between a government and its people was that of authority. Post-Revolution Mexican historian Daniel Cosío Villegas led the writing of a serious, objective ten-volume modern history of

Mexico based on archival and primary sources. He wrote five of these, and supervised and trained young Mexican historians to write the other five. He is the acknowledged expert on the *Porfiriato* and concludes that the confrontation between landowners and peasants spurred the Revolution to set up a radically different, reformed Mexico from the *Porfiriato* days.

In 1960, Mexican historian Jesús Silva Herzog wrote about the causes of the Mexican Revolution, analyzing primary documents, and allocated much of the blame on Porfirio Díaz. Silva Herzog blames Díaz for creating the land tenure conditions for the displacement of agrarian workers, who in turn propelled the social causes of the Revolution. Mexican Marxist historian Arnaldo Córdova credits Díaz for beginning the process of centralizing power in Mexico, and championing capitalist and bourgeois ideals, but feels the Revolution was unable to meet socialist goals and that the bourgeois process continued after the Revolution. Another Marxist historian, the Argentine Adolfo Gilly, charges Díaz with creating a disenfranchised and seething proletariat, by developing railroads that stimulated transport of minerals and cash crops to ports, and the employment of workers at low wages and poor conditions. This in turn created an exploited, angry proletariat willing to join the landless peasants in revolution.

Recent **revisionist** histories have taken a broader view of Díaz's strengths and weaknesses and his legacy in Mexico. One such historian is Paul Garner, a British historian from the University of Leeds, UK. He maintains that, before 1900, Díaz's regime was far more open and considerably less despotic than biographers and historians have given Díaz credit for. Austrian historian Friedrich Katz discovered archival documentation in Germany about Díaz's role before the First World War, inserting Mexico into world diplomatic history. Spanish–French historian François-Xavier Guerra reviewed the *Porfiriato* and focused on Díaz's clientelism as a root cause for the Revolution. Historian Anna Macías has focused on the role of intellectuals and journalists, especially Mexican women, in destabilizing the Díaz regime with their writings.

One of the most balanced recent historians to analyze the Mexican Revolution, British historian Alan Knight, points to the Díaz regime's oligarchy in creating the conditions for a revolution: the displaced, poor rural masses and workers in Mexico who eventually resorted to the extensive violence of the Revolution.

KEY TERM

Revisionist A new look at past events or historical periods from a fresh perspective, especially when new evidence has surfaced. This generally criticizes historiography up to that point.

TOK

Is it possible for historical writing to be free from perspective? To answer, consider the historians' perspectives and judgements of Porfirio Díaz's 34 years in power and how far he can be blamed for the start of the Revolution. (Language, Emotion, Reason, Memory.)

Chapter summary

The regime of Porfirio Díaz and the background of the Mexican Revolution

In 1910 Mexico had the trappings of modernity in a country with an important railway and transportation network, electrification in large cities and foreign and national investment in mining and agribusiness. On the other side, there were strong signs of social malaise among the landless peasants, industrial workers and miners. The social make-up of Mexico in the early twentieth century consisted of a vast majority of agricultural workers; mostly landless peasants working in an oppressive system. A growing number of urban workers were beginning to organize labor unions to defend their interests. Disenfranchised Mexican Indians were brutally repressed, in particular the Yaquis and Mayas.

Díaz's political machine, and his use of the military and *rurales* to coerce and control the population and their dissent, added to the volatile mix. The political structures of Mexico in the early twentieth century did not allow citizens to voice grievances. Porfirio Díaz's presidential powers had grown between 1887 and 1910, as he maintained power by manipulating Mexican politics and its republican government. This was done through constitutional reform, paternalism and a patronage system, as well as through coercion, with the *rurales*.

Porfirio Díaz felt that social repression and political manipulation were necessary in order to modernize Mexico. By availing himself of the *científicos*, he privileged economic development by encouraging foreign investment in building railroads, ports and the mining and oil industries. After 34 years, from 1876 to 1911, the long dictatorship of Porfirio Díaz created an unbalanced Mexico.

Examination advice

How to answer 'evaluate' questions

For questions that contain the command term 'evaluate', you are asked to make judgements. You should judge the available evidence and identify and discuss the most convincing elements of the argument, in addition to explaining the limitations of other elements.

Example

Evaluate the importance of economic injustices during the Díaz regime in the outbreak of the Mexican Revolution in 1910.

1 For this question you should aim to make judgements about the role of economic injustices during the Díaz regime in the outbreak of the Mexican Revolution in 1910. Remember the time frame of the question is up to 1910, so concentrate on the *Porfiriato* only (1876–1910). Naming the economic injustices would be a good start, including the perpetrators of the injustices and their victims.

The elite certainly prospered under Díaz, but the majority of Mexicans faced abysmal poverty. There was an excess supply of labor, especially as more and more peasants were displaced from their lands by hacendados. This ensured low wages. Repeated demonstrations and revolts by workers, both rural and urban, reflected clearly that the much-touted 'economic progress' of Porfirian Mexico was inherently unequal. Some of the injustices the workers protested against had to do with large wage differences between Mexican and US workers in mines. There were also major strikes among railway and textile workers. Rural workers in Morelos deeply resented losing their lands to hacendados, who cultivated the land exclusively for cash crops like sugar cane. In the North, there were similar reactions as ranchers lost lands to railroad construction.

2 Before writing the answer, you should produce an outline – allow around five minutes to do this. You might want to organize your thoughts by naming economic injustices, who imposed them and who suffered from them. You could include evidence such as:

Economic injustices:

- One per cent of Mexican society was wealthy and just 8 per cent was in the middle class. The overwhelming majority was poor: they were agricultural workers in the *haciendas*, or sharecroppers, miners, soldiers, small merchants, factory workers and beggars.
- Agricultural workers were mostly poorly paid, illiterate, landless peasants working within the *hacienda* system.
- In 1910, 81 per cent of all Mexicans were illiterate and living conditions were poor. Workers were often dependent on the landowners and indebted to the *hacienda* or mining company store.
- The poor could not afford nor did they have access to healthcare. The mortality rate for children under five was 36.8 per cent, but 50 per cent of babies under one died of diseases such as malaria, yellow fever and whooping cough.
- The urban middle class showed some growth, with roles in commerce, banking and law, but the majority of Mexicans worked under poor conditions for low wages.
- Vast landholdings for plantations producing cash crops were sold to landowners, and displaced peasants, sharecroppers and Indian communities.
- Factories, especially textile factories, grew around urban centers. Workers hoping for better wages and living conditions moved to the cities, but due to an oversupply of labor, wages were low and living conditions were terrible.

- Mexican Indians were also badly treated. Military actions succeeded in controlling uprisings and forcibly dispersing Indian populations, who lost most of their ancestral communal lands.
- Appointed governors, members of Congress, and *jefes políticos*, all of whom had the economic advantage of purchasing public lands, started businesses that would be protected by government tariffs or tax breaks, and function as intermediaries for foreign interests. They could also buy and resell government railway and public works concessions to foreigners.
- As Díaz sought to modernize Mexico, he surrounded himself with *científicos*, experts and entrepreneurs who also received economic advantages at the expense of the poor.

3 In your introduction, you will need to state your thesis. This might be 'Economic injustices in Mexico between 1876 and 1910 grew to a point that they became intolerable by 1910, so revolution broke out.' Do not waste time by restating the question.
An example of a good introductory paragraph for this question is given below.

Porfirio Díaz came to power in 1976 vowing to modernize Mexico. To do this, he focused on concentrating power and imposed economic measures that created glaring economic injustices over the course of his 34-year regime. Díaz ruled with an elite of experts and promoted foreign investment to improve Mexico's infrastructure. However, by encouraging economic progress and investment, he allowed the majority of Mexicans to suffer the consequences of greed and corruption on the part of landowners, mine-owners, industrialists and politicians. By 1910, most Mexicans were illiterate, landless and poorly paid. These economic injustices in Mexico grew to a point where they became intolerable by 1910, becoming the catalyst for the Revolution.

4 In the body of your essay, devote at least one paragraph to each of the topics you raised in your introduction. This is your opportunity to support your thesis with appropriate evidence. Be sure to explicitly state how your supporting evidence ties in to the question asked. If there is any counter-evidence, explain how and why it is of less importance than what you have chosen to focus on.

5 A well-constructed essay will end with a conclusion. Here you will tie together your essay by stating your conclusions. These concluding statements should support your thesis. Remember, do not bring up any new ideas here.

6 Now try writing a complete essay that addresses the question asked.

Examination practice

Below are two exam-style questions for you to practice on this topic.

1 Discuss the importance of either the status of Mexican Indians OR the role of rural elites (*hacendados*) and urban elites in starting the Revolution.
(For guidance on how to answer 'discuss' questions, see page 172.)

2 Assess the development of industries and railroads in creating a modern, developed Mexico by 1910.
(For guidance on how to answer 'assess' questions, see page 214.)

CHAPTER 2

The Revolution and its leaders, 1910–17

This chapter investigates the Mexican Revolution and its leaders during 1910–17. It will examine the ideological foundation of each major leader, the degree to which each was successful and the 1917 Constitution.

You need to consider the following key questions throughout this chapter:

- How did Madero's *Plan de San Luis Potosí* affect the Mexican Revolution?
- How did Zapata's *Plan de Ayala* affect the Mexican Revolution?
- How did Villa and Carranza contribute to the Revolution?
- What happened during the course of the Revolution?
- What were the successes and failures of Madero, Zapata, Villa and Carranza?
- What made the 1917 Constitution so unique?
- What social, political and economic changes were made in applying the 1917 Constitution?

1 *Francisco* Madero's *Plan de San Luis Potosí*

Key question: How did Madero's Plan de San Luis Potosí affect the Mexican Revolution?

By Porfirio Díaz's seventh term in office during 1900–10, voices of discontent started to speak up. Díaz's loyal clique was aging and static, causing much resentment among the excluded members of the urban and rural elites, especially younger ones. Middle-class professionals and intellectuals also felt frustrated by their lack of political influence. Díaz did not feel threatened by these voices, even when they formed clubs to discuss republicanism and express outrage at the growing power of the Church and Díaz's constitutional changes to remain president.

Francisco Madero

Who was Francisco Madero?

The formation of political parties against Díaz

By 1901, liberal clubs opposed to the Díaz regime had merged to form the Mexican Liberal Party or *Partido Liberal Mexicano* (PLM), which became increasingly anarchic as more joined. Francisco Madero, a wealthy landowner and intellectual, joined and contributed funds to it. By 1903, the

influence of the Flores Magón brothers (see box) enlarged the PLM to include factory workers. Criticism of Díaz's regime led Díaz to imprison more radical members who called for revolution. After jail, or to avoid jail in the first place, many chose exile in the USA. Madero, who did not approve of anarchy, had left the PLM by 1909.

Ricardo and Enrique Flores Magón

Ricardo and Enrique Flores Magón were Mexican anarchists, social reformers and journalists who wrote and published the journal *Regeneración*, or 'Regeneration', to voice their ideas. Díaz jailed them and banned the journal, which appeared clandestinely.

After the Creelman interview in 1908 (see pages 18–20), Madero, by now a moderate politician, took Díaz at his word and began to campaign for the presidential election of 1910. He ran for and became president of a new party, the National Anti-Re-electionist Party or *Partido Nacional Antirreeleccionista* (PNA). He campaigned with the slogan 'effective suffrage – no re-election'. When Díaz saw this, he decided he would run for re-election after all.

The 1910 presidential election

Díaz realized Madero was a threat because so many people turned out to hear his speeches all over Mexico and supported his campaign. He not only represented disgruntled members of the elite, but also intellectuals and local *caudillos* who had lost power to the highly centralized, authoritarian Díaz regime. Madero also appealed to:

- alienated younger politicians
- teachers and other middle-class professionals
- students
- evicted ranchers
- low-paid factory and mine laborers
- landless peasants.

KEY TERM

Sedition The act of encouraging resistance and rebellion against the legally established government.

As election day arrived on 26 June 1910, Madero was campaigning in the city of San Luis Potosí. Díaz had him jailed on counts of **sedition**, insulting authorities and inciting rebellion. Congress announced Díaz had won by an overwhelming majority, and so began his eighth presidential term, preparing for the Centennial Celebrations in September (see page 20).

Madero was released after the elections and fled to San Antonio, Texas. He was incensed at the obvious manipulation of the election results. He issued a proclamation, the *Plan de San Luis Potosí*, named after the city where he had been imprisoned.

Plan de San Luis Potosí, October 1910

Why was the *Plan de San Luis Potosí* so important?

Details of the *Plan de San Luis Potosí*

Madero published the *Plan de San Luis Potosí* in the USA on 5 October 1910. It was the work of Madero, his brothers and a group of eight other exiled collaborators.

SOURCE A

Excerpts from 'Francisco Madero: The Plan of San Luis Potosí', United States Congress, Senate Subcommittee on Foreign Relations, *Revolutions in Mexico*, 62nd Congress, 2nd Session, Government Printing Office, Washington, D.C., 1913), pages 730–6, passim. Accessed on 26 January 2013 at www.fordham.edu/Halsall/mod/1910potosi.asp. This text is part of the Internet Modern History Sourcebook Project by Paul Halsall at Fordham University, New York. The Sourcebook is a collection of public domain and copy-permitted texts for introductory level classes in modern European and World History.

… A force of tyranny which we Mexicans were not accustomed to suffer after we won our independence oppresses us in such a manner that it has become intolerable. In exchange for that tyranny we are offered peace, but peace full of shame for the Mexican nation, because its basis is not law, but force; because its object is not the aggrandizement and prosperity of the country, but to enrich a small group who, abusing their influence, have converted the public charges into fountains of exclusively personal benefit, unscrupulously exploiting the manner of lucrative concessions and contracts. …

Therefore, and in echo of the national will, I declare the late election illegal and, the Republic being accordingly without rulers, provisionally assume the Presidency of the Republic until the people designate their rulers pursuant to the law. In order to attain this end, it is necessary to eject from power the audacious usurpers whose only title of legality involves a scandalous and immoral fraud.

With all honesty I declare that it would be a weakness on my part and treason to the people, who have placed their confidence in me, not to put myself at the front of my fellow citizens, who anxiously call me from all parts of the country, to compel General Díaz by force of arms, to respect the national will. …

What does Source A accuse the Díaz regime of? ?

In addition to Madero's accusations, the *Plan de San Luis Potosí* listed eight distinct items for action. These included:

- preserving the legal ***status quo*** until such a time that Madero could be sworn in and a democratic legislature could vote in new laws
- promising free and clean elections within a month
- a call to arms against Díaz's illegitimate government, even setting the date (20 November 1910) and time (6p.m.) to start the Revolution
- stating that the land belonging to many dispossessed peasants and Indians should be returned to them – this was a key promise of the Plan.

KEY TERM

Status quo The preservation of things as they are, without changes.

The Plan called for armed rebellion, since Díaz did not relinquish power, but at the same time it tried to reassure both Mexicans and foreigners that a state of law would be preserved and free elections would be held. Madero was a spiritual man who abhorred violence, but realized that he may have to use it to oust Díaz.

Effects of the *Plan de San Luis Potosí*

The start of the insurrection began in the colonial city of Puebla. One of Madero's collaborators on the Plan, the intellectual Aquiles Serdán, decided to begin the insurrection on 18 November instead of waiting until 20 November. The reason for this was that the Díaz government had already discovered the *Plan de San Luis Potosí*. The first armed confrontation occurred in the Serdán house as *rurales* came to arrest them, though the Serdán family was well armed. Two Serdán brothers, including Aquiles, died, and their sister Carmen was arrested.

By 20 November, the official beginning of armed conflict, Madero had crossed the US border into Mexico with a few men, hoping to come across armed forces for support. When this did not happen, he returned to the USA, disappointed. It would take several months for the uprising to gather momentum, and support came from unexpected quarters. Slowly, local **guerrilla** leaders begin to appear in rural areas. In the northern state of Chihuahua, the Madero supporters Pascual Orozco, Abraham González and Francisco Villa organized their own militias to attack the army. In the south-central state of Morelos, rebel leader Emiliano Zapata did the same.

KEY TERM

Guerrilla Irregular form of warfare against the established military using ambush and sabotage techniques.

By May 1911, realizing the magnitude of the rebellion against him, Porfirio Díaz and vice-president Ramón Corral left the country. Madero promptly arrived in Mexico City in June and, after holding presidential elections, he was officially elected President, with José Pino Suárez as vice-president. All Mexicans who had supported the ousting of the long-time dictator Porfirio Díaz now looked upon President Madero to fulfil the promise of a more egalitarian and democratic Mexico.

How did Madero achieve power?

Madero's ideologies, aims and methods

Madero's ideologies

Madero challenged Díaz before the 1910 elections under his political slogan of 'effective suffrage, no re-election'. His political ideology was a strong belief in democratic institutions that he felt Díaz had abused. During his campaign, what began as an anti-re-election movement among the elites slowly widened to include poor Mexican peasants and workers.

Díaz's resulting persecution and Madero's consequent exile produced the *Plan de San Luis Potosí*, where Madero formalized his defiance of the *Porfiriato* and questioned the authority of the Mexican state. Madero's social ideology became more radical still, as he included a promise of returning lands to the peasants whose farms had been taken over by *hacendados* (see page 24).

Madero's aims and methods

Madero's aim in 1908 was to be elected president using the election system in place in the Mexican Constitution before Díaz manipulated and amended it to prolong his office.

To do this, Madero formed the Anti-Re-Electionist Party, the support of which came from the liberal professions, like law and journalism, and from legislators in Congress and *científicos* who felt Díaz's stay in office should end. Discussions within the party raised the admission that some reforms would need to take place to address the peasants' concerns.

In his book *The Presidential Succession* (1910), Madero insisted on the urgency of political and electoral reform, so that all Mexican men could vote in the upcoming election. Madero was adamant on democratic practices for Mexico and campaigned all over the country, speaking at clubs and writing articles. As Díaz became increasingly intolerant of Madero and the growing Anti-Re-Electionist Party, the editors of these newspapers were put in prison.

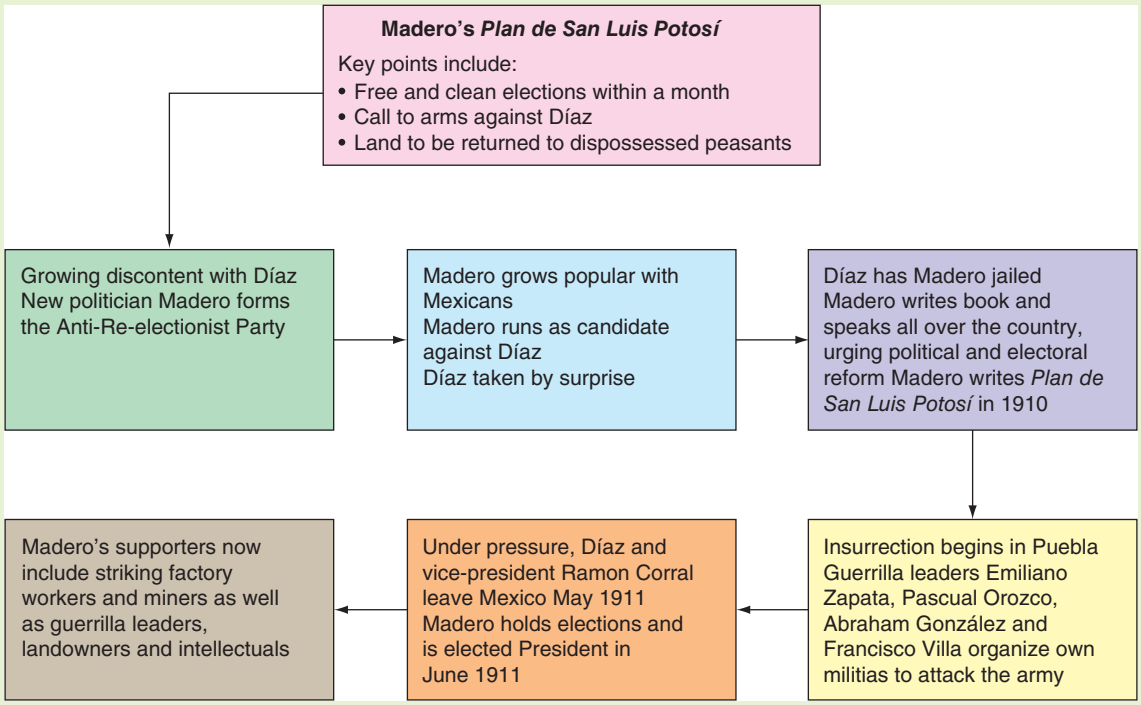
Madero's methods included proposing some social reforms to reach more of his electorate, but criticizing the *Pofiriato* led to his arrest and imprisonment (see page 40). He realized that electoral and legal means would not get rid of Díaz, and this marked radicalization of his aims and methods, shown in the *Plan de San Luis Potosí*. Now his methods were to urge insurrection and incite rebellion against Díaz.

The Plan is credited with uniting the various disparate social groups in Mexico and inspiring them to rise against the Díaz regime. Madero's supporters now included many more Mexicans than his original group of intellectuals and disgruntled politicians and landowners. Striking factory workers and miners as well as local rebel leaders like Villa and Zapata joined in the uprising.

? What does Source B reveal about the Maderos and their supporters?

SOURCE B

Madero's entry to Mexico as a president, with his wife. Engraving by José Guadalupe Posada.



SUMMARY DIAGRAM

Madero's *Plan de San Luis Potosí*

2 Emiliano Zapata's *Plan de Ayala*

Key question: How did Zapata's Plan de Ayala affect the Mexican Revolution?

When drafting the *Plan de San Luis Potosí*, Madero did not foresee how his call to arms would be taken up by social groups such as intellectuals, disgruntled *hacendados* and *rancheros* and middle-class liberals. His message, to throw off the dictatorship of Porfirio Díaz and make Mexico into a liberal democracy with clean elections, appealed to many more sectors of Mexico. However, it was the point about restoring lands that struck a chord with landless peasants, Indians and village leaders. One such leader was Emiliano Zapata, mayor of the village of Anenecuilco in Morelos.

Emiliano Zapata

Who was Emiliano Zapata?

Rebellion against Díaz in Morelos

There had been sugar plantations in Morelos since colonial times, but during the *Porfiriato* it came to produce just a third of Mexico's sugar crop. This was because increasingly large *haciendas* produced this sugar as the *hacendados* acquired more and more land (see page 24). By the 1880s, the Díaz regime thoroughly supported the rights of the *hacendados* over small farmers and villagers by facilitating a new railroad to Morelos. Railroad companies received expropriated land adjacent to the train tracks, which they could sell for profit. They sold this land to *hacendados* who could then grow more sugar. By 1909, Zapata had been elected mayor of Anenecuilco and studied the legal rights of the village regarding communal lands. He tried putting a legal defense forward against the *hacendados*, then writing letters to the governor of Morelos and finally to Díaz himself. When none of these initiatives prevented *hacendados* from taking over lands for sugar cultivation, he began to arm volunteers to defend local lands. At the same time, he continued to battle the *hacendados* in the courts, becoming known for his impassioned speeches, so that judges feared revolt and preferred to postpone decisions that favored *hacendados*.

SOURCE C

Excerpt from *Villa and Zapata: A History of the Mexican Revolution* by Frank McLynn, published by Basic Books, New York, 2002, page 38. McLynn is a British historian and biographer.

The role of the railways as an important and exponential, though not exclusive, cause of conflicts between villages and haciendas *should never be underrated: during the 1877–1884 railway building boom, fifty-five serious armed conflicts*

What does Source C say about Zapata's observations regarding railways? ?

were noted by the authorities. Zapata saw that certain phenomena seemed always to go hand in hand: whenever there was rail expansion, the hacendados *sent armed men to seize village land, to increase their acreage and meet the growing demand for sugar in national and international markets.*

Zapata's support of Madero

When Madero issued the *Plan de San Luis Potosí* in 1910 (see page 41), Zapata and many other Morelos village leaders supported it. The Plan spread everywhere in Mexico, and the section regarding land reform resonated deeply in Anenecuilco; so much so that Díaz attempted to defuse the issue by reversing all claims to Anenecuilco land in the previous 40 years in favor of the villagers. He was also trying to appease the increasingly notorious Zapata, but it was too late. In May 1911, Zapata's army defeated Díaz's army at Cuautla. Zapata agreed to continue to support Madero in August if Madero would make sure land was returned to villages and small landowners in Morelos. This did not come to pass.

Zapata, deeply disappointed and mistrustful of President Madero's broken promises (see pages 54–55), called for Madero's overthrow in the *Plan de Ayala*.

Why was the *Plan de Ayala* so important?

Plan de Ayala, November 1911

Chased by the army and in hiding in the mountains of Ayala near Puebla, Zapata and other local leaders met to write a declaration of principles and demands for the Mexico they wanted. The ideas behind it had been taking shape for years. The results are what in 1969 US historian John Womack, Jr. called 'more than a program of action, almost a Scripture' for the ***zapatistas***.

KEY TERM

Zapatistas Zapata and his followers, who believed in fighting a revolution primarily for radical agrarian reform, and especially for returning land to peasants.

Details of the *Plan de Ayala*

The radicalism of the plan took revolutionaries to another level. Zapata was especially keen on driving out the idea that the *zapatistas* were just bandits. He believed that their demand for agrarian reform was a legitimate and essential change the new government of Mexico needed to address.

SOURCE D

Excerpts from the *Plan de Ayala* by John Womack, Jr, translated by John Womack, Jr, found in *Zapata and the Mexican Revolution*, published by Knopf, New York, 1969, pages 400–4. Womack, Jr. is widely credited as being an expert on Zapata. He is a professor of Latin American History at Harvard University.

… Taking into account that the so-called Chief of the Liberating Revolution of Mexico, Don Francisco I. Madero, through lack of integrity and the highest weakness, did not carry to a happy end the revolution which gloriously he initiated with the help of God and the people … Taking into consideration that the so-often-repeated Francisco I. Madero has tried with the brute force of

? What does Source D say about Madero and his government?

bayonets to shut up and to drown in blood the ***pueblos*** *who ask, solicit, or demand from him the fulfillment of the promises of the revolution, calling them bandits and rebels, condemning them to a war of extermination without conceding or granting a single one of the guarantees which reason, justice, and the law prescribe …*

… we invoke, we give notice: that [regarding] the fields, timber, and water which the landlords, científicos*, or bosses have usurped, the* pueblos *or citizens who have the titles corresponding to those properties will immediately enter into possession of that real estate of which they have been despoiled by the bad faith of our oppressors, maintain at any cost with arms in hand the mentioned possession; and the usurpers who consider themselves with a right to them [those properties] will deduce it before the special tribunals which will be established on the triumph of the revolution.*

In virtue of the fact that the immense majority of Mexican pueblos *and citizens are owners of no more than the land they walk on, suffering the horrors of poverty without being able to improve their social condition in any way or to dedicate themselves to Industry or Agriculture, because lands, timber, and water are monopolized in a few hands, for this cause there will be expropriated the third part of those monopolies from the powerful proprietors of them, with prior indemnization, in order that the* pueblos *and citizens of Mexico may obtain* ejidos*, colonies, and foundations for* pueblos*, or fields for sowing or laboring, and the Mexicans' lack of prosperity and well-being may improve in all and for all. …*

KEY TERM

Pueblos Spanish name for Indian villages in rural Mexico that often held communal lands.

The plan also established the *zapatistas* as a national movement to bring down the Madero government, calling supporters of the Madero government 'traitors', and that upon the overthrow of Madero, a new leader would be chosen. Most importantly to local leaders and landless peasants all over Mexico, in addition to reclaiming lands, the plan called for expropriating land from large landowners and distributing it to those who needed them.

Effects of the *Plan de Ayala*

Zapata now commanded the Liberating Army of the South, as more and more local chiefs in Morelos joined in. By early 1912, other rural leaders, especially in the powerful northern states of Durango and Chihuahua, pledged to defend the *Plan de Ayala*. Madero's government now had to deal with revolutionary armies not only in Morelos, but also in six other states. Zapata himself led continual attacks on federal troops, coming closer and closer to Mexico City. The unifying power of the *Plan de Ayala* contributed to the severe crisis of Madero's government and deeply frightened landowners

KEY TERM

1917 Constitution Mexican Constitution emanating from the Revolution, reinforcing land ownership, resource ownership, anticlericalism and labor rights.

all over Mexico, as they saw their landholdings threatened by armies of landless peasants now turned armed revolutionaries.

The ultimate result of the *Plan de Ayala* was its impact on all future discussions of agrarian reform and land tenure. In the 1914 Aguascalientes convention (see page 58), it served as a basic plan to advance agrarian reform, and the ideals of the plan formed the land reform articles of the **1917 Constitution**.

How did Zapata achieve power?

Zapata's ideologies, aims and methods

Emiliano Zapata was born in 1879 in Anenecuilco, in the small south-central state of Morelos, to *mestizo* small landowners. As he grew up, he developed his lands and a strong ideology of agrarian reform. This was mostly after observing how *hacendados* were protected and encouraged by the Díaz government to take over village and small landowners' lands as railways expanded Mexico's infrastructure. By 1909, Zapata had become a charismatic local leader. As mayor of Anenecuilco, Zapata began to defend villagers against *hacendados* taking over their lands.

Zapata's ideologies

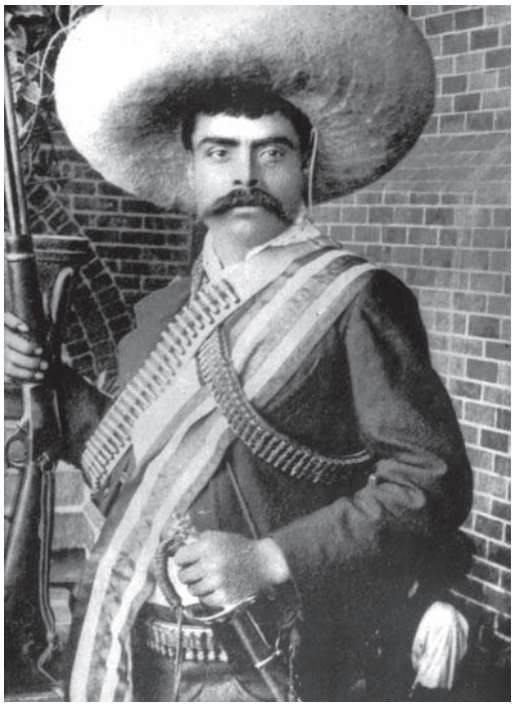
Zapata was always interested in agrarian reform and justice in Morelos. His ideology did not include the entire nation, nor did he desire to rule Mexico. He wanted Morelos to be free of interference from Mexico City, and to this end he fought for control of every town in the state. Zapata above all believed in the rights of small farmers and villagers to be free of the abuse and power of large landowners. He was an eloquent speaker, who was able to move people to join his growing army. An example of his pithy rhetoric is the well-known phrase that has been an inspiration to downtrodden people ever since: 'It is better to die on your feet than to live on your knees.'

Zapata's aims and methods

As leader of Morelos' guerrilla army, Zapata armed villagers and peasants, forming his own army to rise against Porfirio Díaz and joining Madero's call to arms. Zapata at first was all for the *Plan de San Luis Potosí* ideals of returning land to peasants. His armed forces were so successful that in May of 1911 he was able to defeat Díaz's army at Cuautla, causing his exile from Mexico. The way was open for Madero's presidency to fulfil the promises of the *Plan de San Luis Potosí*. Zapata recruited his supporters among landless peasants, villagers and disgruntled *hacienda* workers who had been forced into debt peonage. All had lived and worked the land in Morelos for centuries. Agrarian reform and reclaiming their land was their top priority.

SOURCE E

Emiliano Zapata



What does Source E reveal about Zapata as an icon of the Mexican Revolution? ?

Zapata: mayor of Anenecuilco in Morelos grew increasingly militant especially re. *hacendados*: 'It is better to die on your feet than to live on your knees.'

↓

Zapata increasingly notorious
Díaz reversed all claims to Anenecuilco land in the previous 40 years in favor of the villagers but this was not enough

↓

Zapata joined in uprising as guerilla leader, joined Maderos
Grew distrustful and disillusioned at Madero's empty promises

↓

Zapata hiding in mountains of Ayala near Puebla, Zapata wrote the *Plan de Ayala*; key points:

- *Zapatistas*: a national movement to bring down the Madero government
- Reclaiming land
- Expropriating land from landowners and redistributing it

↓

Zapata had firm supporters among landless peasants, villagers and *hacienda* workers. Agrarian reform and land reclamation top priority. All had lived and worked the land in Morelos for centuries.

SUMMARY DIAGRAM

Emiliano Zapata's *Plan de Ayala*

3 Pancho Villa and Venustiano Carranza

Key question: *How did Villa and Carranza contribute to the Revolution?*

How did Villa achieve power?

Pancho Villa

Rebellion against Díaz in Chihuahua

Pancho Villa came from the north of Mexico. A popular bandit, he became a military hero by joining Madero's rebellion against Díaz. Villa's power base came from Chihuahua. Like Zapata, he was from the countryside, but his supporters were far more varied. Chihuahua had mostly developed and become densely populated during the *Porfiriato*, with railways, mines and ranches. Its population was mixed, mobile and more united behind their leader, rather than driven by a single goal like agrarian reform in Zapata's Morelos. Villa's followers after 1910 included:

- *hacienda* peons
- farm tenants
- sharecroppers
- small farmers
- mining and industrial workers
- **artisans**
- shopkeepers
- **muleteers**
- former military members
- peddlers
- and even intellectuals.

KEY TERM

Artisans Handworkers who practice traditional crafts, such as woodworking, pottery, etc.

Muleteer A person who works guiding and transporting mules.

His cohort also included bandits, the unemployed and even foreign adventurers who Villa paid generously from the profits of the estates and enterprises he took over. Villa was particularly popular for his policy of providing for widows and orphans, and for promising land to his soldiers once peace was achieved. Notably, Chihuahua's nearness to the USA supported Villa's cause, as he could trade cattle and proceeds from confiscated landholdings for arms in the USA.

Madero's call to rebellion had originally mobilized Pascual Orozco, a muleteer from Chihuahua, who was one of the first to form an army to support Madero. Villa joined him, but quickly became the revolutionary hero in Chihuahua. Madero needed Orozco and Villa to fight Díaz in the North but Villa quickly outshone Orozco as a guerrilla leader.

Villa's ideologies, aims and methods

How did Villa achieve power?

Pancho Villa was born Doroteo Arango, his real name, in 1878 in the northern state of Durango to poor sharecroppers who could not afford schooling for him. By 1910 he had become a popular bandit in the state of Chihuahua, killing landowners and taking over ranches. He became a military hero by joining Madero's rebellion against Díaz. By 1913 he had joined Carranza's forces against Huerta in northern Mexico, but a year later left Carranza and joined Zapata's movement against Carranza.

Villa's ideologies

It is difficult to say Villa had an ideology, other than looking out for himself and his guerrilla army. He was not interested in land reform, workers' rights or democratic government. Historians have dithered between labeling him an opportunist who merely used the Revolution to give free reign to his violent character, to others who have said that despite his brutal actions his role as a guerrilla leader fighting against Díaz, then Madero and finally Carranza, redeems him from his criminal past.

Villa's aims and methods

Villa was a charismatic leader and an excellent horseman. He was quick to anger and to act rashly. His methods were in accordance with the rough frontier life of the arid north, using a large cavalry of peasants, miners, Indians and adventurers who were excellent shots. The nearby US border also provided him with a place to escape to on occasion, to buy arms, but also to terrorize. In 1916, he entered the USA to attack a small New Mexico town, causing the USA to send troops against him. They never found him, but it created an international incident when the USA sent in the punitive expedition after him (see page 159). Although by 1920 he had signed a peace treaty with the Mexican government and laid down his arms, he was never trusted. He lived violently and died violently: President Álvaro Obregón had him assassinated in 1923.

Venustiano Carranza

How did Carranza achieve power?

Venustiano Carranza, a well-off *hacendado* from Coahuila, proposed a different sort of uprising. He was a political conservative and favored the *hacienda* system rather than its destruction, so his goals did not include social or agrarian reform. This assured him the support of *hacendados* and foreign companies. Villa and Zapata at first recognized Carranza as the leader of the **Constitutionalist** armies against Huerta, but balked after it became clear that Carranza did not want social or land reforms.

KEY TERM

Constitutionalists Name coined by Venustiano Carranza for the army led by himself against Huerta, with the goal to re-establish Mexico under its present constitution.

Carranza's ideologies

Madero and Carranza both came from landowning families and wealth. They realized the extent of the social malaise of Mexican landless peasants, factory workers and miners, and were prepared to speak about them for political purposes. Although Carranza supported Madero at first, he disapproved of making concessions to the old Porfirian political machine and called to remove them from power. His political ideology can be summed up in his quote 'When a revolution makes concessions, it commits suicide.'

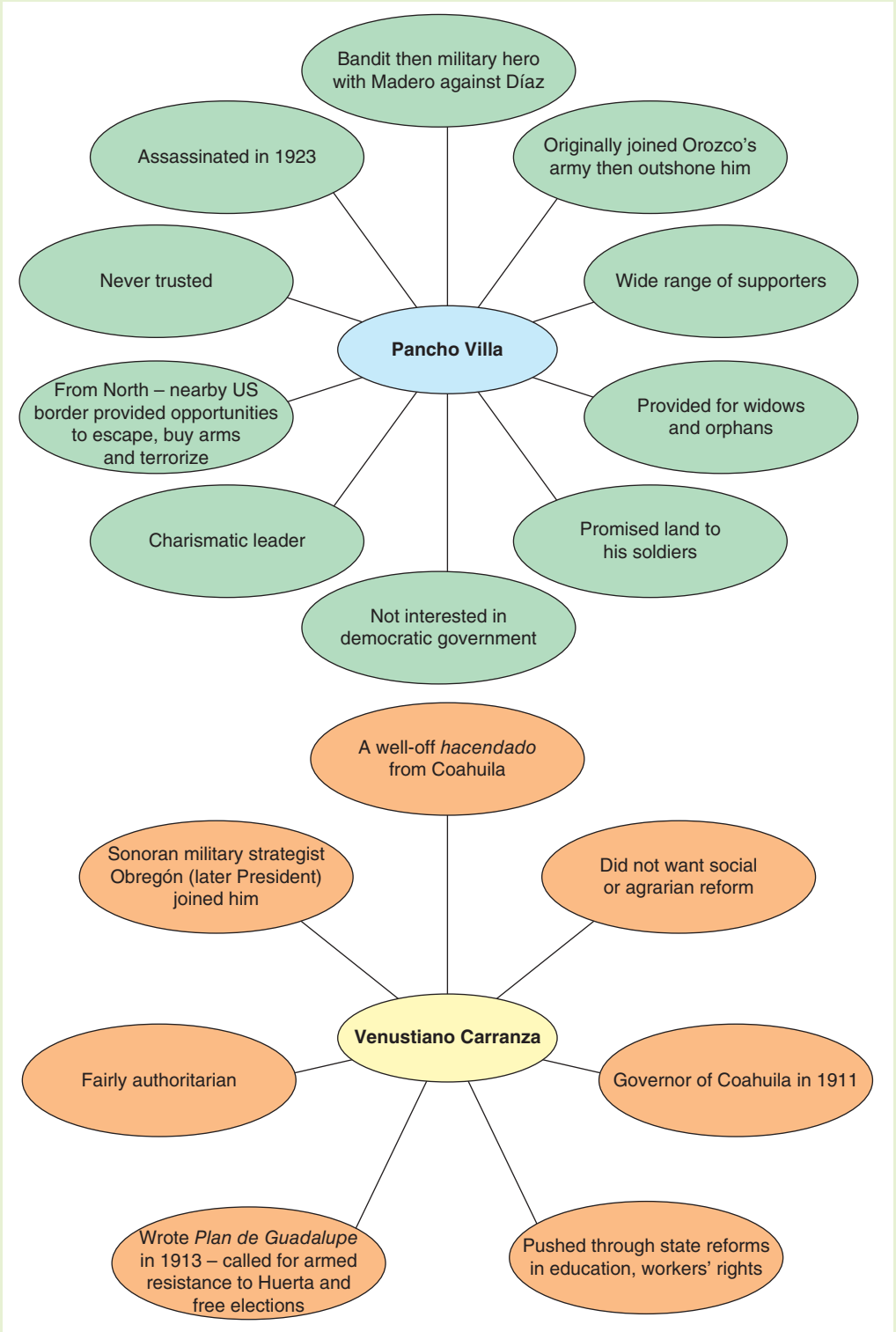
As governor of Coahuila in 1911, he pushed through state reforms in education, workers' and miners' rights and tax and law codes. After Madero's assassination (see pages 55–56), he decided to go beyond state power and take on a national role against Huerta. Mindful of having lost part of his state to Texas in the nineteenth century, he was also adamant about defending Mexican sovereignty against the USA, in case of intervention (see page 156).

Carranza's social ideology was conservative and often paternalistic, but he was a political pragmatist as well as a liberal, so understood that Mexico required deep reforms to avoid and later suppress revolution. He was uncomfortable with the concept of class struggle, but felt that only through strong authority could disgruntled Mexicans be guided to legal, institutional change through the writing of new laws and a new Constitution (see page 66).

Carranza's aims and methods

To fulfil his aim to defeat Huerta and defend the Mexican Constitution, Carranza named the Constitutionalist movement, and himself the leader of the Constitutionalist Army. With a group of young officers, he announced the *Plan de Guadalupe* in 1913, which other powerful leaders from Sonora and other states later supported. Unlike the *Plan de San Luis Potosí*, it had no call to social reforms, but called for armed resistance to Huerta under the military leadership of Carranza and free elections once peace had been restored. His main political method was authority and making the Constitution central to his policies.

Carranza's age and experience earned him respect. His Constitutionalist movement soon took hold, especially in the northern states of Coahuila, Sonora and Sinaloa. His call was enough to make Álvaro Obregón – a Sonoran military officer and rancher, and a brilliant military strategist – and other able generals join him, but he was unable to co-opt the popular leaders Villa and Zapata, even after Huerta's defeat.



SUMMARY DIAGRAM

Pancho Villa and Venustiano Carranza

4 The course of the Revolution

Key question: *What happened during the course of the Revolution?*

Madero had called for rebellion and his call had been answered by various leaders around the country, who had been able to muster guerrilla forces. Madero encouraged them all, as they fought Díaz and the army. Between 1911 and 1913, Madero was President of Mexico, and as a believer in democracy tried to meet the various demands from all sectors of Mexican society.

How did Madero lose power?

The end of Madero

Madero was unable to control the various guerrilla armies that had fought Díaz in his name. Worse, he was unable to attend to the urgent needs and grievances of Mexicans. His loss of power and his death ushered in the violent phase of the Mexican Revolution.

President Madero's broken promises

Once he was President in November 1911, Madero could not appease the elites and the peasants at once. The first wanted little or no change in the *status quo* and their privileges, while the second pressed for fast and sweeping social and land reform.

The *Plan de San Luis Potosí* (see page 41) had promised a return to representative democracy, free elections, no re-election and some land reform, so these disparate groups felt these were promises that Madero needed to fulfil.

Madero was true to his word in promoting democracy; for example, by allowing the press full freedom, even when he was viciously attacked by it for his hesitation in social and land reform matters. He nominated committees to study these reforms, but that seemed far too slow to leaders like Zapata, who felt they could not wait for long administrative and legal debate.

Regarding labor rights, Madero did form a Department of Labor, but his appointees were too conservative for union leaders and meant to appease entrepreneurs and landowners, whose financial and political support Madero needed. Cotton textile workers took advantage of the politically unstable period between the outbreak of revolution on 20 November 1910, and Madero taking office on 6 November 1911, to unionize the largest, most important mills. This forced Madero to consider their rights and the rights of workers in general. In December 1911, the workers carried out the first successful general strike in Mexican history and shut down industry. It is suggestive that the strike took place against Madero's new, revolutionary government, rather than against the old Díaz dictatorship. Madero negotiated a provisional settlement, which included a pay raise, a reduction in the work day and a promise of a later meeting to settle the industry's labor woes – but the workers and the peasants did not easily forgive Madero's condescension.

The slowness of Madero's movement toward reform disappointed liberal intellectuals as well as agricultural and industrial workers. The most dangerous groups, because they were armed and organized, were those headed by Zapata, Villa, Orozco and others. With Zapata's *Plan de Ayala* (see page 46) it came to open insurrection against the Madero government. Madero, in his efforts to pacify the country and control revolts, was forced to send out the army and appoint General Victoriano Huerta to head it. It was feared that the rebellious forces would take over Mexico City and the government. Huerta proved to be an able general, who fought back the rebellious forces in the north. His loyalty to Madero would soon prove questionable.

The Ten Tragic Days

Ultimately, the most dangerous rebellion against Madero came from within his closest military circles. Military leaders, like Huerta, felt constrained by Madero to deal with revolts in a harsher way. The Ten Tragic Days that signify the last days of the Madero Presidency have been labeled '*La Decena Trágica*'. These took place between February 9 and 18 in 1913. The central garrison under Porfirio Díaz's brother, General Félix Díaz, revolted against Madero in Mexico City and were besieged by the Mexican Army. Madero appointed General Huerta to lead the siege, which ended after ten days of bloody fighting in the city with an agreement signed by Huerta that Madero was to be dismissed. Huerta would act as interim president until elections could be held. This agreement was signed in the US Embassy with the connivance of the US Ambassador, H. L. Wilson (see page 150).

Mexico City became a chaotic place, with barricades and fighting, looting and fires. Thousands of people were killed. Huerta had Madero, his brother Gustavo, vice-president José María Pino Suárez and the Cabinet arrested and forced to sign resignations. These were promptly accepted by the Mexican Congress and Huerta became interim president. On 21 February, as Madero and Pino Suárez were being taken from the national palace to jail, they were shot and killed. This was the tragic end to the last ten days of Madero's presidency.

Fighting General Huerta: a common cause

How did the leaders come together to defeat Huerta?

Huerta and foreign affairs

Huerta came to power on 20 February 1913. Few governments recognized Huerta as the legitimate leader of Mexico. Perú, Guatemala and El Salvador were the first to recognize Huerta in 1913. Britain was the first in Europe, followed by others.

US Ambassador H.L. Wilson recommended that the USA recognize Huerta's government, yet US President Woodrow Wilson, in March 1913, refused to recognize the new regime, saying it was a 'government of butchers'. This was soon followed by the brief US occupation of Veracruz (for an analysis of foreign intervention during the Mexican Revolution, see Chapter 5).

KEY TERM

Coup A violent government takeover.

General Huerta's implication in Madero's assassination was strongly suspected but never proven. His strong military authority was behind his aim to end the indecisive Madero government that spurred social unrest and civil strife. There was no pretence of a republic; Huerta abolished Congress and even arrested many of its members. He exercised repression, censorship and military intervention to pacify the country. The revolutionary leaders Zapata, Villa, Carranza and Obregón did not accept his **coup** and called him a 'usurper'.

Revolutionary forces in Huerta's defeat

Austrian historian Friedrich Katz noted in 1981 that a second stage in the Revolution was illustrated by 'the increasing radicalism of all factions'. Huerta's command of the federal army, made up of forced conscripts, was strong at first but increasingly worn down by the radical guerrilla forces of Zapata in Morelos and Villa in Chihuahua, as well as the respected authority of Carranza.

In January of 1914 Zapata wrote Villa a letter to unite against Huerta.

? What does Source F reveal about Zapata's goals and ideals?

SOURCE F

Excerpt from 'Emiliano Zapata: The Possibility of Alliance with Villa, 1914', found in *The Mexican Revolution: A Brief History with Documents* by Mark Wasserman, published by Bedford / St Martin's, Boston, Massachusetts, 2012, pages 64–6. Wasserman is a history professor at Rutgers University, New Jersey.

The Liberating Army of the South and Center
Revolutionary Camp in Morelos, January 19, 1914
General Francisco Villa
Ciudad Juárez, Chihuahua

Esteemed General and friend:

I received yours dated November 28, 1913, which I have read closely and I respond to you that the ideals of the Revolution of the South and Center of the Republic have always been and will continue to be those of 'Land and Liberty'. … the day is not far off when we will have to attack the capital of the Republic with blood and fire, sweeping away all of those corrupt elements who are the enemies of the people, who are called científicos, militarism and clericalism. … Remember that the Revolution which began on November 20, 1910 failed solely because upon entering Mexico City it did not decapitate its enemies, and they were the ones who ultimately defeated it. …

I have faith that you may well be the only one in the North who is concerned with the progress of the people, and the one who essays to effect in those regions the division of lands and the parceling of the large monopolies of lands, as is indicated by the Plan de Ayala. …

I am your most affectionate, attentive and faithful friend and servant.

El General (Emiliano Zapata)

By the end of 1914, Villa controlled Chihuahua with his army of 40,000, now called the Northern Division, and began marching south toward Mexico City. Obregón and Carranza did the same, while Zapata moved north from Morelos.

These leaders were not a consolidated army, but remained mistrustful and separate, giving each other intermittent support. As it became increasingly clear that Huerta could not sustain his defense, Obregón followed Carranza's order to reach the city before Villa. Obregón's army surged south to the capital as the first to arrive and force Huerta to resign at Teoloyucán in August 1914, 45 km north of Mexico City. Huerta then left Mexico for Jamaica on a German cruiser. Villa, Zapata, Obregón, Carranza and their armies had united in ousting Huerta, but did not agree on the Mexico they wanted to build in the immediate future.

SOURCE G

Emiliano Zapata (holding sombrero), Pancho Villa and fellow revolutionaries, 6 December 1914. Villa and Zapata met in the Presidential Palace after driving the Constitutionalists out of Mexico City.

What does Source G reveal about the meeting between the two popular leaders? Note their body language and clothing style. ?

What was the significance of the Aguascalientes Convention?

The Aguascalientes Convention, October 1914

The revolutionaries who overcame Huerta's forces held a convention in the city of Aguascalientes to discuss the urgent matter of a new Mexican government, so that Mexico could develop in peace. Here, the *Plan de Ayala* (see page 46) was thoroughly discussed as a manifesto of what Mexicans wanted in the new Mexico.

Rivalry

The growing rivalry and animosity between Carranza and Villa and their refusal to give up their respective armies eventually sabotaged the Convention. Carranza, who never even attended the Convention, agreed to resign as leader, but felt Villa and Zapata should too. He also felt the country should have a provisional government while drafting the new Constitution. When the Convention named Eulalio Gutiérrez as provisional president, Carranza refused to recognize the authority of the Convention. Obregón eventually sided with Carranza, in what became known as the Constitutionalist side.

KEY TERM

Conventionists Led by Pancho Villa and Emiliano Zapata, those who recognized the authority of the Convention of Aguascalientes (as opposed to the Constitutionalists).

Zapata did not seek office; he longed to return to Morelos rather than unite with Villa against Carranza. Villa wanted to return to Coahuila. However, as peasant leaders, they agreed to enter Mexico City together with their **Conventionist** armies. They met at Xochimilco in December 1914 and agreed to recognize the authority of the Convention. They also agreed on land reform in their respective states, yet neither was willing to project himself as a national force, nor did they agree on joining forces against Carranza. They could not put aside a strong mutual distrust.

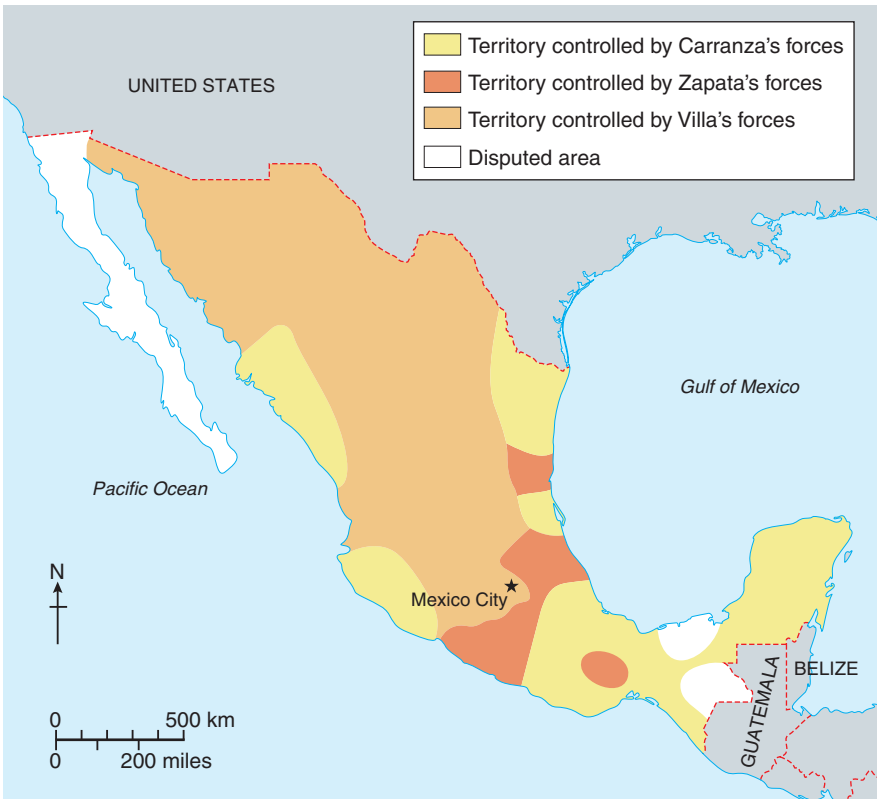
Constitutionalists versus Conventionists

Although factions and *caudillos* constantly changed sides until 1917, the two groups had different aims. The Constitutionalists felt Mexico needed to draft a new, modern Constitution that not only accounted for peasant and industrial workers' issues, but was also open to international trade in a market-oriented economy. Agrarian reform was necessary, but to be implemented from above by the government. An organized government was essential to accomplish this. Additionally, 'modern' indicated secular and so the Constitution should be less accepting of the Church.

The Conventionists, on the other hand, wanted agrarian reforms to begin at the local level by the peasants themselves, rather than depend on government. They focused almost exclusively on land reform aimed at peasants, rather than on industrial workers and the middle class. Their views on the Church were also more traditional, as opposed to the Constitutionalists' secular views.

SOURCE H

Map of the Military Situation in Mexico, October 1916, based on the one by Jean Meyer in *La Revolución Mejicana*, published by DOPESA, Barcelona, Spain, 1973, found in *Mexico: Biography of Power: A History of Modern Mexico, 1810–1996* by Enrique Krauze, translated from the Spanish by Hank Heifetz, published by Harper Collins Publisher, New York, 1992, page 345. Here you can see which force controlled which area.



What does Source H reveal about the various factions vying for power in 1916?

Carranza's bid for power

After the convention, Carranza aimed to become President. He felt only he had the experience, vision and strong national authority to fulfil the Mexicans' desires for social reform and see through the writing of a new Constitution.

With the support of Obregón and other local *caudillos*, Carranza organized a government in Veracruz. His Constitutionalist government was bent on creating a modern Constitution to govern a market-oriented, developing

nation. He invited mostly middle-class professionals to join his government, but he also invited organized labor for the support of industrial workers. Entrepreneurs and *hacendados* also joined the Constitutionalist cause. In time, even dissatisfied peasants began to join the cause. Carranza also instituted a repressive government in certain areas to control all agitation and rebellion. This included suppressing workers' strikes.

While widening his power base, Carranza used his army under Obregón to push toward Mexico City. After succeeding, he continued north to Chihuahua, soundly defeating Villa in Aguascalientes. By the end of 1915, the Constitutionalist army under the able military leadership of Obregón controlled the north of Mexico. After taking over Mexico City from the *Zapatistas*, Carranza ordered Obregón to push south to Morelos.

Zapata's resistance in Morelos

When Zapata retreated to Morelos after the failure of the convention, he set about to encourage land reform as he had written in the *Plan de Ayala* (see page 46). Often villages went further and took over *hacendados'* lands without compensation.

The Constitutionalist offensive in Morelos caught Zapata unprepared, so that by July 1916 urban areas in the state had been overpowered. Zapata and his *caudillos* again turned to guerrilla warfare. The Constitutionalist Army responded with brutality; they carried out group and village executions and looted anything that could be taken away and sold. They were especially vicious regarding the Church, its priests and nuns, and its property. The outrages against the Church caused a particularly strong repulsion in traditional Morelos.

KEY TERM

Villistas The name given to people who joined the cause and army of Pancho Villa, or who supported him.

Carrancistas Another name for the Constitutionalist forces who followed the orders of Venustiano Carranza.

SOURCE I

Excerpt found in *Mexico: Biography of Power: A History of Modern Mexico, 1810–1996* by Enrique Krauze, translated from the Spanish by Hank Heifetz, published by Harper Collins Publisher, New York, 1992, page 356. Krauze is a Mexican historian, editor and essayist.

In contrast to the Zapatista devotion to the Virgin of Guadalupe, evident in their images, the crosses they wore, their banners with the image of the Virgin, in contrast also to the ***Villistas*** *who were cautious in the face of religion, the* ***Carrancistas*** *gloried in acts of premeditated and jubilant sacrilege. They drank out of chalices, paraded wearing priestly vestments, built fires in confessionals, shot up sacred images, converted churches into barracks, carried out mock executions of the statues of saints. In the state of Mexico, they banned sermons, fasting, christenings, masses, confessions, and even kissing the rings of priests.*

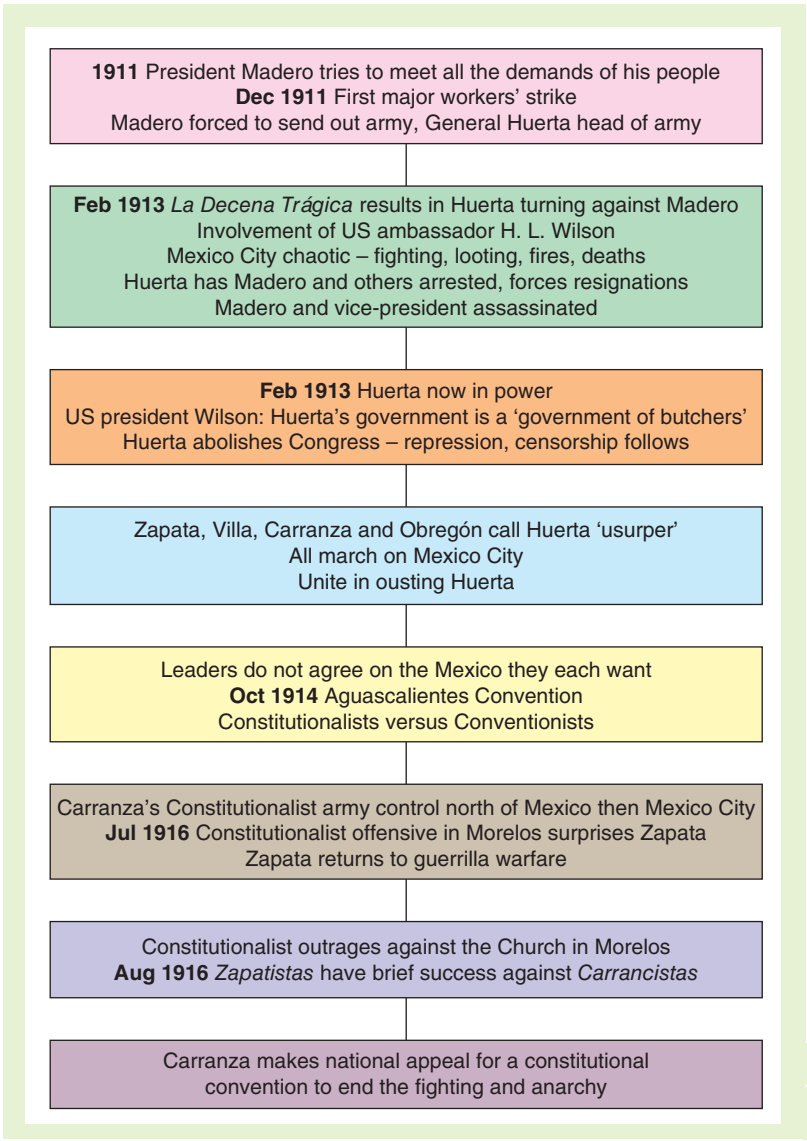
? How does Source I characterize regard for the Church among the different factions of the Revolution?

The Constitutionalists' success

In August 1916, *Zapatistas* redoubled their efforts and had expelled Carranza's Constitutionalist army from Morelos by the end of the year. Even so, the Constitutionalists' military success covered most of Mexico, including Yucatán and Tampico, by September 1916. Carranza then made a national appeal for a constitutional convention in Querétaro, 200 km north of Mexico City, to end the fighting and anarchy. This was because he believed in formally setting down the vision of a new, modern Mexico, and wanted to give legitimacy to his ***de facto*** government.

KEY TERM

De facto Term that refers to the actual government, which, in fact, exists, regardless of whether it is legitimate or not.



SUMMARY DIAGRAM

The course of the Revolution

5 Leaders of the Revolution

Key question: *What were the successes and failures of Madero, Zapata, Villa and Carranza?*

Madero, Zapata, Villa and Carranza came from very different sectors of Mexican society and had different grievances. This section gives an overview of their achievements during the Revolution, as well as the ways in which they failed.

What were the aims and outcomes of these leaders?

Methods and motivations

Madero

Francisco Madero can certainly be credited with lighting the spark to the movement of opposition to the 34-year dictatorship of Porfirio Díaz. He took it upon himself to take Díaz at his word after the Creelman interview (see pages 18–20) and organized an opposition party. He believed in democracy and representative government and was appalled at the favoritism and corruption of the Díaz regime. He succeeded, with his imprisonment and the consequent *Plan de San Luis Potosí*, in uniting the various groups of disaffected Mexicans who wanted to end the Díaz dictatorship. Ultimately, the forces of various revolutionary leaders who fought for him succeeded in ousting Díaz and electing Madero as President.

Madero failed in meeting the expectations of the disparate groups that originally fought for him, supported him and voted for him. He was constantly torn between placating the Mexican wealthy, privileged classes, whose financial and political support he needed to govern, and, on the other hand, the downtrodden lower classes, represented by landless peasants, factory workers, miners and others, led by revolutionary leaders like Zapata, Orozco and Villa, who wanted drastic social reform immediately. Madero ultimately failed to control the many revolts that arose from both of these extreme opposites of Mexican society. He paid with his life for his failed leadership.

Zapata and Villa

At first Villa and Zapata supported Madero, but they felt betrayed by his slow-paced and gradual moves toward reform. After Zapata's *Plan de Ayala* in November 1911, the tide turned against Madero and then Huerta. Villa and Zapata initially succeeded in forming a common front for peasant movements in the north, central and southern portions of Mexico. Their combined armies of about 65,000 were a formidable force, which accomplished the goal of Huerta's resignation and exile to the USA. They also kept the goals of agrarian reform alive. However, this unity was not to last.

During and after the Aguascalientes Convention (see page 58), Villa and Zapata missed the opportunity to join under common goals such as the *Plan*

de Ayala. They also declined to assume a more national role in Mexican politics. This has been credited as a major failure of the two charismatic leaders. It provided Carranza, who *did* see himself in a national role as the President of Mexico, with the chance to exploit the indecision and the division between them.

Tactics

Both Zapata and Villa continued to use guerrilla tactics. Zapata wrecked trains and had enemies shot. Villa used kidnappings, ransom and summary executions of perceived enemies. The death toll to civilians continued to mount, not only from encounters with revolutionaries, but also through disease. One of the biggest killers during the Revolution was typhoid, as water sources were destroyed, especially in the North. As their armies entered Mexico City, the revolutionaries engaged in wanton violence, pillage and rape. The difference between them was that the *zapatistas* acted for political motivations against enemies of the *Plan de Ayala*, while *villistas* did so for personal motivations that were far from noble. The city watched in horror and was more than willing to support the forces of Carranza that promised to defeat the anarchy.

Carranza

Carranza succeeded in unifying forces in the north, at first including Villa, but later falling out with him on account of Villa's uncontrolled leadership. Carranza stood for the landowners, mine-owners, entrepreneurs and the middle classes, but he also believed in some social reform and improvement of conditions for the lower classes. He supported Madero at first, but was also disappointed in him when he kept many of Díaz's cronies in his government. Carranza fought against Huerta and was instrumental in defeating him. As President, Carranza was authoritarian, but he also believed in the rule of law and strongly supported the movement for a new Constitution that would perpetuate social change in Mexico. Carranza's major success was the eventual writing and implementation of the 1917 Constitution.

Carranza failed to co-opt Zapata and Villa into the government and so they became his enemies. In addition, despite his support for the 1917 Constitution, he did not act fast enough on social and agrarian reform to appease the masses. In fact, he chose not to enforce many of the most radical reforms (see page 66). Carranza was trying to protect mine-owners and industrialists, as well as foreign investors, so that the civil war-torn Mexican economy could recuperate. To this end, he brutally repressed labor strikes with the army. He also defended large landowners in Morelos, where he sent the army after Zapata. Ultimately, using deceit, Carranza had Zapata assassinated. Carranza, who was President during the First World War, chose to concentrate on rebuilding Mexico and pursued a neutral foreign policy toward Germany that was also manifestly anti-US. Even so, he finally did not ally Mexico to Germany.

6 Key debate

Key question: *How have historians judged the revolutionary leaders Madero, Zapata, Villa and Carranza?*

Historians have judged Madero for not following through with the ideals expressed in the *Plan de San Luis Potosí*. He took too long in promoting the social and land reforms that the majority of Mexicans expected. His assassination at first made him a martyr; Mexican historian Adrián Aguirre Benavides, writing in the 1960s, called him *El inmaculado*, or The Immaculate One. On the other hand, more recently and with hindsight, British historian Alan Knight wrote in 1986 that as an urban liberal, Madero was out of touch with landless peasants. He alienated ranchers and, rather than being progressive and forward-thinking, he preferred to return to the liberal Constitution of 1857.

Mexican–American historian Ramón Eduardo Ruíz, writing in the 1980s from a left-of-center perspective, did not even qualify Madero's call to arms as a revolution, but called it a 'great rebellion'. Marxist historian Adolfo Gilly writing in 1971 had no qualms in labeling Madero 'bourgeois'. Since the required conditions for a socialist revolution are that a bourgeoisie must exist in order to be toppled, Gilly felt that Madero's bourgeois revolution was necessary for the subsequent socialist revolution of the proletariat.

Austrian historian Friedrich Katz, writing in 1986, noted that ultimately Madero's assassination in February 1913 indicated the beginning of the second revolution and 'the increasing radicalism of all factions'. This initiated the violent phase of the Revolution.

In 2010, US journalist and independent historian Philip L. Russell called Villa and Zapata's decision not to unite against Carranza, who would have been easily outnumbered, one of the most important in the Revolution. Marxist historian Adolfo Gilly in 2005 indicated that the peasants who made up part of Villa's, and certainly most of Zapata's cohorts were furious at the bourgeois Carranza and his followers when they realized the lack of national leadership in their movement. Guerrilla fighting continued as peasant forces, often under various local *caudillos*, refused to lay down their arms and give up their aspirations for land. Thereafter, as Friedrich Katz points out in 1981, the bloodiest phase of the Revolution ensued, degenerating into an all-out civil war.

British historian Alan Knight pointed out in 1986 that class, regional and factional forces tore the *Plan de Ayala* apart. One of the factional forces was the distrust between Villa and Zapata, and ultimately their failure to unify under a powerful cause for the exploited underclass at a national level. Instead, they chose to go back and be leaders in their own states. Carranza and Obregón exploited this division, which signaled drastic change for revolutionary Mexico.

In 1913, Mexican contemporary historian José Fernández Rojas wrote that 'in Puebla, Morelos, Mexico, and Guerrero, *Zapatismo* is making a mockery of the authority principle'. In truth, when Zapata and other revolutionaries repudiated Madero as he assumed the Presidency in November 1911, the Revolution broadened into a widespread challenge to authority all over Mexico.

Historian John Womack, Jr. pointed out in 1969 that the *Plan de Ayala* served as a signal to those in government at Mexico City, and state governments, that there was a deep social malaise in the countryside, with a strong and growing militant force. Mexican historian and Director of the National History Museum in Mexico, Salvador Rueda, in the 1980s, stated that Mexico finished the nineteenth century and truly began the twentieth with the *Plan de Ayala*. The plan enabled the modern political language that caused the landless peasant to finally be taken seriously as a stakeholder in the state. The *zapatistas* and the peasants became the focus of attention in Mexican history.

Zapata himself has become the subject of much scholarship and admiration worldwide. Film Studies professor Zuzana Pick, a Canadian scholar writing in 2010, has made a study of photographs and films about him and other revolutionaries in the Mexican Revolution. She points out that Zapata gave political and social legitimacy to the struggles and demands of the *zapatistas* by posing on horseback in ***charro*** clothing. With the photographs, he wished to project his leadership and military talent, during his lifetime and for posterity.

Marxist historian Adolfo Gilly showed that Zapata was well aware that the revolutionary ideas of the *Plan de Ayala* in particular and the Mexican Revolution in general could form part of a larger movement. Analyzing a letter written by Zapata in February 1918, while the Bolshevik Revolution was in full swing, Gilly wrote in 1971:

> 'This letter testifies that the Mexican Revolution, through its southern component [in Morelos], was striving to transcend its own nationalist or peasant limits and to link up with the revolutions of those times elsewhere. Already in its last stages of resistance, the Morelos Commune tried to make contact with the Soviet Republic.'

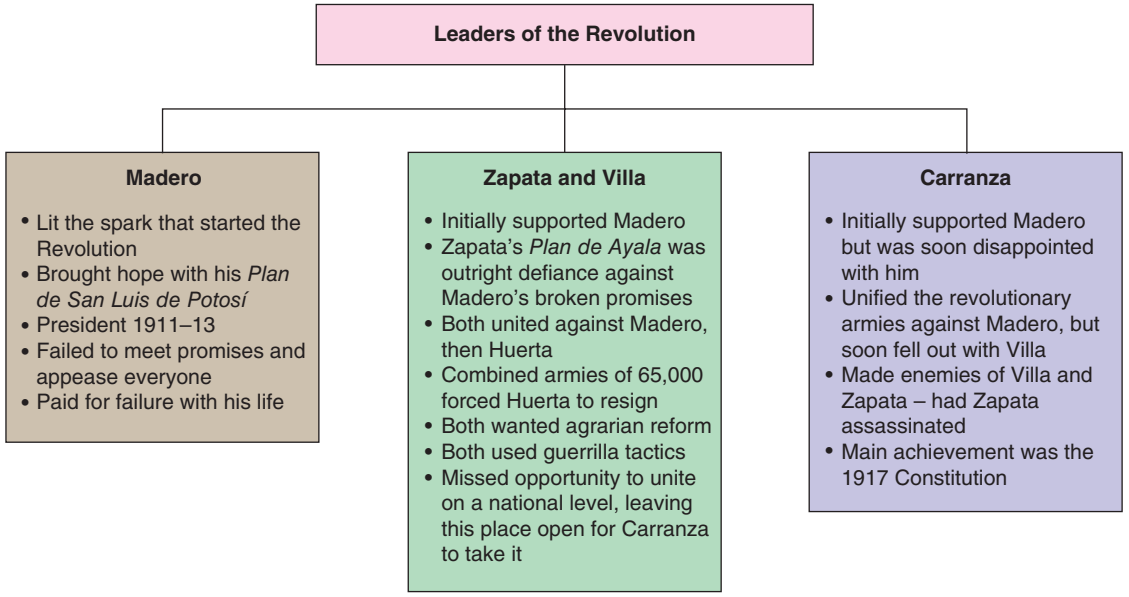
Finally, Austrian historian Friedrich Katz indicated in 1981 that Zapata's movement was the most homogeneous in Mexico. The peasants and their demands were clearly articulated in the *Plan de Ayala*: return usurped lands and expropriate parts of the large landholdings using guerrilla tactics. Katz states that although the *zapatistas* were certainly representative of a majority of Mexicans, the movement continued to grow to include more segments of society, such as increasingly radical intellectuals. It would also gain national attention and influence on other revolutionaries such as Pancho Villa in Chihuahua.

KEY TERM

Charro Well-dressed rural Mexican man with tight-fitting trousers and jacket, silver ornaments and wide-brimmed hat. There was a code of honor and gallantry associated with this role.

TOK

Scholars have approached the study of history by focusing on the deeds of 'great men'. How valid is this approach and does it work for the study of the Mexican Revolution 1910–20? Consider Villa, Zapata, Carranza and other leaders in this chapter. (History, Perception, Reason.)



SUMMARY DIAGRAM

Leaders of the Revolution

7 The 1917 Constitution

Key question: What made the 1917 Constitution so unique?

Over 200 delegates convened in Querétaro to forge a new Constitution. They came from many segments of Mexican society: young professionals, such as teachers and journalists, representatives of small businesses, and workers. There were conservative *Carrancistas* who wanted to avoid social reforms that might impair investment and business, as well as believers in the land reforms of the *Plan de Ayala*. The members argued and discussed for several months and finally proclaimed the Constitution on 5 February 1917. The key articles were the most progressive in the world at that time.

How did Article 3 address Mexican needs?

Article 3: secular and obligatory education

Details of Article 3

This article called for free and secular education for all Mexican children, and prescribed four years of elementary school education for children aged six to fifteen, in a country where only 20 per cent of the people were literate. It also

reflected the anticlericalism of the Constitutional Convention members, many of them middle-class professionals and intellectuals, in a country where nearly 90 per cent were Roman Catholics.

SOURCE J

Excerpts from the Mexican Constitution of 1917. Accessed on 22 February 2013 at www.oas.org/juridico/mla/en/mex/en_mex-int-text-const.pdf. This open website is developed and supported by the OAS (Organization of American States), a regional association of the countries of the Americas, since 1889.

Article 3

The education imparted by the Federal State shall be designed to develop harmoniously all the faculties of the human being and shall foster in him at the same time a love of country and a consciousness of international solidarity, in independence and justice.

I. Freedom of religious beliefs being guaranteed by Article 24, the standard which shall guide such education shall be maintained entirely apart from any religious doctrine and, based on the results of scientific progress, shall strive against ignorance and its effects, servitudes, fanaticism, and prejudices. Moreover:

It shall be democratic, considering democracy not only as a legal structure and a political regimen, but as a system of life founded on a constant economic, social, and cultural betterment of the people. …

VI. Elementary education shall be compulsory.

VII. All education given by the State shall be free.

How does Article 3 as seen in Source J address Mexican needs? ?

Effects of Article 3

This article encountered much opposition from the Catholic Church, long accustomed to educating Mexican children according to its precepts. The anticlerical factions of the Constitution authors triumphed here against Carranza's more conservative views.

As the enforcement of free compulsory elementary education was at the local level, it was not always possible to implement it, often because of low budgets. Even states received only a small amount of pay for providing this service, which at the national budget in Carranza's presidency comprised slightly more than 1 per cent of the budget. It would take decades to enforce this article, and even then the anticlerical implications would create a serious public outcry (see pages 90–91).

Article 27: land reforms

How did Article 27 address Mexican needs?

Land reform was an all-important cause of the call to arms by *zapatistas* and later *villistas*. The more progressive members of the Constitutional Convention followed through in addressing these grievances. The *Plan de*

Ayala (see page 46) was used as a blueprint for Article 27, which was carried despite the objections of the more conservative *carrancistas*.

This article went further than just reforming landownership; it also was unique in declaring public ownership of the nation's subsoil. This would have serious implications for private and foreign investors in mining and oil fields.

Article 27

Carranza and his supporters in the Convention said that special foreign status regarding property and legal jurisdiction had to end. The more radical members of the Convention went further and agreed that foreign and national mine or industrial owners would now have the same rights and obligations. In the end, the Constitution went further still by limiting property rights exclusively to Mexicans (see Section I in Source K below).

? What does Source K say about land and resource ownership and restitution in Mexico?

SOURCE K

Excerpts from the Mexican Constitution of 1917. Accessed on 22 February 2013 at www.oas.org/juridico/mla/en/mex/en_mex-int-text-const.pdf. This open website is developed and supported by the OAS (Organization of American States), a regional association of the countries of the Americas, since 1889.

Article 27

Ownership of the lands and waters within the boundaries of the national territory is vested originally in the Nation, which has had, and has, the right to transmit title thereof to private persons, thereby constituting private property. …

The Nation shall at all times have the right to impose on private property such limitations as the public interest may demand, as well as the right to regulate the utilization of natural resources which are susceptible of appropriation, in order to conserve them and to ensure a more equitable distribution of public wealth.

With this end in view, necessary measures shall be taken to divide up large landed estates; to develop small landed holdings in operation …

In the Nation is vested the direct ownership of all natural resources of the continental shelf and the submarine shelf of the islands; of all minerals or substances[;] … solid mineral fuels; petroleum and all solid, liquid, and gaseous hydrocarbons; and the space above the national territory to the extent and within the terms fixed by international law. …

Legal capacity to acquire ownership of lands and waters of the Nation shall be governed by the following provisions:

I. Only Mexicans by birth or naturalization and Mexican companies have the right to acquire ownership of lands, waters, and their appurtenances, or to obtain concessions for the exploitation of mines or of waters. The State may grant the same right to foreigners, provided they agree before the Ministry of Foreign Relations …

II. Religious institutions known as churches, regardless of creed, may in no case acquire, hold, or administer real property or hold mortgages thereon; such property held at present either directly or through an intermediary shall revert to the Nation, any person whosoever being authorized to denounce any property so held. …

XVIII. All contracts and concessions made by former Governments since the year 1876, which have resulted in the monopolization of lands, waters, and natural resources of the Nation, by a single person or company, are declared subject to revision, and the Executive of the Union is empowered to declare them void whenever they involve serious prejudice to the public interest.

Effects of Article 27

This article had an enormous impact on Mexicans, most importantly to landless peasants and village communities whose land had been appropriated by *hacendados*; there was now the real restitution of these lands available. It also set out to describe and respect communal landholdings going back to the historical *ejidos*. Further, it set out official federal institutions that would be in charge of the land reform and distribution.

That the Constitution gave the direct ownership of the subsoil to the nation had important implications for mining and oil industry. Private investors could only have the right to exploit resources in the Mexican subsoil. Mexican historian Enrique Krauze pointed out in 1997 that in this matter, Mexico reverted to the colonial pattern whereby the Spanish monarchy dominated the land and gave concessions as it saw fit.

Article 123

How did Article 123 affect labor rights?

Details of Article 123

Carranza and the Constitutionalists had fought to defend the rule of law in the Constitution of 1857, and also for a new Constitution based on the old one, but with social reforms. Even they were surprised at how radical this article was – the most far-reaching in the Americas. It provided the toughest legal protections against firings in Mexican history. The work day and compensation were now to be regulated. Employers could no longer terminate employment of workers without just cause, or just for being members of a union.

? What revolutionary grievances does Source L address?

SOURCE L

Excerpts from the Mexican Constitution of 1917. Accessed on 22 February 2013 at www.oas.org/juridico/mla/en/mex/en_mex-int-text-const.pdf. This open website is developed and supported by the OAS (Organization of American States), a regional association of the countries of the Americas, since 1889.

TITLE VI

Labor and Social Security

Article 123

a. The maximum duration of work for one day shall be eight hours. …

g. Equal wages shall be paid for equal work, regardless of sex or nationality. …

j. Wages must necessarily be paid in money of legal tender and cannot be paid in goods, promissory notes, or any other token intended as a substitute for money.

k. Whenever, due to extraordinary circumstances, the regular working hours of a day must be increased, one hundred percent shall be added to the amount for normal hours of work as remuneration for the overtime. …

p. Both employers and workers shall have the right to organize for the defense of their respective interests, by forming unions, professional associations, etc.

q. The laws shall recognize strikes and lockouts as rights of workmen and employers. …

kk. Social security shall be organized on the following minimum bases:

a. It shall cover work accidents and occupational diseases, nonoccupational illness and maternity; and retirement, disability, old age, and death.

b. In case of accident or illness, the right to work shall be retained for the time specified by law.

Carranza, who was conservative regarding labor and tended to side with industry owners and *hacendados*, nevertheless realized that workers' demands needed to be heard. The country could not develop without workers, and continual strikes and work disturbances disrupted Mexico's development. In addition, his army needed to deal with *villistas* and *zapatistas* still in rebellion, so Carranza was willing to support the constitutional reforms.

Before the Revolution, the owners had made all decisions in a factory, plantation or mine regarding employment and terminating employment. Owners enforced their own disciplinary rules for workers. Article 123 changed this reality.

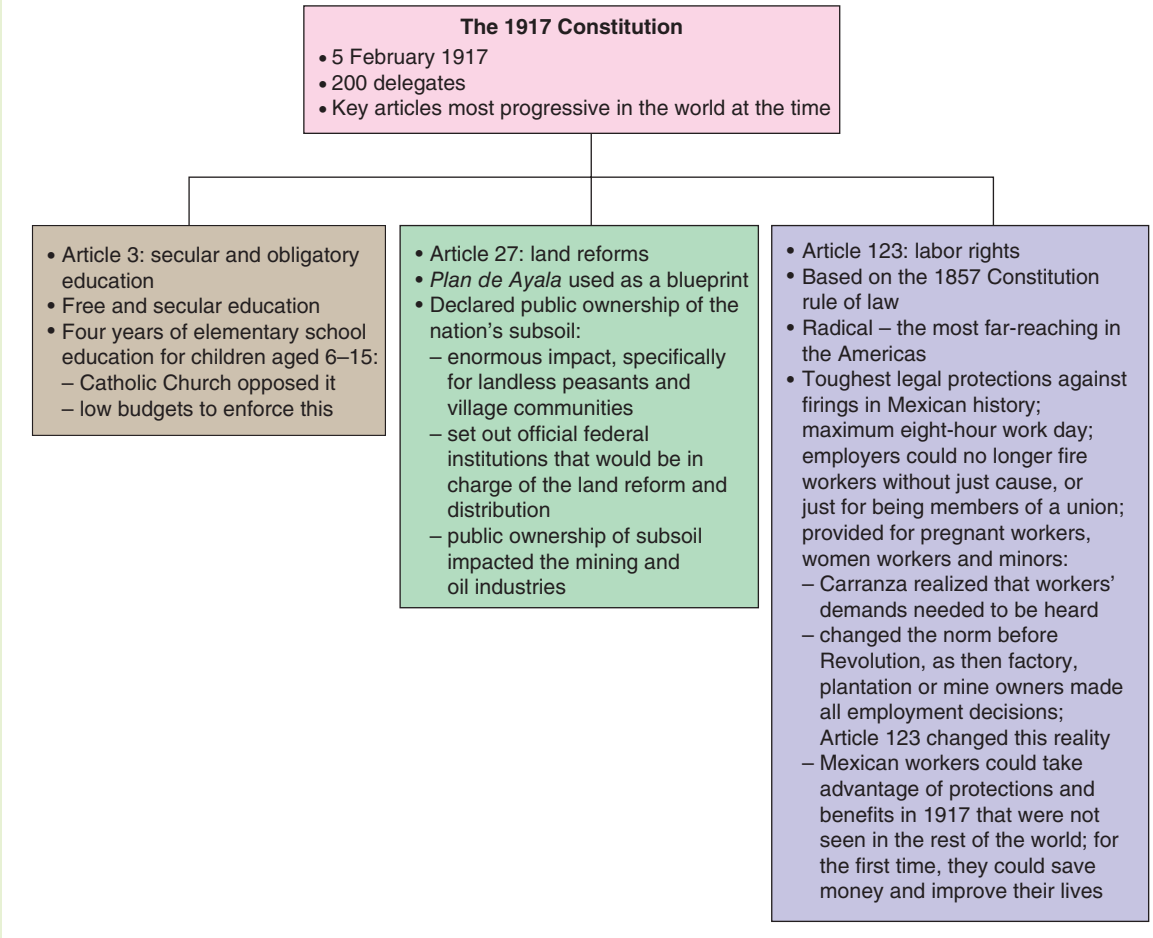
Effects of Article 123

The new Constitution implemented Article 123 by requiring its terms to be written into state labor codes. For the first time, a maximum work day of eight hours was set by law. Another important effect was that after state ratification, firing workers for arbitrary reasons or without the sanction of trade unions was almost impossible. After the Revolution, it was labor

unions that hired and fired and who controlled the disciplinary procedures that ruled factory or mining work.

Mexican workers could now benefit from protections and benefits in 1917 that were not seen in the rest of the world. They had job security and strong union leaders who looked after their rights. They were no longer at the mercy of unfair supervisors, received fair wages and were able, for the first time, to save money and improve their lives.

The new Constitution also recognized that workers needed measures protecting women and children. These measures spared women and minors under sixteen from dangerous work, and night labor after 10 p.m. It protected pregnant women from heavy work three months before childbirth and gave them a month of fully paid maternity leave after, with nursing rights while working.



SUMMARY DIAGRAM

The 1917 Constitution

8 The application of the 1917 Constitution

Key question: What social, political and economic changes were made in applying the 1917 Constitution?

Carranza and his conservative supporters had mixed feelings about the Constitution of 1917, as the results were far more radical than they had envisioned. Nonetheless, it was signed on 31 January and published on 5 February 1917. Carranza called for elections to be held the following month and the country to return to constitutional order. He won the election and became President on 1 May 1917.

Carranza reserved the right to discourage the implementation of articles or parts of articles he disagreed with; for example, he refused to apply articles that went against the Catholic Church, even though Congress opposed him (see page 73).

What challenges did Mexico face in applying the new Constitution?

The new Constitution and its challenges

The new Constitution faced resistance, not only with Carranza but also among the social sectors whose power it meant to curb, such as:

- the Catholic Church hierarchy
- supporters of the Catholic Church
- foreign and national *hacendados*
- mine and factory owners
- and more radical peasants and workers who wanted immediate redress for their grievances.

The 1917 Constitution has been the charter of Mexico ever since, but its application has been slow in some areas. Sometimes this was due to political obstruction, expressing long-entrenched economic interests in Mexico; at other times this was due to world events.

Social changes

The Revolution from 1910 to 1917 had left a country deeply shaken from the effects of civil war, disease and destruction. Social changes after the Revolution were expected in the agrarian, political, labor, economic and other sectors, although these changes did not take place smoothly. The Constitution put forward radical new ideas that states had to turn into practical and applicable laws, passed by state political institutions. This work

became part of the embodiment of a new national vision and mission. The social reforms of the Constitution also went beyond Mexico. They became a great inspiration to countries in Latin America, which replicated many progressive laws stemming from the 1917 Constitution.

An enormous immediate effect was on half of the population – women. With the Constitution as a starting point, an improved family law reinforced a mother's authority over her minor children. It also limited child labor, legalized divorce and gave adopted and birth children equal legal rights. However, not all women welcomed these changes. Sofía Villa de Buentello, an early Mexican feminist of the 1920s, criticized the family relations law enacted in 1917 because it allowed the state to reorganize women's lives based on inequality and dependency on men, rather than equality between men and women before the law.

The Constitution also instituted public primary education for all Mexican children. This implied a series of reforms in education that took place over the next ten years.

SOURCE M

Excerpt from *Church and State Education in Revolutionary Mexico* by Patience A. Schell, published by the University of Arizona Press, Tucson, Arizona, 2003, pages 21–2. Schell teaches at the University of Aberdeen, Scotland.

In the postrevolutionary era, primary-school programs were designed to mold patriotic citizens who were prepared to work for national economic development. Between 1917 and 1925, reforms to both municipal and federal curricula promoted skills of observation, experimentation and, in schools run by the Secretaría de Educación Pública, [Secretariat of Public Education] training in manual, agricultural, and domestic skills. …

The new program was to be nationalistic and practical; students were to observe natural phenomena, study life cycles of plants and animals, collect specimens, and draw their own conclusions from their work, using textbooks only as an aid. The curriculum was to refer to Mexico and things Mexican as much as possible, in order to foster a sense of national identity.

What does Source M say about the objectives of primary education after 1917? ?

Education now became secular, severely restricting the role of the Catholic Church. Catholic primary schools continued to exist, but were closed down if they did not follow the new national curriculum. This meant school attendance declined, Catholic teachers in public schools were fired and more than a million children were left without a school education. Some Catholic schools chose to conform to the new programs, but taught religious classes after school.

The spirit of anticlericalism that triumphed in Querétaro resulted in changes within the Catholic Church. Article 130, in particular, denied the Church any legal recognition and the clergy any political rights. Mexican bishops demanded these and other limits on the social actions of the Church and its members should be removed, but with little success. Carranza chose to meet these demands by not immediately enforcing them. Federal authorities did try to enforce these in the late 1920s, touching off the Cristero Revolt of 1926–29 (see page 90).

Political changes

After the 1917 Constitution and Carranza's election as President came the chore of rebuilding a devastated country and generating a more democratic and representative political system. Certainly, the increased power of the executive in Articles 71, 72 and 76, no vice-president and a weak legislature pleased Carranza as it strengthened his authority. British historian and biographer Frank McLynn quipped in 2000, 'Here was irony indeed. The Revolution had not just devoured its own children but had created a new chief executive with powers greater than Díaz had enjoyed.'

Carranza certainly used these powers, starting with his ongoing military attacks against Villa and Zapata (see page 63), but he did not fully succeed in ending violence in the countryside. Obregón chose to distance himself from Carranza and retired to his farm in Sonora. He would run for president in 1920.

Article 83 was another important political change. The overriding political issue that started the Revolution – re-election – was abolished for presidents as well as for governors and mayors.

Economic changes

Peasant and industrial labor had certainly won many rights in Article 123. This had an impact on many followers of Zapata and Villa, who now felt their grievances would be addressed.

Foreign investors, particularly from the USA, were not at all happy with Article 27, and tried to fight for ownership rights in the courts. It would take until 1923 for the Supreme Court in Mexico to rule that the Article could not be applied retroactively to accords from before 1917. The Bucareli Agreement (see pages 83–4) in 1923 agreed on paying damages to US investors for wreckage during the Revolution, a gesture that calmed relations for a decade or so.

9 Key debate

Key question: *A Marxist perspective of the Mexican Revolution: to what extent can it be viewed as part of the class struggle of a rural, semi-industrialized society against the bourgeoisie?*

The Revolution

The philosopher Karl Marx, writing in the middle of the nineteenth century, viewed historical analysis in a new way. He said that social structures derive from economic structures and that these are altered as a consequence of class struggles. Each ruling class produces another class struggle, which will overcome and destroy it. This will happen several times in a nation, the final phase being the emergence of a communist society, where the lowest class, the proletariat, will rule. When analyzing the Mexican Revolution from this perspective, historians see the Revolution as a struggle between the bourgeoisie and the elite, but also as the struggle between the peasants and workers against the bourgeoisie and the elite.

In 1929, US historian Frank Tannenbaum helped construct a view of the Revolution as popular, peasant, agrarian and nationalist, designing its social and political reforms after a bloody revolution. Tannenbaum, one of the first US historians to seriously analyze the Mexican Revolution in the 1920s, has called the convention at Querétaro 'the most important single event in the history of the Revolution', as a manifestation of the grievances of the peasants. This view points the way to an analysis of the Revolution as a class struggle of the peasants against upper classes.

In the 1960s, historians and social scientists the world over became fascinated by the Mexican Revolution. Mexican Political Scientist Arnaldo Córdova, writing from a Marxist perspective, viewed the post-revolutionary period as a consolidation and institutionalization of mass politics. This process would eventually emerge as a single-party state grouping Mexicans by social sectors, but the process is still far from being a socialist revolution. Analyzing the achievements of the Revolution and its possibilities as a proletarian class struggle, Córdova looked to the labor unions as leaders in this process.

US Historian John Womack, Jr, also from a leftist perspective, feels that the Revolution is best thought of not as emancipation, but 'rather a new order of capitalist control'. Even strong believers in Marxist doctrine and historical analysis admitted that the Mexican Revolution could not lead to communism. Russian revolutionary Leon Trotsky, exiled to Mexico from the Soviet Union by Stalin, warned about the contradictions that emerge from establishing advanced economic activity within a backwards social formation. He felt that this had led, in Mexico, to the volatile conditions of

the *Porfiriato* that erupted in rebellion. Perhaps the most balanced pronouncement about the Mexican Revolution in the historical debate from a Marxist perspective is the following, from Gilly.

SOURCE N

Excerpt from *The Mexican Revolution* by Adolfo Gilly, translated by Patrick Camiller, published by The New Press, New York, 2005, page 330. Gilly is a historian from Argentina, but has lived and taught in Mexico since 1979. He writes from a Marxist perspective.

In its objectives and outcome, the national uprising was a bourgeois revolution. At the same time, however, it was a peasant war for land in which the most radical wing, grouped around the Ayala Plan, made proposals and took measures of an anticapitalist character. As in every bourgeois revolution, the plebeian left wing went beyond the limits of capitalism and pointed toward a social revolution. Its ideas and aspirations could not emerge triumphant ….

? How does Source N characterize the Mexican Revolution and its achievements and shortcomings?

The Constitution

Gilly, analyzing the Constitution of 1917 as an end result of the Revolution, called it the most advanced of its time, but pronounced it nationalist rather than socialist.

SOURCE O

Excerpt from *The Mexican Revolution* by Adolfo Gilly, translated by Patrick Camiller, published by The New Press, New York, 2005, page 238. Gilly is a historian from Argentina, but has lived and taught in Mexico since 1979. He writes from a Marxist perspective.

It is not enough, then, to say that the 1917 Constitution was a bourgeois constitution. Undoubtedly it was, and under its protection the bourgeoisie and capitalism would undergo development in Mexico. But it is also an indirect, remote – in short, constitutional – testimony to the conquests of the mass struggle. The 1917 Constitution ratified the victory of the first nationalist revolution in Latin America.

? What does Source O say about class struggle and economic structures in the Constitution?

KEY TERM

Nationalist Strong emphasis on patriotism that exalts the nation and its values above any other considerations.

Mexican historian Enrique Krauze prefered to view the Constitution of 1917 as an enormous effort to create and institutionalize peace after so many years of civil war, thereby forging a new national life. He did not view this accomplishment from a Marxist perspective. He pointed out its radical nature, especially in Article 27, saying that 'only the Bolshevik Revolution would go further'. The left–right argument is straddled by Mexican-born writer Anita Brenner, who wrote in 1943 that the Constitution 'is so written as to accommodate either capitalism or socialism. Which emphasis is applied depends on who runs the government …'.

The application of the 1917 Constitution

- Radical results, conservatives had mixed feelings
- President Carranza could discourage articles he disagreed with, such as those that went against the Catholic Church

Main opposition:

- The Catholic Church hierarchy
- Supporters of the Catholic Church
- Foreign and national *hacendados*
- Mine and factory owners
- More radical peasants and workers who wanted immediate redress for their grievances

Political changes:

- Needed to generate a more democratic and representative political system
- The increased power of the executive in Articles 71, 72 and 76, no vice-president and a weak legislature pleased Carranza and strengthened his authority
- Article 83: the overriding political issue that started the Revolution – re-election – was abolished for presidents as well as for governors and mayors

Social changes:

- Needed in agrarian, political, labor, economic and other sectors
- Changes not made smoothly
- Went beyond Mexico – became a great inspiration to countries in Latin America in their own law-making
- Enormous immediate effect was on half of the population – women – though not all women welcomed these changes (reforms based on dependency on men, rather than equality between men and women before the law)
- Public primary education for all Mexican children – further reforms over next decade
- Catholic primary schools continued to exist, but were closed down if they did not follow the new national curriculum – led to a decline in school attendance, firing of Catholic teachers and more than 1 million children without a school education
- Article 130 denied the Church any legal recognition and the clergy any political rights – led to Cristero Rebellion of 1926–29

Economic changes:

- Article 123 – rights for peasant and industrial labor
- Many followers of Zapata and Villa now felt their grievances would be addressed
- Foreign investors, particularly from the US, were not at all happy with Article 27 and tried to fight for ownership rights in the courts – led to Bucareli Agreement in 1923

SUMMARY DIAGRAM

The application of the 1917 Constitution

Chapter summary

The Revolution and its leaders, 1910–17

With the election of Madero in 1911, his ineffectual attempts at governing and his eventual assassination, to the writing and ratification of the Constitution of 1917, Mexico was convulsed by factions fighting a bloody civil war. The Mexican Revolution involved charismatic military and ideological leaders, but also thousands of troops made up of landless peasants, workers and poor people. They involved the whole nation: men and women, as well as children. Although the combat deaths range up to 250,000, disease, hunger and the ravages of civil war killed 750,000 people. In total, this amounts to one million people in a population of 15 million Mexicans.

The violent phase of the Revolution ended in 1920 with the assassination of Carranza and the beginning of the Obregón presidency. Mexicans now looked to the new government to apply the 1917 Constitution and truly implement the reforms Mexicans fought for at such a great cost.

Examination advice

How to answer 'compare and contrast' questions

For 'compare and contrast' questions, you are asked to identify both similarities and differences. Better answers tend to approach the answer thematically rather than merely listing all the similarities and then listing all the differences. In any case, straight narrative should be avoided.

Example

Compare and contrast the contribution and significance of Emiliano Zapata and Francisco 'Pancho' Villa in the course of the Mexican Revolution between 1910 and 1919.

1. You will need to define what is meant by 'contribution and significance' and clearly set out the similarities and differences between Zapata and Villa.
2. Before writing the answer you should produce an outline – allow around five minutes to do this. You might want to organize your thoughts by defining the terms 'contribution and significance' and then naming the similarities and differences between the two leaders. You could include evidence such as:

The terms 'contribution and significance'

- *'contribution'*
  - *Helping in the outbreak of the Revolution*
  - *Involvement in supporting national leaders*
  - *Military success / failure*

- 'significance'
  - Input in amassing popular support
  - Influence in the outcome of the Revolution
- Similarities
  - Both regional leaders: Zapata from Morelos and Villa from Chihuahua
  - Neither wanted a national revolution
  - Both guerrilla leaders
  - Both initially supported Madero against Díaz, but disappointed in his slowness to address injustices
  - After Madero, Zapata in the South and Villa in the North led the fight against Huerta
  - Both opposed Carranza
  - Their forces occupied Mexico City in 1914
  - Both assassinated, Zapata by Carranza's order and Villa by Obregón's
- Differences
  - Zapata was a rural leader and small landowner. Villa was an uneducated son of a laborer who became a bandit in his youth
  - Background and regional allegiances led to differences in ideas and methods
    - Zapata seized land by force, supported by hacienda peons, farm tenants, sharecroppers, small farmers recruited from plantations and villages, and formulated the Plan de Ayala as a manifesto demanding agrarian reform
    - Villa was supported by ranch peons, farm tenants, sharecroppers, small farmers, mining and industrial workers, artisans, shopkeepers, muleteers, military members, peddlers and even intellectuals; he had no ideology or manifesto like Zapata – more of an opportunist

3 In your introduction, you will need to state your thesis. This might be 'Both Villa and Zapata made considerable contributions and were very significant in the course of the Mexican Revolution.' Do not waste time by restating the question.
An example of a good introductory paragraph for this question is given on page 80.

The course of the Mexican Revolution between 1910 and 1919 was deeply affected by two extraordinary men, Emiliano Zapata and Francisco 'Pancho' Villa. They were popular guerrilla leaders from the Mexican lower classes who appealed to the vast numbers of poor Mexicans and brought together huge armies to fight in the Revolution. They were undisputed leaders in their regions; Villa in the North, Zapata in the South (Morelos). They supported various national leaders at different times, affecting military outcomes. Both have become heroes and iconic figures of the Mexican Revolution. Villa and Zapata made considerable contributions and were very significant in the course of the Mexican Revolution.

4 In the body of your essay, your argument should focus on the similarities and differences between Villa and Zapata. You could also devote at least one paragraph to each of the topics you raised in your introduction. This is your opportunity to support your thesis with appropriate evidence. Be sure to explicitly state how your supporting evidence ties in to the question asked. If there is any counter-evidence, explain how and why it is of less importance than what you have chosen to focus on; for example, a counter-argument here could be that Zapata's significance was greater than Villa's because he had an ideological base demanding agrarian reform (*Plan de Ayala*) while Villa was more of an opportunist. It is important, however, to stress that the most important reason for the outbreak of the Revolution was the economic injustices, as per your thesis. The best answers will provide a critical assessment of both Zapata and Villa's contributions and significance in a structured comparative / contrasting framework. An evaluation of different historical interpretations of the contributions and significance of Zapata and Villa in the course of the Mexican Revolution would reach top marks here.

5 A well-constructed essay will end with a conclusion. Here you will tie together your essay by stating your conclusions. These concluding statements should support your thesis. Remember, do not bring up any new ideas here.

6 Now try writing a complete essay that addresses the question asked.

Examination practice

Below are two exam-style questions for you to practice on this topic.

1 To what extent do you agree that Francisco Madero was 'The father of the Mexican Revolution'?
(For guidance on how to answer 'to what extent' questions, see page 137.)

2 Assess how Zapata's *Plan de Ayala* was consistent with his revolutionary ideology.
(For guidance on how to answer 'assess' questions, see page 214.)

CHAPTER 3

The Construction of the Post-Revolutionary State, 1920–34

This chapter examines the period of Mexican history in which a succession of presidents sought to institutionalize the Revolution by slow and methodical actions. It will focus on the Álvaro Obregón presidency (1920–24), the Plutarco Calles presidency (1924–28) and the three puppet presidents during the Calles *Maximato*, the period from 1928–34. Finally, it examines how far these Mexican leaders promoted the goals of the Revolution or themselves, as well as their achievements and failures.

As you read this chapter, you should keep in mind the following key questions:

- Why was there a revolt against Carranza?
- What significant social reforms did Obregón make?
- What social and economic advances did Calles make?
- Why did the Cristero Revolt break out?
- What were the major areas of disagreement between Mexico and the USA?
- How did Calles control Mexican politics from 1928–34?

1 Obregón's election, 1920

Key question: *Why was there a revolt against Carranza?*

In 1919, Álvaro Obregón, the most successful general of the Revolution (see Chapter 2 pages 57–60), resigned from Venustiano Carranza's cabinet and announced he would run for the presidency in the upcoming 1920 elections. Carranza responded by choosing a little-known candidate, Ignacio Bonilla, expecting to manipulate the electoral machinery so that Bonilla would be elected. Carranza also moved troops into Obregón's province of Sonora, which led to the declaration of the *Plan of Agua Prieta* in Sonora. The *Plan of Agua Prieta* called for an interim government to be named by Congress to rule until there were fair elections. Carranza was accused of having betrayed the Revolution and the 1917 Constitution. Very quickly, most of the military joined Obregón's side and Carranza fled the capital, taking as much gold and silver as he could with him, on the fabled 'golden train'. Carranza never made it to his destination of Veracruz, as he was murdered en route by Obregón supporters.

KEY TERM

Maximato Period in Mexican history from 1928–34 in which Calles ruled from behind the scenes.

What did Obregón hope to accomplish as President?

Obregón's plans

In 1920, Obregón was joined by two powerful fellow Sonorans, Adolfo de la Huerta and General Plutarco Calles. Congress duly chose de la Huerta as the interim president, and in the September elections Obregón won the presidency with 95 per cent of the vote. Like many other politicians, he decried corruption in Mexico, saying on the campaign trail 'How sad to see the most distinguished men, civilians and soldiers, turn the revolutionary movement into a butt for ridicule and devote heart and soul to the pursuit of the almighty peso'. As well as confronting corruption, Obregón faced huge tasks in rebuilding Mexico. 'The reforms which Mexico needs require at least four factors for their complete solution: time, capital, education and a directing hand,' he told his biographer E.J. Dillon. He also had to rebuild Mexico's infrastructure, severely damaged by the years of civil conflict, and repair relations with their powerful neighbor to the north, the USA. Finally, Obregón needed to discipline the military so they would not threaten his administration.

? Why does Source A label Obregón as Mexico's New Dictator?

SOURCE A

Excerpt from an editorial in *The Washington Post* on 6 September 1920, entitled 'Mexico's New Dictator'.

The announcement of the election of Gen. Álvaro Obregón to be president of Mexico is expected. The election was held yesterday, such as it was. National elections have never attracted much attention in Mexico, the majority of the people having no idea that they are supposed to exercise the franchise. In Díaz' time the governors and jefe políticos were advised as to the number of votes they should turn in for the respective candidates, the total being a prearranged tabulation purporting to show that there was a genuine contest between two or more candidates …

The same burlesque of republican government is expected to be exhibited now, with Obregón's election foreordained by the combination that secured control of the governmental machinery after Carranza had been betrayed and driven out of the capital. The sight of a presidential election in a nation of 16,000,000 persons, with only a few hundred voting, is not very pleasing to Americans [US] who are eager to make the world safe for democracy. The same methods, if pursued in the United States, would cause the streets of New York and Washington to run with blood, and the country would be in civil war from one end to the other. Perhaps it is not to be wondered at that Mexico lapses from one revolution into another.

A revolution is predicted as the result of Obregón's seizure of the presidency. Perhaps it is just as well that a revolution should occur, for it will reveal, at least, that the spark of independence and democracy is not dead …

How was Obregón able to defeat de la Huerta?

Revolt against Obregón

Álvaro Obregón was one of eighteen children, and through personal drive became a schoolteacher, wealthy landowner, famous general and clever

politician. Nonetheless, he faced major challenges in his four years as President of Mexico. He crushed a rebellion in 1922 when elements in his army rose against him. He would face a more serious military rebellion when his former ally de la Huerta broke with him in 1923 at the urging of conservative landowners. Many in the military joined de la Huerta's forces, but because they were scattered across Mexico, disorganized, and representative of the anti-revolutionary past, Obregón was able to defeat them by May 1924. Consequently, the President continued his campaign to reduce the number of officers in the armed forces. Many conspirators were executed or forced to resign. One key element in Obregón's victory over de la Huerta was the rapid shipment of military supplies to his forces from the US government, a timely assist that resulted from recent successful negotiations concerning US petroleum companies operating in Mexico.

Mexican–US relations

Why were US companies upset with Obregón?

Relations with the USA were frosty. US business interests felt threatened by provisions of the 1917 Constitution, which gave rights to subsoil resources such as oil and minerals to the Mexican government. This especially aggrieved US petroleum and mining companies. Claims of damages to US-owned property during the upheaval of the Revolution were not settled either. The USA withheld diplomatic recognition to Obregón's government to put pressure on him. Britain and France did likewise. Obregón certainly recognized the difficulties he faced when he told *The New York Times* (in November 1920) that 'The greatest problem I face as the next Mexican executive is that of general reconstruction … Of first interest to Americans, of course, it is the oil problem, and in this connection I might say that articles XIV and XXVII will not be abrogated. But I am sure that within a short time a commission will be appointed to regulate the application of these articles'.

The importance of oil

It is important to keep in mind that the revenues derived from Mexico's oilfields were essential in keeping the economy afloat. During Obregón's presidency, these revenues constituted between 21 and 34 per cent of his government's income. Mexico was also the world's second largest producer of oil in 1919. It produced 16 per cent of petroleum (the USA produced 68 per cent!). While Mexico desperately needed income from oil export taxes, it also needed British and US financing because it did not have the capital needed to expand and exploit the oilfields. In 1922, Mexico's debt to the USA was rescheduled on a 40-year installment plan, but it was the question over who owned the oil underneath Mexico's soil that would plague US–Mexican relations for years to come.

The Bucareli Agreement

The Mexican Supreme Court recognized in 1921 that foreign-owned oil companies had rights to subsoil resources, if they acquired the properties prior to 1917 and had performed the very ambiguous 'positive acts' (which

KEY TERM

Bucareli Agreement Agreement between Mexican and US representatives that 'solved' the dispute over subsoil rights. Named after Bucareli Street where the negotiations took place.

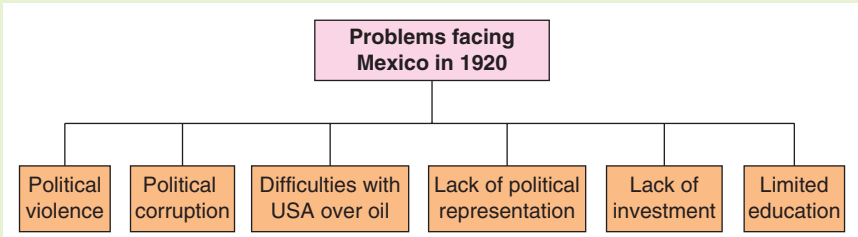
could mean improving the land or putting in infrastructure). The US government wanted a formal agreement. A series of meetings in Mexico City resulted in the **Bucareli Agreement** in 1923. Because neither the Mexican nor US Congress signed this 'understanding', it was not strictly legal but provided cover for both governments. US diplomatic recognition of Mexico followed immediately after and just in time for Obregón as he squared off with de la Huerta.

Obregón's ties to the USA

Obregón could not appear to surrender any of his country's integrity and independence to the USA because that would give ammunition to his nationalist opponents. Privately, Obregón had substantial dealings with US companies, particularly in relation to his own large *hacienda* in Sonora. In exchange for substantial loans, he had given seized Indian lands to the W.R. Grace Company, a US entity. In fact, he grew quite wealthy from his contacts with US citizens and was able to export large quantities of agricultural products, especially garbanzos (chickpeas), from his farms to the nearby USA. Obregón's ties to the USA add to the complexity of Mexican–US relations.

SUMMARY DIAGRAM

Problems facing Mexico in 1920



2 Obregón's reforms

Key question: *What significant social reforms did Obregón make?*

Álvaro Obregón made a half-hearted attempt at land reform, one of the key aims of the Revolution. He was more successful in promoting the expansion of education and helping to shape a new Mexican national identity.

How did Obregón gather support for his initiatives?

Workers and land reform

Part of Obregón's political acumen was his ability to create broad support for his government. Historian John Mason Hart wrote in 1987 that '… Obregón functioned as the ultimate compromiser, capable of negotiating

with Carrancistas, Villistas, workers, Zapatistas and Americans'. For industrial workers, he co-opted the newly-formed workers' union, the Regional Confederation of Mexican Labor (CROM) and worked closely with Luis Morones, the CROM general secretary, to their mutual benefit. He also won the allegiance of many landless peasants through land reform, or at least the promise of it. At this point, a mere 1 per cent of Mexico's land, or 1.2 million hectares, had been redistributed (mostly between 1916 and 1919, when seizures were finally recognized by the government). The Church and *hacendados* certainly slowed the pace of any significant land reforms because they knew they would lose property. Furthermore, because Obregón himself had become a wealthy landowner, he was unlikely to make a sincere push for significant distribution of land. Cleverly, Obregón gave the peasants a small measure of hope in return for large doses of support. This wide coalition of support meant that by early 1923, his allies controlled Congress, state legislatures and all state governorships.

SOURCE B

Excerpt from *The Great Rebellion: Mexico 1905–1924* by Ramón Eduardo Ruíz, published by W.W. Norton and Co, New York, 1980, pages 313–4. Dr Ruíz, the son of Mexican immigrants, taught Latin American History at the University of California, San Diego for many years and died in 2010.

The future of Mexico required a healthy agriculture.

The solution, said Obregón, lay in the modernization of agriculture, bringing to it the benefits of science. It was imperative to introduce up-to-date technology, to mechanize farming, and to diversify what was planted, but always with an eye on heavy yield crops and on large markets … As an incentive to modernize, Obregón dangled before the hacendados *a pledge to safeguard their properties; he would take lands only from the unproductive* haciendas. *This policy would provide, he said, a truce for* hacendados *willing to employ new methods as well as stimulus to improve the condition of agriculture.*

From Source B, why might ***hacendados*** find comfort in Obregón's ideas? ?

National Agrarian Commission

Obregón set up the National Agrarian Commission in 1922 to survey Mexico's agricultural areas. The Commission was hampered by lack of funds, but its findings would later be used when President Cárdenas embarked on the first serious land reform in Mexico's history (see pages 114–117).

Education and culture

Why did Vasconcelos stress Mexico's Indian heritage?

Obregón's most notable achievements were in the fields of education and culture. He chose the intellectual José Vasconcelos as the head of the newly created Ministry of Education. Under his guidance, funds were used to build 2000 libraries and more than 1000 schools from 1921–24. Mexico's Indian past was also heavily promoted in an attempt to unite the country. In 1920,

as many as 4 million Mexicans in rural areas spoke native languages rather than Spanish. Bringing literacy to the countryside was one way of helping to create a new Mexican identity. Muralists were allowed to use the walls of government buildings to portray the importance of the Indian in Mexican history and society. See Chapter 6 for more on achievements in education and the arts.

? Describe Obregón's inauguration as portrayed in Source C.

SOURCE C

Obregón turned the presidency over to Plutarto Calles, December 1, 1924. Obregón is center-left and Calles is center-right.

End of Obregón's first term

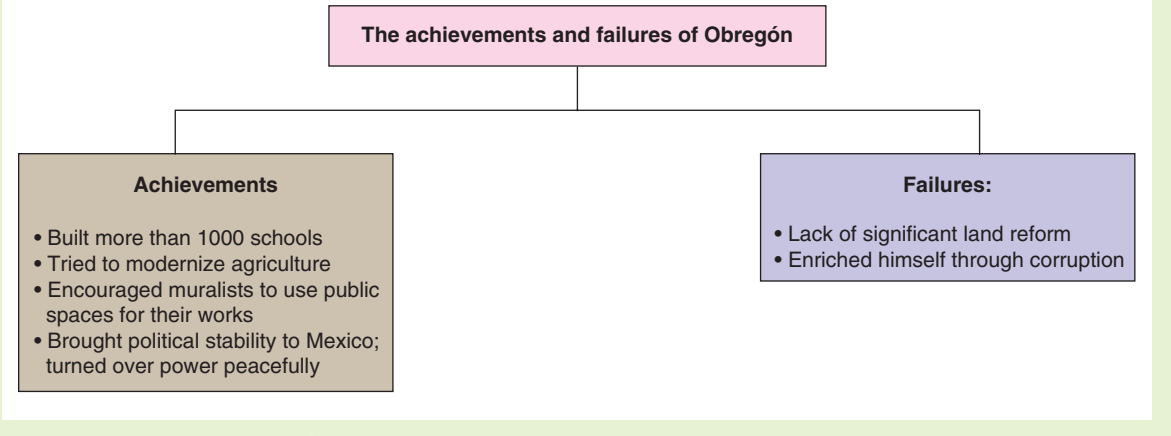
Many historians see Obregón as a pragmatist and reformer. To some, he was also Mexico's last *caudillo*. When he came to power in 1920, it was in a Mexico that had declined by 1 million people, due to war and disease, since 1910. What the country craved and what Obregón provided was some semblance of order and stability, though this came at some cost. As historian Thomas Skidmore wrote in 2010, 'Obregón succeeded to the spoils of the presidency'. He was now in a position to increase his wealth and, while corruption in the government certainly continued, Obregón was able to pass the office to his successor Plutarco Calles without violent upheaval – no small achievement in Mexico at the time. Obregón chose a slow reformist path, hoping to bring steady improvements in Mexican agriculture through better management and modern techniques. These, he hoped, would improve the life of the desperate peasant. At the end of his term in office in 1924, Obregón returned to his *hacienda*, La Quinta Chilla, in Sonora. Plutarco Elías Calles, another Sonoran, stood for election.

SOURCE D

Excerpt from *President Obregón: A World Reformer* by Dr E. J. Dillon, Hutchinson and Co, London, 1923, page v. E. J. Dillon was a prolific Irish journalist and author.

General Obregón is, to my thinking, the most attractive figure on the world-scene today. Falling into no class he cannot be labeled. He is a pioneer, and no one who takes the beaten track is that. As a private individual his career is a remarkable human document. As a soldier who headed a revolution against revolutions and waged war against war, he was the hero of many thrilling episodes. As a popular leader too he gave proof of that rare, magical quality which wins the sympathies and arouses the enthusiasm of men … As a Mexican statesman he stands out as the great reality of his country and his race: he has, at any rate for the time being, rescued the former from the danger that threatened its political existence and the latter from a most perilous precedent … Of all contemporary statesmen he alone stands for the aspirations of that growing section of the human race who feel and know that regeneration cannot proceed from laws, edicts or institutions but only from a wholly new moral and cultural orientation … Having come into close contact with the seamy side of human nature at its worst, instead of turning cynical and sour, he has maintained his faith in humanity intact.

According to Source D, what personal qualities did Obregón possess that made him a great leader? ?



SUMMARY DIAGRAM

The achievements and failures of Obregón

3 Calles in power

Key question: What social and economic advances did Calles make?

Plutarco Elías Calles shaped Mexico over a decade-long period as both President and behind-the-scenes puppet-master. Politically, Calles

was the dominant figure in Mexican politics, until he was outmaneuvered by Lázaro Cárdenas in 1934.

What did Calles see as the main obstacles to Mexico's development?

Calles' plans for Mexico

Calles, the illegitimate son of a well-off Sonoran and a former schoolteacher like Obregón, was governor of his home state Sonora, and had served in previous governments as the Minister of War, Minister of Government and the Minister of Labor, Industry and Commerce. Obrégon handpicked him (see page 86) to become President, and so little stood in his way to the presidency in December 1924. His 84 per cent of the vote ensured he had the support of the same groups who had backed Obrégon.

During his official four-year term in office, and the six that followed when he governed behind the scenes, Calles created many of the institutions that helped Mexico move past the upheavals of the Revolution. These included the National Bank, an expanded educational system, the National Agricultural Credit Bank and a political party that would rule the country until the 2000 elections. Some progress was also made in terms of land reform, the expansion of the highway network and large irrigation schemes.

SOURCE E

'Calles' Platform to Govern Mexico' from *El Democrata*, Mexico City, 2 May 1924, as quoted in *Mexico Before the World: Public Documents and Addresses of Plutarco Elías Calles*, The Academy Press, New York, 1927, pages 51–2.

The following are principal points of General Calles' programme of government:

1. To stimulate and encourage by all possible means the organization of the Mexican people so that they may direct their efforts, not alone toward political ends, but toward well defined objects of social betterment.

2. To comply strictly with, and to compel the rigid compliance with, Article 27 of the Constitution, to bring about the solution of the agrarian problem, considering it as an integral problem by itself, in which the principle of small land holdings is merely one of the indispensable factors of success; to organize the necessary systems of agricultural credit, to distribute water rights and establish rural cooperative organizations.

3. To bring about the immediate and just regulation of Article 123 of the Constitution and thereby provide for the workers the legal protection which they enjoy in the most progressive industrial countries, in order that they may play in the social and political life of the country the role to which they are entitled as an integral, and as the principal, factor in the production and in the wealth of Mexico.

4. To continue the cultural and educational programme for the benefit of the masses, preferably of the Indians, with the object of making all of the units in the

? Explain how Source E would appeal to most sectors in Mexican society.

population of Mexico useful to themselves, to their families and to the country and creating in them an exact comprehension of their duties.

5. To bring about the collective development of the middle and the sub-middle classes, placing them in touch with the proletariat, with whom they should share their struggles and their ambitions.

6. To bring about, through an ample and well planned system of communications, closer contact between all parts of the country and a more extensive commercial interchange of their products, as a necessary moral and material basis for the development of a nationalistic spirit.

7. To establish a purely nationalistic government, uncontrolled by small private cliques and without a spirit of sectarianism, guided in all cases by the ideals and the sentiments of the country as represented by the necessities of the majority and not by the interests of political parties.

8. To establish relations with all the countries of the world on a basis of mutual respect, equity and justice, without admitting that strong nations may impose their will upon the weak, in matters of domestic concern.

Calles' reforms

What did Calles achieve in his first two years in power?

In the first two years, Calles put his stamp on Mexico. What follows is a partial list of achievements:

Calles' first two years in power

January 1925	General Law of Institutions for Credit passed
January 1925	National Banking Commission founded
August 1925	National Bank of Mexico founded
September 1925	National Road Commission created; plan to build 10,000 km of roads in four years; 7000 km built
January 1926	Federal Irrigation Law passed
February 1926	National Bank of Agricultural Credit founded

National postal system organized

Twice as much land redistributed as in Obregón's time, much of it in the first two years

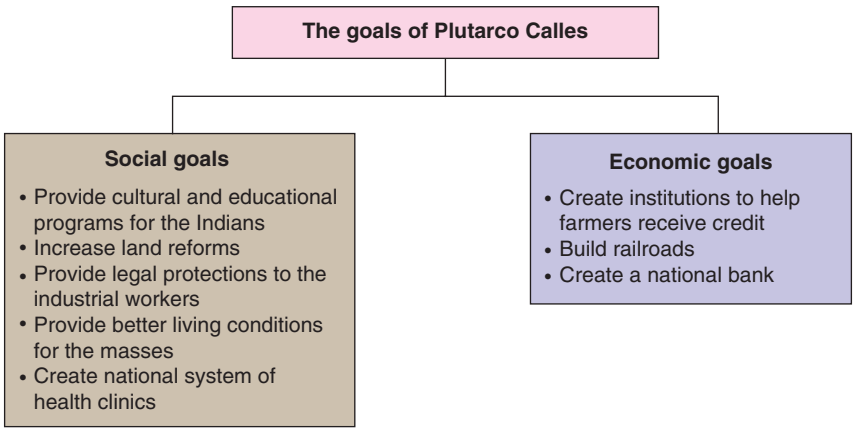
Continued to build schools, including agrarian colleges

System of health clinics created

The Mexican historian Enrique Krauze calls this period **The Constructive Phase**

KEY TERM

The Constructive Phase
The period in which the construction of state institutions began.



SUMMARY DIAGRAM

The goals of Plutarco Calles

4 The Cristero Revolt

Key question: *Why did the Cristero Revolt break out?*

Despite some progress there were still difficulties, such as continued cold relations with the USA and the Cristero Revolt. From 1926–29, a violent challenge to the government broke out. Disgruntled Catholics, particularly ones living in rural areas, rebelled against what they viewed as godless measures taken by the Calles government. While lack of organization and national support doomed this rebellion, it still left deep wounds that would take years to heal.

How did Calles attack the Church?

The relationship between Calles and the Church

Calles never had a great fondness for the Catholic Church. He thought it continued to stand in the way of Mexico's modernization and promoted superstition. Church–State relations had been difficult during the more violent stages of the Mexican Revolution, and the 1917 Constitution quite clearly stated that education was under government, not Church, control. Obregón had essentially followed a conciliatory path and not enforced any of the Constitution's articles that involved the Church. Calles, though, took a markedly anticlerical direction. While he was governor of Sonora, he expelled a number of the clergy from his state, accusing them of being against the Revolution.

The Church was undoubtedly fearful of what Calles might do because of his previous anticlerical acts in Sonora, and so established the National League for Religious Defense in early 1925. In January 1926, Calles asked the

Congress to grant him extraordinary powers to refashion the penal code. The Church said it would not obey the Constitution's articles on religion. Calles' government passed the Law Reforming the Penal Code, also known as Calles' Law, on 14 June 1926. Among its many provisions were:

- No foreign priests allowed in Mexico
- All education to be controlled by the State
- Monastic orders forbidden
- Priests not to preach disobedience to the nation's laws
- Respect to be shown for the government
- All religious periodicals to be apolitical
- No political meetings allowed in churches
- All religious ceremonies to take place only in churches, under the government's supervision
- No religious clothing to be worn outside the church
- Municipal authorities fined if they did not enforce the various new laws

The Catholic Church response

What happened to cause the Cristero Revolt?

The Church realized that these laws would definitively break its power, and consequently took drastic measures. It essentially went on strike and did not perform any religious services. In several poor rural states, particularly in western and central Mexico, conservative landowners funded the growth of armed rebel groups. Peasants took up the cry of *Viva Cristo Rey* (Long Live Christ the King) and soon became known as ***Cristeros*** or Christers. In some cases, they tortured and murdered schoolteachers, who were seen as promoting the secular values of the Mexican Revolution. In retaliation, government forces executed priests and raped nuns. Calles soon had a full-scale Catholic rebellion in several states, particularly in Jalisco. The rebel forces numbered upwards of 50,000 armed men and women by 1928, and some women formed the Juana de Arco (Joan of Arc) Brigade.

KEY TERM

Cristeros Catholics who rose in rebellion against the Mexican government from 1926 to 1929.

The course of the revolt

The *Cristeros* suffered from disunity and a lack of military supplies. Although they scored several victories, they could not thoroughly defeat the government. Government tactics did not ensure a swift victory; the slaughter of villagers suspected of supporting the rebellion only increased *Cristeros* support in the countryside. The rebels did not have the full backing of the Church hierarchy in Mexico and were often without strong leadership. Furthermore, it did not help that the vast majority of priests stayed out of the fighting and even left the villages in the countryside, the very heart of the rebellion. Catholic groups pressured the US government to intervene, but the USA preferred to protect its business investments from the violence, and so mostly sided with Calles.

The ensuing revolt cost an estimated 90,000 lives, including over 50,000 federal troops and 30,000 *Cristeros*. It finally ended with the assistance of the US ambassador to Mexico, Dwight Morrow. He helped arrange a negotiated settlement in 1929 that resulted in a stalemate. The anticlerical laws would not be repealed, nor would they be enforced. Calles never did accept his share of blame in fanning the fires of the conflict.

? According to Source F, why did Calles feel he had to attack the Church?

SOURCE F

On the day before Calles was exiled from Mexico in 1936, he gave an interview to the journalist José C. Valadés. It was not published until a number of years later. The complete interview, in Spanish, can be found at www.historicas.unam.mx/moderna/ehmc/ehmc22/275.html.

General, why did you initiate the problem or religious conflict [with the Church]? You have said on various occasions that a conflict or religious problem did not exist in Mexico.

Look, I have told the truth. We did not have a problem or religious conflict. What we had was a war with rebellious priests. No, there wasn´t a conflict with religion. The conflict was with the priests, only with the priests.

I'm going to tell you the truth about the origin of the conflict with the priests. In 1926, we were dedicated to the economic reconstruction of the country. The Bank of Mexico was founded … we began the big irrigation projects to develop agriculture, we initiated the construction of a highway network. We didn´t have any other problem than the problem of economic reconstruction. I can say without boasting that we were on the path to progress and social advancement. Then, suddenly, there appeared in El Universal [a popular Mexican newspaper] several declarations by Archbishop Mora y del Rio questioning my government, the State, saying that the clerics did not agree with the laws, that they needed to be changed. The abruptness caught my attention and disgusted me. It was a challenge to my government … we had until then ignored the priests and the Church. … later, when Mora y del Rio denied having made such declarations, I received a communication signed by archbishops, bishops and priests, approving and ratifying the Archbishop of Mexico's declaration. As you can see, the attack was by the clergy against the State. Following up, the priests declared a strike …

The striking priests abandoned the temples. My government could have ordered them closed but in wise consideration I ordered them turned over to the neighborhood associations. The strikers then became rebels; they went to war and forced the government to go to war, too … first the priests attacked the State and its laws, then there were striking priests and in the end rebel clergy. What could the State do except to defend itself? And you know the rest. The merciless war began and with painful consequences …. At times the State appeared too cruel but that was because the state needed to defend itself … I wanted to end my term in office without this conflict but the rebel priests provoked me.

Calles' attacks	Church responses
As governor of Sonora, Calles attacked the Church	Catholics feared a Calles presidency; formed National League for Religious Defense
Calles' Law enacted	Severe restrictions on Church
Calles sent in federal troops	Church went on strike; armed rebellion began in countryside
	Cristero Revolt lasted three bloody years
	US Catholics tried to pressure its government to intervene, without success
	US embassy helped broker an end to the conflict

SUMMARY DIAGRAM

Calles' attacks on the Church and the Church's responses

5 Key debate

Key question: Why did Plutarco Calles attack the Catholic Church?

While historians certainly agree that the Cristero Revolt was a bloody conflict, the reasons President Calles chose to suppress the Church cover a range of opinion. Read the following historians' views and try to determine where they agree and where they disagree. Are some historians more convincing than others?

SOURCE G

Excerpt from *Modern Latin America* by Thomas Skidmore, Peter Smith, James Green, 2010, page 59.

This stolid officer-politician soon proved to be the man who would put the postrevolutionary political system on a strong footing. For Calles, however, the threat was from the right. Calling themselves cristeros *('Christers'), Catholic militants mounted a broad-based ideological challenge to revolutionary ideals.*

SOURCE H

Excerpt from *Triumphs and Tragedy* by Ramón Eduardo Ruíz, 1992, page 344.

Frequently compared to Kemal Ataturk, the Turkish leader, Calles, in spite of his leftist reputation, was not a radical … Not always a strong leader and totally lacking in charisma, Calles, during the years 1926 and 1927, had to govern by executive decree, largely because the Senate blocked his plans.

SOURCE I

Excerpt from *A History of Latin America* by Robert Shafer, 1978, page 563.

One issue on which Calles was 'revolutionary' in Mexican terms was the Church … Calles then took strong action in support of the old Liberal thesis, confirmed by the Revolution, that the Church must confine itself to a spiritual role defined by the state.

SOURCE J

Excerpt from *A History of Latin America* by Benjamin Keen, 1996, page 286.

… a serious domestic dispute arose as a result of the growing opposition of the Church to the whole modernizing threat of the revolution. Under Calles this opposition assumed the proportions of a civil war.

SOURCE K

Excerpt from *The Mexican Revolution: 1910–1940* by Michael Gonzales, 2002, pages 208–9.

The centralizing policies of the Calles administration left little leeway for dissent, and those resisting subordination faced suppression regardless of their political ideologies or local power bases…For Plutarco Calles the Roman Catholic Church represented the preeminent obstacle to building a revolutionary state.

SOURCE L

Excerpt from *Plutarco Elías Calles and the Mexican Revolution* by Jürgen Buchenau, 2007, page 128.

… anticlericalism was an important vehicle for creating a national bourgeoisie loyal to the new leadership rather than to local allegiances or to the global reach of the papacy. His opposition to the Church focused on organized Catholicism …

SOURCE M

Excerpt from *Wars of Latin America: 1900–1941* by Rene de la Pedraja Tomán, 2006, page 288.

The lack of enforcement of anti-Catholic provisions seemed to parallel the erosion of revolutionary principles. By the time Plutarco Elías Calles became president in 1924, he felt the decay had gone too far and that something had to be done to revive the revolutionary spirit. Out of a personal ambition to try to justify that he was still an idealist, Calles devolved all his remaining revolutionary fervor to try to destroy the grip of the Catholic Church on the population.

SOURCE N

Excerpt from *Mexico and the United States* by Lee Stacy, 2003, page 125.

Tensions between the government and the Catholic Church … erupted into armed conflict. Calles was keen to impose the anticlerical restrictions of the 1917 Constitution. These had been included because the revolutionary movement believed the clergy exploited the poor. In 1926 Calles began to close down Church schools and forced all foreign clergy to leave Mexico. This provoked a strong reaction from many in the Catholic community, culminating in the Cristero Rebellion (1926–1929).

SOURCE O

Excerpt from *Plutarco E. Calles: Reformar desde el origen* by Enrique Krauze, 1987, page 68.

1926 was the year of the break. Throughout all of 1925, Calles had hoped that the governors would follow the Constitution but their reticence, he determined, resulted in the necessity to take more severe measures. In January, he asked Congress for extraordinary powers to reform the Penal Code and introduce regulations covering the cult [Catholic Church].

TOK

Is it possible to detect ethical arguments embedded within the explanations provided by these historians? (Language, Ethics.)

6 Relations with the USA

Key question: What were the major areas of disagreement between Mexico and the USA?

The relationship between Mexico and the USA remained tense during Calles' official term in office. At one point during his presidency, Mexico faced the threat of a US invasion.

US fears

What happened to cause tension between the USA and Mexico?

Nicaragua

The USA had stationed marines in the Central American country on and off since 1909. In 1926, during a political struggle in Nicaragua, the USA and Mexico supported two opposing sides. Calles sent two military expeditions to support the Liberal Juan Bautista Sacasa, while the USA supported the Conservative Adolfo Díaz, who had recently seized power. The USA was not accustomed to having its will thwarted, particularly in Central America, which it regarded as its backyard. A small-scale trade war began. The USA refused to sell military supplies to Mexico and Mexico responded by banning all US goods from entering the country. The conflict ended when the USA forced the two Nicaraguan opponents to stop hostilities. Díaz was allowed to finish his term in office.

Bolshevism

On 4 August 1924, the Soviet Union opened its embassy in Mexico City. This did not sit well with the USA, which had recently had soldiers fighting in the former Russian empire in support of the anti-Communists. It was particularly galling for the USA when the Soviet ambassador Alexandra Kollontai declared that 'There are not two countries in the whole world who share more than the modern Mexico and the new Russia.'

KEY TERM

Bolshevist A follower of Bolshevism, a term used to describe how the Communist Bolsheviks seized power in Russia.

Tensions between the two countries increased when, after consultations with the US ambassador to Mexico, the US Secretary of State Frank Kellogg issued a statement. On 12 June 1925 he stated that 'It is declared to be a fact that radical doctrines have been spread in Mexico …Two members of the Cabinet, León and Morones, in charge of the Departments of Agriculture and Labor, are declared to be **Bolshevist** in their tendencies.'

The USA most objected to the seizure of some US-owned property by the Mexican government and, more importantly, the threats against the US petroleum companies. The USA felt these were Bolshevist acts. The Harding administration refused to negotiate over the issue and, in 1926 and 1927, there was even talk of going to war against Mexico. However, calming voices prevailed, among them bankers who feared war would put the repayment of Mexico's outstanding loans in jeopardy, and many Congressmen who did not think invasion would solve the problem. Harding and Kellogg soon backed down.

Land reform under Calles

While Calles was able to point to a number of achievements in helping to build up Mexico's infrastructure, particularly in the areas of irrigation and highways, his touted land reform programs were patchy at best. He did oversee the distribution of over 3 million hectares of land, but much of it was barren. In the succeeding administrations that Calles controlled (see pages 99–105), more land was given to landless peasants, but it would not be until Lázaro Cárdenas became President that truly significant amounts of land were redistributed. It is important to remember that one of the key cries during the Revolution was for the dissolution of the large *haciendas* and the redistribution of that land to the millions of landless peasants. This certainly was what drove the followers of Zapata to revolt. Yet even if peasants did receive land, they seldom had access to credit to purchase tools and seed. Conversely, a significant number of generals and high-ranking officers did receive large tracts of land for their services during the Revolution.

SOURCE P

Table from *La Reforma Agraria de Mexico, Su crisis durante el periodo 1928–1934* by Ing. Marta R. Gomez, Librería de Manuel Porrua, S.A, Mexico City, Mexico, 1964, quoted in *Land Reform and Politics: A Comparative Analysis* by Hung-chao Tai, University of California Press, Berkeley, 1974.

? Of the eight presidents listed in Source P, who distributed the least amount of land and the most? What might explain this?

President	Term	Months in office	Total hectares distributed	Average hectares per month	Total number of beneficiaries
Venustiano Carranza	1915–20	63.5	224,393	3.535	59,848
Adolfo de la Huerta	1920	6	157,533	26,256	17,355
Álvaro Obregón	1920–24	48	1,677,067	34,939	158,204
Plutarco Elías Calles	1924–28	48	3,310,577	68,970	318,030
Emilio Portes Gil	1928–29	14	3,306,842	216,917	213,981
Pascual Ortiz Rubio	1929–32	31	1,203,737	38,830	84,009
Abeldardo L. Rodríguez	1932–34	27	2,094,638	77,579	161,327
Lázaro Cárdenas	1934–40	72	20,072,957	278,791	774,000

Improved relations with the USA

How did Ambassador Morrow help improve US–Mexican relations?

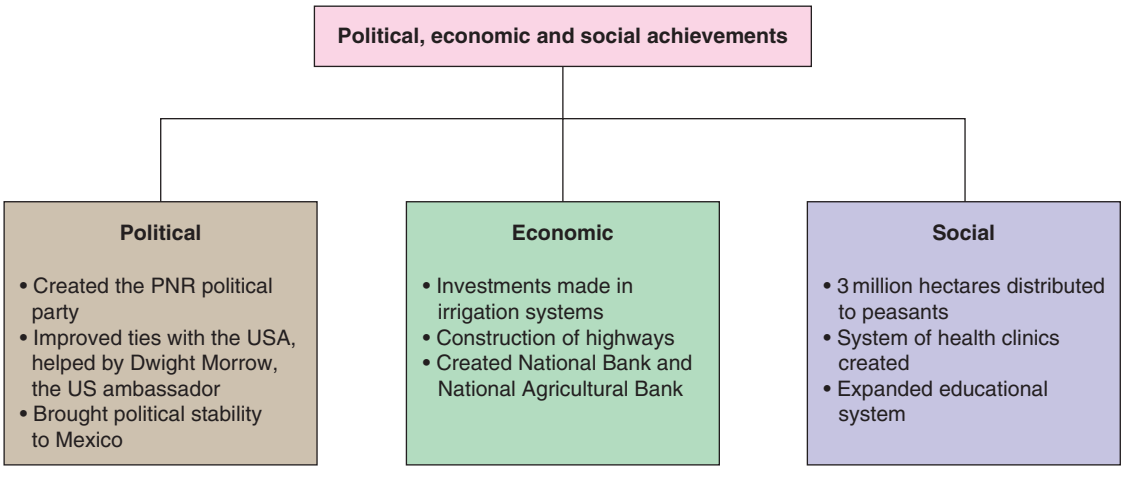
The appointment of Dwight Morrow, a Wall Street banker, as the new US ambassador to Mexico did much to decrease tensions. Morrow and his wife showed a genuine interest in Mexico, and the ambassador soon established close relations with President Calles. The two men would often meet and discuss the vexing issues between the two countries. Mexicans were particularly impressed when Morrow described their country as 'sovereign'.

A clever public-relations coup took place in December 1927 when the aviator Charles Lindbergh took a flight from Washington D.C. to Mexico City. Calles called a national holiday and said that he considered the flight 'above all, a priceless embassy of good will'. Massive public celebrations and parades took place. Mexico was transfixed by the aviation hero's thrilling visit.

Morrow served as ambassador from 1927 to 1930. He helped negotiate an end to the Cristero Revolt, decrease the tensions concerning US petroleum interests in Mexico and establish much friendlier relations between the two countries. As the *New York Times* wrote in 1929, 'Mr Morrow, while not sacrificing United States property owners' legitimate interests, is, nevertheless – and Mexico appreciates this – not brandishing any big stick.' Morrow also acted as an unofficial financial adviser and helped Mexico to restructure its entire foreign debt.

The USA and Mexico by 1929

In terms of how well Calles was able to deal with Mexico's northern neighbor, the Mexican historian Enrique Krauze put it succinctly when he wrote in 1987 that 'Calles won more important items than the oil battle … The United States withdrew her threat of invasion; he dissolved the worries of a "Soviet Mexico", and he reduced the harshness and hysteria of North American diplomacy. He won what he could win.'



SUMMARY DIAGRAM

Political, economic and social achievements of Calles

7 The *Maximato*: Who did what?

Key question: How did Calles control Mexican politics from 1928–34?

Once Calles' term in office as President was over, the former general was not content to sit on the sidelines. He would be the power behind the scenes of the next three presidents, each of whom felt the intense pressure Calles applied to bend them to his will.

Why was Obregón assassinated?

Obregón and the 1928 elections

After spending four years mostly on his *hacienda* in Sonora, Obregón decided to re-enter national politics in 1928. However, the law – which forbade someone from holding the presidency for more than one term – stood in his way. Calles pressured Congress to amend the 1917 Constitution to allow

presidents to be re-elected and run for a second term. Also included was that presidential terms would now be six years in length, known as the *sexenio,* instead of the traditional four. Obregón was still a popular figure in Mexico and not much stood in his way. Those who opposed this arrangement, including two politicians who wished to run for the office, soon found that Calles did not tolerate any challenge to his authority. Twenty-five generals and 150 others were summarily executed without trial. Obregón ran unopposed.

Obregón had escaped an assassination attempt in 1927, for which he blamed 'clerical reactionaries'. He would not be so lucky six months later, on 20 July 1928. After being elected President but before assuming the post, he met with a group of his supporters for a fancy luncheon. His assassin, a caricaturist called José de León Toral, had been making the rounds of the president's supporters, drawing quick sketches. When he approached Obregón and asked to show him his work, he pulled out a revolver and shot the president-elect five times. Toral later declared he killed Obregón and that his 'intention was good. My soul will be saved. So will Obregón's because I offered my life in atonement for him'. A religious fanatic, he did not distinguish between the more conciliatory Obregón and the atheist Calles. Supposedly his last words before being executed by a firing squad were 'Viva Cristo Rey!' (Long Live Christ the King).

Political aftermath of the assassination

Many Mexican observers suspected that Calles, or the Minister of Labor and head of CROM (see page 85), Luis Morones, was behind the political killing. Calles acted quickly and pressured Congress to elect Emilio Portes Gil as interim president. By taking himself out of the running, he probably saved the country from another bout of rebellion. Portes Gil was to serve as leader from 1 December 1928 until February 1930. Elections for a new president were scheduled for November 1929.

Thus began the period in Mexican history known as the *Maximato*. Three presidents served from 1928 until 1936, all suspected of being controlled by Calles, who operated behind the scenes. Calles was called ***el jefe máximo***.

KEY TERM

El jefe máximo Supreme leader, also known as Plutarco Calles.

Callistas Supporters of Calles.

Obregonistas Supporters of Obregón.

Ruralistas Supporters of land reform.

Cromistas Supporters of the workers' union CROM.

Presidency of Emilio Portes Gil (1928–30)

What did Portes Gil accomplish in his two years as President?

Portes Gil made his position clear when he announced to the press in September 1928 that 'My task will be to continue the policies developed by President Calles in all branches of public administration and also to procure the fulfilment of the social program outlined by the late General Obregón.' The 37-year-old was soon put to the test when competing factions of ***Callistas***, ***Obregonistas***, ***ruralistas***, ***cromistas***, disaffected Catholics and disloyal generals each tried to take political control, often through violent means, in eight Mexican states. A bomb exploded on the presidential train carrying Portes Gil in an assassination attempt. Nevertheless, this rebellion was crushed fairly quickly.

In his short administration of fourteen months, Portes Gil attempted to enact significant land reform. He was able to provide as much land to peasants as Calles had distributed in 1948. He also oversaw the treaty that finally put an end to the bloody Cristero Revolt. Finally, he was able to defuse a crisis at the National University of Mexico that resulted in the university being granted autonomy. In foreign relations, Portes Gil broke off diplomatic relations with the Soviet Union.

Why were the elections of 1929 disputed?

Presidency of Pascual Ortiz Rubio (1930–32)

The Partido Nacional Revolucionario, 1929

Although the law had been changed that allowed him to run for his own second term, Calles declined to do so, in favor of engineering politically useful substitutions. He seemed quite content to be the puppet-master. It was also under his guidance that a new political party, the Partido Nacional Revolucionario (PNR) or National Revolutionary Party, was formed.

Calles hoped to bring some order to Mexican politics by creating a national political party that would be responsible for choosing the country's leaders and creating national policies. Up until that time, political parties were usually short-lived and only functioned when there were elections. Calles created something much more permanent. The PNR was a loose amalgamation of important political interests all joined under one roof. It was this organization that ensured continuity in Mexican politics. However, the PNR and its successors turned Mexico into what was basically a one-party state until the elections of 2000, or, to put it another way, ruled Mexico for 71 years without much opposition.

The 1929 elections

In the special elections of 1929 that were meant to replace the interim president, the two main contenders were Pascual Ortiz Rubio, backed by the PNR, and the former Secretary of Education, José Vasconcelos, chosen by the Anti-Re-electionist Party. Vasconcelos wished to end the corruption that had infected the political process and reinvigorate the ideals of the Revolution. When he was chosen by his party, he said 'Mexico has less liberty than an imperial colony. National autonomy has been limited by perpetual tyranny.' These were clear insults towards Calles and the PNR. Vasconcelos was also in favor of women's suffrage – Mexican women would not get to vote until 1958. *The National Revolutionary* newspaper was the mouthpiece of the PNR, giving a voice to their views against Vasconcelos: 'One doesn't govern a country with literary instruction … the PNR did not distribute the Iliad … only 35 million hectares.' It attacked Vasconcelos and 'the intellectuals, homosexuals, bourgeoisie, students, feminists and fanatics' who favored him. The campaign was violent. In September 1929, shots were fired at Vasconcelos, though he was not hit.

Ortiz Rubio was elected President of Mexico with a reported 93.6 per cent of the vote. These figures were certainly manipulated by the PNR, which also

carried out a campaign of violence and intimidation to blunt Vasconcelos' appeal to many middle-class Mexicans. Vasconcelos quickly left Mexico, fearing assassination. He said that 'I have not been defeated – I have been cheated. Dozens of my leaders have been killed by the Portes Gil Government and hundreds of my followers are yet in jail. Our crime is to have won 95 per cent of the vote.'

The aftermath of the elections

Very quickly, the Mexican government crushed a revolt by those who refused to accept the official election results. They executed generals and rounded up Vasconcelos officials.

On 5 February 1930, Ortiz Rubio took the oath of office before 50,000 spectators. Two hours later, his motorcade was attacked. He was shot in his jaw but recovered. The would-be assassin, Miguel Flores, was a Vasconcelos supporter. In retaliation, the military tortured and murdered dozens of Ortiz Rubio's opponents. This was not an auspicious beginning to Ortiz Rubio's presidency. He was supposed to finish out the *sexenio* but would only last two and a half years.

Challenges facing Ortiz Rubio

Domestically, the new President had difficulties blunting Calles' influence. Whenever he tried to chart an independent course, Calles held him back, particularly when Ortiz Rubio sacked a Calles crony, Rivera Palacio, while choosing who was going to be in his Cabinet. Calles then engineered the virtual takeover of the Cabinet by forcing the President to install Calles' supporters. Ortiz Rubio could not turn to the Party for any sort of substantial support because the PNR was torn apart by various factions. The legislative elections in July 1930 provided ample evidence of how the PNR had become the controlling force in Mexican politics. Although there were countless examples of electoral fraud, the PNR's choices became the new legislators. Ortiz Rubio also had the misfortune of becoming President as the Great Depression took hold. Petroleum, mineral and agricultural exports plummeted as nations put up protective trade barriers, and it became difficult to get credit. Exports fell by half from 1929 to 1932 and Mexico's Gross Domestic Product (GDP) dropped by 12.5 per cent in 1930.

Mexico's three international problems

First, foreign bankers wanted to be sure the country could repay its external debts before lending it any further money. The Mexican government hoped to take out a new loan of US$450 million to be used for public works, but the bankers would not budge. In July 1930, Mexico issued bonds in exchange for the original loans and an agreement was signed for these to be paid off over 45 years. The bankers agreed to wipe off US$211 million (the accumulated interest since 1910) of Mexico's debt. Mexico then asked for new loans, but these were refused because bankers were not confident in its ability to pay them back.

Secondly, the seemingly endless conflict with the USA over the oil industry continued (see chapter 4). US oil companies were beginning to shift their attention to Venezuela, where a more compliant government did not threaten growing oil production. Consequently, oil production and exports fell significantly during the Great Depression, from 200 million barrels in 1921 to 33 million in 1932.

Lastly, the Great Depression led to the repatriation of over 300,000 Mexican workers from the United States. Mexico had also forced the departure of roughly 40,000 US workers from Mexico.

One bright spot, internationally, was that Mexico finally joined the League of Nations in September 1931. For years, Mexico had been sidelined from full international participation because of the continued unrest and civil strife brought on by the Revolution and the lack of resolution regarding ownership rights of petroleum. Mexico was reluctant to become a member of an organization that had not stopped US intervention in the Caribbean and Central America. However, as the threat of a US invasion receded, Mexico looked further afield. Mexico needed to find new markets now that its most important trading partner, the USA, was importing much less as a consequence of the Depression.

SOURCE Q

Excerpt from *Triumphs and Tragedy: A History of the Mexican People* by Ramón Eduardo Ruíz, Norton and Co, New York, 1992, page 383.

Prodded by the Great Depression, racial bigotry had its day in the sun, this time against the Chinese. Brought in during the late nineteenth century, mostly to lay railroad track and work in the mines, the Chinese had tarried only briefly in those jobs. When the Maderistas took office, most of them were in business and commerce for themselves, the owners of laundries and stores selling groceries, vegetables, clothing, shoes, and diverse other items. Usually they were in competition with Mexicans. They took Mexican women for their wives and raised boys and girls with the faces of two races. This led Sonora in 1923 to bar marriages between Mexicans and Chinese and, two years later, to confine the Chinese to their own barrios. Those who broke the law were fined, sent to jail, or deported. Ghettos for Chinese, also decreed by law, could be found virtually the length and breadth of the border … even Chiapas and Oaxaca [much further south], heavily Indian states, followed that pattern. For all that, this failed to satisfy the bigots who, in the early 1930s, ran the Chinese out of Sonora and Sinaloa, headquarters of the agitators … One of their principal leaders was Rodolfo Elías Calles, the son of the Jefe Máximo *and governor of Sonora. Francisco (Pancho) Villa had earlier shot and killed Chinese … In towns such as Cananea, mobs fell upon the hapless Chinese, beating them and looting their stores. Altogether, eleven thousand Chinese had to flee northern Mexico.*

? What were possible reasons for attacks against the Chinese, according to Source Q?

The end of Ortiz Rubio

Politically, Ortiz Rubio's days were numbered, since Calles would not allow any sort of disobedience. Ortiz Rubio had little choice but to resign for 'health reasons' in September 1932. Like many other ousted Mexican leaders, he left for the USA.

Next in line for presidency was someone Calles knew would be more malleable. Abelardo Rodríguez was yet another Sonoran and military officer. Few were fooled by Calles' manoeuvers. As an editorial in the *Washington Post* put it, 'That the forceful guiding hand of General Plutarco Elías Calles is behind the latest change in Mexico, the resignation of President Pascual Ortiz Rubio, is not doubted by those who are familiar with Mexican politics.'

Presidency of General Abelardo Rodríguez (1932–34)

In what ways was Rodríguez more malleable than the previous two presidents?

Rodríguez was a self-made millionaire whose fortune was garnered in casinos and bars in Sonora. He had served as minister in several administrations and was a pliant tool in the hands of Calles. Unsurprisingly, Congress unanimously chose him to complete the final two years of Obregón's unserved *sexenio*. He clearly knew his role: after being chosen, he said 'I shall try to bring to a final stage of development all the possibilities of the Revolution with the aid of the National Revolutionary Party'. He was put in place to administer Calles' programs.

The Great Depression

During Rodríguez's presidency, Mexico slowly crawled from the depths of the Great Depression. This was due to two important factors. First, the value of Mexico's exports increased so that by 1934 they were equal to when the Depression first struck in 1929. Secondly, significant changes were made in the country's monetary policies. The peso was allowed to float instead of being artificially pegged to the US dollar. Both these factors increased Mexico's monetary reserves.

Relations with the USA

US–Mexican relations were generally smooth. Franklin D. Roosevelt chose his friend Josephus Daniels to be his ambassador to Mexico. Daniels was the public face of Roosevelt's foreign policy, the **Good Neighbor Policy**, towards Latin America. Daniels showed his appreciation of and admiration for Mexico's history and culture, and this made him a welcome guest. He also stressed his approval of universal public education in Mexico and his support for the elected government in Spain at the outset of the Spanish Civil War in 1936. Both of these positions were dear to the Mexicans.

KEY TERM

Good Neighbor Policy
When Franklin D. Roosevelt became president in 1933, he announced that the USA would become a good neighbor to Latin American countries. This marked a departure from US military interventions.

Domestically, 1932–34 saw the expansion of national industries, especially in the production of electricity and cement. Roads were built and local demand was met by locally produced goods rather than imports.

Domestic policies

The government also hoped to offset the power of foreign-owned petroleum companies by creating the *Petróleos de México* (PEMEX). It was funded wholly by the government but remained of little threat to the foreign concerns because it had few resources. Thinking ahead, the government also expanded Mexico's territorial waters to 50 km, hoping that in the future petroleum would be found in the Gulf of Mexico.

Rodríguez continued to make efforts to professionalize the armed forces so that they would not be a future threat to the state. Allegiance to the nation, fitness and obedience to authority were stressed. The soldiers, it was hoped, were not in the army to enrich themselves but to serve.

In other employment, a minimum wage was set for the first time, but conditions for industrial workers did not dramatically improve. Strikes became more frequent; in 1934 there were 202. Rodríguez attacked many of the independent unions behind them. Strong-arm tactics were used to attack Communists and Jews alike. A repressive trend seemed to be developing in Mexico as the government kept searching for conspiracies from alleged enemies.

The PNR created the Six-Year Plan to provide guidelines for the country's social, educational and economic progress. This was passed at the Party convention in December 1933 and took effect the following year. Land reform, public health care and education were all discussed. There was a call for 15 per cent of the federal budget to be earmarked for education – an impressive demand (at least on paper).

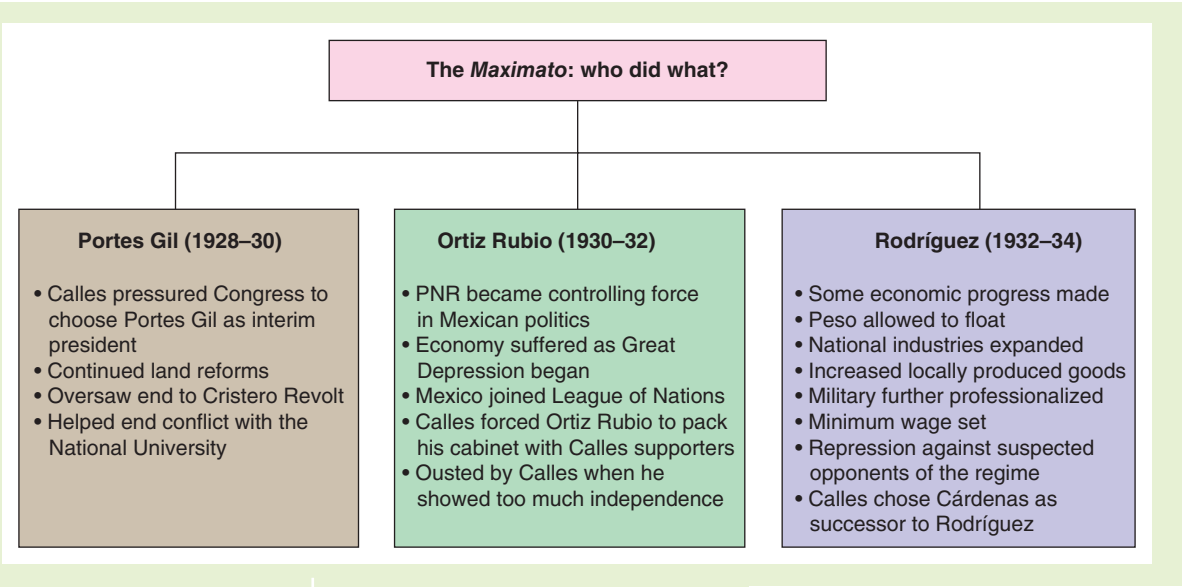
The Church and education

The Catholic Church was suspected of plotting against the government and came under increased scrutiny and persecution. The Church was very much against the introduction of 'Socialist' education, as the Ministry of Education termed it, for all. It also vigorously deplored the proposed addition of sex education to the curriculum. Both measures struck at the core of the Church's beliefs. The government, for its part, hoped both to expand its influence in schools and further cripple the Church. Congress had even amended the Constitution with an article that made its intentions plain. The article read 'The education from the state will be socialist – and will further exclude all religious doctrine to combat fanaticism and prejudices … the school will organize its teaching and activities to help create in the young a rational and exact concept of the universe and social life. Only the State – Federal, State, Municipal – can provide primary, secondary, and university education.'

An education to escape 'the slavery of capitalism'

The government also sponsored huge marches to promote its plans, such as the one that took place in Mexico City on 28 October 1934. Tens of thousands

marched in front of Rodríguez and his full Cabinet. The president-elect, Lázaro Cárdenas, saluted the marchers from the balcony of the PNR headquarters. There certainly was no separation from the party and government policy since they were one and the same. According to the *New York Times*, some of the banners paraded included slogans such as 'Socialistic education means freedom from Catholic oppression'; 'We seek the return of all priests to their home which is the Vatican'; and 'We demand socialistic education to escape from the slavery of capitalism'. It was all a good show meant to cement support for the government, but it did not mean that the country had embarked in any particularly new direction. That would have to come from the next president.



SUMMARY DIAGRAM

Similarities and differences of the three presidents during the *Maximato*

Chapter summary

The Construction of the Post-Revolutionary State, 1920–34

From 1920 to 1934, successive governments sought to bring order and stability to Mexico. This was no easy task in the aftermath of a bloody revolution that cost the lives of 1 million Mexicans. The need to placate various groups, among them industrial workers, peasants, the middle class and *hacendados*, did not lead to dramatic social and economic changes. President Obregón ushered in the decade, and his four-year term was followed by that of Calles. Calles served as President from 1924 to 1928 and continued to rule the country from behind the scenes until 1934. Several serious outbreaks of violence and rebellion occurred, including the ferocious Cristero Revolt, but the foundations for a calmer and more prosperous Mexico had been laid.

Examination advice

How to answer 'analyse' questions

When answering questions with the command term 'analyse', you should try to identify the key elements and their relative importance.

Example

Analyse the reasons for the deterioration of Church–State relations from 1920 to 1934.

1 To answer this question successfully, you need to discuss the ways in which the relationship between the Catholic Church and the Mexican government worsened from 1920 to 1934. Make sure you discuss which the most important reasons for the deterioration were and why.

2 Take several minutes before you begin your essay, and write down as many reasons for the worsening relationship as you can. Your list might include some of the following:

- *1917 Constitution: Restrict the Church.*
  - *Church feels threatened by secular education and land reform.*
  - *Constitution articles not followed because of other more serious economic problems confronting Mexico.*
  - *Plutarco Calles never liked the Church. As governor of Sonora, he carries out anti-Church measures.*
  - *Calles wants to centralize government. Church seen as a threat.*
- *1925: Catholics form National League of Religious Defense to combat growing anticlericalism.*
  - *Calles pushes new penal code that confronts the Church. Adopted in 1926. No foreign priests allowed, education controlled exclusively by the State. No religious ceremonies outside the Church. No religious clothing outside the Church.*
  - *Cristero Revolt breaks out, especially in western and central Mexico. Lasts from 1926–29. 50,000 armed men on Cristero side. 90,000 lives lost, majority on government side.*
  - *Rebellion fails because of lack of organization, reluctance of Church hierarchy to break totally with the State, lack of common goals.*
  - *US embassy involved in arranging end to the rebellion.*

3 In your introduction, provide your thesis and the major points you plan to make in the body of your essay. An example of a good introduction follows.

The Catholic Church and Mexican government's relations slowly deteriorated once Álvaro Obregón became President in 1920, and would worsen with his successor, Plutarco Calles, who was elected as Mexico's leader in 1924. By 1926, a full-scale uprising, known as the Cristero Revolt, had broken out and would eventually be crushed by 1929. Core issues involved which institution – the State or the Church – would control education and the loyalty of the people, how much freedom of action the Church would possess and how closely the State would try to enact the various articles of the 1917 Constitution.

4 For each of the key points you raise in your introduction, you should be able to write one or two long paragraphs. Here, you should provide your supporting evidence. Be sure to make a judgement about each item's importance. An example of a good body paragraph follows.

President Calles pushed through his law reforming the Penal Code in 1926. He had no great love for religious activity, which he viewed as backwards, superstitious and standing in the way of making Mexico a modern nation. As the governor of Sonora, he restricted the power of the Church by seizing some of its lands and expelling a number of priests from the state. This new law was a direct challenge to the power of the Catholic Church nationally because its various provisions called for reining in many of the Church's traditional activities. Among the more important aspects of the law were that the State would control all education, no foreign priests would be allowed in Mexico, no religious clothing could be worn outside the church and all religious ceremonies could only take place in churches and had to be supervised by the government. In response, the Church refused to perform religious ceremonies or services. More dangerous was the beginning of a Catholic rebellion in several poor rural states that began in 1926.

5 In the final paragraph, you should tie your essay together and state your conclusions. Do not raise any new points here.
6 Now try writing a complete answer to the question following the advice above.

Examination practice

Below are two exam-style questions for you to practice on the topic raised in this chapter.

1 Evaluate the success of President Calles' social and political programs during his presidency and the *Maximato*.
(For guidance on how to answer 'evaluate' questions, see page 35.)

2 Assess the difficulties in constructing stable governments after 1920.
(For guidance on how to answer 'assess' questions, see page 214.)

CHAPTER 4

Lázaro Cárdenas and the renewal of the Revolution, 1936–40

During Lázaro Cárdenas' *sexenio*, great changes occurred in Mexico. Millions of acres of land were distributed to peasants, thousands of schools were built, the foreign-owned railroads and oil companies were nationalized and a strong sense of Mexican identity developed. Cárdenas and his achievements have attained mythical proportions for many Mexicans. Yet the longevity of his accomplishments and whether he renewed the goals of the Revolution is debatable. In this chapter, you will examine the extent to which the lofty goals of the Revolution were realized.

You need to consider the following questions throughout this chapter:

- How did Cárdenas' background help him to become President in 1934?
- How did Cárdenas outfox Calles and reform politics?
- Why did Cárdenas institute an enormous land reform program?
- What characterized Cárdenas' Socialist education programs?
- What led to the nationalization of the petroleum industry?
- Why did some support and others oppose Cárdenas?
- What changes did Cárdenas make to the political structure of Mexico?
- Why do some historians see the Cárdenas period as the end of the Mexican Revolution?

1 How Cárdenas became President

Key question: How did Cárdenas' background help him to become President in 1934?

Cárdenas was President of Mexico for six years, during which time he tried to fulfil many of the grand promises of the 1917 Constitution. While the extent to which he renewed the goals of the Revolution continues to be debated by historians, he was much admired and loved by many Mexicans.

Cárdenas as soldier and politician

Who was Lázaro Cárdenas?

Lázaro Cárdenas, of Indian stock, was born in the village of Jiquilpán in the state of Michoacán in 1895. His father died when Cárdenas was eleven, and it fell to Cárdenas to support the family. As a consequence, he had to drop out

of school. He joined the Revolution while still a teenager and rapidly rose through the ranks. He was a colonel at twenty and a major general at 29. He was cunning enough to align himself with Plutarco Calles and became appointed first as the military commander of the Huasteca region in 1925 and then as governor of Michoacán in 1928.

Huasteca was the chief oil-producing region in Mexico and it was here, according to historian Michael Gonzales, writing in 2002, that Cárdenas saw the poor living conditions faced by the oil workers and their families first hand. A measure of his honesty was when he turned down a huge bribe offered by the company managers. They had hoped he would ignore their mistreatment of workers and their failure to pay the Mexican government the correct amount of tax revenues owed.

Cárdenas' governorship

Later, in the brief period in which he served as governor, Cárdenas experimented with several of the political ideas he would expand on when he became President. These included land distribution, non-religious education and the creation of political groups that owed allegiance to him. He also distributed more than 300,000 acres to needy peasants, promoted education and built up a grass-roots organization, the Michoacán Revolutionary Confederation of Labor, to help him carry out his reformist program by opposing the *Cristeros* and *hacendados*. He also made it a habit to visit many villages to speak directly to peasants. When he became President, he would continue to promote all of these programs and actions, but on a national rather than local scale.

Cárdenas remained in the *Jefe Máximo's* camp and was duly rewarded with the presidency of the *Partido Nacional Revolucionario* (PNR). Although he only served for under a year, he made himself known to many party insiders, who recognized him as a loyalist who had great personal appeal. Cárdenas later served as the Minister of War in the Rodríguez regime.

Calles' choice

As Rodríguez's term was ending, Calles was under pressure from the left wing in the PNR to choose someone more progressive as president. Calles was certain that Cárdenas, although philosophically more in tune with peasants and workers, would be as impressionable as the three other puppet presidents during the *Maximato*.

The PNR duly chose Cárdenas for the 1934 elections. Cárdenas wanted to be president for all Mexicans, instead of those who had used the Revolution to enrich themselves.

Cárdenas' campaign and inauguration

Before the elections were held, and unlike any of his predecessors, Cárdenas traveled throughout the country. He journeyed more than 17,000 miles, by train, plane, boat, car, horse and mule. That the president-to-be would seek out his people was astonishing to many. He would often appear in a village with a translator (many Mexicans still did not speak Spanish in 1934) and sometimes musicians. He spoke of his grand plans for the country and his need to hear the people's problems in the countryside first hand. Musicians would play local songs and ones that praised Cárdenas. Cárdenas was a **populist** and understood how to relate to the common people. After he won the elections with 98.2 per cent of the vote, he continued to break traditions. He chose the National Stadium in Mexico City, which could hold 50,000, for his inauguration, instead of the much smaller venues of the past. Instead of wearing a tuxedo, he was inaugurated wearing a simple suit.

KEY TERM

Populist A politician who claims to support the people against the elite.

SOURCE A

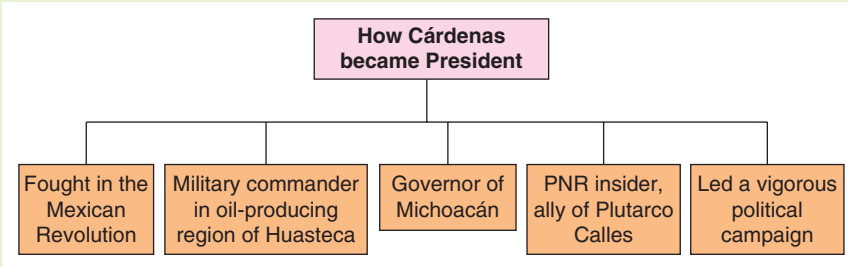
Excerpts from Cárdenas' inaugural speech, 1 December 1934, from *The New York Times*, 2 December 1934.

Special attention will be given to improving the condition of the masses, especially the workers and Indians, who constitute the great bulk of our population. Nothing could better justify the continuance of Mexico's revolutionary struggle than the existence of immense regions where Mexicans live outside the pale of material and spiritual civilization, buried in ignorance and the most complete poverty, when Mexico's material resources are amply sufficient to insure a more just social order …

Children must understand human activities from a scientific, liberal viewpoint. My government will encourage a socialistic education with the purpose that all children shall understand the aspirations of the proletariat …

I have been elected President and I intend to be President.

From Source A, what did Cárdenas think were Mexico's most pressing problems? ?



SUMMARY DIAGRAM

How Cárdenas became President

2 Aims and methods: The Cárdenas–Calles confrontation

Key question: How did Cárdenas outfox Calles and reform politics?

Cárdenas continued to show how he was in touch with the common people when he chose not to move into the presidential Chapultepec Palace, but opted for the much more modest Los Pinos residence. Like Franklin D. Roosevelt in the USA, Cárdenas used the radio extensively to promote his vision for the country and to let his citizens know he cared for them. But before he could embark on his plans for Mexico, he had to deal with Plutarco Calles and his supporters, the *Callistas*.

How did the *Callistas* influence events?

The power of the *Callistas*

The *Callistas* held most of the positions in Cárdenas' Cabinet: the vast majority of state governorships, important military positions and much of the Mexican Congress. These were the new President's chief foes. The *Callistas* became particularly perturbed when Cárdenas, early on in his term, closed down many of the gambling and prostitution houses they owned. They and Calles were further enraged when Cárdenas essentially encouraged workers to carry out strikes for better wages and working conditions. This went against the close relationship the *Callistas* had with the business sector and marked a different path in the state–worker relationship.

Crisis with the *Callistas*

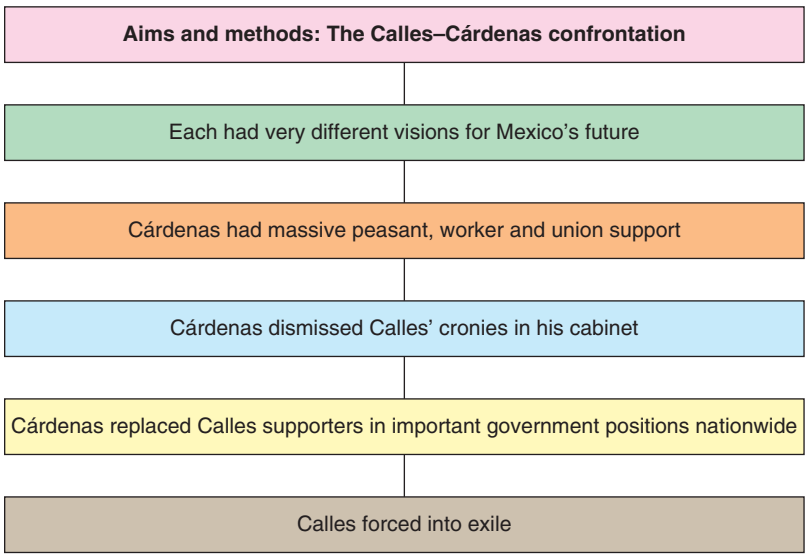
In June 1935, barely six months into his presidency, the *Callistas* created a crisis that forced the President's hand. Tomás Garrido Canabal, the Minister of Agriculture, set loose his ***camisas rojas*** on Catholics in Coyoacán. In one confrontation, twelve Catholics were killed. This was soon followed by a declaration by *Callistas* that Cárdenas supported radicalism and was driving the country towards a civil war. Many in Congress agreed. However, Cárdenas' opponents did not count on the massive support of the unions and peasant organizations for their new President. They were not willing for someone who favored their right to organize and strike to be deposed. Cárdenas had cleverly outwitted the opposition and was now in a position to move against the *Callistas*. First, he dismissed his whole Cabinet, and followed this up with replacing most governors, some members of Congress and several *Callista* generals. The myth of *el jefe máximo*'s invincibility (see page 99) was shattered. Huge pro-Cárdenas demonstrations took place across Mexico. Calles declared that he was retiring from politics and left for the USA. Garrido Canabal, no longer the Minister of Agriculture, continued to attack Catholics to stir up trouble and was soon expelled from Mexico.

KEY TERM

Camisas rojas 'Red shirts' – a Socialist paramilitary organization formed under the direction of Garrido Canabal.

Final confrontation

The final confrontation with Calles began in December 1935 when the former president returned from the USA and led the opposition to Cárdenas. The President responded by sacking five senators and those public officials and generals who publicly supported Calles. Calles accused Cárdenas of taking Mexico down the path to Communism and undermining Mexico's economy by favoring industrial unrest. Cárdenas quickly ordered the arrest and deportation of Calles. (Calles was allegedly in bed reading Hitler's *Mein Kampf* when he was arrested.) Calles and four of his senior supporters, including the once powerful union boss Luis Morones, soon found themselves in the USA. A government spokesman said that 'the departure of General Plutarco Calles … is the consequence of threats to the public welfare'. Calles responded from exile that 'The government wants to change the constitutional status of the country to implant Communism, which the people on the whole do not want.'



SUMMARY DIAGRAM

Aims and methods: The Calles–Cárdenas confrontation

3 Aims and methods: Land reform

Key question: *Why did Cárdenas institute an enormous land-reform program?*

Now that his main rivals were safely out of the way, Cárdenas finally felt he was in a position to carry out the reforms he had promised the long-suffering Mexican people. Land reform was high on his agenda. During his *sexenio*, he would distribute twice as much land as all his predecessors combined, a grand total of 45 million acres.

What did Cárdenas do for land reform?

How Cárdenas' policies differed from earlier land reform

Cárdenas' agrarian reform policies differed in several important ways from past reforms:

- Much of the land distributed was irrigated, unlike the dry, unfertile land that had been distributed from 1920 to 1934.
- He chose to base land distribution on the *ejido*. However, particularly in the north, there were individual grants. In some areas, huge *ejidos* that were similar to collectives were created.
- Many large *haciendas* were broken up.
- There was support in terms of loans and training. The Banco de Crédito Ejidal was formed for this purpose.

The historian Ben Fallaw in 2002 put Cárdenas' efforts into a broader perspective: 'There was more than land at stake … Cárdenas always saw agrarian reform as inseparable from a larger social, cultural, and even moral transformation. To the nationalist *Cardenistas*, the *hacienda*, along with the church and the *cantina*, represented Old Mexico, a backward mind-set mired in superstition, ignorance and sloth. The collective *ejido*, along with the school, would instil sobriety, patriotism, industry, and secularism.'

Not only did land come from the large Mexican-owned *haciendas*, but also from foreign-owned property that Cárdenas seized, especially in northern Mexico. The historian John Dwyer details this in the following source:

SOURCE B

Excerpt from *The Agrarian Dispute: The Expropriation of American-Owned Rural Land in Postrevolutionary Mexico* by John Dwyer, Durham, Duke University Press, page 1. Dwyer is a professor of History at Duquesne University, Pittsburgh, PA.

'Land and Liberty' and 'Mexico for the Mexicans' were among the most popular slogans of the Mexican Revolution between 1910 and 1920. These rallying cries made agrarian reform and economic nationalism prominent features of twentieth-century Mexican politics. However, it was only through the expropriation of

? According to Source B, why might Cárdenas have chosen US properties in particular to nationalize?

American-owned rural properties in postrevolutionary Mexico that both of these important issues coalesced. Between January 1927 and October 1940, 311 individual and corporate American property owners lost approximately 6.2 million acres to Mexico's land redistribution program. When President Lázaro Cárdenas's administration expropriated most of this property in the mid-to-late 1930s, it sparked a serious bilateral conflict that I have termed 'the agrarian dispute'. This crisis severely strained diplomatic relations, due to the fact that hundreds of American-owned properties below the border were seized without compensation.

Cárdenas used the 1934 Nationalization Law to justify the actions he took. He would also seize railroads and oil industries (see pages 121–7).

Land reform in action

La Laguna

The two largest projects were in La Laguna in the north and in the *henequén*-producing areas of the Yucatán. Regarding the former, the President himself helped to move along the process as the Mexican historian Fernando Benítez explained in 1978:

'On November 6, 1936, Cárdenas arrived with a group of engineers to begin to distribute lands … Cárdenas distributed the lands of La Laguna in one month, and all of the important and revolutionary measures there were taken during his administration. For the first time, the ***campesinos*** were awarded fertile lands … and it was now demonstrated beyond any doubt that a well-organized collective [*ejido*] could be as efficient as an *hacienda*, with the advantage that it favored hundreds of *campesinos* instead of a single land-owning family.'

KEY TERM

Campesinos Mexican peasant farmers.

In La Laguna, Cárdenas did not want to create thousands of small plots of land because he feared a drop in production. Here, a large collective *ejido* was formed. *Campesinos* would share farm machinery, seeds, insecticides and the profits. Unlike some of the previous land distribution schemes, there would also be technical assistance and loans from the government.

By 1940, the new *ejidos* produced just over half of all of the country's agricultural output and soaked up roughly the same percentage of capital investment. Almost 1.5 million landless peasants received land under the distribution program. While this was significant, 60 per cent of the rural poor still had no land of their own in 1940.

The Yucatán

It was in the Yucatán that land reform failed most dramatically. More than 900,000 acres of land were seized from the large plantations and collective *ejidos* put in their place beginning in 1937. The intimate relationship between the resident workers, or peons, and the landowners was not properly understood. The land to be distributed was not meant for the peons but landless peasants, and this led to fierce resistance by the landowners and the peons.

? Why might peons be unwilling to see the *haciendas* split up?

SOURCE C

Excerpt from *Cárdenas Compromised: The Failure of Reform in Postrevolutionary Yucatán* by Ben Fallaw, Duke University Press, Durham, 2001, page 10. Fallaw is a professor of Latin American History.

In 1934, some thirty thousand adult male peons and their families lived on hacienda *estates. Yucatán's large* henequén *plantations were a world unto themselves, boasting their own chapels, stores, and schools; residents rarely interacted with neighboring towns and villages. Landowners used paternalistic loans, gifts and medical care (and at times schools), along with the social bond of godparentage, to foster loyalty and dependency among peons.*

Land reform problems

Many in the countryside saw the land reform program as proof that Cárdenas wanted to alter Mexico's social past fundamentally. Many blamed the rise of new, large privately owned plantations after he left office in 1940 as a turning back of the clock. However, there were serious problems with the agrarian reform efforts from the beginning, including:

- The Banco de Crédito Ejidal could not keep up with the enormous demands for loans.
- *Hacendados* were allowed to keep 720 acres of land for themselves. They often arranged for relatives to take 720 acres each as well. Not surprisingly, they would choose to keep the best land for themselves.
- *Hacendados* often employed thugs to harass ***ejidatarios***, and over half of them did not have their lands distributed.
- By instituting a system of *ejidos*, peasants were tied directly to the central government rather than independent farmers.
- Poor rainfall between 1936 and 1938 meant reduced agricultural output.
- Land distribution did not always take into account local needs; for example, in the Yucatán the seizure of *henequén* plantations led to further misery for the peasants.

KEY TERM

Ejidatarios Peasants who held a share of the *ejido* or co-operative land.

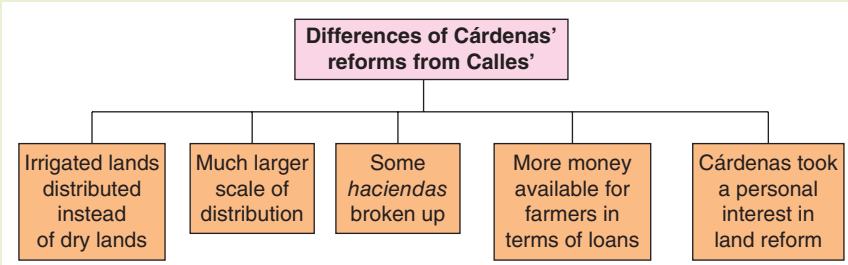
An economic downturn towards the end of the 1930s meant less money for bank loans to the new *ejidos*. This, together with greedy local bosses and the paternalistic attitudes of outsiders, all contributed to the collapse of the scheme. Popular support for Cárdenas here was not forthcoming.

Other large land expropriations took place in the Yaqui valley near the US border. This benefited the Yaqui Indians, who had had much more land stolen from them during the Díaz regime in Michoacán, the birthplace of the President, and in the state of Sinaloa. Unlike previous land distribution plans, the overall balance was positive and earned Cárdenas the enduring support of millions of the peasant class.

As Michael Gonzales wrote in his book *The Mexican Revolution: 1910–1940* (2002), 'More peasants had access to land and water resources, and the poverty index declined by 8 per cent from 1930 to 1940. In addition, through

collectivization and grassroots electioneering villages were brought into national politics and given a voice. Nevertheless, the persistence of rural poverty underscores the gravity of the problem Cárdenas faced. In 1940, 26.6 per cent of the total population was too poor to afford shoes, and in regions with large Indian populations … this number soared to 75 per cent. Outside of Mexico City, 80 per cent of the population had no indoor plumbing or sewage disposal …'

It is clear that Mexico's rural problems were grave and that even a concerted effort led by President Cárdenas was not enough to solve them. Poverty and lack of basic services would continue to plague the country in the following decades.



SUMMARY DIAGRAM

Aims and methods: Land reform

4 Aims and methods: Educational reforms

Key question: *What characterized Cárdenas' Socialist education programs?*

Cárdenas believed education was an important key in developing the country. He put a considerable amount of state funds into expanding access to education. He felt the philosophical underpinnings of this program should be 'Socialist' and include more than solely teaching people to read and write.

Socialist education

What were Cárdenas' goals for education?

A key element in Cárdenas' overall reform program for his country was in education. While the number of schools and students had grown since 1920, Cárdenas put even greater efforts into seeing that more Mexican children received basic and free education and that they would feel loyalty to the state

for the first time. As he said in 1934, 'We want fewer Indians and more Mexicans'. To do this, he amended the Constitution to change the overall direction of the educational process.

? Why might the Catholic Church find the amendment in Source D unsettling?

SOURCE D

Excerpt from the 1934 Amendment to Article 3 of the Mexican Constitution, 'Reforma al artículo tercero de la Constitución General de la República', D.O, 13 December 1934, quoted in 'Mexico and the 1981 United Nations Declaration on the Elimination of All Forms of Intolerance and of Discrimination Based on Religion or Belief' by J. L. Soberanes Fernandez. Accessed at http://lawreview.byu.edu/archives/2002/2/Sob12.pdf, pages 437–8.

The education that the State provides shall be socialist, and in addition to removing all religious doctrine, it will combat fanaticism and prejudices, for which the school shall organize its teachings and activities in a manner that builds in the youth a rational and exact concept of the universe and of social life …

[The State] will be able to grant authority to those who desire to provide education … according to, in every case, the following norms: … they must comply with the precepts in the first paragraph without any exceptions.

Goals of the program

Furthermore, the 1934 Six-Year Plan (see page 104) called for no less than 15 per cent of state expenditures to be put towards education. The number of elementary schools jumped from 8477 to 12,879 and there was a 54 per cent increase in primary school pupils during his presidency. Education was now more than just learning how to read and write. Hygiene, sex education, vaccination programs, anti-alcohol campaigns and new farming techniques were introduced to the curriculum.

Cárdenas knew the scope and depth of problems Mexico's rural poor faced. In 1934, he explained why a new way of thinking was needed, when he declared 'Children must understand human activities from a scientific, liberal viewpoint. My government will encourage a socialistic education with the purpose that all children shall understand the aspirations of the proletariat.'

The teachers

Teachers were not just the foot soldiers of this educational revolution, but, as historian Mary Kay Vaughan explained in 1997, 'federal teachers became explicit political actors. They were instructed to organize peasants and workers to press for the implementation of federal agrarians and labor laws that would effect a redistribution of wealth and power'. Teachers often worked in grim conditions and could go months without pay.

However, many were committed to the notion of a Mexican identity. This meant that political and economic matters were added to the earlier interpretation of ***indigenismo*** in which the Indian culture and languages was glorified. To further these aims, the Department for Indigenous Affairs was created in 1936 and a subdivision of the Secretariat of Public Education, which focused on indigenous education, was created in 1937. New textbooks stressed the role played by popular revolutionary heroes such as Emiliano Zapata. Teachers would connect these heroes to the Cárdenas government.

KEY TERM

Indigenismo Cultural movement strongly promoted by the post-revolutionary governments in Mexico, to raise the Indian image as a cultural icon representing the Mexican nation.

How *indigenismo* played into reforms

A powerful cultural movement that emerged after the Revolution, especially during the 1920s, was *indigenismo*. This movement also had a strong artistic component (see pages 193–94). The post-revolutionary governments in Mexico and many supporting intellectuals strongly promoted it. For centuries, Mexican Indians had been denigrated as a social group and exploited economically. After the Revolution, the Indian image became a cultural icon as the war-torn nation sought to recreate its image. In 1917, the governments set up the Office of Anthropology, to document and support Indian culture in Mexico, and ultimately seek assimilation into the *mestizo* culture.

The status of Mexican peasants

Chilean historian Florencia Mallon argued in 1995 that since the nineteenth century Mexican governments had had no choice but to negotiate with local levels in rural Mexico. After the Revolution, this meant applying the social reforms demanded by the masses of rural Mexicans – landless peasants, *mestizos* and Indians. The post-revolutionary governments tackled some of these social reforms by extolling the virtues of *indigenismo*, even across gender lines. US historian Stephanie J. Smith pointed out in 2009 that the beauty pageants held in Mexico City were for an Indian Beauty and, in Yucatán, for a Mayan Beauty.

Alan Knight, writing in 1986, included peasants and Indians among groups traditionally disdained by historians. US historian Mary Kay Vaughan in 1999 approached the Revolution from the view of cultural history. She contended that political history often leaves out groups like peasants and Indians from historical analysis. Further, marginalized groups were becoming the object of study of new historiography of the **subaltern** school. Vaughan and others are very critical of the *indigenismo* of the post-revolutionary period. By looking at an idealized Indian icon, preferably associated to the Aztecs and the Nahua-speaking tribes, other groups, such as the Yaqui in Sonora, were stigmatized as primitive, for not wanting to be part of this new Mexican self-view. Ultimately it was the *mestizo*-like Indian who kept artistic elements, but accepted European sense.

KEY TERM

Subaltern Term coined by the Italian intellectual Antonio Gramsci referring to subordinate social groups. In the 1980s it was developed by historians in India studying post colonialism. It has now become the study of marginalized and lower-class groups in general, like peasants and Indians in Mexico in the early twentieth century.

? What conclusions might a Mexican child make after reading the text in Source E?

SOURCE E

Excerpt from *Simiente* textbooks by Gabriel Lucio, 1935, quoted in *Zapata Lives!: Histories and Cultural Politics in Southern Mexico* by Lynn Stephen, University of California Press, Berkeley, 2002, pages 47–8.

If the peasants have achieved having their own lands to cultivate, they owe this to Emiliano Zapata. It was he who demanded with great courage that the revolution initiated in 1910 should defend the principle ´free land for everyone', land without overseers and landlords.

Emiliano Zapata was the son of peasants who lived in the state of Morelos.

Ever since he was a boy he could see the sad life that the workers in the countryside had on the large haciendas.

They earned really low wages, just a few centavos *per day, which were then taken away by the* hacienda *owners in the* tiendas de rayal *(company or* hacienda *stores), where basic goods were sold at very high prices.*

The ignorance that existed because of the lack of schools and religious fanaticism kept them (the rural workers) in conditions of infamous slavery.

When Emiliano Zapata was only eight years old, he saw the land that was all of his father´s property taken away by an hacienda *owner. Indignant at the injustice he had just witnessed, the boy exclaimed:*

– Father, when I am grown up, I am going to make them return our land! …

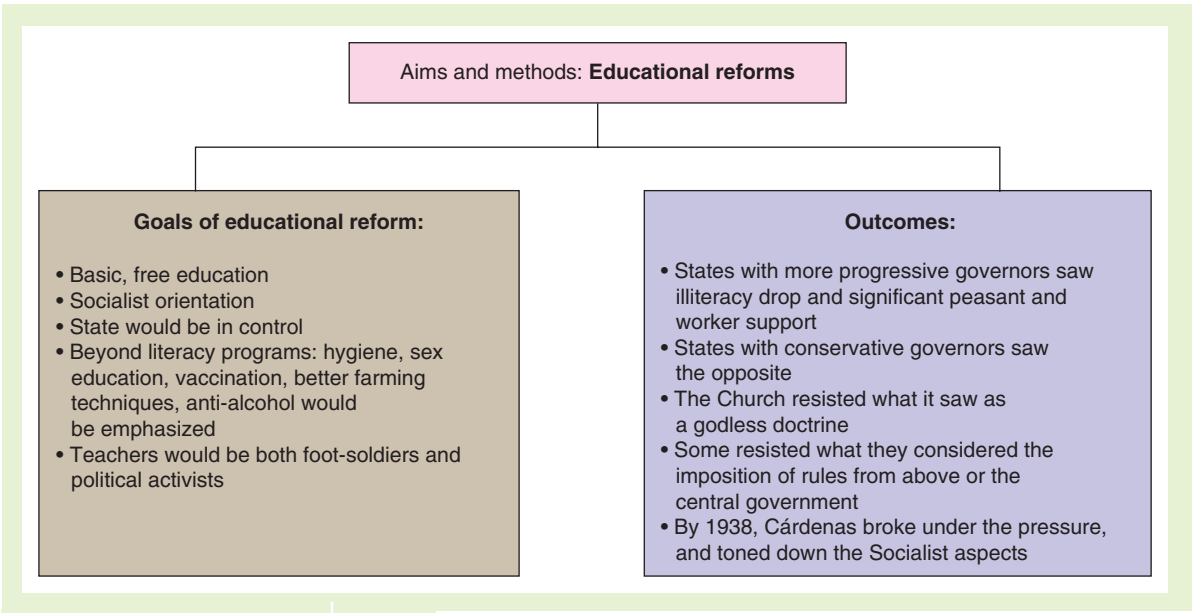
Because of this he began a revolution, which was followed by thousands of peasants who loved and respected him.

He came to dominate a vast region of the country and distributed lands to the peasants …

His desire that land be distributed to all of the people in the countryside is being realized. The peasants should honor the memory of this noble and generous Mexican, they should defend the rights they have won, working hard on their land so that they don´t lose their existence as free men.

Successes and failures

There was mixed success with these educational reforms. Success often depended on local conditions. In those states that had more progressive governors, illiteracy dropped and peasant and worker support was significant. The opposite was true in states run by conservatives. The Church resisted what it saw as a godless doctrine that promoted promiscuity and encouraged peasants to keep their children out of government schools. In such villages, over 200 teachers were murdered by conservatives and many others had their ears cut off, possibly because they would not listen to the words of God. As with a number of the land-reform programs, some resisted what they considered the imposition of rules from above or the central government. By 1938, Cárdenas essentially broke under the pressure and toned down the Socialist aspects of the education policies.



SUMMARY DIAGRAM

Aims and methods: Educational reforms

5 Aims and methods: The railways and the petroleum industries

Key question: *What led to the nationalization of the petroleum industry?*

While Mexico was in need of foreign investment to help modernize, several key industries were partially or totally owned by non-Mexican companies. Cárdenas' seizure of the railway and petroleum industries appealed to nationalist Mexicans, even though the results were not economically helpful.

KEY TERM

Expropriation Law of 1935 Law that gave the federal government the power to nationalize industries for the public good. Compensation was to be paid over a ten-year period.

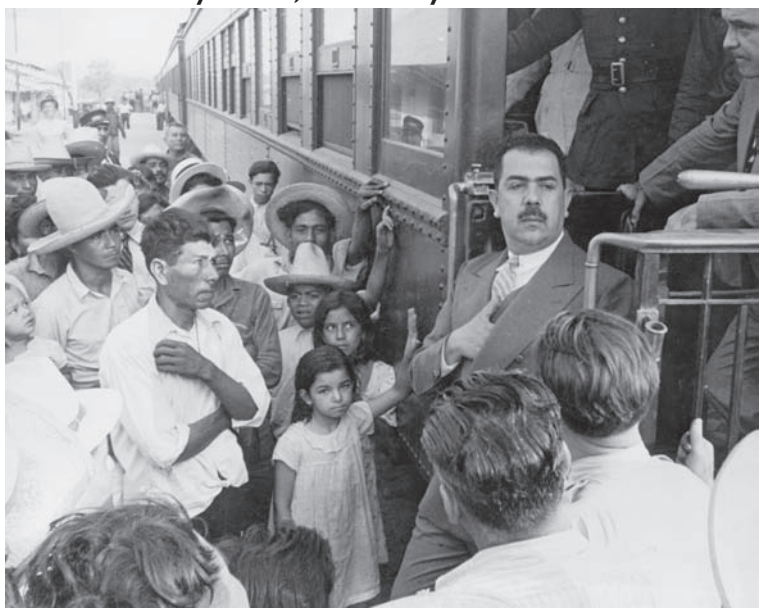
Cárdenas' role

What did Cárdenas do for these industries?

The railways

The part of the Mexican National Railways Company not already owned by the government was nationalized on 13 June 1937. Cárdenas applied the **Expropriation Law of 1935**. There was not much international outrage as the railways had become money-losing operations. Government efforts to turn the railways over to the workers resulted in further decline, and were an overall failure.

Cárdenas at a railway station, Mexico City



The oil industry

One of Mexico's key industries in the 1930s, this sector of the economy was largely controlled by foreign companies in the USA, Britain and the Netherlands. Oil had been a cause of disagreement between the foreigners and the Mexicans since the early days of the Revolution (see pages 144, 166–69).

SOURCE F

Oil production between 1934 and 1940 (thousands of barrels), from: *In the Shadow of the Mexican Revolution* by Héctor Aguilar Camín and Lorenzo Meyer, University of Texas, Austin, Texas, 1993, page 137.

Year	No. of barrels (in thousands)
1934	34,001
1935	40,241
1936	41,028
1937	46,907
1938	38,818
1939	43,307
1940	44,448

? What conclusions can you make from Source F about the amount of oil produced in Mexico during Cárdenas' term in office?

The historian Ramón Eduardo Ruíz estimated in 1992 that the $100 million invested in the industry from 1901 to 1938 turned a profit of $5 billion for the foreign companies. While foreigners were beginning to worry about the application of the 1935 Expropriation Law, Cárdenas tried to reassure them that they and the mining industry were safe from nationalization.

However, the failure of the oil companies to negotiate in good faith saw them lose all their investments in Mexico.

The oil workers and the unions

How did Cárdenas challenge these?

The oil workers were a disorganized group. They were spread across nineteen separate unions, and could not present a united front to pressure the oil companies to increase wages and benefits, which were seen as being too low and few. The Cárdenas government helped create the *Sindicato de Trabajadores Petroleros de la República Mexicana* (STPRM) or Republic of Mexico Union of Petroleum Workers, which gathered all the workers into one union. Soon, the STPRM joined with the *Confederación de Trabajadores de México* or Confederation of Mexican Workers (CTM), the largest trade union, and was now a force to be reckoned with. For the first time, they negotiated with the companies with one voice.

Union demands

The oil workers asked for a raise of 65 million pesos. The wealthy companies cried poverty and countered with an offer of 14 million pesos. The STPRM called for a strike in 1937, but this proved short-lived as the Mexican government realized that any prolonged interruption in oil production would harm the country's economy. A federal committee investigated whether or not the companies could afford more than their initial offer.

The Supreme Court's decision

The committee's report was a damning indictment of the overall role played by the foreign-owned companies, and stated that they had the capacity to pay 26 million pesos. The companies feared that they were losing control and that hidden figures would actually drive their costs to 41 million pesos. A labor court agreed with the committee's report, at which point the companies appealed to the Mexican Supreme Court. On 1 March 1938, the Supreme Court ordered the companies to pay 26 million pesos to the workers in wages and benefits. The companies ignored the high court's decision.

On the evening of 18 March 1938, Cárdenas gave the most important speech of his life. It was broadcast live on all Mexican radio stations.

SOURCE G

Excerpt from Cárdenas' speech to the nation, 18 March 1938. Accessed at www.oup.com/us/companion.websites/9780195375701/pdf/SPD7_Nationalization_Mex_Oil.pdf.

It has been repeated ad nauseam *that the oil industry has brought additional capital for the development and progress of the country. This assertion is an exaggeration. For many years throughout the major period of their existence, oil companies have enjoyed great privileges for development and expansion, including customs and tax exemptions and innumerable prerogatives; it is these factors of special privilege, together with the prodigious productivity of the oil deposits*

How did Cárdenas appeal to Mexican nationalism in Source G? ?

granted them by the Nation often against public will and law, that represent almost the total amount of this so-called capital.

Let us now examine the social contributions of the companies. In how many of the villages bordering on the oil fields is there a hospital, or school or social center, or a sanitary water supply, or an athletic field, or even an electric plant fed by the millions of cubic meters of natural gas allowed to go to waste?

What center of oil production, on the other hand, does not have its company police force for the protection of private, selfish, and often illegal interests? These organizations, whether authorized by the Government or not, are charged with innumerable outrages, abuses, and murders, always on behalf of the companies that employ them.

Who is not aware of the irritating discrimination governing construction of the company camps? Comfort for the foreign personnel; misery, drabness, and insalubrity for the Mexicans.

Refrigeration and protection against tropical insects for the former; indifference and neglect, medical service and supplies always grudgingly provided, for the latter; lower wages and harder, more exhausting labor for our people. Another inevitable consequence of the presence of the oil companies, strongly characterized by their anti-social tendencies, and even more harmful than all those already mentioned, has been their persistent and improper intervention in national affairs. …

As a logical consequence of this brief analysis, it was therefore necessary to adopt a definite and legal measure to end this permanent state of affairs in which the country sees its industrial progress held back by those who hold in their hands the power to erect obstacles as well as the motive power of all activity and who, instead of using it to high and worthy purposes, abuse their economic strength to the point of jeopardizing the very life of a Nation endeavoring to bring about the elevation of its people through its own laws, its own resources, and the free management of its own destinies.

Popular reaction

Enormous crowds reveled in the economic independence of Mexico and huge rallies took place across the country on 23 March. President Cárdenas stood on the balcony of the National Palace (where he worked) for four hours as 250,000 marchers paraded by. He declared that 'We are not going to refuse to pay for what is expropriated. We are acting on a high legal and moral plane in order to make our country great and respected … the public once again has shown its desire for economic independence … and we will tell them today or tomorrow what their contribution will be for the liberation of our petroleum wealth.'

Mexicans of all lifestyles celebrated and (Catholic) church bells pealed. The US Ambassador Daniels witnessed some of the scenes in Mexico City.

SOURCE H

Excerpt from Josephus Daniels, quoted in *The Mexico Reader* by Gilbert Joseph and Timothy Henderson, eds, Duke University, Durham, 2002, page 454. The editors are both professors of History.

Something the like of which has rarely been seen in any country occurred on the twelfth day of April. By the thousands, women crowded the Zócalo [Mexico City's central square] and other parks and in companies marched to the Palace of Fine Arts to give of their all to the call of their country's honor. It was a scene never to be forgotten. Led by Señora Amalia Solórzano de Cárdenas, the President's young and handsome wife, old and young, well-to-do and poor – mainly the latter – as at a religious festival gathered to make, what was to many, an unheard-of sacrifice. They took off wedding rings, bracelets, earrings, and put them, as it seemed to them, on a national altar. All day long, until the receptacles were full and running over, these Mexican woman gave and gave. When night came crowds still waited to deposit their offering, which comprised everything from gold and silver to animals and corn.

According to Source H, why did Ambassador Daniels find this event so moving? ?

The oil companies' reactions

The outraged oil companies turned to their respective governments for help in reversing the nationalization of 'their' oil and mounted an aggressive press campaign to describe the seizures as highway robbery. The *New York Times*, in an editorial entitled 'Mexico Defeating Itself', stated that though the losses for the petroleum companies were great, 'the adverse effects on Mexico itself are likely to be even more serious' and economic conditions would deteriorate.

Cárdenas was fortunate in that the US Ambassador, Josephus Daniels, was a friend of Mexico and not the usual sort of interfering diplomat. Daniels duly reported that Cárdenas was willing to pay for the nationalized properties.

The oil companies estimated the value of their oil properties at more than $450 million, and included not only the facilities but also the oil in the ground. Cárdenas offered to pay the companies a much smaller amount over ten years, in oil. Tough negotiations lay ahead.

In the meantime, the oil companies organized an international boycott of Mexican oil and spare parts needed to keep the oil pumps pumping. Mexico and Britain soon broke off diplomatic relations, even though Britain's investments were even greater than those of the USA.

SOURCE I

Excerpt from *Century of the Wind* by Uruguayan author Eduardo Galeano, Nation Books, New York, 2010, pages 112–13.

Standard Oil demands an immediate invasion of Mexico.

If a single soldier shows up at the border, Cárdenas warns, he will order the wells set on fire. President Roosevelt whistles and looks the other way, but the British Crown, adopting the fury of Shell, announces it will not buy one more drop of

In what ways is Source I supportive of Cárdenas' actions? ?

Mexican oil. France concurs. Other countries join the blockade. Mexico can't find anyone to sell it a spare part, and the ships disappear from its ports.

Still, Cárdenas won't get off the mule. He looks for customers in the prohibited areas – Red Russia, Nazi Germany, Fascist Italy – while the abandoned installations revive bit by bit. The Mexican workers mend, improvise, invent, getting by on pure enthusiasm, and so the magic of creation begins to make dignity possible.

The world's reaction

In the face of the boycott and diplomatic rupture, many leftists worldwide supported the independent Mexican spirit.

SOURCE J

Excerpt from Leon Trotsky's letter to the London newspaper *The Daily Herald* on 23 April 1938. Accessed at www.marxists.org/archive/trotsky/1938/04/mexico.htm.

In the vocabulary of all civilized nations there exists the word 'cynicism'. As a classic example of brazen cynicism, the British government's defense of the interests of a clique of capitalist exploiters should be introduced into all encyclopedias …

The juridical side of the question is clear to a child. With the aim of exploiting the natural wealth of Mexico, the British capitalists placed themselves under the protection and at the same time under the control of Mexican laws and the Mexican authorities. No one compelled Messrs. Capitalists to do this, either by military force or through diplomatic notes. They acted entirely voluntarily and consciously. Now Mr. Chamberlain [British Prime Minister] and Lord Halifax [Foreign Secretary] wish to force mankind into believing that the British capitalists have pledged themselves to recognize Mexican laws only within those limits where they find it necessary …

… the British government, accustomed to command hundreds of millions of colonial slaves and semislaves, is trying to fit those same methods also to Mexico. Having encountered courageous resistance, it instructs its lawyers hurriedly to invent arguments in which juridical logic is replaced by imperialist cynicism.

? According to Source J, what British government actions were cynical?

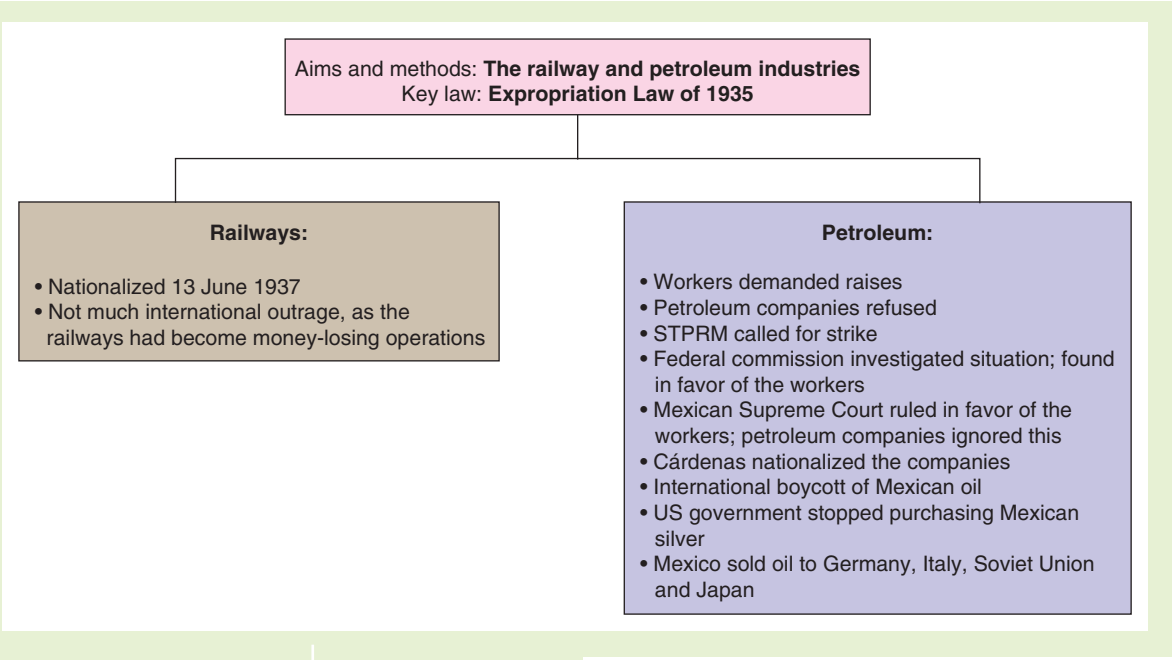
President Roosevelt and the crisis

US President Franklin Roosevelt was pressed by companies, such as the US Standard Oil of New Jersey, to take action, but a military response was not considered. Roosevelt knew that Europe was drifting towards an armed confrontation and that the USA would need allies nearby. He was also conscious that his highly praised Good Neighbor Policy (see page 103) could not sustain an armed reaction. Nonetheless, Roosevelt did cut off Mexican oil imports and Mexican silver. These actions did hurt the Mexican economy but, for the first time, Mexico had plenty of energy supplies to fuel the development of its internal economy. It could now demonstrate that it had the capabilities to run

the industry without foreign expertise. Mexico sold oil to the international **pariahs** of the day (Germany, Japan, Italy and the Soviet Union) to compensate for the lack of customers in Latin America, Europe and the USA. Negotiations with the foreign petroleum companies did not result in any final resolutions while Cárdenas was in power. However, one thing was certain: Mexico now controlled its energy resources.

KEY TERM

Pariahs Outcasts.



SUMMARY DIAGRAM

Aims and methods: The railway and petroleum industries

6 Achievements: Supporters and opposition to Cárdenas

Key question: Why did some support and others oppose Cárdenas?

Much of Cárdenas' support came from peasant farmers and organized labor groups. He also had a formidable party apparatus to support his reformist programs, both on the regional and on the national level. Opposing him were traditionalists such as *hacendados*, the Catholic Church and peasants who feared Socialist education and change.

Who were Cárdenas' supporters and opponents?

How Cárdenas caused division

Supporters

While not all peasants received land from the Mexican government, the President did make an impact upon many. For decades, he was revered and known as 'Tata' which roughly translates into 'Dad'.

SOURCE K

The peasant Ru Marti recollected his feelings for Cárdenas in 1976 or 1977. Accessed at www-01.sil.org/~tuggyd/tetel/F001i-Cardenas-nhg.htm Legado. Cárdenas visited Ru Marti's village of Tetelcingo in Morelos three times.

If one of them [a national leader] visited a state, a large escort would go with him to protect him. Why would they go with a large escort? Because they mistrusted the peoples in the villages. But Cárdenas did not mistrust the village people. He opened his arms to humble villages like Tetelcingo … Cárdenas had compassion for the poor. Cárdenas' love was not self-centered, but was sincere. Cárdenas opened his heart to all his fellow men who live in the country of Mexico. Because of his good heart, all the country folk considered him to be a treasure … In all the years that have passed over us, no other national ruler has ever been known to visit a village and find out what our needs were, as Cárdenas did … because of the level of trust that there was between Cárdenas and the country folk, he always went around in the villages without a gun and without an escort.

? According to Source K, how was Cárdenas different from other Mexican leaders?

Three years into his *sexenio*, the *New York Times* gave a glimpse of what was taking place in Mexico.

SOURCE L

Excerpt from 'Cárdenas Molds Mexico in His Own Pattern. Midway of His Term He Remains Dominant' from *The New York Times*, 9 January 1938.

Mexico became a tremendous workshop. Farm laborers marched to former landed estates and took them over. Dams sprang up to irrigate arid valleys. New school buildings rose under the ring of carpenters' hammers and stonemasons' trowels. New labor unions were organized and encouraged to demand higher wages. Strike followed strike; but wages mounted. Sweating road gangs crushed stone and carved hills and filled valleys; the paved highways crept across the countryside. Track gangs scooped ballast, laid ties and steel, and shot-line railroads reached across the coastal plains and into the highlands. Speed, speed and more speed was the motto. Work, build, organize, produce! There was little time to think; less time to plan carefully. El Presidente wished to remake Mexico during his six-year term, and six years is not a long time.

? How would you characterize the type of development in Mexico after reading Source L?

The popular US weekly *Life* magazine was similarly impressed by the President and outlined the challenges facing the country in a fifteen-page article.

SOURCE M

Excerpt from *Life* magazine, 23 January 1939, Vol. 6, No. 4, pages 30–1.

He is perhaps the only politician who never carries a gun. He is probably the first completely fearless, honest, and unselfish politician to appear in Mexico since Madero (assassinated in 1913). He is the first to command the genuine consent of the governed. And for that reason Mexican politics for the first time have the look of the politics of a first-class nation.

Here are the peoples of Mexico. Out of 19,000,000, one-third live in semi-savagery on the rockiest sierras. Another third are farmers. The last third are city people … Among the peasants, three out of five children die as infants. Soon afterwards the survivor may die of smallpox, leprosy, typhoid fever, tuberculosis, venereal disease or plain starvation … He is always thirsty for water. His life is shut in by the closed valley where he and his ancestors have always lived. His fabulous deliverance has come in the past four years. Some 50,000,000 acres, about 17% of all Mexico's arable land, has now been expropriated by the government and handed over to 1,500,000 peasants who support probably a total of 5,000,000 dependents.

According to Source M, what were the greatest problems Mexico faced? ?

Opponents

Among the strongest opponents to Cárdenas were the hierarchy of the Catholic Church, the dwindling *hacendados*, conservative farmers, local bosses and those who had profited earlier from the chaotic aftermath of the early years of the Revolution.

SOURCE N

Poem from 1939, quoted in 'Reassessing Cardenismo: The Mexican Right and the Failure of a Revolutionary Regime 1934–1940' by John Sherman, in *The Americas*, Vol. 54, No. 3, January 1998, page 357.

Serf of the Russians, patron of foreigners, you have left Mexicans only their hides because of your obstinacy – which is the mother of your understanding; for it is very difficult to get a fool to accept correction. Be content to return to Uruapán [Cárdenas' hometown], since fools are certainly killed …

In Source N, why did the poet call Cárdenas a 'Serf of the Russians'? ?

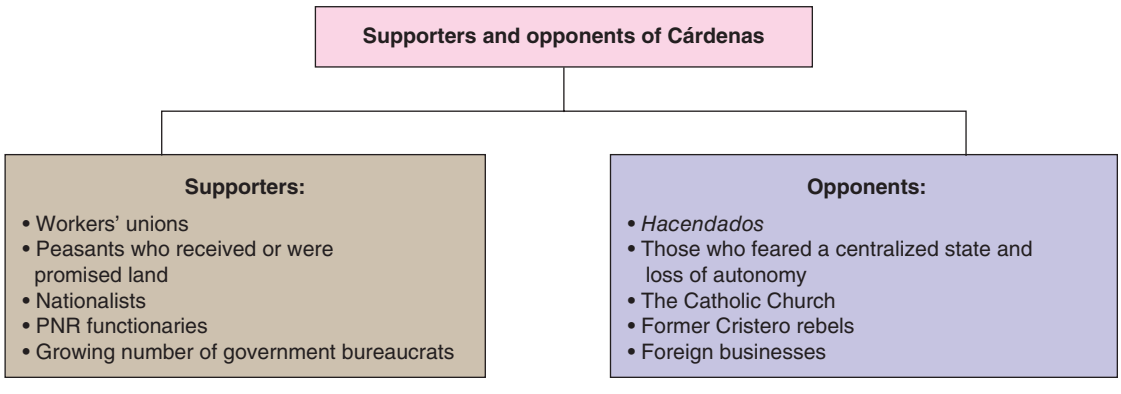
Other opponents used the press in order to highlight the dangers posed by the Cárdenas reforms. They feared that the very heart of the Mexican family was in danger because of educational and political change.

SOURCE O

Excerpt from an article by Diego Arenas Guzmán, in the newspaper *El Hombre Libre*, 1937, quoted in John Sherman, page 365.

The family can not coexist with a communist regime … Communism must destroy the home, because as long as it and family affections endure, it is not able to completely take over the bodies and souls of men. And the Communist State needs absolute slaves.

How does Source O show that Communism or Cardenismo was trying to destroy the Mexican family? ?



SUMMARY DIAGRAM

Supporters and opponents of Cárdenas

7 Achievements: Political reforms

Key question: What changes did Cárdenas make to the political structure of Mexico?

During his presidency, Cárdenas ensured that one political party, the Mexican Revolutionary Party, would hold virtually all power in the nation. All significant decisions, whether economic or political, were to be made through the various levels of the party, from its village offices all the way up to the national government in the Federal District of Mexico City. One challenger to this centralized system was Cárdenas' former ally Saturnino Cedillo, who led one of the last significant rebellions in Mexico.

What important events happened in 1938?

An uprising

The governing political party

After sidelining Calles and his supporters (see page 112), Cárdenas looked to his political party, the PNR, to help him carry out his plans. He carefully and cleverly incorporated different sectors in Mexican society to act as his base of support. He used the Nationalist Peasant Confederation and the CTM, led by the leftist Lombardo Toledano, as his shock troops. In 1938, Cárdenas remade the PNR into a new political party, the Partido Revolucionario Mexicano, or Mexican Revolutionary Party (PRM). The biggest changes here involved a reordering of the components in the party. It no longer represented regional interests. Instead, it was composed of four distinct groups: the agriculture,

labor, the military and the so-called 'popular' sector. Each was meant to carry out the overall reform programs of the government, but because they were kept separate, with their own set of interests, they could not collectively disobey the central authorities.

The Cedillo uprising

The National Sinarquista Union

There were several groups who were against the aims of the government. Landowners, both large and small, feared land seizures. Practicing Catholics continued to despair over what they saw as radical atheism. Even some *ejido* members began to oppose Cárdenas because they continued to be poor, because of the lack of credit and because the small plots they had been given could not support them. These various groups coalesced into the **quasi-fascist** organization known as the National Sinarquista Union in 1937. Luckily for the government, this group never became a national movement, but there was still blood spilled.

KEY TERM

Quasi-fascist Partially fascist or leaning towards radical authoritarian nationalism.

Sinarquistas Supporters of the National Sinarquista Union.

Saturnino Cedillo

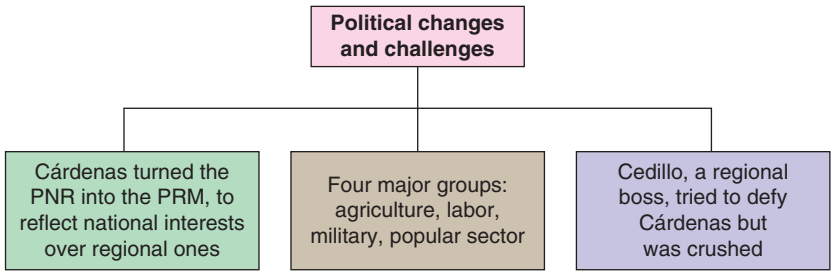
One of Cárdenas' most important supporters, General Saturnino Cedillo, took up arms on the side of the ***sinarquistas***. Cedillo was the boss of the state of San Luis Potosí and possessed the last private army in Mexico. He served in Cárdenas' government as the Minister of Agriculture and tried to resist land reform – in fact, any reform at all. When Cárdenas nationalized the oil industry, Cedillo contacted the aggrieved foreigners, hoping they would support him. Like other conservatives, he suspected Mexico was turning into another Soviet Union. In May 1938, he told a journalist that the Mexican people 'are tired of the infamous dictatorship, with communistic trimmings, that is putting an end to all sources of wealth and submerging the country in ruin and misery'. Cedillo felt that his own freedom of action or autonomy was threatened by a strong central government and so he took up arms, hoping to overthrow Cárdenas. However, few conservatives sided with Cedillo, since they could see how Cárdenas' reforms were running out of steam, and they thought they had a good chance of taking over the presidency in the 1940 elections.

Cárdenas' actions against Cedillo

Cárdenas blunted the appeal of the rebellion by creating the Bureau of Small Landholdings in 1938. The organization was designed to protect the properties of those farmers who felt threatened by the co-operative nature of the collective. As a consequence, Cedillo lost any chance of having widespread support. Without significant backing from any quarter, Cedillio was doomed. The rebellion ended in January 1939 when Cedillo was hunted down and executed. More importantly, the episode highlighted the clear primacy of the national government, and marked the end of local *caudillos* and armed rebellion for at least the next half-century.

SUMMARY DIAGRAM

Political changes and challenges



8 Key debate

Key question: How have historians viewed the Cárdenas presidency?

The Cárdenas years and their impact have elicited diverse opinions, ranging from **hagiographic** interpretations (N. and S. Wehl and W. Townsend) to those who viewed Cárdenas' reforms as a failure to foster a true revolution (A. Gilly and R. Pedrueza) and everything in between (A. Knight and D. Bailey). Even among the Marxists, different interpretations exist: earlier interpretations from the 1930s and early 1940s viewed Cárdenas' reforms as subverted by the presidents who followed him. Later generations, in the 1970s, were influenced by the Cuban Revolution in 1959 and the Tlatelolco Massacre in 1968. These Marxists had a very pessimistic view of the Revolution and post-revolutionary period, and tended to see a victory for the middle-class bourgeoisie and the development of capitalism. Other historians criticized these Marxists as simplifying a complex history into solely economic and class-struggle terms.

KEY TERM

Hagiographic Idolizing or excessively flattering.

SOURCE P

Excerpt from *Lázaro Cárdenas, Mexican Democrat* by William Townsend, Ann Arbor, George Wahr Publishing Co., 1952, page 372.

[Cárdenas] ruled without shedding blood. He made no political prisoners. He welcomed home all political exiles. He opened the doors of Mexico to political refugees from other lands. He gave liberty of expression to the press. He restored liberty of worship. He took the government to the people. He exalted the dignity of the common man. He combated vice, ignorance, selfishness, and prejudice. He sought the welfare of the Indians. He respected other nations and secured their respect for his own. He worked for peace and for a Western Hemisphere united as 'one great spiritual fatherland'. This he did and then retired to work, fight, and work again in obscurity that Mexico might be democratic.

SOURCE Q

Excerpt from *The Course of Mexican History* by Michael Meyer and William Sherman, published by Oxford University Press, New York, 1979, pages 606–7.

As the Mexican Revolution was about to embark on a new course not all of the old problems had been resolved, but the Cárdenas administration was remarkable, nevertheless, for what it had done. It saw the end of one age and the beginning of another. Cárdenas had finally broken the back of the hacienda *system, had fostered an impressive program of rural education, had seen the labor movement was cleaned up and that it was reorganized into a new, powerful union, and had struck a sharp blow for Mexican economic nationalism when he failed to be bludgeoned by the oil companies … But, perhaps, most important, by avoiding pivotal mistakes and not sacrificing principles to expediency, he won a new respect for the office he held as well as the plans he espoused.*

SOURCE R

Excerpt from *Triumphs and Tragedy: A History of the Mexican People* by Ramón E. Ruíz, published by Norton, New York, 1992, page 410.

Many of the reforms of the Cardenistas, under heavy fire since the expropriation of the foreign oil giants, fell by the wayside after 1940, dismantled before they could bear fruit. From this time on, conservatives, more and more, called the tune.

SOURCE S

Excerpt from *The Mexican Revolution: 1910–1940* by Michael J. Gonzáles, University of New Mexico Press, Albuquerque, 2002, page 258.

Although he did not achieve all of his objectives, Lázaro Cárdenas remains Mexico's most appealing twentieth-century president. He tried to make the revolution work through implementation of the most vital tenets of the 1917 Constitution: agrarian reform, ownership over subsoil rights, state supremacy over the church, labor reform, and socialist education … Cárdenas was the president who truly cared about the poverty of the foot soldiers of the revolution.

SOURCE T

Excerpt from *A History of Latin America* by Robert J. Shafer, published by D.C. Heath, Lexington, Massachusetts, 1978, page 697.

Many interpretations insist that after Cárdenas' reaffirmation of the Revolution, a great swing to the right occurred. Partly this idea arose because Cárdenas was an extraordinarily effective president in the sense that matters most – giving spiritual guidance to his people – and his successor was conventional and conservative and lacked an inspirational personality. Partly the thesis rested on overemphasis on the tone or style of Cárdenas' leadership instead of on his actions. Admirers tended to make him the foe of politics as a system of control, which he was not; a supporter of socialism, which he did little to further; a seeker for humanistic simplicity and justice, especially in a rural environment, against the subtleties and corruptions of modern urban and industrial life. It has been observed, however, that Cárdenas

strengthened the one-party system, aided private enterprise, and did not much alter the distribution of income, and presided over an economy in which industry grew more than agriculture.

SOURCE U

Excerpt from *A History of Latin America*, 5th edition by Benjamin Keen, published by Houghton Mifflin, Boston, 1996, page 291.

The Cárdenas era was the high-water mark of the struggle to achieve the social goals of the revolution. Under his successors, there began an erosion of the social conquests of the Cárdenas years. During those years the material and cultural condition of the masses had improved, if only modestly; peasants and workers managed to secure a somewhat larger share of the total national income. After 1940 these trends were reversed.

SOURCE V

Excerpt from 'Cardenismo: Juggernaut or Jalopy?' by Alan Knight in the *Journal of Latin American Studies*, Vol. 26, No. 1, February 1994, Cambridge University Press, page 79.

Cardenismo was, in terms of its objectives, a genuinely radical movement, which promised substantial change; that it also embodied substantial popular support, albeit this was not mediated through liberal democratic forms of representations; that, precisely because of its radicalism, it faced severe resistance … and led it to fudge, compromise, and retreat on several issues; and that, in consequence, its practical accomplishments were limited and even those which were attained during 1934–40 ran the risk of being subverted in later years by more conservative administrations … the implication is that Cardenismo – as a vehicle for radical reform – was less powerful, less speedy, and less capable of following its proposed route across a hostile terrain than is often supposed; that, in other words, it was more a jalopy than a juggernaut.

? On what points do most of the historians agree? Disagree?

SOURCE W

Excerpt from *A New Time for Mexico* by Carlos Fuentes, published by the University of California, Berkeley, 1997, pages 156–8.

I have known all the presidents of Mexico from 1934 to the present. Some have been more intelligent than others, some more politically astute, some more cultivated; but only one has attained true greatness: Lázaro Cárdenas. By greatness I mean, over and beyond tactical skill, energy, and determination, the concept of nationhood, the lofty vision Cárdenas had of Mexico, its people, its history and culture, its destiny. He never thought small; he never belittled Mexico or its people … Under Lázaro Cárdenas, Mexico did not cease to be the country of inequality that Alexander von Humboldt described in 1806. But never in our history have we had more equitable development, in which all classes and sections grew together … later policies dismantled or rendered ineffective many of Cárdenas's revolutionary advances.

TOK What would explain these different interpretations? Investigate each historian in this debate. How does your brief research explain the position each historian has taken? You might want to work in groups or divide up the historians among you. (Language, History, Logic, Emotion, Ethics, Imagination.)

9 Achievements: The end of an era

Key question: *Why do some historians see the Cárdenas period as the end of the Mexican Revolution?*

While Mexico had made economic and social progress, the high costs involved with land reform, nationalizations and education led to a shortage of funds in the national treasury. Some PNR leaders felt the party needed to stop the various reforms and rethink where it was leading the country. The election of Manuel Ávila Camacho ensured that the renewal of the Revolution was over.

The state of Mexico in 1940

What had happened to Mexico by 1940?

Poverty, population levels and rising inflation

In the six years that Cárdenas was President, great social, economic and political changes took place in Mexico. However, these reforms cost the Mexican treasury huge sums. While the poverty level declined, the population grew, which meant there were many more people to feed and provide work for.

SOURCE X

Statistics from *The Mexican Revolution: Federal Expenditures and Social Change Since 1910* by James W. Wilkie, 2nd revised edition, University of California Press, Berkeley, 1970, pages 297 and 299.

Year	Poverty Levels	Population
1910	56.90%	
1921	53.10%	14,334,780
1930	50.00%	16,552,722
1940	46.00%	19,653,552
1950	39.4%	

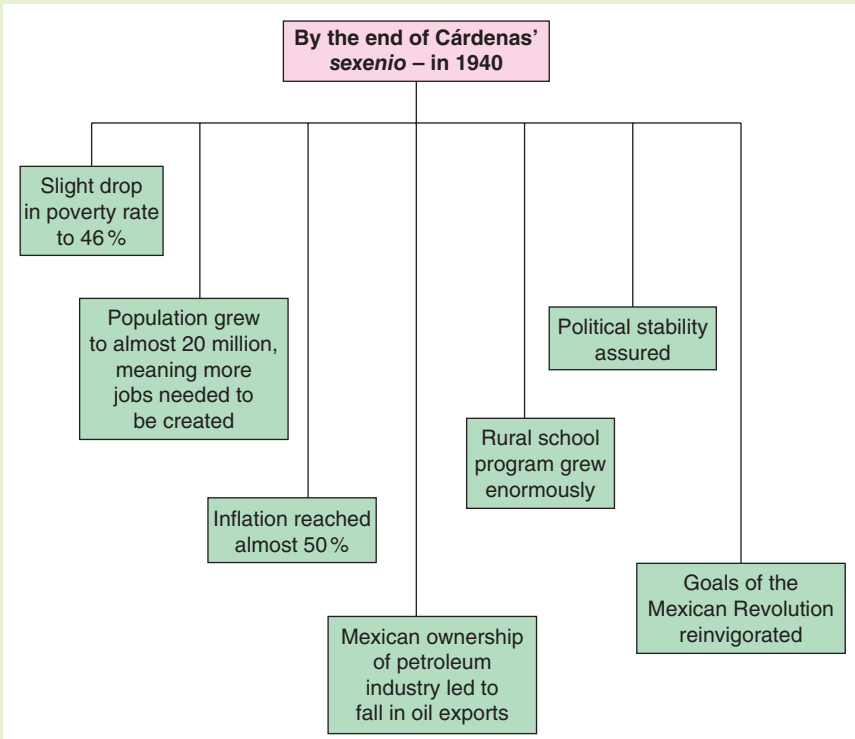
According to Source X, to what extent did the Mexican Revolution from 1910 to 1940 alleviate poverty? ?

The nationalization of oil companies also came at a heavy cost, since Mexico could no longer export significant quantities of oil. Finally, the inflation rate neared 50 per cent during Cárdenas' term in office.

The 1940 elections

Cárdenas was widely expected to choose his long-time ally and fellow reformer, Francisco Múgica, as his successor. Múgica would certainly have chosen to continue the reforms begun by Cárdenas, reforms that put some teeth into the grandiose plans of the 1917 Constitution. However, Cárdenas was under attack from various quarters and bowed to pressure. He chose the relatively unknown Manuel Ávila Camacho, nicknamed 'the Unknown Soldier'. Ávila was a surprising choice because he was a church-going conservative. As in previous elections, the results were a foregone conclusion. He won with a reported 93.9 per cent of the vote.

Once Ávila was in office, he made significant alterations to the Cárdenas reform program. Land reform based on the *ejido* slowed down, with a greater emphasis on private property. Workers saw their right to strike cut back. The rural school program fell out of favor as the Ávila government focused more on private schools. The Second World War (1939–45) would also impact Mexico as it sided with the USA. Though the stability of the country and its governing institutions had been assured with Ávila in charge, a new stage in Mexican history had arrived. The ruling party – the PRM – and its successor, the Institutional Revolutionary Party (PRI), would control the country for the next several decades.



SUMMARY DIAGRAM

Achievements: The end of an era

Chapter summary

Lázaro Cárdenas and the renewal of the Revolution, 1936–40

In six years, Lázaro Cárdenas had sought to put Mexico on a path in which she controlled her own destiny, whether through resource nationalism and energy security or through the creation of a Mexican sense of identity. He tried to accomplish these goals through a strong central authority and one political party. In the end, his achievements were significant, although not thoroughly successful.

Examination advice

How to answer 'to what extent' questions

The command term 'to what extent' is a popular one in IB exams. You are asked to evaluate one argument or idea over another. Stronger essays will also address more than one interpretation. This is often a good question in which to discuss how different historians have viewed the issue.

Example

'Lázaro Cárdenas achieved most of the social and economic goals of the Mexican Revolution.' To what extent do you agree with this statement?

1 First, take at least five minutes to write a short outline. Here, you can list the different social and economic goals of the Mexican Revolution and achievements of Cárdenas.

- *Social goals:*
  - *Education: thousands of schools built – Socialist education – wanted to create a Mexican identity – resistance by Church and conservatives in some areas meant growth of illiteracy*
- *Economic goals:*
  - *Land reform: millions of acres distributed – La Laguna and Yucatán – not always successful – Banco de Crédito Ejidal did not have sufficient funds – loopholes for some hacendados*
  - *Nationalizations: land was taken from foreigners, particularly in the north – railway industry was nationalized in 1937 – petroleum industry was nationalized in 1938 – great public support for latter but results were mixed – rocky relations with the USA*

3 In your introduction you should touch on the major economic and social goals of the Mexican Revolution and the extent to which Cárdenas' programs were successful in meeting these.
An example of a good introductory paragraph for this question is given below.

The Mexican Constitution of 1917 included many ambitious articles that were included in order to address Mexico's deep economic and social problems. The majority of Mexicans were poor and illiterate and much of the country's wealth was controlled by foreigners. While elected officials from 1920 until 1934 did attempt to confront these obstacles to turn Mexico into a

prosperous and modern nation, it was not until Lázaro Cárdenas assumed the presidency that concerted efforts were taken to tackle the country's serious problems. While Cárdenas did make significant progress in ameliorating the social and economic distress suffered by many Mexicans, his measures were only partially successful.

4 In the body of the essay, you need to discuss each of the points you raised in the introduction. Devote at least a paragraph to each one. It would be a good idea to order these in terms of which ones you think are most important. Be sure to make the connection between the points you raise with the major thrust of your argument. You will be assessed according to your use of evidence to support your thesis.

5 In the conclusion, be sure to offer final remarks on the degree to which you agree or disagree with the idea that Cárdenas was successful in achieving most of the social and economic goals of the 1917 Constitution. Do not add any new information or themes in your concluding thoughts. An example of a good concluding paragraph is given below.

In conclusion, it is clear that President Cárdenas was not able to achieve the lofty economic and social goals of the Mexican Constitution. The sheer scale of the country's problems meant that, although he tried, particularly in his first two years in office, he could not fully overcome the obstacles. At the same time, he was able to distribute millions of acres of land to needy peasants, improve education in the countryside and take control of Mexico's subsoil wealth. These were no small achievements.

6 Now try writing a complete answer to the question, following the advice above.

Examination practice

Below are two exam-style questions for you to practice on this topic.

1 Analyse the economic and political impact of the nationalization of the petroleum industry.
(For guidance on how to answer 'analyse' questions, see page 106.)

2 Compare and contrast Cárdenas' land reform programs with those of his predecessors.
(For guidance on how to answer 'compare and contrast' questions, see page 78.)

CHAPTER 5

The role of foreign powers in the Mexican Revolution, 1910–40

While Mexican society was deeply involved in revolution and civil war, world events proceeded rapidly. During the *Porfiriato*, Europe was taking part in a global armaments race and the increasingly competing imperialism in Africa and Asia. Within Europe, an increasingly intricate alliance system was taking shape. These events would come to a head in the First World War. In the Americas, most countries were more and more wary of US investment, imperialism and intervention. These world events would all have an impact on Mexico. The extent to which foreign powers were involved in the outbreak and development of the Mexican Revolution is detailed in this chapter.

You need to consider the following questions throughout this chapter:

- What was the extent of European and US economic influence in Mexico prior to 1910?
- How did US presidents and ambassadors react to the Mexican Revolution?
- How did Latin America and the USA intervene in Mexico?
- How did the US government respond to Pancho Villa's raid in New Mexico?
- What effects did the Zimmermann Note have on the Mexican Revolution?
- What caused economic tensions after the 1917 Constitution?

1 European and US economic influence in Mexico prior to 1910

Key question: *What was the extent of European and US economic influence in Mexico prior to 1910?*

From 1876, Porfirio Díaz invited foreign investment in Mexico because he firmly believed that Mexico needed to modernize, in keeping with the rest of the world. He also believed that a long and steady government was needed to provide the necessary stability for investment and industry to thrive. This attitude was also Díaz's response to the political turmoil experienced by Mexico since independence in 1822: 75 presidents in 55 years, two foreign invasions, the loss of half its territory and one civil war. Under Díaz, Mexico would be a place where US and European investors could make a profit and, at the same time, build a modern infrastructure to ensure Mexican progress.

One of Díaz's first measures was to promote investment in railroad construction. This required negotiation more often than force, as Díaz used local *jefes políticos* to deal with local communities to obtain lands (see page 15),

which could then be sold to investors for railroads, mining, agriculture or manufacturing and fund new development projects.

Where did foreign investors invest and how were they treated?

Foreign investment in Mexico before 1910

The railroads

To attract foreign investment, it was important to provide modern means of transporting machinery and products to the Atlantic and Pacific ports as well as to the US border. Díaz achieved this by awarding concessions to foreign investors, while also encouraging national investors. In the 1880s, the first railroad line from Mexico City to El Paso, Texas was given to US investors, who formed the Mexican Central Railroad Company. This line took four years to complete. By the end of the 1880s, there were many more lines to the Pacific and the Atlantic ports, and British and French investors had joined the Mexican Central Railroad Company.

British and US investment

Although Díaz entered into contracts with Japanese firms in agriculture, mining and the trade of Japanese manufactured goods like porcelain, the majority of foreign investment was from Britain and the USA. With foreign investors, Díaz and his advisors were always careful to try to negotiate the best terms possible for Mexico. This did not always work, as was seen in the negotiation with the British engineering company S. Pearson and Son Ltd, founded by Samuel Pearson in 1884. Pearson rebuilt a railroad connecting the Pacific with the Atlantic at the country's narrowest point, the Isthmus of Tehuantepec, but only after the government had provided costly infrastructure in a difficult jungle setting. Between 1889 and 1900 alone, Pearson's contracts had a total value of £12.4 million, not only in railroads but also electricity, trams, mining and oil.

Pearson's political influence

Samuel Pearson also exercised political influence in Britain, as he supported Mexico when the Mexican government applied for banking loans in London. British lenders were pleased that the Mexican government contracted British companies. The Mexican public also preferred British investment to US investment, so Díaz favored them. In particular, the warm relationship between Samuel Pearson and Díaz led to advantages for Mexico, in providing financial loans for Díaz's modernization projects as well as in international politics. Pearson was influential in the British government, which supported Mexico in border disputes with its southern neighbor, Guatemala. Additionally, Pearson's firm hired influential Mexican politicians or their relatives, including Díaz's own son. Ultimately, this increasingly entangled web of influences served the elderly dictator well in 1911, providing safe conduct to exile.

SOURCE A

S. Pearson & Son's Construction Contracts in Mexico, 1889–1911, found in 'Pearson and Public Works Construction in Mexico, 1890–1910' by Priscilla Connolly, published in *Business History*, Vol. 41, No. 4, October 1999, page 52, Historical Abstracts, EBSCO host. Accessed 20 March 2013. Connolly, of British origin, has been teaching at the Universidad Autónoma Metropolitana, Azcapotzalco, Mexico City since the 1970s.

What does Source A tell you about the clients and sources of finance for the Pearson contracts? ?

TABLE 2

S. PEARSON & SON'S CONSTRUCTION CONTRACTS IN MEXICO, 1889–1911

Name of Contract	Date	Client	Nominal Value in Sterling	Value in Pesos	Source of Finance for the Contract
Mexico City Gran Canal drainage	1889–1898	Mexico City Municipality	£2,000,000	$9,062,000 total value of project 1896–1900 $18,550,253	Total project 1896–1900: 55% External debt 8% Internal debt 23% Federal Govt. Fiscal revenue 14% Mpal. Fiscal and other revenue.
Veracruz Harbour	1895–1903	Mexican Federal Government	£3,000,000	$30,027,924	Almost all by 'Internal debt' in 5% silver bonds paid direct to Pearson who cashed them with BANAMEX. See below.
Veracruz drainage water supply	1901–1903	Veracruz State Government	£400,000	$3,964,494	Mostly 5% State Government Bonds paid directly to Pearson who cashed them with BANAMEX.
Juile Railway	1896–1900	Vera Cruz (Mexico) Railways Ltd	£100,000	N.A.	S. Pearson & Son Ltd. as owner of Vera Cruz (Mexico) Railways.

Name of Contract	Date	Client	Nominal Value in Sterling	Value in Pesos	Source of Finance for the Contract
Alvarado Railway Reconst.	1900	Vera Cruz (Mexico) Railways Ltd	£100,000	N.A.	S. Pearson & Son Ltd. as owner of Vera Cruz (Mexico) Railways.
Tehuantepec Railway	1896–1906	Mexican Federal Government	£2,500,000	N.D.	Partly in Silver Bonds.
Coatzacoalcos port works	1896–1909	Mexican Federal Government	£1,400,000	$21,751,344	External Debt: $20,532,153 from the 1904 4% Gold Debt. (Bazant 1968, 163–4.)
Selina Cruz port works	1899–1907	Mexican Federal Government	£3,300,000	$24,983,400	Internal Debt, c. $26,000 in 5% Silver Bonds, paid to Pearson who cashed them with BANAMEX.
Selina Cruz and Coatzacoalcos drainage and water supply	1905–1907	Mexican Federal and Veracruz State Governments	£385,000	Coatzacoalcos $676,115 (Salina Cruz was more)	Internal debt: Salina Cruz, probably by 5% Silver Bonds. Coatzacoalcos water and drainage by 5% State Government Bonds.
Mazatlán Drainage	1906–1908	Sinaloa State Government	£60,000	N.D.	State Government 5% Bonds.
Minatitlán Railway	1906	'El Águila S.A.'	£15,000	N.A.	S. Pearson & Son Ltd as owner of 'El Águila'.
Río Conchos Irrigation	1909	Mexican Power Co.	£850,000	N.A.	Mexican Northern Power Ltd.*

Note: *The Mexican Northern Power Ltd was formed to combine W. D. Pearson's Mexican electricity companies with the Canadian Electricity companies in Mexico, controlled by the American Dr F. S. Pearson. See C. Armstrong and H. V. Nelles,* Southern Exposure *(Toronto, 1988), p.252.*

Sources: *The identification of the contracts, dates and nominal values in sterling are taken from PR 'List of Contracts'. In the Client column, I have specified the level of government, where appropriate. The value in pesos of the contracts, that is, the amount actually paid to the contractor and how financed, is taken or calculated from various sources, particularly from:* Memoria Histórica, Técnica y Administrativa de las Obras del Desagüe 1499–1900, *vol. IV (Mexico DF, 1902);* Memorias de la Secretaría de Comunicaciones y Obras Públicas, *various years;* Memorias de la Secretaría de Hacienda, *various years; P. Macedo,* La Evolución Mercantil, Comunicaciones y Obras Públicas, La Hacienda Pública *(Mexico DF, 1905); F. Bulnes,* El Verdadero Díaz y la Revolución *(Mexico DF, 1920); Bazant,* Historia de la Deuda Pública Externa de México *(Mexico, 1976). See P. Connolly,* El Contratista de Don Porfirio *(Mexico, 1997), chapters III–IV.*

Types of investment

Other foreign investors in railroad construction, like the US contractor Thomas Braniff, negotiated special deals with the Díaz government. Braniff included a profitable side business transporting **duty-free** goods from Veracruz to Mexican interior cities.

KEY TERM

Duty-free Manufactured goods, usually foreign-made luxury consumer goods, sold without customs duties in order to encourage consumption.

Some investors, particularly the French and the USA, concentrated on building contracts where they became suppliers of machinery or services once the project was completed; for example, when irrigation canals were required for agriculture, a US company with experience in canals was preferred. This was appealing to the investor, who could then provide continuing service for the canals built. Indeed, after finishing the Tehuantepec railroad, Pearson ran it at a profit as a partner of the Mexican government. This was because the Mexican government over the years wanted to own the railroads or port facilities, so slowly bought the majority of the shares in these companies.

Mining and oil

Once transportation and modern ports were functioning, investors could both export and import products. To encourage the export of Mexican minerals, in 1884 Díaz and his advisers passed a new mining code in favor of making mineral rights more attractive to foreign investors. (The 1917 Constitution [see page 48] would later reaffirm the Spanish colonial law that gave possession of subsoil to the state.) Taxes were also kept low for extracting some minerals, and dispensed with entirely for other minerals. The effect was exactly what Díaz wanted: an increase in new mining ventures by foreign investors.

Investment in minerals

These investors could import modern technology and machinery for mineral extraction and refinement, with tax advantages. This led to major

development in northern Mexico, especially in Coahuila and Sonora. One mixed German–French owned copper mine in Baja California was particularly lucrative for its owners. Other minerals were also profitable: gold production rose from 1.5 million pesos in 1877 to 40 million pesos by 1908, and silver from 24.8 million pesos in 1877 to 85 million pesos by 1908. The largest investor was the owner of a huge mining **conglomerate**, the Guggenheim family from the USA, now of art-museum fame. Another lucrative copper mine was owned by the US Cananea Consolidated Copper Company, and which was the site of a major miners' strike in 1906 (see page 32).

KEY TERM

Conglomerate A series of small companies owned by a large corporation.

Investment in oil

Oil exploitation became a worthwhile investment in the early 1900s, as more and more fuel was needed for machinery and transport, including automobiles. Díaz was especially adept at playing off British, US and Dutch investors in this field. The US-owned Mexican Petroleum Company was one of the first to extract oil around the Gulf of Mexico locality of Tampico. Pearson's British company also invested heavily in Mexican oil fields, having discovered oil while building the Tehuantepec railway (see page 140). Later, Pearson owned oil fields in other areas under the El Águila Company. Together with the Mexican Petroleum Company, these two companies became dominant. Mexico was soon among those countries producing most of the oil in the world in 1910.

Industry

Mexican workers

The border area between the USA and Mexico has always harbored mixed populations of US–Anglos, US–Mexicans and Mexicans. These last were usually migrant workers, working for US landowners on cattle ranches and farms, such as cotton fields in Texas. These were known as ***braceros***. Historian Alan Knight notes that their numbers are impossible to establish, as most crossed the border back and forth illegally.

KEY TERM

Braceros Literally, those who work with the physical strength of their arms, in farm and cattle ranch work.

In 1907, when a series of droughts and crop failures caused a recession in Mexico, many migrants went to work in the USA. By 1910, when the Mexican economy recovered right before the Revolution, many returned. Throughout the Revolution, Mexican workers crossed the border to work as needed in agricultural and mining enterprises on US territory. They also inevitably suffered persecution in times of tense US–Mexican relations (see pages 148 and 154).

Industrial growth

Mexico under Díaz imported most of its manufactured goods, but the Díaz regime also stimulated industrial growth. One way was to center the iron and steel industry in the city of Monterrey. By 1911, this

industry, the Compañía Fundidora de Fierro y Acero de Monterrey (the Monterrey Iron and Steel Foundry), was producing over 60,000 tons of steel a year.

Other growing industries during the *Porfiriato* included glass, bottles, beer breweries, rubber, sisal, cement and textiles. Many were foreign-owned. Industry overall grew by more than 60 per cent between 1891 and 1912. Improved transportation and port facilities built by foreign investors helped to commercialize industrial products, for both domestic and foreign markets. These included steel rails, beer, glass bottles, cement, explosives, cigars and cigarettes, soap, bricks, tiles and furniture. This caused foreign trade to increase tenfold by the end of the *Porfiriato*. The visibility of foreign investors, and that most of their profits did not benefit the country, became increasingly irritating to Mexicans.

The influence of the USA

What were the reasons for anti-USA feelings?

A growing influence

During the *Porfiriato*, the close proximity of the USA caused its influence in Mexico to loom large in the consciousness of Mexicans. The Mexican province of Texas had seceded from Mexico in 1836 and was annexed to the USA in 1845. The US–Mexican War 1846–48 culminated in Mexico losing half of its territory to the USA. Mexicans had not forgotten this. Aware of his people's perception, Díaz continually made offers to European investors to counteract US economic influence. US companies investing in Mexico were increasingly part of large trusts, although the US government launched a campaign to break up these large conglomerates in 1898. Still, US companies wielded great influence in political affairs.

Although, as we will see, the border between Mexico and the USA provided a road for revolutionaries to organize and purchase arms (see pages 40–41 and 149), growing US influence carried with it possible threats to Mexican sovereignty as well. Since 1898, the USA had pursued **the 'Big Stick' Policy** in the Caribbean and Central America. For this reason, the USA intervened in the following countries in the early twentieth century: Panama, the Dominican Republic and Honduras in 1903, and Nicaragua 1909–13. After Díaz's reign, this list would also include Mexico (see pages 150 and 155–56).

KEY TERM

The 'Big Stick' Policy
Also known as the Roosevelt Corollary to the Monroe Doctrine, this 1904 assertive policy justified US military intervention in Latin America and the Caribbean.

Beyond the Americas

European countries were becoming increasingly belligerent in the areas of naval rivalry, imperial colonies and alliances. Mexico was in a strategic location, directly south of the USA; it had oil as a valuable resource; and had Atlantic and Pacific coastlines. Therefore it was of great interest to world powers.

What were the effects of the Creelman Interview?

Effects of the Creelman Interview

As seen in Chapter 1 pages 18–20, the aging Díaz gave a rare interview to US journalist John Creelman. British historian Alan Knight suggests that Díaz conceded the interview to a well-known journalist, from a popular US magazine with wide readership, to assure foreign investors of Mexican stability. There are certainly many details in Source B that seem to advertise Mexico's stable investment climate.

? How does Source B encourage foreign investment in Mexico?

SOURCE B

Excerpt from 'President Díaz: Hero of the Americas' by James Creelman, in *Pearson's Magazine*, 1908. Accessed on 7 January 2013 at http://historicaltextarchive.com/sections.php?action=read&artid=138. Creelman was a Canadian-born US journalist sent to Mexico to interview Díaz in 1908.

I [Creelman] have been privately assured by the principal American [US] officers and investors of the larger lines that railway enterprises in Mexico are encouraged, dealt with on their merits and are wholly free from blackmail, direct or indirect. …

More than $1,200,000,000 of foreign capital has been invested in Mexico since President Díaz put system and stability into the nation. Capital for railways, mines, factories and plantations has been pouring in at the rate of $200,000,000 a year. In six months the Government sold more than a million acres of land.

In spite of what has already been done, there is still room for the investment of billions of dollars in the mines and industries of the Republic. Americans [US citizens] and other foreigners interested in mines, real estate, factories, railways and other enterprises have privately assured me, not once, but many times, that, under Díaz, conditions for investment in Mexico are fairer and quite as reliable as in the most highly developed European countries. The President declares that these conditions will continue after his death or retirement.

Historian Alan Knight says that this interview cannot be taken at face value, and in fact most assertions made by Díaz were denied in the following months and years. Historians agree that by far the most important effect of the interview was political.

Railroad construction: 'negotiated' lands from peasants and communities using *jefes políticos*

- 1880s: the first railroad line from Mexico City to El Paso, Texas, USA was given to US investors, who formed the Mexican Central Railroad Company
- End of the 1880s: many more lines to the Pacific and Atlantic ports

British and US investment

- British: between 1889 and 1900 alone, Pearson's contracts had a total value of £12.4 million, not only in railroads but also electricity, trams, mining and oil
- Samuel Pearson also garnered political influence in Britain on behalf of Mexico
- The Mexican public preferred British investment to US investment
- In particular, Mexicans had not forgotten the US–Mexican War, 1846–48
- Growing US influence carried with it possible threats to Mexican sovereignty (Big Stick Policy)

European and US economic influence in Mexico prior to 1910

- Díaz invited foreign investment to modernize Mexico
- Creelman interview 1908 – main purpose to advertise Mexico's stability
- Mexico also attractive as:
  - in strategic location
  - directly south of the USA
  - had oil
  - had Atlantic and Pacific coastlines

Industry

- Mexican workers (*braceros*): most crossed the US–Mexico border back and forth illegally; they worked in agriculture and the mines
- By 1911, the Compañía Fundidora de Fierro y Acero de Monterrey (the Monterrey Iron and Steel Foundry) was producing over 60,000 tons of steel a year
- Industry overall grew by more than 60% between 1891 and 1912; improved transportation and port facilities built by foreign investors helped to commercialize industrial products, for both domestic and foreign markets
- Foreign trade increased tenfold by the end of the *Porfiriato*

Mining and oil

- Once transportation and modern ports were functioning, investors could both export and import products
- New mining code and low taxes to attract foreign investors:
  - mining (minerals): major development in northern Mexico, especially in Coahuila and Sonora
  - oil: US-owned Mexican Petroleum Company and British-owned company Pearson dominated; Mexico soon among those countries producing most of the oil in the world in 1910

SUMMARY DIAGRAM

European and US economic influence in Mexico prior to 1910

2 The US government and the Mexican Revolution, 1910–13

Key question: *How did US presidents and ambassadors react to the Mexican Revolution?*

US government foreign policies, namely the Big Stick Policy, **Dollar Diplomacy**, President Wilson's teaching Latin American nations about democracy and finally **isolationism**, all had considerable impact on the Mexican Revolution. US presidents and ambassadors had different degrees of involvement and intervention in Mexican affairs.

How did President Taft react to events in Mexico?

US President William Taft

The US–Mexico political relationship

At the beginning of his US presidency in 1909, President Taft met with Díaz at the border in El Paso, Texas. The presidents pledged continued relations and prosperity for the two nations. Taft, however, became increasingly annoyed with Díaz's navy-base contract for Japan in Baja California, and his preference for European investment. When Díaz persisted in exercising Mexico's prerogative as a sovereign nation, Taft openly welcomed Mexican politicians exiled from Mexico on US territory. At the same time, Taft basically approved of Díaz's strong control of Mexico, which protected foreign investment in general, and US investment in particular.

Francisco Madero was given asylum in the USA when persecuted by Díaz in 1910 (see page 40). Once Madero became President a year later, at first Taft enthusiastically supported him. As it became apparent that Madero was losing control of the *zapatistas* and rebelling peasants in Morelos, Taft then moved 34,000 troops to the border and US ships to Mexican ports. US investors also feared attacks on US property in northern Mexico. Taft spoke to Congress in 1912, insisting that US economic interests abroad in general, and in Mexico in particular, needed to be protected. This fueled the Mexican fear of US intervention and anti-US demonstrations in Mexico City.

Clearly, Taft's opinion of Díaz was ambivalent, as most foreign policies are. Taft mixed high-minded ideals, like providing political asylum to Mexican politicians when Díaz persecuted them, with protecting US economic interests (he was under pressure from US corporations and mining and oil companies, who wanted their investments protected by Díaz's strong control). Taft's opinion of Díaz was probably more favourable than not, as he held a conservative view of the importance of protecting business investments at home and abroad.

KEY TERM

Dollar Diplomacy President Taft added this US foreign policy to the Big Stick Policy. It aimed to protect US business interests in foreign countries.

Isolationism US foreign policy 1919–39 whereby the USA chose not to get involved in world events.

US armaments to Mexico

At the same time, the border area with the USA continued to provide arms to revolutionaries. US arms dealers along the US–Mexican border sold arms for cash, but in March 1912 Taft urged Congress to pass a law that arms could only be sold to the constitutional government. This ruled out revolutionaries like Pancho Villa and Pascual Orozco, who severely resented this measure. Historian Alan Knight, writing in 1986, noted that Taft did not want to violate US neutrality laws by dealing with revolutionaries as legitimate purchasers of arms. News stories showing aggression against US landowners, or US mine owners, raised USA indignation and influenced anti-Mexican public opinion. At this time, US citizens had investments and property in Mexico reaching $1 billion in railroads, mining, agriculture and various industries.

During the turbulent events in Mexico since Madero's assassination and Huerta's rise to power (see page 56), Taft lost his bid for re-election and Woodrow Wilson won the US presidency in November 1912.

US Ambassador Henry Lane Wilson

What role did Henry Lane Wilson play in the demise of Francisco Madero?

President Taft appointed Henry Lane Wilson as US Ambassador to Mexico in January 1911. He remained in this position until July 1913, when President Wilson recalled him.

In the period between President Wilson's election victory in November 1912 and his entry into office in March 1913, Ambassador Wilson made a series of decisions based on how the newly elected President Woodrow Wilson was likely to change US policy toward Mexico in general and toward Madero in particular. Wilson had been in the US Foreign Service since 1897 and was steeped in the Big Stick Policy as well as Dollar Diplomacy. He strongly believed that the USA had to intervene if US business interests were at risk; for example, he wrote exaggerated reports to Washington from Mexico City about how the situation in Mexico was particularly hostile to US citizens and businesses.

SOURCE C

Excerpt from *Diplomatic Episodes in Mexico, Belgium and Chile* by Henry Lane Wilson, published by Doubleday, Page & Company, New York, USA, 1927, page 210. Henry Lane Wilson was US Ambassador to Mexico from January 1911 to July 1913. These are his memoirs.

Under the Madero régime the situation of Americans [US citizens] in Mexico became increasingly precarious; murders, lootings, and outrages occurred and the embassy was in constant receipt of telegrams telling of crimes committed against Americans [US citizens] or requesting protection against anticipated wrongs. …

To meet this emergency a telegraphic consultation was held between the Department of State and the embassy. … Americans [US citizens] were neither ordered nor officially advised to go out of Mexico during the Taft régime; under the Wilson administration they were twice and perhaps thrice ordered out.

What does Source C have to say about the lives of US citizens in Mexico during Madero's government? ?

US intervention

When Madero imposed a small tax on extracting petroleum and passed legislation to defend local industry through tariffs on foreign goods, Ambassador Henry Lane Wilson (without authorization) threatened US intervention. This sentiment was echoed by Texas governor Oscar Branch Colquitt, who placed US troops on the border with Mexico. Witnesses from various foreign legations have said that the agreement made during the Ten Tragic Days (see Chapter 2 pages 55–6) was signed in the US Embassy with what historian Adolfo Gilly calls 'the personal intervention' of Ambassador Wilson. Ambassador Wilson wrote about this agreement in his memoirs.

? How does Source D's defense of Henry Lane Wilson's actions stand up to analysis as historical evidence?

SOURCE D

Excerpt from *Diplomatic Episodes in Mexico, Belgium and Chile* by Henry Lane Wilson, published by Doubleday, Page & Company, New York, 1927, pages 281–2. Henry Lane Wilson was US Ambassador to Mexico from January 1911 to July 1913. These are his memoirs.

Later in the day [February 18, 1913] I determined that I must take a decisive step on my own responsibility to bring about the restoration of order. … Without having conferred with any one, I decided to ask Generals Huerta and Díaz [Félix Díaz was Porfirio Díaz's brother and was leading the rebel barracks] to come to the embassy, which, as neutral ground, would guarantee good faith and protection, for a consultation. My object was to have them enter into an agreement for the suspension of hostilities and for a joint submission to the federal congress. …

[T]o force a decision, I said to them that unless they brought about peace the demand by European powers for intervention might become too strong to be resisted by the Washington government. This had the desired effect, and at one o'clock in the morning, the agreement was signed, deposited in the embassy safe, and a proclamation announcing the cessation of hostilities was issued. …

That night thirty thousand people paraded through the streets of Mexico City giving thanks for peace and to the American [US] government for having been instrumental in bringing it about. President Wilson considered the part played by the embassy as an intrusion in the domestic affairs of Mexico; persons who rest pleasantly by the home fires sometimes have curious conceptions of what the conduct of a public officer should be under critical and dangerous conditions. After years of mature consideration I do not hesitate to say that if I were confronted with the same situation under the same conditions I should take precisely the same course.

Ambassador Wilson's motivations

Wilson sided with Huerta and invited the German, Spanish, British and other ambassadors to join him in asking Madero to resign. Madero had sent an official protest to President Taft regarding the US Ambassador as interfering, and the USA officially replied that it would not intervene.

Huerta advised Ambassador Wilson of Madero's imminent toppling and Wilson telegraphed Washington with news of the coup before it occurred. Following the US government's instructions, Ambassador Wilson and German Ambassador Admiral Von Hintze visited Huerta to ensure that the imprisoned Madero and his vice-president Pino Suárez were safe. However, it was obvious that Wilson despised Madero and thought him mentally unfit to rule. He may have given his implicit approval to kill Madero.

Friedrich Katz noted that Wilson played a decisive role in the ousting of Madero and the rise to power of Huerta. Alan Knight, on the other hand, concluded that US influence and intervention was never single-handedly responsible for ousting or supporting a government in Mexico between 1910 and 1914. He does not discount US influence at certain junctures, but notes that domestic Mexican quarrels had preponderant influence in the turn of events.

SOURCE E

Excerpt from *Talons of the Eagle: Latin America, the United States, and the World* by Peter H. Smith, published by Oxford University Press, New York, 2013, page 54. Smith is a Professor of Political Science at the University of California, San Diego and a former president of the Latin American Studies Association.

Unchastened, the ambassador then undertook negotiations with Madero's counterrevolutionary opponents, Victoriano Huerta and Félix Díaz. Shortly thereafter Huerta deposed and murdered Madero. While not directly responsible for this assassination, an accredited US diplomat had campaigned actively against an elected president of Mexico and expressed no palpable remorse over his demise. This is not remembered as a happy chapter in US–Mexican relations.

What does Source E reveal about Ambassador Wilson's decisions in hindsight? ?

The US State department did not approve of Ambassador Wilson's actions. President Woodrow Wilson unceremoniously recalled him in July 1913.

After the interference of Henry Lane Wilson by siding with Huerta, and his involvement in the overthrow of Madero and Pino, President Woodrow Wilson refused to recognize the Huerta *de facto* government in Mexico in March 1913. This was more than a declaration on non-recognition as it also meant that the USA would not sell any armaments to Huerta, who needed them to maintain the army and quell revolutionaries like Orozco, Villa and Zapata as well as Carranza's Constitutionalist faction.

US President Woodrow Wilson

How did President Wilson react to events in Mexico?

President Wilson's motivations

Woodrow Wilson's administration began in March 1913. He reversed the Congressional ban on arms sales to revolutionaries and sent US naval ships to the Gulf of Mexico on patrol, and eventually to occupy the port of Veracruz (see page 156).

Tension between the USA and Mexico increased, coming to a head in April 1914, as Huerta fought to stay in power against the revolutionaries. The altercation with the USA was due to the temporary jailing of US military personnel in Tampico (see page 155). However, the issue was also the protection of US citizens and property in Mexico, as the following contemporary source shows.

SOURCE F

Excerpt from *Diplomatic Days* by Edith O'Shaughnessy, found in *The Mexican Revolution: A Brief History with Documents* by Mark Wasserman, published by Bedford/St Martin's, Boston, 2012, page 138. Edith O'Shaughnessy was the wife of US *chargé d'affaires* (second-in-command) in the US Embassy in Mexico City during the Madero and Huerta governments.

April 17 [1913]

… [The US Embassy] call[s] categoric attention to the enormous destruction of American [US] property, ever on the increase in Mexico, and the taking of American [US] life, contrary to the usages of civilized nations.

The United States expects and demands that American [US] life and property within the Republic of Mexico be justly and adequately protected, and will hold Mexico and the Mexicans responsible for all wanton and illegal acts sacrificing or endangering them. …

The shooting of the unfortunate, misguided Thomas Fountain by Orozco (said T.F. was having a little fling seeing life, and death, too, with the Federal forces) is deplored. Orozco 'answers back' that naturally he executed Fountain, who was 'fighting in the enemy's army'. Several Americans [US citizens], employed on the Mexican railways, have also been murdered by the revolutionists.

? What does Source F say about US casualties in 1914 during the Mexican Revolution?

President Wilson's motivations

President Wilson famously abhorred Huerta, saying, 'I will not recognize [his] government of butchers'. He explained his views of the Huerta government in the following speech to the US Congress at the end of 1913.

SOURCE G

Excerpt from President Woodrow Wilson's State of the Union Address, delivered at a joint session of the two houses of Congress on 2 December 1913 at Washington, D.C., found online in the Woodrow Wilson Presidential Library. Accessed on 20 November 2012 at *wwl2.dataformat.com/Document.aspx?doc=30395*. The Woodrow Wilson Presidential Library online gives public access to President Wilson's speeches, memoranda and other documents. Woodrow Wilson was President of the US from 1913 to 1921.

There is but one cloud upon our horizon. That has shown itself to the south of us, and hangs over Mexico. There can be no certain prospect of peace in America until Gen. Huerta has surrendered his usurped authority in Mexico; until it is understood on all hands, indeed, that such pretended governments will not be countenanced or dealt with by the Government of the United States. We are the

? What does Source G reveal about Wilson's feelings regarding the Huerta regime in Mexico in December 1913?

friends of constitutional government in America; we are more than its friends, we are its champions; because in no other way can our neighbors, to whom we would wish in every way to make proof of our friendship, work out their own development in peace and liberty. Mexico has no Government.

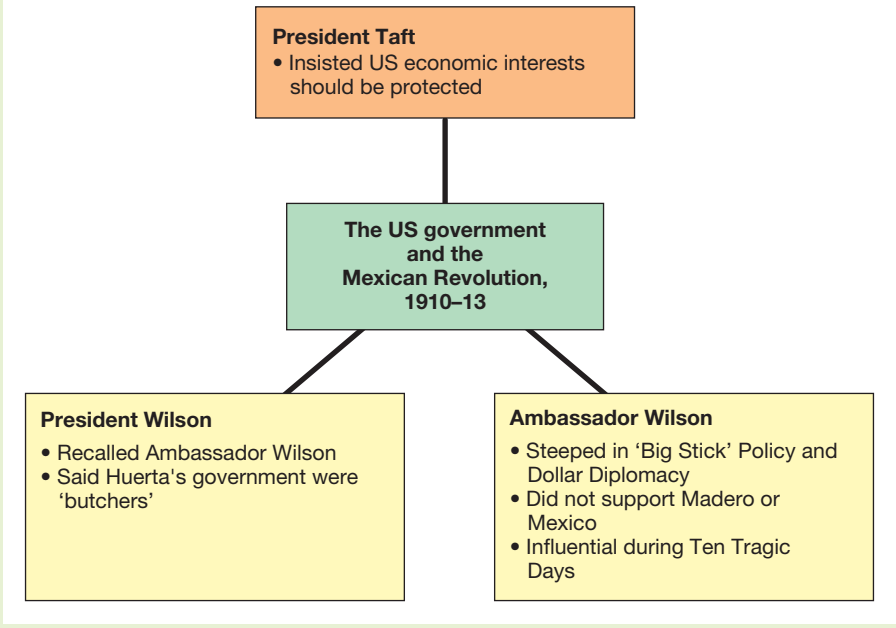
As a former university professor, President Wilson has been criticized for his inclination to instruct foreign countries. Speaking to a British dignitary in November 1913, he said 'I am going to teach the South American republics to elect good men!' As a policy toward Mexico, this was not a successful teaching strategy.

President Wilson after 1913

Wilson's attention was soon directed toward Europe, where the First World War had been raging since 1914. The USA joined the Allies against the **Central Powers** in mid 1917, a year and a half before the war ended. In 1916, Wilson would countenance another intervention in Mexican territory by sending a US punitive mission after the revolutionary leader Pancho Villa (see page 159).

KEY TERM

Central Powers During the First World War, the name given to the belligerents Germany, Austria-Hungary, Turkey and Bulgaria.



SUMMARY DIAGRAM

The US government and the Mexican Revolution, 1910–13

3 Latin America and the USA, 1911–14

Key question: How did Latin America and the USA intervene in Mexico?

As international relations deteriorated on the eve of the First World War, and US, British, German and French governments took an interest in Mexico, Latin American nations started to notice Mexico too. This was particularly true of countries in the **Southern Cone**. Many governments supported by the elites in Latin American countries did not approve of (and were indeed fearful of) peasants or urban workers participating in politics.

How did Latin America and the USA react to Huerta's coup?

Huerta's coup

Huerta's coup in February 1913 divided foreign interests in Mexico. France and Germany, at first, supported Huerta. The British sold Huerta arms and approved loans to his government. They were anxious to protect their investments, especially in petroleum, for a possible war in Europe against Germany. The USA and the countries that made up Latin America had different reactions.

Latin America's reaction

As the Revolution proceeded, Latin American diplomats informed their home governments of events. Chile, Brazil and Argentina had **consuls** and business representatives in Mexico, and Latin American diplomats in the US capital, Washington DC, also began to meet and observe events unfolding in Mexico. Madero's election was certainly respected, but after 1911 some countries moved their diplomats to Washington in case of revolution. Others, like Chile and Argentina, left **ministers plenipotentiary** and business representatives in Mexico.

Minister Anselmo Hevia from Chile was particularly active during Huerta's coup and President Madero and vice-president Pino's imprisonment. He constantly tried to obtain safe conduct for them to leave the country. Though he eventually succeeded in lifting restrictions, and so allowing Madero and Pino's widows and other relatives to leave, he was unable to save Madero and Pino from their deaths. Business representative Pedro Goytía from Argentina recommended that his government recognize the *de facto* government of General Huerta. Uruguay recognized the Huerta government in 1913. Chile, Argentina and Brazil consulted with each other and agreed not to do so. The reasons for this varied. Some of these countries were selling armaments to Huerta. Others wanted to show their own citizens that rebellions had to be controlled.

KEY TERM

Southern Cone A geographical and political name given to the southern-most countries of South America: Chile, Argentina, Uruguay and Paraguay.

Consuls Government officials sent to foreign countries to attend to their country's businesses and to protect its citizens.

Ministers plenipotentiary Early twentieth-century term for a diplomat just below the rank of Ambassador.

US reaction to Huerta's coup

The USA, under the new President Woodrow Wilson, did not support Huerta's government, and furthermore resented European influence in Mexico. The USA believed it held **hegemony** over Latin American nations to the exclusion of other countries in the world.

The Tampico Affair

What happened in the Tampico Affair?

Rising tensions

By the end of 1913, US oil companies were becoming particularly nervous about the safety of their **oil installations**, especially in the gulf-coast area near the port of Tampico. Wilson had approved selling arms to revolutionaries against Huerta, although as the historian Katz mentioned in 1981, this situation made him 'uneasy'. He would have much preferred to support the Constitutionalists (see page 52) and then provide a guiding hand in Mexican democracy. The revolutionary factions, including Carranza's Constitutionalists, did not welcome such guidance.

President Wilson then resorted to sending US navy ships to patrol the area, in early 1914. One of the ships sent a few crew members into Tampico to purchase fuel. When they ventured into an area controlled by Huerta's men, they were arrested. Although they were released within an hour, with apologies, this insignificant incident ballooned into a motive for US intervention. Ultimately, it boiled down to the USA demanding an official Mexican apology, which Huerta was willing to give, and a 21-gun salute to the US flag by Mexican troops, which Huerta rejected. Wilson asked Congress to invade Mexico, and this was approved on 20 April 1914.

The intervention

Since the US navy was already in the gulf area, and a German ship with arms for Huerta was on the way to Veracruz, Wilson ordered the US Marines to occupy the Veracruz customs house on 21 April. Fighting ensued. Many Mexican and US troops died, anti-US demonstrations surged all over Mexico, and many Mexicans even joined Huerta's army. Wilson had hoped the revolutionaries would back the US intervention, but the opposite occurred. Carranza came out against it, as he was first and foremost a Mexican nationalist from a border state that had lost much of its territory to the USA in the nineteenth century.

In the USA, there were also demonstrations against the intervention in Mexico. At the same time, some government officials, and some interest groups with Mexican investments, called for all-out invasion of Mexico. In view of uncertain events in Europe, however, with the possibility of war looming, Wilson opted to keep the US intervention no further than Veracruz. The USA would occupy Veracruz for over six months.

KEY TERM

Hegemony Predominant influence of one country over others in the region or continent.

Oil installations Rigs, refineries, storage areas and port facilities for loading.

How did the US occupation of Veracruz affect the Americas?

The US occupation of Veracruz

The US occupation now became an international incident. The occupation also provoked intense anti-US demonstrations in Latin American countries as varied as Uruguay, Guatemala, Argentina, Costa Rica, Ecuador and Chile.

Even the Carranza faction, which received armaments from the USA, put Mexican sovereignty above internal conflict. The formal diplomatic participation of Argentina, Brazil and Chile, now called the ABC Powers, met to mediate between the USA and Mexico and prevent a war.

Motives for peace

In 1914, Latin American nations were concerned about the US occupation of Veracruz for several reasons. Ministers saw a great danger in the increasingly menacing war climate in Europe, and the possibility of a war between the USA and Mexico that could mean US intervention elsewhere in the Americas. At the same time, the social revolution in Mexico, with deep-seated roots in all of Latin America, created great uneasiness in conservative elite ruling parties. Finally, some Latin American countries, notably Chile, were also selling arms to Huerta and Mexican revolutionaries alike, and the US occupation blocked this. In this context, the international diplomatic community in Mexico agreed that both Europe's and the Americas' interests would be well-served by seeking peace.

The ABC Powers Conference, 1914

The Argentine, Brazilian and Chilean ambassadors in Washington thus offered their good offices to the US government, who accepted them. This was because by 1914, President Wilson was changing former US President Theodore Roosevelt's Big Stick Policy (see page 145) to a more peaceful, understated option in the Americas. He proposed a Pan-American Pact that included negotiating conflicts and a more evenly distributed share of political power. The ABC Powers even envisioned strengthening the Southern Cone as a way of balancing the dominance of the USA in the northern part of the Americas. Other Latin American countries viewed the pact with suspicion, and there were voices of protest from Bolivia, Perú, Colombia, Ecuador and Venezuela.

Carranza gains strength

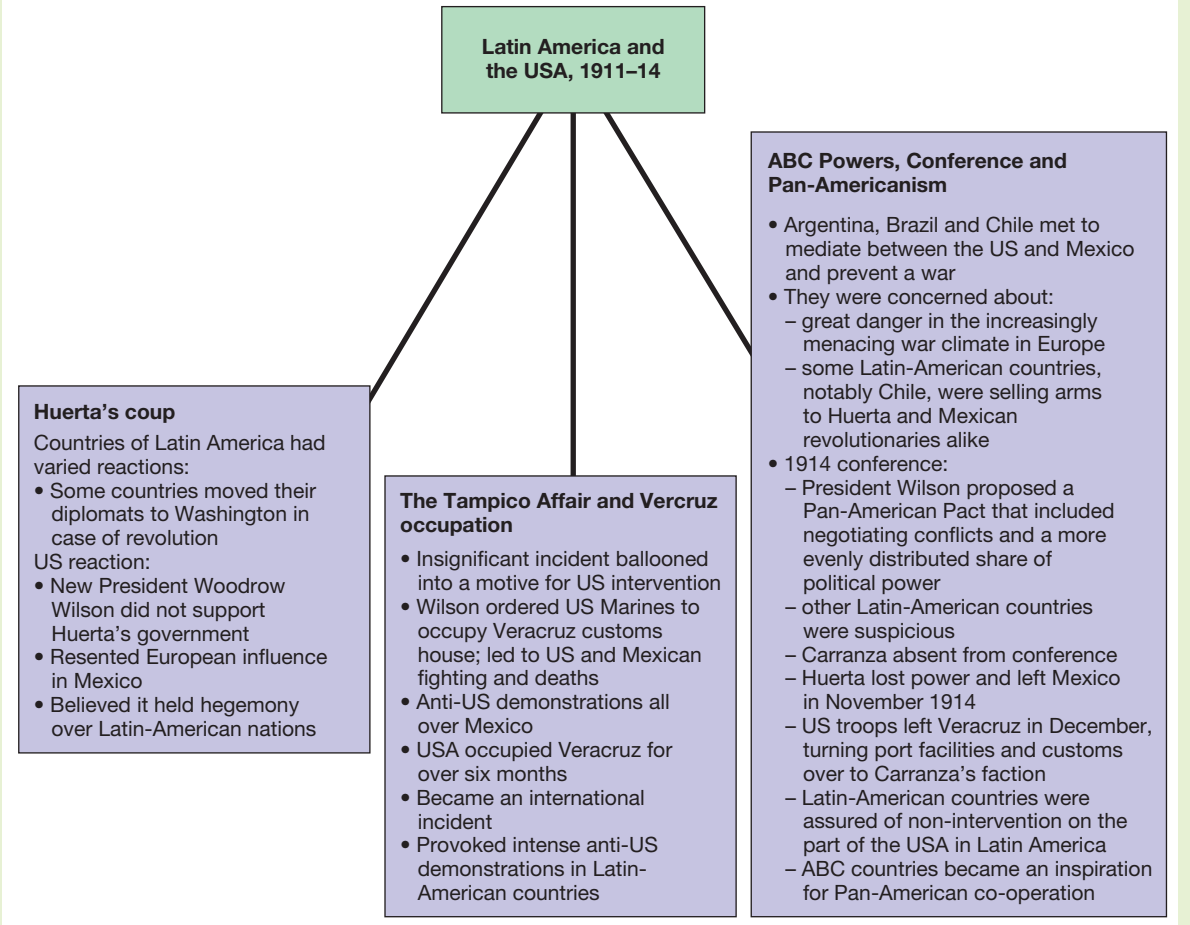
The ABC ministers met in Canada in May 1914 with representatives from the Huerta government and from the US government. Yet the conference was doomed from the start, as the Constitutionalist army leader Carranza, who was growing in strength and popularity, refused to go because he considered events in Mexico to be an internal rather than an international matter. Also, the US occupation had left Huerta unable to access custom receipts and arms purchased from Germany, as the German boats could not disembark them. This weakened Huerta's position against the revolutionary armies of Carranza, Villa and Zapata.

The negotiators agreed to halt hostilities and create a provisional government. At the same time, Huerta lost power and left Mexico in November 1914; the US troops left Veracruz in December. The departing US troops turned port facilities and customs over to Carranza's faction.

The effect of the ABC Powers Conference

Canadian diplomat Michael Small wrote in 1981 that Canada welcomed the conference in its territory, but that it was hopeless from the start, as it was held between countries and factions in a civil war. He pointed out that the absence of Carranza's faction in particular weakened the conference. However, Small said that the conference did succeed in having the USA drop its insistence on a gun salute at Tampico and did not seek an indemnity. In addition, Latin American countries, not least the ABC countries, were assured of non-intervention on the part of the USA in Latin America.

Chilean historian and Mexican Revolution specialist Cristián Guerrero wrote in 1966 that the conference also signified a great accomplishment for the ABC countries, who were heartened about the possibilities of working together and even forming a more formal union in future. The three countries became an inspiration for Pan-American co-operation.



SUMMARY DIAGRAM

Latin America and the USA, 1911–14

4 Pancho Villa's raid in New Mexico, 1915–16

Key question: How did the US government respond to Pancho Villa's raid in New Mexico?

The Mexican Revolution introduced a new era of instability when Mexican bandits and revolutionaries raised havoc in the Texas and New Mexico borderlands. For a time, residents in the US border states lived in fear that extremists from the neighboring country, aided by militant US Mexicans, would attempt to retake lands lost by Mexico in the nineteenth century. On the other hand, as well as the US government, many private US arms vendors profited from selling arms to the warring factions in the Mexican Revolution. President Taft cut these sales short in 1912. This severely strapped revolutionaries in northern Mexico, like Pascual Orozco, Pancho Villa, and Venustiano Carranza's Constitutionalist faction.

Why were relations between Villa and the US hostile?

Villa and the USA

By the end of 1915, the warring factions of the Mexican Revolution were deeply enmeshed in civil war. The USA decided to recognize the Carranza government and officially would no longer sell arms nor support anyone else. Villa, who had previously enjoyed a good business relationship with US citizens, was now excluded from buying arms in the USA.

Villa, Carranza and the USA

Historian Friedrich Katz has argued, using archival material, that, by 1915, Villa believed that Carranza and his supporters were surreptitiously seeking Wilson's support in providing arms in exchange for political, military and economic concessions. Villa accused Carranza of selling out Mexico to the USA. Villa's letters to Zapata show that Villa was planning an incursion into US territory, and even invited Zapata to join him. His hope was to force a US reaction that would either expose Carranza's treachery or cause Carranza to unite with revolutionary forces (such as his own) to oust the invaders. Katz has also found some indication that a German double agent, who bought arms and ammunition for Villa in the USA, might also have instigated Villa's incursion into the USA, promising him German support. In light of the tenuous evidence, however, Katz concludes that Villa was merely exploiting all connections to people that would sell him armament, regardless of their national origins or of international ramifications.

The attack on Columbus, New Mexico, 1916

In January 1916, one of Villa's generals attacked a train in Chihuahua and had seventeen US citizens shot. This caused immediate protest in the USA, but it was difficult to officially seek redress from a country in the midst of a civil war. Carranza was nominally in power, but still combating rebel forces, such as Villa's. President Wilson ordered US citizens out of Mexico for their own safety. Events escalated on 9 March 1916, when Villa and his men rode into US territory at New Mexico and terrorized the town of Columbus in a day-long gun battle that took both Mexican and US lives.

The US response: intervention

After the Columbus incident, President Wilson responded by sending a punitive expedition to Mexico to find Villa and punish him for his wrongdoings. Wilson also conscripted 150,000 US soldiers and stationed them along the border with Mexico. General John J. Pershing led an expedition of 12,000 men and artillery from 15 March 1916 to 5 February 1917. In eleven months of chasing the wily Villa, the US force was unable to catch him, though they did manage to wound him temporarily in a battle on 29 March.

Meanwhile, Carranza's forces were also after Villa. Carranza protested the US intervention strongly, officially asking the US government to recall its troops in April 1916. Talks between Carranza's General Obregón and US General Scott in El Paso, Texas did not reach agreement, however, and talks were suspended in May.

The effect of the US intervention

The US intervention caused a wave of anti-US sentiment in northern Mexico and helped Villa gain popularity and troops, as Villa had expected. Carranza also sent in troops, to go after Villa and to escort US troops out of Mexico. After some confrontations, negotiations were reconvened in September 1916. Mexico demanded unconditional withdrawal of US troops and the USA demanded conditions such as being able to return in case of further incidents. This stalemate was finally resolved, not by negotiations, but by external events.

How was the conflict resolved?

Loss of support for Villa

One reason for the resolution of the conflict was the **radicalization** of Villa himself. Shrewdly aware of his rising popular support, he continued even more brazen guerrilla activities, such as storming Chihuahua City, freeing jailed prisoners and commandeering arms, ammunition and supplies. He

KEY TERM

Radicalization The process of becoming increasingly extreme in taking violent action.

even declared a manifesto in October 1916 to all Mexicans to stand firm against the US invaders, take over their mines and railroads, and not allow any foreigner who had been in Mexico less than 25 years even to own property. Villa wanted to unify all Mexicans from various factions against the invaders from the United States, but his radicalization began to alienate and discourage his supporters.

The First World War

Another reason for the resolution of the conflict was impending US participation in the First World War, which had been raging in Europe since 1914. After nearly a year of hot pursuit, General Pershing's forces had clearly failed to bring Villa to justice for the Columbus incident (see page 159). The US troops at the border would be needed in the war, if the USA entered it. In the end, the US left Mexico in March and entered the war in Europe in April 1916.

Carranza's negotiations with the USA

A final reason for the resolution of the conflict was that by December 1916, meetings were taking place to write a new Mexican Constitution. Historian Adolfo Gilly wrote in 1971 that the presence of US troops in Mexican territory would radicalize the left at the Congress, pushing social reform, which was something neither Carranza nor Mexican moderates wanted. This situation pushed Carranza to be more open to negotiation with the USA. He now accepted concessions, but did not receive US loans or even arms sales. Carranza also kept Mexico strictly neutral during the First World War. Confrontation over borderland violence ceased to be a major issue.

Soviet historians Moisei Alperovich and Boris Rudenko proposed in 1960 that it was not Villa who provoked US intervention, but US bourgeois interests seeking an all-out US military intervention of Mexico. US political scientist Peter Smith, on the other hand, remarked in 2013 on the relative 'timidity of US incursions' in Mexico and noted that General Pershing was 'rewarded for his failure with promotion to leadership of US forces in Europe after Wilson finally entered the World War'.

Pancho Villa's raid in New Mexico, 1915–16

End of 1915
- Mexico enmeshed in civil war
- USA recognized the Carranza government; would no longer sell arms to nor support anyone else

Villa
- Now excluded from buying arms in the USA
- Accused Carranza of selling out Mexico to the USA
- Was planning an incursion into US territory

Attack on Columbus, New Mexico, 1916
- January: one of Villa's generals attacked a train in Chihuahua and had seventeen US citizens shot
- Caused immediate protest in the USA
- President Wilson ordered US citizens out of Mexico for their own safety
- March: Villa and his men rode into US territory and terrorized Columbus in a day-long gun battle that took both Mexican and US lives

US intervention
- President Wilson sent punitive expedition to Mexico to find Villa and punish him
- Wilson conscripted 150,000 US border troops
- Carranza protested US intervention, officially asking the US government to recall them in April 1916
- Talks suspended in May
- Carranza also after Villa
- General John J. Pershing led 12,000 men and artillery from March 1916 to February 1917, but could not catch Villa
- Anti-US sentiment in northern Mexico helped Villa gain popularity and troops, as Villa had expected
- Mexico–US negotiations reconvened September 1916; Mexico demanded unconditional withdrawal of US troops and the USA demanded conditions such as being able to return, in case of further incidents
- This led to stalemate

Conflict resolution
- Villa's increasing radicalization began to alienate and discourage his supporters
- Impending US participation in the First World War – US troops at the border would be needed in the war
- By December 1916, meetings were taking place to write a new Mexican Constitution; Carranza needed to be more open to negotiation with the USA – he now accepted concessions, but did not receive US loans or even arms sales

SUMMARY DIAGRAM

Pancho Villa's raid in New Mexico, 1915–16

5 The Zimmermann Note, 1917

Key question: *What effects did the Zimmermann Note have on the Mexican Revolution?*

Relations with Germany had deep implications for the Mexican Revolution between 1915 and 1917. In particular, Germany cultivated the closest relations with the Carranza faction from 1915 until his assassination in 1920, and Germany had important business and trade interests in Mexico (see page 29). In this scenario, events in Europe during the First World War added an international dimension to the Mexican Revolution, as Germany sought to entice Mexico to its side and against the United States.

Why was the Zimmermann Note issued?

The First World War and Arthur Zimmerman

German, Mexican and US relations during the First World War

Germany and its allies Austria-Hungary, Bulgaria and Turkey, known as the Central Powers, had been at war with the Allies – France, Belgium, Britain and Russia – since 1914. The USA sympathized with the Allies, and floated loans and shipped war matériel to them. Germany attempted to stop these deliveries using submarine warfare against US ships. They also encouraged Mexico–US hostilities, reasoning that if the USA was involved in a war with Mexico then they would use their resources, arms and soldiers there instead of helping or joining the Allies in Europe. Germany also hoped that a war in Mexico would destroy Mexican oil fields, which were important to the British war machinery.

In his book *The Secret War in Mexico: Europe, the United States and the Mexican Revolution* (1981), historian Friedrich Katz convincingly proved that Germany certainly intrigued and reached out to revolutionaries, starting with Huerta, then Orozco, Villa and finally Carranza. They meant to use these revolutionary factions to destabilize US–Mexican relations in exchange for arms and support, although the German Foreign Office denied such charges. Secret internal **memoranda** show the opposite.

KEY TERM

Memoranda The plural of 'memorandum'; a note written for diplomatic purposes.

SOURCE H

Excerpt from a 1915 German Foreign Office memorandum by German Foreign Minister Gottlieb von Jagow, found in *The Secret War in Mexico: Europe, the United States and the Mexican Revolution* by Friedrich Katz, published by the University of Chicago Press in Chicago, Illinois, USA, 1981, page 334. Katz was an Austrian historian who lived in Mexico, and was a professor of Latin American history, specializing in Mexico, at the University of Chicago.

? What does Source H reveal about German intentions in Mexico during the First World War?

Even if the shipments of munitions cannot be stopped, and I am not sure they can, it would be highly desirable for America [the USA] to become involved in a war and be diverted from Europe, where it is clearly more sympathetic to England [Great Britain]. … hence an intervention made necessary by the developments in Mexico would be the only possible diversion for the American [US] government. Moreover, since we can at this time do nothing in the Mexican situation, an American [US] intervention would also be the best thing possible for our interests there.

German intrigue and conspiracies

German agents were accused of actively stirring up US-Mexicans in the border states of Texas, New Mexico, Arizona, Colorado and California. In a conspiracy known as the San Diego Plan, nine US-Mexicans signed a plan in January 1915 to stage uprisings and massacres in their states to gain eventual independence, with an option to join Mexico again. Although this did not happen, some US citizens of Mexican descent did attack and raid local communities, causing the US government to retaliate.

Once the USA recognized Carranza in 1915, events subsided, although there was a resurgence of incidents once General Pershing entered Mexico with his troops, pursuing Villa. Katz has found no proof of German involvement in these incidents. By 1916, German efforts began to concentrate on Carranza, although Carranza resented the fact that a German ship had taken Huerta to exile.

During the First World War, Carranza cultivated relations with Japan and Germany. Japan sold arms to Carranza, but Carranza saw Germany as a promising ally, should it come to a US–Mexican war. This possibility loomed in 1916 after President Wilson sent General Pershing after Villa (see page 159). This year also saw increasing German submarine warfare against Allied ships, which were transporting war matériel and fuel to Britain, in the Atlantic.

SOURCE I

Excerpt from an October 1916 memorandum by the Mexican envoy to the Austrian Foreign Office, found in *The Secret War in Mexico: Europe, the United States and the Mexican Revolution* by Friedrich Katz, published by the University of Chicago Press in Chicago, Illinois, 1981, page 348. Katz was an Austrian historian who lived in Mexico and was a professor of Latin American history, specializing in Mexico, at the University of Chicago, USA.

… in October 1916, Mexico again approached the German government 'seeking from Germany a declaration in Washington according to which an armed intervention in Mexico would not be viewed with favor. In return, the Mexicans offered extensive support for the German U-boats [submarines], should they desire to attack English [British] oil tankers leaving the port of Tampico'.

According to Source I, what does Mexico want from Germany, and what does Mexico offer in return? ?

KEY TERM

Favored treatment
A special status regarding trade. In this case, Carranza was most interested in the German provision of armaments.

How Zimmerman came to issue the note

Despite the Mexican offer of support, no U-boat bases were ever built on Mexican coasts. In November 1916, the Mexican envoy in Berlin, Arnoldo Krumm Heller, presented a list of **favored treatment** items for Germany as a proposal to German Foreign Minister Arthur Zimmermann. These were designed to strengthen Carranza's military power. Zimmermann was cautious regarding dealings with Mexico, not wanting to exacerbate relations with the United States, and rejected the proposal. Meanwhile, Germany continued to sell ammunition to Carranza, through a German enterprise in Chile.

Unrestricted submarine warfare

As the First World War consumed Europe, in early 1917 Germany decided on a policy of unrestricted submarine warfare against any ships suspected of transporting supplies to the Allies. The Mexican proposal now seemed more attractive. US–Mexican relations were at a low point, with General Pershing's forces still unsuccessfully pursuing Villa in Mexican territory. Germany knew that US entry into the war was imminent. A Mexican ally would then be most useful to Germany, especially one that would go to war with the USA. In such an event, the USA would need to send troops to Mexico instead of Europe.

Zimmermann wanted to provoke Carranza into attacking the USA by implying Germany would support Mexico should Carranza attack. He composed the following note, even including Japan in a possible alliance, though evidence has shown that his main interest was using Mexico to keep the USA militarily engaged outside of Europe. Zimmermann opted for sending the note in a secret code, via the USA, to Mexico. It was intercepted en route by Britain, who had cracked the code.

? According to Source J, what would Mexico gain from an alliance with Germany?

SOURCE J

English translation of the German cipher telegram written in code, sent by Arthur Zimmermann, German Foreign Secretary, to Heinrich von Eckardt, the German Ambassador in Mexico, 16 January 1917, found in 'The World War I Document Archive at wwi.lib.byu.edu/index.php/The_Zimmerman_Note. Accessed on 8 May 2013. The Zimmermann Note is transcribed from a telegram from Walter H. Page, US Ambassador in Great Britain, to Robert Lansing, US Secretary of State (File No. 862,20212/69). The World War I Document Archive is managed by Richard Hacken on the server of the Brigham Young University Library, Utah.

We intend to begin on the 1st of February unrestricted submarine warfare. We shall endeavor in spite of this to keep the United States of America neutral. In the event of this not succeeding, we make Mexico a proposal of alliance on the following basis: make war together, make peace together, generous financial support and an understanding on our part that Mexico is to reconquer the lost territory in Texas, New Mexico and Arizona. The settlement in detail is left to

you. You will inform the President of the above most secretly as soon as the outbreak of war with the United States of America is certain and add the suggestion that he should, on his own initiative, invite Japan to immediate adherence and at the same time mediate between Japan and ourselves. Please call the President's attention to the fact that the ruthless employment of our submarines now offers the prospect of compelling England [Britain] in a few months to make peace. Signed, Zimmermann.

The British kept their knowledge secret and the note was passed to US Ambassador Page in London, who sent it to Robert Lansing, US Secretary of State. President Wilson, about to face an opposition Congress in asking to take measures against German unrestricted submarine warfare, had the press publish the note a day before speaking to Congress. The strong opposition to US entry in the war accused the note as a fake, but Wilson was saved from explanation by Zimmermann himself, who admitted he had written the note. This effectively silenced US opposition to the war, as the note then became a propaganda tool. Japan rejected any possible alliance with Germany and Mexico.

After the Zimmerman Note

What were the effects of the Zimmermann Note?

Effects in Mexico

In Mexico, Carranza received the Zimmermann Note at a time when US–Mexican relations were much improved. General Pershing and his men were leaving Mexico, having spent nearly a year looking for Pancho Villa and not finding him. Even so, Carranza did not discount the possibility of war with the USA, especially if the USA joined the Allies and took over Mexican oilfields. Before the note went public in 1917, he asked the Germans for more precise details of how they would provide aid, but was not convinced that Germany could even deliver the arms and ammunitions it promised, given the Atlantic blockade. As for German support for taking over the former territory lost to the USA in 1848 (see page 145), Carranza had no illusions about succeeding there. When the US ambassador in Mexico, Henry P. Fletcher (who had succeeded Ambassador Wilson) asked Carranza to publicly reject a Mexican–German alliance and break relations with Germany, Carranza insisted on Mexican neutrality and denied any knowledge of the Zimmermann Note. Once Carranza was assured the USA was not going to invade Mexico, he denied Germany any possibility of an alliance with them.

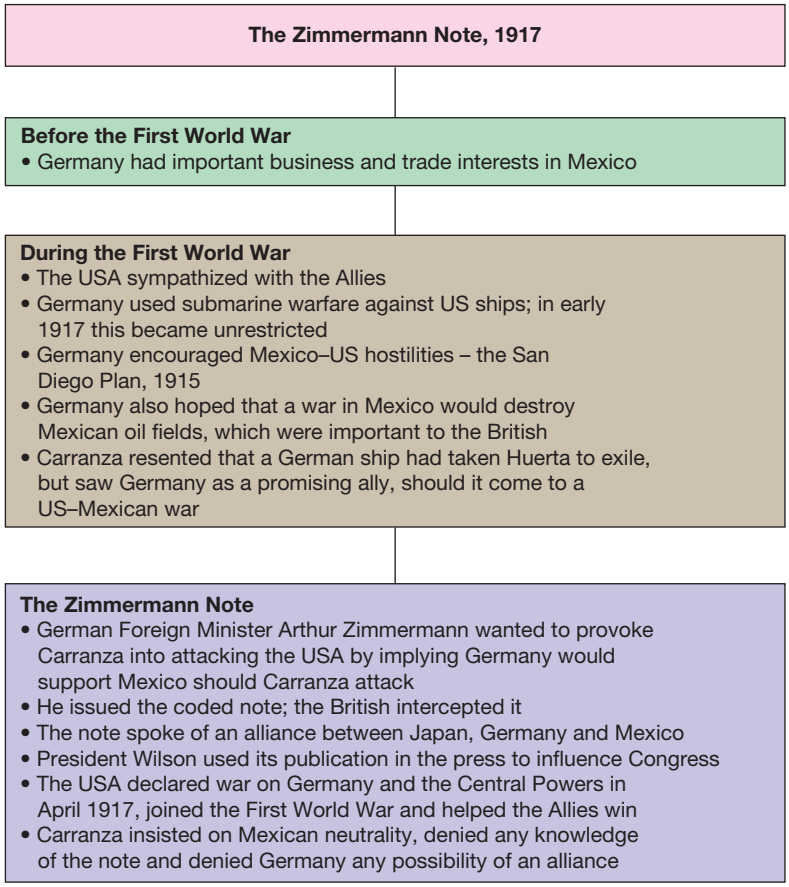
Effects in Germany

In Germany, although not everyone agreed with his note, Zimmermann was not removed from the Foreign Office and he continued to try to win Carranza over to Germany. He also covertly supplied Villa with arms, hoping a Carranza–Villa force would take on the USA. Carranza continued to preserve Mexican neutrality and to ask Germany for military

instructors, wireless telegraphs, arms factories, loans, debt settlements and commercial agreements directed to post-war relations, in exchange for Mexican mining and oil concessions. Despite or because of Mexico's neutrality, German and Allied espionage and propaganda in Mexico endured through the entire period of the First World War. Carranza shrewdly accepted whatever proposals were most beneficial to him and/or Mexico.

Effects in the USA

Ultimately, the most dramatic effect of the Zimmermann Note was on the United States, as it helped to push public opinion in the USA in favor of joining the Allies in the First World War. President Wilson deftly used its publication in the press to influence Congress, and finally the USA declared war on Germany and the Central Powers in April 1917. This, in turn, had a major effect on Germany, as it provided the much-needed help for the Allies to defeat the Central Powers. Mexico remained neutral.



SUMMARY DIAGRAM

The Zimmermann Note, 1917

6 Mexico and the USA after the 1917 Constitution

Key question: What caused economic tensions after the 1917 Constitution?

Economic tensions between Mexico and the USA, as historian Friedrich Katz has wisely observed, have never responded to a single policy, but have either moved together or in opposing directions according to the changes during the Mexican Revolution. There was tension with Britain, Germany and France regarding their business interests as well, but the geographical proximity and sheer economic weight of US investments is more interesting in the context of the Americas.

Carranza after the 1917 Constitution

How did Carranza deal with the USA after 1917?

Foreign investments after the Constitution

Once the Constitution of 1917 was announced, Article 27 about subsoil and Article 123 about labour became particularly worrying to foreign investors in Mexico (see pages 68–71). Carranza became President in May 1917, and set about consolidating his political power, sending General Obregón and the Mexican Army after revolutionaries like Villa and Zapata, and common bandits.

Carranza was mindful of the need for industry to function, as Mexico tried to rebuild after the bloodiest period of the Revolution. Therefore, he often chose to defer, strictly applying the Constitution for the sake of peace and development. Due to the strong role of the executive, also in the new Constitution, it was Carranza's **prerogative** to do this. His government did not nationalize any foreign investments or expropriate foreign-owned lands to give to landless peasants, as per the Constitution. (This would occur after 1920, once Carranza was dead.)

KEY TERM

Prerogative Legal choice given to the president; in this case, according to the Mexican Constitution.

The Carranza Doctrine, 1918

Even so, Carranza pursued a nationalistic stance. On 1 September 1918, he gave a speech to the Mexican Congress, which later became known as the Carranza Doctrine. In it, he rejected the US Monroe Doctrine and its Roosevelt Corollary (see page 145). He also established that foreigners had to adhere to Mexican law and were not privileged or above the law regarding business practices, taxes and royalties. Given the privileged situation of the Díaz days and the sketchy application of taxes and tariffs during the worst of the fighting, this meant higher taxes for foreign investors with the Carranza presidency. These higher taxes quickly created tension with all foreign investments and the USA, who had extensive investments, in particular.

The Carranza government needed to increase revenues to appease Mexico and reconstruct the country. Applying a fair tax system was the best option. Carranza issued laws, which Congress passed, to begin this application, starting with the petroleum industry. As Mexican Education Minister (1928) and writer Moisés Sáenz wrote in 1926, Mexico followed a nationalistic policy 'to regain or to retain our material inheritance'. He was referring to Mexico's natural resources, like petroleum. At the same time, not wishing to alienate foreign industry too much, Carranza did not strictly apply Article 123; for example, he did not apply its directives of eight-hour days, **severance**, disability compensation and better working and housing conditions, as this would make hiring workers more expensive for industrialists.

KEY TERM

Severance Legal termination of a work contract that requires the employer to give the released worker monetary compensation.

What issues affected US–Mexican relations over US mining industries?

Mexico and US mining industries after 1917

US owners possessed 78 per cent of the mines and 72 per cent of the **smelters** in Mexico in 1911. During the Revolution, these figures increased. Writing in 1981, historian Friedrich Katz pointed out that US mining investments grew between 1910 and 1920, as mining claims were sold by fleeing owners and mine prices became very competitive for risk-taking US investors. Carranza passed a law that forced government approval only if the property had been Mexican-owned, however. At the same time, Congress passed another law forcing closed mines to reopen or become available for sale.

KEY TERM

Smelter A factory for melting mineral ore into metal.

By February 1918, the Mexican government forced all foreign companies to register property titles, again under pain of losing the properties. Even so, Carranza again hesitated to apply these laws and no mines were sold or nationalized for not reopening, as had been required by the Constitution. He also continually delayed closing foreign-owned mines that did not re-register their property titles according to the new law.

What issues affected US–Mexican relations over US oil industries?

Mexico and US oil industries after 1917

In 1915, a particularly entrenched artillery battle between *Carrancistas* and *Villistas* took place in the premises of the US-owned Mexican Petroleum Company, wreaking wholesale destruction of buildings and oil tanks. By Carranza's presidency starting in May 1917, however, the oil fields were spared battle scenes, but many ended up coming to informal arrangements with revolutionaries for protection, in exchange for food and supplies. All of these expenses were later charged to the Mexican government when the USA claimed damages to its oil installations during the Revolution.

After 1917 and US entry into the First World War, oil became especially important, as the German, US and British navies switched from coal to oil for fuel. At the same time, Carranza continued to consolidate power and control the country.

The Constitution of 1917 provided Mexico with the legal foundation for nationalization of foreign-owned mining and oil industries, though Carranza chose not to put these into effect. He was more interested in US recognition, thus lessening any danger of intervention. The USA, for its part, was more interested in Carranza supporting the Allies than Germany in the First World War.

Foreign investment: the USA

After much protestation, foreign-owned companies by 1918 paid the increased taxes and royalties demanded by the Carranza government. Katz pointed out in 1981 that given the extraordinary profits of the oil industry selling fuel during the First World War, these royalties were 'hardly a tremendous burden'. At the same time, the US exerted different forms of pressure on Mexico to prevent closing or nationalizing of US mines, oil plants and other industries, such as rubber and sisal. Hints of intervention were always used to good effect, especially regarding occupation of oil fields. Loans and arms shipments, food staples and manufactured goods from the USA were sent to Mexico, stopped, then resumed, according to circumstances. The USA also intermittently supported Carranza's opponents and allowed various US interest groups to support them, except for Villa and Zapata, who received no support from the USA after 1918 (and Zapata was assassinated under Carranza's orders in 1919).

Relations between the USA and Mexico from 1918 to 1920 were tense, and diplomatic pressure and conspiracies abounded. Ultimately, the USA failed to get Carranza to renounce the Constitution of 1917 or give up Mexican neutrality in the First World War. By 1923, the US-owned petroleum industry was able to exert pressure on the President at the time, Warren Harding (1921–23), who withheld recognition of Mexico until Mexico could guarantee US investments, especially in the oil industry (see Bucareli Agreement, pages 83–4).

How oil helped the revolution

Mexican historian Lorenzo Meyer, writing in 1968, pointed out that oil paid a substantial part of the costs of the Mexican Revolution. By 1921, Mexico was generating 25 per cent of the world's oil production. This was primarily due to US owners, who raised the US share of investment in the Mexican petroleum industry from 38.5 per cent in 1911 to 61 per cent in 1921. The Mexican government depended on the tax revenues this industry generated. Carranza caused this revenue to increase when he ended tax exemptions and privilege for foreign industries.

In 1938, as seen on pages 123–7, the Mexican President Lázaro Cárdenas nationalized the petroleum industry. Mexicans from all walks of life contributed to a fund to compensate the foreign (Dutch, British and US)

companies. These companies retaliated in other ways. For instance, US President Roosevelt cut off Mexican oil imports and Mexican silver (see page 126). This meant that by the end of 1939, Mexico was selling half of its oil to the **Axis Powers**.

KEY TERM

Axis Powers The Alliance between Germany, Italy and Japan during the Second World War.

The Second World War

War had been raging in China since 1937. By 1939, it was clear that war in Europe was imminent, and the USA would need oil resources as well as a friendly neighbor at its Southern border. This formed part of the reasoning behind Roosevelt's Good Neighbor Policy (see page 103).

As war began in Europe in September 1939 with the German invasion of Poland, the USA became more amenable to bilateral co-operation with Mexico. International events precipitated in December 1941 when Japan attacked the USA and the USA joined the Allies in the Second World War. By April 1942, the USA and Mexico agreed to a compensation package for the expropriation of the US-owned petroleum companies and to forming a US–Mexican defense commission.

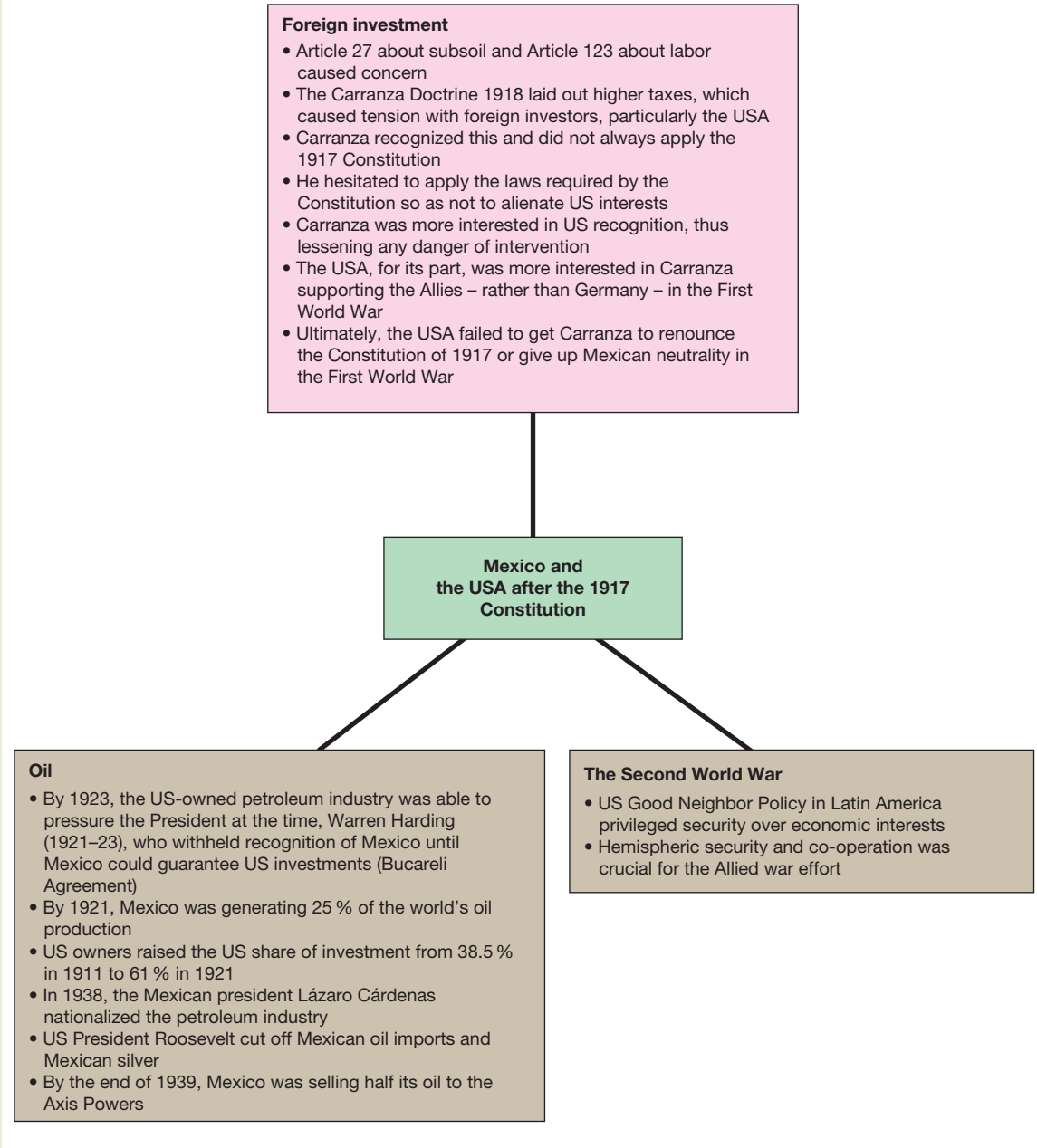
Mexican industry during the Second World War

In 1942, the Mexican Congress also passed a series of laws more sharply defining Article 123 regarding labor, placing the petroleum, mining, textile, railroad and automobile industries under a 'strategic' category that seriously curtailed their workers' rights to strike. These laws affected Mexican and foreign industry owners. War in Asia and Europe also gave these strategic industries and labor a chance to negotiate directly with the federal government regarding wages and pensions. This led to Congress passing the Social Security law later in 1942, which provided Mexican workers with health, pension and retirement benefits. The Second World War made Mexican resources and industrial production important for belligerent countries, the closest of which was the USA.

Hemispheric security and co-operation was crucial for the Allied war effort. The US Good Neighbor Policy in Latin America privileged security over economic interests. The main US objective was to prevent Mexico from remaining neutral or from joining the Axis Powers.

TOK

What distinguishes a better historical account from a worse one? Consider the sources in this chapter: memoirs, scholarly journals, images, internet sources, journals, academic historians, government memoranda, journalistic sources and political speeches. (Perception, Reason, Memory.)



SUMMARY DIAGRAM

Mexico and the USA after the 1917 Constitution

Chapter summary

The role of foreign powers in the Mexican Revolution, 1910–40

Foreign intervention in Mexico during the Mexican Revolution was often based on immediate events, such as border clashes. The US intervention in Tampico and Veracruz, as well as Villa's incursion into New Mexico and the consequent US punitive expedition under Pershing, illustrate this. There were also economic events such as danger to foreign investments. German, French, British and US investments were threatened and attacked by various factions during the Revolution. This sometimes provoked diplomatic intervention, such as the negotiations between Germany and Carranza, as well as long-term negotiations between the USA and Mexico when Mexico nationalized US-owned oil concerns. Latin American countries also became involved in the Mexican Revolution, as they tried to mediate between the USA and Mexico during the Tampico and Veracruz incidents in 1914. Mexico's geopolitical situation and its wealth in strategic resources, and international events such as the world wars, also influenced the roles foreign powers played.

Examination advice

How to answer 'discuss' questions

For questions that contain the command term 'discuss', you are asked to offer a considered and balanced review that includes a range of arguments, factors or hypotheses. Opinions or conclusions should be presented clearly and supported by appropriate evidence. In any case, straight narratives should be avoided.

Example

Discuss the impact of the policies of the United States toward Mexico during the course of the Mexican Revolution.

1. For this question, you should aim to articulate and consider the impact of US policies toward Mexico during the course of the Mexican Revolution. You would need to consider these policies and their impact on events, using evidence to show their impact.
2. Before writing the answer, you should produce an outline – allow around five minutes to do this. You might want to organize your thoughts by naming US policies and how they played out in the Mexican Revolution, gauging their impact on it. You could include evidence such as:

US policies

- *The Big Stick Policy*
  - *US intervention in Central America and the Caribbean since the beginning of the twentieth century*
- *Dollar Diplomacy*
  - *Protecting US investments*
- *President Wilson*
  - *Teaching Latin American nations about democracy*
  - *Isolationism*
  - *Not getting involved*
- *Impact on the events and the course of the Mexican Revolution*
  - *Almost every victorious Mexican faction during the Revolution, between 1910 and 1920, except for Huerta, counted on the sympathy and often the direct support of USA*
  - *US armament and war matériel affected the course of the Revolution*
  - *US presidents were quick to turn against their recently supported favorites, if US investments or geopolitical policies were threatened*
  - *The USA's inconsistent attitude had some reasons:*
    - *When a new faction instituted measures considered harmful to US interests or citizens, the US did not hesitate in intervening*
    - *Withholding economic or armament support*
    - *Diplomatic recognition or lack thereof*
    - *Direct military intervention, such as the Pershing punitive expedition in 1916 or the Veracruz naval intervention in 1914*
    - *US support was sought by the different factions and leaders and this contributed to their ascendancy*
    - *When these leaders applied sanctions to US-owned businesses or attacked US citizens, they lost US support, often to their detriment*

3 In your introduction, you will need to state your thesis. This might be: Some US policies had more impact on the Mexican Revolution than others.
When you write your introduction, do not waste time by restating the question. Also, be sure to number your answer correctly.
An example of a good introductory paragraph for this question is given on the next page.

Since the United States is located directly on Mexico's northern border, the USA was very concerned when revolution broke out. US foreign policies, namely the Big Stick Policy, Dollar Diplomacy, President Wilson's teaching Latin American nations about democracy and finally Isolationism all had some impact on the Mexican Revolution. Some US policies had more impact on the Mexican Revolution than others.

4 In the body of your essay, devote at least one paragraph to each of the topics you raised in your introduction. This is your opportunity to support your thesis with appropriate evidence. Be sure to explicitly state how your supporting evidence ties in to the question asked. If there is any counter-evidence, explain how and why it is of less importance than what you have chosen to focus on.
For example, a counter-argument here could be that US direct and indirect intervention also helped to fuel Mexican nationalist sentiment, at times even unifying opponents, which is what happened during the naval intervention in Tampico and Veracruz in 1914. It can also be argued that US intervention helped prolong the Revolution by supporting successive factions. It can also be argued that sometimes the US tried to shape the outcomes of the Revolution according to its own ideas about democracy and governance. This was especially true of President Woodrow Wilson. The impact can be judged positive or negative, according to the material used to discuss the impact of the USA on the Mexican Revolution, but specific details and events must be used to support arguments.

5 A well-constructed essay will end with a conclusion. Here you will tie together your essay by stating your conclusions. These concluding statements should support your thesis. Remember, do not bring up any new ideas here.

6 Now try writing a complete essay that addresses the question asked.

Examination practice

Below are two IB exam-style questions for you to practice on this topic.

1 Compare and contrast the intervention in Mexican affairs of US Presidents Taft and Wilson.
(For guidance on how to answer 'compare and contrast' questions, see page 78.)

2 Assess the effect of the peace conference organized by the ABC countries of the Southern Cone when the USA intervened in Mexico in 1914.
(For guidance on how to answer 'assess' questions, see page 214.)

CHAPTER 6

The impact of the Revolution on women, education, the arts, music and literature

Once the horrible level of bloodletting was over by 1920, the Mexican government turned its attention to fostering national cohesion. All Mexicans were affected by the Revolution, but some groups, like women, lived the Revolution in ways specific to their gender. They sought political rights, but these would take decades to become law. More successful were the state-sponsored art projects and the expansion of the educational system. The Revolution also spawned a great creative outpouring in music and literature. In many ways, Mexico City became one of the premier global centers of creativity and innovation, and attracted renowned artists and educators from around the world. Nonetheless, there was no one Mexican school of artistic, literary or musical expression. Mexico remained as diverse as its many political and regional strands, and continued to reflect the tensions created by the Revolution. Certainly, different groups had different goals, and these all played out in the arts, education, music and literature.

As you read this chapter, keep in mind the following questions:

- What was the impact of the Mexican Revolution on women?
- How did Mexican education change as a result of the Revolution?
- How did the Mexican Revolution impact the arts?
- How was the Revolution reflected in popular music?
- What impact did the Revolution have on Mexico's literature?

1 Women during the Mexican Revolution

Key question: What was the impact of the Mexican Revolution on women?

Mexican women in 1910 traditionally looked after their husbands and families. At the same time, their husbands or fathers were there to protect them. The Mexican Revolution broke down these roles, especially between 1910 and 1920.

Soldaderas

As men left to join the revolutionary armies or were conscripted into the federal army, women were exposed to being kidnapped and raped in their

KEY TERM

Soldaderas Mexican women who followed their men into battle, made camp, found food, cooked, washed clothing, cured wounds, and buried dead soldiers.

villages and rural dwellings. In cities, women often had the protection of their extended families and city authorities, but these were not available for poor rural women. Additionally, many peasant women felt they had to continue their nurturing role on the battlefield. So for their own and their children's safety, as well as their traditional role as family caretakers, they became *soldaderas*, or camp followers, who cleaned, cooked and provided medical care to their husbands (or brothers and fathers) while these men performed the more masculine, traditional roles of soldiers.

While the men rode into battle, the women would walk all day hauling equipment and food, eventually catching up to the soldiers to set up camp for the night. These activities were often done on top of raising children. Some *soldaderas* also went beyond submissive roles to join the military ranks and were promoted as officers. Some also took on vital roles such as arms smuggling and spying.

SOURCE A

Excerpt from Here's to you, Jesusa!, by Elena Poniatowska, published by Penguin Books, New York, 1969, p. 75–77. Poniatowska is a Polish Mexican journalist who wrote this novel based on the life of a real *soldadera* she interviewed.

That day the shooting started at two in the morning and went on all day until five o'clock in the afternoon when General Morales y Molina ordered all the women to move out, to abandon the plaza, and had everyone leave Chilpancingo; we all went to Mochtitlán, but the shooting continued because the Zapatistas were chasing us. We couldn't return to Chilpancingo for six months. There were a lot of casualties in that battle. The ones who fled as soon as they saw that the attack was heavy lived. My father sent me on ahead with the family of a lieutenant. (…)

I started to get mean when I was with the troops. (…) My father got mad because I was talking Zapotec with the boys from Tehuantepec. He caught up to me and scolded me. I didn't say anything. I was traveling with the vanguard and I kept on walking and as I walked I got madder and madder, and when we reached Tierra Colorada, I was burning with rage. (…) I sat there and made no attempt to find him food or anything. He showed up and yelled at me again, but he was so mad he grabbed a plant, one this big, he pulled it out of the ground, root and all, and raised it up to hit me.

? What does the narrator in Source A, the young girl Jesusa, reveal about the life of a *soldadera*?

As the revolutionary armies provided no services to their troops, women proved crucial in the success of many revolutionary factions by making battlefield life easier. Northern revolutionaries, such as Villa's, did not incorporate *soldaderas* into their armies as Villa despised them, even murdering 90 *soldaderas* in December 1916. Zapata, on the other hand, encouraged brave *soldaderas* in his troops. The most famous *soldadera* was Amelia Robles. She changed her name to Amelio Robles, rose to the rank of colonel and, after the Revolution, earned a veteran's pension.

Some feminist historians have classified *soldaderas* as followers of tradition, rather than women making conscious decisions to step away from their

submissive roles. Their revolutionary involvement has been said to be due to their desire to depend on their husbands. These historians argue that women remained in submissive roles and men in dominant roles, defining their social relationships in respect to one another. This argument does not explain the respect given to women who actually became soldiers, and officers, and fought in the revolution. Whether driven by Mexican tradition or not, the importance and influence of *soldaderas* on the battlefield must be acknowledged.

Women's rights

As men left factories, mines and farms to join the Revolution, the women who stayed behind often worked in traditionally male jobs. This opened positions for women in the workforce after the revolution. The Constitution of 1917, however, always gave women rights within their roles as mothers and wives, such as protecting them from heavy labor and long hours when they were pregnant (see page 73).

Middle class women joined the revolution in intellectual circles, writing in newspapers and broadsheets, like Carmen Serdán (see Chapter 2, page 42). These women founded liberal girls' schools and women's newspapers, in particular *La Siempreviva*, founded by the feminist Rita Cetina Gutiérrez. These women would form the core of feminist groups promoting women's votes in the next decades after the Revolution.

An interesting development during the Revolution was the *Congreso Femenino* (Feminine Congress) in the Yucatán, sponsored by the revolutionary governor, Salvador Alvarado, in 1916. This was a meeting attended by over 600 people, women and men, to discuss women's rights.

Laws to improve the rights of women were only ever initially discussed in terms of women's rights within the traditional roles of wives and mothers, or traditional professions such as teachers and nurses. Only in the late 1930s would Mexican women take up issues such as voting rights, and Mexican women would finally be able to vote in federal elections in 1958.

2 The Revolution and Mexican education

Key question: *How did Mexican education change as a result of the Revolution?*

A new-found focus on improving the poor state of education in Mexico emerged out of the chaotic years of the Revolution. With the establishment of the Secretariat of Public Education (SEP), 15 per cent of the country's budget was devoted to addressing the huge needs of the mostly illiterate and rural population. Many leaders knew that Mexico could not move forward economically, socially and culturally unless serious attention was paid to

improving educational levels. Mexican reformers heroically tackled the problems and experimented on how best to rebuild the nation from destruction wrought by the Revolution. There were certainly setbacks but, overall, the number of Mexicans who could read and write increased dramatically, and many Mexicans began to see themselves as citizens of the country.

What did José Vasconcelos do to improve education?

Mexican education in the early 1900s

Mexican education before the Revolution

Under President Díaz, education was generally meant for the elite. Urban schools were strongly favored over rural ones, and, by 1910, about 20 per cent of students went to private institutions in the cities. There was no federal oversight of the educational system: schools were run by the Catholic Church, the various state governments and municipalities. Illiteracy was 80 per cent when the Revolution began, and of those who were fortunate enough to attend school, most never stayed to the end. The instability of the Revolution resulted in the number of schools dropping from 12,000 to 9,000, from 1910 to 1920. The effects were also felt in Mexico City, where the number of primary schools dropped from 226 to roughly half that number.

Who was José Vasconcelos?

José Vasconcelos (1882–1959) was a writer, philosopher and politician. An early supporter of President Madero (see page 42), Vasconcelos strongly believed that the central government had a duty to improve the poor conditions of most Mexicans through education. He was appointed the rector or head of the National Autonomous University of Mexico in 1920 and encouraged professors and students to work towards fulfiling the goals of the Revolution. To him, this meant volunteering as instructors to teach the illiterate under the slogan of 'Each One, Teach One'.

SOURCE B

Excerpt from the inaugural speech given by Vasconcelos at the National Autonomous University of Mexico, 1920. Accessed at www.sep.gob.mx/en/sep_en/History?page=2.

By saying education I mean a direct teaching from those who know something, in favor of those who know nothing, I mean a teaching that serves to raise the productive capacity of each hand that works, of each brain that thinks … Useful work, productive work, noble action and deep thinking, that is our purpose … Let's take the peasant under our care and let us teach him to increase a hundredfold the amount of his production with the use of better tools and methods. This is more important than distracting them by the conjugation of verbs, because culture is the natural fruit of economic development.

? Looking at Source B, what type of education did Vasconcelos think was most important?

Vasconcelos as head of the SEP

Vasconcelos was appointed by President Obregón to lead the newly created SEP in 1921. The 1917 Constitution had to be amended first for the new

government ministry to have state control over all educational institutions. This was duly done and, as his **mandate**, Vasconcelos was in charge of:

- national universities
- state agricultural and industrial colleges
- national museums and monuments
- fine arts and music conservatories
- primary and secondary education.

He also developed an expanded network of vocational schools and created opportunities for adults to learn new skills.

Vasconcelos set himself high goals, accomplishing a tremendous amount in his three years as SEP leader. An avalanche of initiatives was begun on all fronts. Muralists, writers and musicians found state-sponsored work. Thousands of new schools were built and new teachers hired to address the severe problems, particularly in the countryside, where most of the population lived. The country's needs were so great that Vasconcelos allowed the Catholic schools to continue operating independently, even though the 1917 Constitution stated that the government would be in charge.

KEY TERM

Mandate Authority to carry out a policy.

Vasconcelos' educational philosophy in action

At heart, Vasconcelos was an elitist who thought he knew what was best for his countrymen, particularly the poor. He strongly believed that culturally, socially and economically the Indians, in their current state, prevented progress. Part of this was because, in his mind, they had not been assimilated, lived in isolated villages, did not speak Spanish and had no allegiance to the Mexican nation. He hoped to change all this.

Vasconcelos also stressed that educational programs would be based on the realities of Mexico and not elsewhere. He even went so far as to criticize the cooking curriculum in women's vocational schools because they emphasized European over Mexican foods, and asserted that US cakes should be replaced with Mexican desserts.

SOURCE C

Excerpt from *Crafting Mexico: Intellectuals, Artisans, and the State After the Revolution* by Rick A. López, University of North Carolina, Durham, North Carolina, 2010, page 134. López is a historian.

The Mexican masses, in Vasconcelos' estimation, were incapable of changing their retrograde mindset on their own. Their uplift had to be managed by their moral and racial superiors, motivated by a desire to avert the threat of being overrun by ignorant, rapidly reproducing, inferior hordes. … Vasconcelos ascribed no value to existing regional traditions or specific indigenous cultures since, in his eyes, the lower classes were uniformly backward and in need of the edifying values offered by Greek classics, Spanish culture, and modernist philosophy. He aspired to foment an authentically Mexican art and culture, but felt that popular traditions were to be endured only so long as they served as bridges leading the lower order to higher civilization.

According to Source C, how and why did Vasconcelos hope to change the masses? ?

Rural schools

Central to Vasconcelos' plans was the creation of the rural school, or *Casa del pueblo*. He hoped to change the environment of the *campesinos*, who he thought were plagued by diseases and often hungry. To accomplish this, he established hundreds of schools, many of them in remote areas. Not only would students be taught the basics in traditional school subjects, but they would also learn about art, hygiene and the dangers of alcohol. All students would have a sense of being part of the nation by learning Spanish (for most, for the first time) and Mexican history and geography. Adults would be instructed in better farming techniques and learn how to read and write.

? Explain why Rivera included farmers and an armed man in the portrayal of a rural school teacher in Source D.

SOURCE D

'The Rural School Teacher' mural by Diego Rivera at the Ministry of Public Education, Mexico City, 1926

El Maestro

For the average rural teacher, many of whom were little better educated than the children they taught, teaching in remote villages without much support was difficult at best. SEP produced a magazine to assist, direct and encourage them. This publication, *El Maestro* ('The Teacher'), was printed on a large scale. Each issue, from 1921 to 1923, had a print run of 75,000 copies.

It included sections on practical advice, literature, general culture and national history, and children's pages.

Cultural missions

Vasconcelos described his educational mission as a crusade. He created a program known as 'cultural missions' – groups that comprised teacher-trainers, agricultural specialists, nurses, music and art teachers and instructors in small businesses, who were sent out to the countryside. They were known as 'missionaries'. They would stay in villages for a specified amount of time and expose the *campesinos* to different ways of thinking and working. They were not always warmly received because they represented outsiders intent on altering the villagers' strongly-held traditions.

SOURCE E

Excerpt from 'A cultural missionary in Chiapas in the 1920s', quoted in *The Ambivalent Revolution: Forging State and Nation in Chiapas, 1910–1945* by Stephen E. Lewis, New Mexico, 2005, pages 26–7. Lewis is an academic specializing in Mexican history.

*The mestizo teacher will not be accepted because the Indian is suspicious, distrustful and does not tolerate the '**ladino**', who he considers to be his enemy capable of only doing harm and never good: in order to convince him that we are his brothers, sons of the same motherland, an arduous and prolonged campaign will be necessary … Only with love, good faith, and honor we will incorporate and civilize our Indians.*

What difficulties did the *mestizo* teacher face, according to Source E? ?

KEY TERM

Ladino A westernized, Spanish-speaking Mexican, usually a *mestizo*.

Mexican education from 1920

What else did Vasconcelos do to improve education?

SEP publications

As part of his civilizing mission, Vasconcelos believed it was very important to expose the Mexican poor to literature, so that they might develop an '**aesthetic culture**'. He strongly felt that the citizen of the new Mexico needed more than just basic instruction to advance. He chose a number of books he felt would help uplift them. These included works by authors such as Homer, Dante, Cervantes and Tolstoy. Thousands were printed in cheap editions by SEP. While these would probably have been too difficult for the average *campesino*, SEP did publish **readers** and textbooks for students, which numbered in the hundreds of thousands; for example, in 1922, SEP printed 400,000 readers alone.

KEY TERM

Aesthetic culture A culture that has been purified of foreign elements, in this case cleansed of non-Hispanic elements.

Readers A book designed to give students practice in reading.

Libraries

During Vasconcelos' time as minister of public education, hundreds of libraries were built. For remote villages, books were boxed up and sent in by mule. Larger and more accessible villages and towns would receive 100 to 1000 books. In 1922–23, 32,000 volumes were distributed to 285 new libraries. The Mexican historian Enrique Krauze writing in 2011 dubbed

KEY TERM

Cultural *caudillo* An overlord who controlled the cultural policy of the government.

Pedagogy The method and practice of teaching.

Vasconcelos a **cultural *caudillo***. This was not necessarily negative, as Krauze noted that in 1920 there were only 39 public libraries, but by 1924 there were more than 1900.

Obstacles to Vasconcelos' grand plans

The rapid pace of innovation and experimentation was one of the chief obstacles the SEP faced. Rural schoolteachers were often unsure of how and what they should be teaching because of the constantly changing instructions and preferred **pedagogy** from Mexico City. Because the growth of rural schools was so quick, it was often difficult to find and train enough teachers to carry out their duties.

There was also resistance among some Indians, who resented challenges to their cultural and farming traditions, especially that the remote central government was giving the instructions. Sufficient funds, even though they had greatly expanded during Vasoncelos' office, were never enough to meet the enormous needs of the people. Some criticized Vasconcelos for spending resources on printing classic texts that most of the intended readers never read.

Finally, the outbreak of the de la Huerta rebellion in 1923 (see page 83) created further disruptions and instability, which hampered the smooth functioning of the SEP and resulted in a reduction in the education budget. In 1923 and 1924, education was reduced to 9.3 per cent of the national budget, and then to 6 per cent in 1925.

Vasconcelos' resignation

In 1924, when it was apparent that Plutarco Calles would become the next president after President Obregón (see page 87), Vasconcelos resigned. He tried his hand at politics, but his runs for both governor of Oaxaca and president were unsuccessful. In 1925, he produced his most well-known work, *La raza cósmica* ('The Cosmic Race'), in which he suggested that *mestizo* Latin Americans were a new race that combined the best of both the European and indigenous peoples. This was another indication of his views on indigenous peoples.

Who else influenced Mexican education after Vasconcelos?

A new direction for the SEP

José Puig Casauranc

The physician José Puig Casauranc became the new head of the SEP in 1924 and would keep this post until 1928. During those four years, great changes were made in Mexico's educational programs, many of them driven by the under-secretary of the SEP, Moisés Sáenz. Less attention would be paid to Vasconcelos' vision of a cultured peasant and more to expanding the network of rural schools.

SOURCE F

Excerpt from 'Newer Aspects of Education in Mexico, Bulletin of the Pan American Union, LXIII' by Moisés Sáenz, February 1929, page 873, quoted in 'Mexico Experiments in Rural and Primary Education: 1921–1930' by Louise Schoenhals in *The Hispanic American Historical Review*, Vol. 44, No. 1, February 1964, page 41.

Mere education, if by that is meant the conventional three R's, the bookish sort of thing, holds little hope, indeed, for these people in their present condition. The truth of the matter is that we have to change our whole concept of education, and that is exactly what we are trying to do in Mexico. When the problem is one of awakening, energizing, rehabilitating 8,000,000 human beings, education must mean infinitely more than the acquisition of formal knowledge … Functional education is, for us in Mexico, not a refinement but a need of the first order.

Why, according to Source F, was traditional education inadequate? ?

Sáenz and Dewey

One of the most influential US philosophers and education reformers during the first half of the twentieth century was John Dewey. He fervently believed that traditional education was too static and that students needed practical experiences to apply their learning to their daily lives. One of his students at Columbia University in New York was the Mexican Moisés Sáenz, studying for his doctorate. Sáenz returned to Mexico in 1924 and, having graduated and become under-secretary of the SEP, started putting Dewey's plans into action.

Sáenz's plans: rural schools

In his new post, Sáenz greatly expanded the network of rural schools. The number of teachers serving in the countryside rose from around 1000 in 1924 to 6500 by 1930. The number of students also increased dramatically from 50,000 to 325,000. Students now not only attended regular classes, but also had vegetable gardens, orchards, chickens and bees to care for. Produce was sold in order to support the schools. Puig Casauranc hoped to make the school system more efficient and less reliant of money from the central authority.

Communities were encouraged to help build and maintain the new schools: the schools often became the center of rural communities and offered classes, often in art, music and basic health, to children and adults alike. Public health campaigns took place in 3000 villages, and the school was often the meeting place for these. Officials hoped to counter traditional beliefs, such as that winds or evil spirits spread disease, with more scientific explanations.

Assimilation through rural schools

Sáenz hoped to assimilate Indians through these rural schools, by having them learn Spanish and by studying the nation's history. By studying

KEY TERM

Reservations Land set aside for Native Americans to restrict their movement.

? Looking at Source G, why did Dewey think that education in Mexico was revolutionary?

together in a school, they could be exposed to new ideas while not being isolated in their sometimes remote villages. Dewey was impressed by this strategy during his 1926 visit to Mexico. He compared it favorably to how US Native Americans had been segregated from mainstream society on **reservations**.

SOURCE G

Excerpt from 'Mexico's Educational Renaissance' by John Dewey from *The New Republic*, No. 48, 22 September 1926, pages 117–18.

The most interesting as well as the most important educational development is … the rural schools: which means of course, those for native Indians. This is the cherished preoccupation of the present régime; it signifies a revolution rather than a renaissance. It is not only a revolution for Mexico, but in some respects one of the most important social experiments undertaken anywhere in the world. For it marks a deliberate and systematic attempt to incorporate in the social body the Indians who form 80 per cent of the total population. Previous to the revolution, this numerically preponderant element was not only neglected but despised … there is no educational movement in the world which exhibits more of the spirit of intimate union of school activities with those of the community than is found in this Mexican development.

Schools in cities and rural areas

For the first time, secondary schools were also established in rural areas. Students could now continue their studies. Open-air schools – small schools with outdoor areas where gardens could be raised and students could take art classes – were established for the poor in Mexico City.

Twenty-four model primary schools were also established in state capitals and large cities. These were designed to demonstrate effective teaching methods to teachers. Indeed, Sáenz knew he had to raise the standards of the mostly poorly trained teachers, so, in addition to these model schools, he established institutes to help the teachers. These offered short professional-development courses, designed to help teachers better serve their communities.

What else happened after Vasconcelos? →

Innovations in education

More innovations in education

La Casa del Estudiante Indígena (House of the Indigenous Student) opened in 1926 in Mexico City. This was an effort to explore how Indians would fare if exposed to excellent instruction, both academic and vocational. Two hundred non-Spanish-speaking students from a variety of tribes attended this boarding school during the first year. While the students exceeded expectations, once they had learned marketable skills they chose to take jobs in Mexico City rather than return to their villages, as had been expected. After this failure, the *Casa* closed in 1932.

Another innovation was the creation of central agricultural schools. These were a favorite of President Calles, an ex-schoolteacher. Each of the schools comprised 2500 acres of agricultural land, where crops were raised and new farming techniques tried. Like other educational programs, these were designed to improve Mexico's agricultural production and promote national economic progress.

Catholic education

As a consequence of the Cristero Revolt, when Calles tried to limit the Catholic Church's power (see pages 90–92), Calles closed all Church schools in Mexico. Severe disruptions to the educational system occurred because of the violence, and the rural teacher often bore the brunt of anger directed at the state. These teachers were viewed as anti-Catholic and representative of the federal government. In some rebellious rural areas, the number of children attending school dropped significantly, and it would take years to regain previous levels of school attendance.

Nationalism and Mexican education

Similarly to previous efforts, the federal educational system promoted nationalism. History lessons stressed the goals and achievements of the Revolution. The Revolution was presented as equally important as Mexican independence in the country's history. In 1925, a pledge of allegiance to the flag was introduced, and President Calles presided over a ceremony that included tens of thousands of students reciting the pledge at the national stadium. A new school calendar also now included the dates of Madero's birth and death to enforce the idea that the Mexican Revolution was a particularly important event.

What did the SEP achieve by the 1930s?

Overly ambitious plans and frequent experimentation – not unlike the frenetic years when Vasconcelos was in charge – led to unsuccessful outcomes in SEP's plans. Furthermore, the lack of trained teachers hurt progress as the network of rural primary and secondary schools expanded. While it is true that by the end of the 1920s there were thousands of new schools, and hundreds of thousands of new students, the quality of education was uneven. Urban schools tended to receive more funds and better teachers. One area that suffered was higher education. By 1928, there were only 14,000 students enrolled in university in a population of over 14 million. Lack of effective leadership hampered the SEP from 1928 to 1931, as four different ministers presided over the large bureaucracy.

A 'Socialist' education

What happened in Mexican education after Casauranc and Sáenz?

Narciso Bassols

Narciso Bassols headed the SEP from 1931 to 1934. Under his guidance, a new SEP publication, *El Maestro Rural* ('The Rural Teacher'), was

published. It was intended as a way for the SEP to communicate with both the rural teachers and the *campesinos*. *Campesinos* and rural teachers were both encouraged to raise issues by publishing articles, and as the magazine was written in simple Spanish, it was a successful technique of maintaining contact between Mexico City and rural areas. For some SEP officials, it also a way of keeping political and ideological control of the rural schools.

It was under Bassols that the first students of the *Escuelas Normales* or Teacher Training Colleges graduated. These new teachers were much better prepared than most of their peers in the rural schools and were seen as a threat to the latter, who felt they might lose their jobs.

SOURCE H

Excerpt from *Triumphs and Tragedy: A History of the Mexican People* by E. Ruíz, New York, 1992, page 402.

Critics, he [Bassols] acknowledged, referred to the ill-equipped and poorly led schools as schools of reading, writing, and arithmetic, rarely as institutions for social change. Countless rural schools were simply out of touch with reality, as one school inspector learned. During one of the periodic anti-alcohol campaigns, he had stopped at a village notorious for its ***pulque*** *drinkers, where he lectured its inhabitants on the pitfalls of alcohol, urging them to drink water instead. His audience listened attentively, saying nothing. After he had finished, the villages asked him to stay and eat with them. At the table, he noticed that his glass held rancid water. Surprised and angered, the inspector demanded an explanation.* Maestro, *they replied, 'this is what you have asked us to drink'. For miles around, there was nothing to drink but water from stagnant pools. The people drank pulque instead.*

? How does Source H illustrate the idea that the SEP bureaucracy was out of touch with reality?

KEY TERM

Pulque An alcoholic drink derived from the agave plant.

Bassols and 'Socialist' education

Bassols was the first Marxist to hold a ministerial position in the Mexican government, and helped to usher in a major shift in Mexican education when he carried out Calles' introduction of 'Socialist' education (see page 104). Article 3 of the 1917 Constitution dealing with education was again changed, this time to incorporate this new direction. Bassols wanted to find more scientific and technological solutions to Mexico's problems, particularly in the poor countryside. He knew that hungry children and parents considered education secondary to the task of feeding themselves. What Bassols and his successors tried to do was to help educate the peasants to increase their agricultural outputs, and thus ensure that *campesino* communities improved their local economies.

Sex education and teacher opposition: Bassols' resignation

Bassols tried to counter an increasing rate of teenage pregnancy by instituting a program of sex education in secondary schools in 1934. He was met by huge opposition from outraged parents and the Catholic Church.

Both groups thought teaching students about birth control and how to prevent sexually transmitted diseases would lead to increased promiscuity. Students, egged on by their parents, went on strike in various cities.

On top of this, many teachers opposed Bassols because he had demanded more transparency and accountability for teachers, including assessing their performance and abilities. There were also conservatives among the teachers who felt a shift towards Socialist education was a dangerous new development. They, alongside the striking students, called for Bassols' resignation. Bassols' days were numbered. He resigned in May 1934, though he later served as interior minister, finance minister and ambassador to a number of countries, including the Soviet Union.

The Cárdenas years, 1934–40

What did Cárdenas do for education?

Lázaro Cárdenas faced massive challenges when elected President in 1934. It was during his six-year term that many aspects of the Revolution were re-energized, not least education. Together with land reform there was:

- an increased budget for education
- a refocus on rural schools
- the founding of the National Polytechnical Institute and the Workers' University
- a recommitment to fostering productive work and social action.

Gonzalo Vázquez Vela served as Cárdenas' secretary of public education for five-and-a-half years. While some more radical educators hoped he would follow Bassols' ideas, he chose to be more of a pacifier. With up to 15 per cent of the national budget at his disposal, Vázquez Vela oversaw the construction of more than 4000 rural schools and a student enrolment that increased by 54 per cent to more than 1.2 million students. There are more details on Cárdenas' education policies on pages 117–21.

On the negative side, as more and more teachers joined different teachers' unions with competing agendas, the SEP became embroiled in politics. This sometimes distracted the ministry from its primary focus of lifting poor Mexicans out of poverty through education, as it tried to placate those who wanted to continue socialism in the schools and those who were more socially and politically conservative.

SOURCE 1

Excerpt from 'The Socialist ABCs' (anonymous), 1929, quoted in *The Mexico Reader: History, Culture, Politics* by Gilbert Joseph and Timothy Henderson, eds, University of North Carolina, Durham, North Carolina, 2002, pages 412–13. This excerpt is from a school primer printed by the state government of Tabasco, one of the most radical and anticlerical states in the nation. While SEP controlled educational policy in general, state governments also ran their own schools.

According to Source 1, how had the wealthy exploited the poor? ?

In our society, before the Revolution of 1910, an odious division of classes came into being. There was one class that enjoyed every consideration and which had the support of the government.

That was the privileged class.

The victim of the privileged class were the workers of the cities and of the countryside; the latter were called 'mozos' *['servants' or 'boys'] and they lived in the saddest conditions you can imagine.*

They were exploited without pity, and the greatest fortunes of Tabasco were built upon their excessive labor.

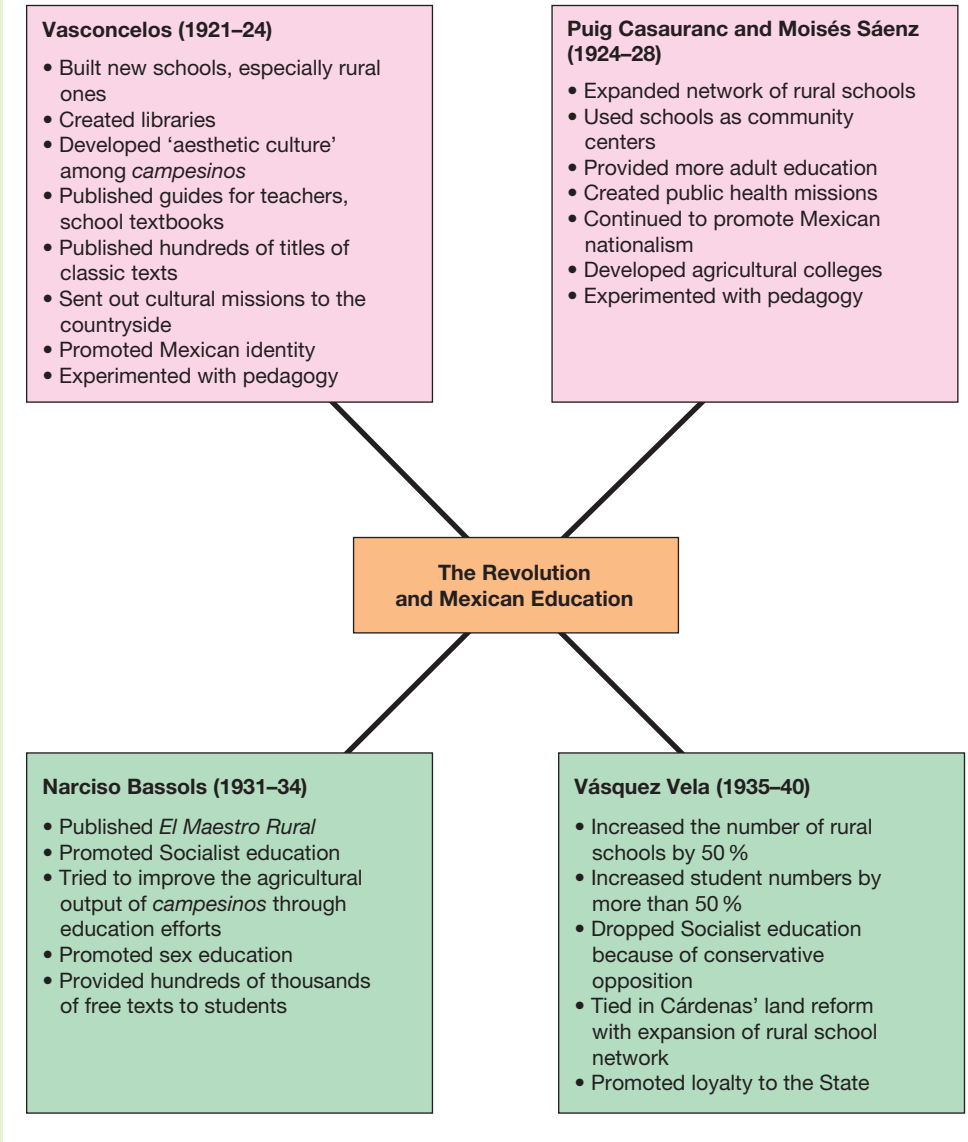
The greedy capitalists packed many tears and sorrows away in their strong treasure chests.

… they were helped by the clergy in their unhealthy passion to exploit; they shared their riches with the clergy in exchange for absolution, and they were blind and deaf to the sorrow of the oppressed. …

It was within this society, organized so unjustly and completely lacking in the principles of love and justice that must exist among men, that the Revolution broke out; the struggle was joined against the regime which protected this state of affairs, and after several years and much blood, tears, and suffering, the Revolution triumphed.

The SEP: a summary

The SEP hoped to redeem Mexicans from their supposed backward state, bring them into the post-revolutionary society and help them become productive members of the community. While it is certainly true that millions were educated after the federal government took over school education, some historians believe Mexico's educational achievements have been somewhat glorified. Historian Mary Kay Vaughan writing in 1975 discussed the idea that actually not much was different between Díaz's educational policies and those from Obregón onwards. She wrote that the elites hoped to better train peasants so they could contribute to the nation's economy by producing more, and then, in turn, become consumers of industrial goods. The elites were not interested in altering the class structure because that would have meant surrendering power; for example, she wrote that history texts 'continued to reinforce tendencies towards incorporation, pacification, and obedience to authority'. Ramón Eduardo Ruíz in 1992, while agreeing that the State hoped to foster nationalism, wrote that 'The school had become a political weapon to use against the *status quo*'. For Ruíz, the rural schools were at the forefront of significant social and cultural change.



SUMMARY DIAGRAM

The Revolution and Mexican Education

3 The creative outburst after the Revolution

Key question: How did the Mexican Revolution impact the arts?

KEY TERM

Muralist Movement A Mexican art movement after the Revolution. Artists often created large murals depicting events in Mexican history.

The sheer scale of the destruction and violence of the Mexican Revolution, as well as the promises of a better future contained in the 1917 Constitution, led to an outpouring of creativity in Mexico. Some historians dubbed the 1920s the 'Mexican Renaissance', as embodied in the **Muralist Movement**. Mexican artists, particularly the muralists known as *Los Tres Grandes* (The Big Three), achieved fame beyond Mexican borders. The walls of public buildings were offered as new canvases for artists to educate the mostly illiterate population, promote the gains of the Revolution, and develop a sense of nationalism.

How did Vasconcelos influence Mexican art?

The government's role in the arts

The SEP

José Vasconcelos, as head of the SEP (see page 177), introduced the use of public spaces for art in 1922. He quickly instituted wide-ranging reforms and new initiatives in education and the arts.

Vasconcelos was keenly aware of the need to reconstruct Mexico after almost a decade of war. As head of the SEP, he was in charge of not only education but also the promotion of the arts, music and the sciences. He hoped to educate the average Mexican in what it meant to be a Mexican national, instead of someone belonging to a particular village or region. With this in mind, he supported artists by providing them with small wages, active encouragement and fairly free rein in what they would paint.

SOURCE J

Excerpt from *Artists, Intellectuals and Revolution: Recent Books on Mexico* by Alistair Hennessy, from the *Journal of Latin American Studies*, Vol. 3, No. 1, May 1971, page 76. Hennessy is a British historian.

The functional role of mural painting has been to disseminate a common, national and secular culture, focusing on an idealized version of the past, an exclusive interpretation of the national history, employing clusters of commonly accepted national symbols and extolling immediately recognizable national heroes. Although the influence exerted by mural painting eludes simple quantification, it has played an important part in the elaboration of those secular myths which contribute to national integration.

? According to Source J, how does mural-painting contribute to nationalism?

The Muralist Movement

Who were *Los Tres Grandes* (The Big Three)?

Los Tres Grandes were muralists who took up the challenge of creating huge murals under SEP sponsorship. They were Diego Rivera, David Alfaro Siqueiros and José Clemente Orozco. They became some of the most famous artists who represented a break from the past.

Influences and accomplishments

Both Rivera and Siqueiros were accomplished Mexican artists living in Europe when José Vasconcelos became head of the SEP. They were influenced by current European artistic trends in the early 1900s, while Orozco had not had such exposure to these outside influences. The master printmaker José Guadalupe Posada (1852–1913) made a more immediate impact on Orozco. As a young student, Orozco watched Posada at work and was influenced by his satirical outlook on Mexican society.

Los Tres Grandes would find both fame and infamy because of their masterful **frescoes**, both in Mexico and in the USA over the decades. Although these artists are often lumped together in the public imagination, they were stylistically, temperamentally and, most significantly, politically quite different from one another. While they knew each other, they could not be described as close friends, because their analyses of what the Mexican Revolution had done to the country were so different. Their interpretations of the role of the artist in society also were at odds.

KEY TERM

Frescoes Artworks applied directly to wet plaster.

Broadside A strong written attack.

The Syndicate of Technical Workers, Painters and Sculptors

In 1922, Rivera, Siqueiros, Orozco and other artists created the Syndicate of Technical Workers, Painters and Sculptors. They wanted to create a union of like-minded artists who hoped to establish new, revolutionary standards of exactly what art should be in Mexico. They issued a **broadside**, setting down their ideology for all to read, which was later published in a new newspaper they created, *El Machete*. Under the masthead ran the slogan 'The machete serves to cut the sugar cane, to open paths through dark forests, behead vipers, chop down weeds, and shame the arrogance of the godless rich'. While the paper proclaimed that it was for the workers and peasants, few could afford the price. *El Machete* soon became the official mouthpiece of the Mexican Communist Party and at its height ran at 11,000 copies a week.

SOURCE K

Excerpt by David Siqueiros et al, originally published as a broadside in Mexico City, 1922, published again in *El Machete*, No. 7, Barcelona, June 1924, English translation from *Modern Mexican Art* by Laurence E. Schmeckebier, University of Minnesota, Minneapolis, 1939, page 31. Accessed at http://backspace.com/notes/2004/09/manifesto-del-sindicato-de-obreros-tecnicos-pintores-y-escultores.php.

Social, Political, and Aesthetic Declaration from the Syndicate of Technical Workers, Painters, and Sculptors to the indigenous races humiliated through

From Source K, why was it important to bring about a 'new order'? ?

centuries; to the soldiers converted into hangmen by their chiefs; to the workers and peasants who are oppressed by the rich; and to the intellectuals who are not servile to the bourgeoisie:

'We are with those who seek the overthrow of an old and inhuman system within which you, worker of the soil, produce riches for the overseer and politician, while you starve. Within which you, worker in the city, move the wheels of industries, weave the cloth, and create with your hands the modern comforts enjoyed by the parasites and prostitutes, while your own body is numb with cold. Within which you, Indian soldier, heroically abandon your land and give your life in the eternal hope of liberating your race from the degradations and misery of centuries.

'Not only the noble labor but even the smallest manifestations of the material or spiritual vitality of our race spring from our native midst. Its admirable, exceptional, and peculiar ability to create beauty – the art of the Mexican people – is the highest and greatest spiritual expression of the world-tradition which constitutes our most valued heritage. It is great because it surges from the people; it is collective, and our own aesthetic aim is to socialize artistic expression, to destroy bourgeois individualism.

'We repudiate the so-called easel art and all such art which springs from ultraintellectual circles, for it is essentially aristocratic.

'We hail the monumental expression of art because such art is public property.

'We proclaim that this being the moment of social transition from a decrepit to a new order, the makers of beauty must invest their greatest efforts in the aim of materializing an art valuable to the people, and our supreme objective in art, which is today an expression for individual pleasure, is to create beauty for all, beauty that enlightens and stirs to struggle.'

The Syndicate directed their efforts towards the indigenous peasant, soldier and worker: the new 'holy trinity' in Mexican society. Initially, at least, the muralists hoped to paint art that told the history of Mexico and clearly defined the heroes and villains. They wished to paint the daily lives and struggles of common people in a marked departure from pre-revolutionary art, which often aped European trends. Many of the artists saw themselves as workers, not unlike those they painted. Interestingly, several of them would later accept commissions for works of art from the very same capitalists they had savaged in their murals and paintings.

Who was Rivera and what role did the Revolution play in his art?

Los Tres Grandes: Diego Rivera

Diego Rivera (1886–1957) was born in Guanajuato in central Mexico. From an early age, he studied art and showed such promise that he earned a Mexican government grant to study in Europe in 1907. He stayed there for the next fourteen years, mostly in Paris, and became a relatively well-known artist. Vasconcelos urged Rivera to visit Italy with him so that he might see and be inspired by Italian masters, then return to Mexico to help launch the

SEP's use of public spaces for art. In Italy, Rivera was impressed by the frescoes of Renaissance painters and the depth of Roman antiquity. This trip helped shape his outlook on murals and the role that ancient history can play in art.

Rivera, the politically charged artist

Rivera was an outsized figure physically, politically and artistically (in terms of how much art he created). He had a huge appetite for attractive women, and was quite successful in seducing many. He had several marriages, including to the artist Frida Kahlo, whom he married and divorced and remarried. Rivera considered himself a die-hard Marxist, fully committed to the cause of workers controlling the factories in which they worked. As one of the original members of the Syndicate of Technical Workers, Painters and Sculptors, he subscribed, at least at first, to its views that large-scale public art was much better than small-scale paintings as more people would see it. Rivera was an early member of the Mexican Communist Party, but did not always toe the Moscow-directed line. Even when he went to the Soviet Union in 1927 as part of the Mexican Communist Party delegation, to mark the tenth anniversary of the Russian Revolution, he criticized Stalinist excesses. By 1929, he had been thrown out of the Party. Rivera was more at home with the internationalist approach of **Leon Trotsky** and joined with fellow Mexican supporters when Trotsky was exiled. He was instrumental in persuading Cárdenas' government to offer Trotsky asylum in Mexico in 1936.

KEY TERM

Leon Trotsky Leader in the Russian Revolution who fled the Soviet Union after Stalin became dictator. He was a proponent of international revolution.

SOURCE L

Excerpt from the article 'Art and Politics in Our Epoch' by Leon Trotsky, June 1938. Accessed at www.wsws.org/en/articles/2011/12/ltdr-d21.html.

In the field of painting, the October [Russian] revolution has found her greatest interpreter not in the USSR but in faraway Mexico, not among the official 'friends', but in the person of a so-called 'enemy of the people' whom the Fourth International is proud to number in its ranks. Nurtured in the artistic cultures of all peoples, all epochs, Diego Rivera has remained Mexican in the most profound fibres of his genius. But that which inspired him in these magnificent frescoes, which lifted him up above the artistic tradition, above contemporary art in a certain sense, above himself, is the mighty blast of the proletarian revolution. Without October, his power of creative penetration into the epic of work, oppression and insurrection, would never have attained such breadth and profundity. Do you wish to see with your own eyes the hidden springs of the social revolution? Look at the frescoes of Rivera. Do you wish to know what revolutionary art is like? Look at the frescoes of Rivera.

According to Source L, what role did the Russian Revolution have in shaping Rivera's outlook on art? ?

Rivera's early murals

When Rivera returned to Mexico in 1922 from Italy, he toured the Yucatán along with his sponsor, Vasconcelos. The trip inspired him to incorporate many of the stunning ancient Mayan artistic achievements he saw. He was

now beginning to sense the great and long history of his country. In his autobiography, he wrote that 'I roamed the country in search of material. I wanted my painting to reflect the social life of Mexico as I saw it, and through my vision of the truth to show the masses the outline of the future'.

Rivera at the National Preparatory School

The first piece of work Rivera did under the Mexican government's commission was at the National Preparatory School in the capital in 1922. Vasconcelos offered him an interior wall. Siqueiros and Orozco, as well as several other artists, were also given wall space for their murals.

Rivera's work was called 'Creation' and attempted to convey the origins of the sciences and the arts. The allegorical figures were over 12 feet tall and included a mixture of racial groups. The conservative students at the school were outraged by what Rivera and the other artists were painting, because they were so unaccustomed to new visual displays. Students tried and partially succeeded on several occasions to damage the murals, and even the *Damas Católicas*, a religious group of right-wing women, voiced their outrage. While Rivera often exaggerated, he did have reason to feel threatened, and often armed himself while painting.

Rivera completed the 1000 square foot mural in a year but was dissatisfied that his work was too derivative of Italian art. For his next project, he would be sure to incorporate Mexican motifs more clearly.

SOURCE M

Excerpt from *Une Renaissance Mexicaine: La Renaissance de l'art français et des industries de luxe* by Anita Brenner and Jean Charlot, Paris, February 1928, pages 61–2. Brenner documented many of the muralists' lives and Charlot, a French muralist who worked alongside Rivera at times, was considered to be the Muralist Movement's historian.

Diego Rivera, a dynamo in a static mass of flesh, perched on the beam of scaffolding near the roof of a tall building, produces fresco after fresco without the least haste. A gigantic cow-boy's hat shades his sleepy eyes and good-natured smile. A stuffed cartridge-belt and the dark case of a Colt 45 encircles his figure, beneath the weight of which the boards are bent.

? How do Brenner and Charlot portray Rivera in Source M?

Rivera's themes

Vasconcelos withstood the withering attacks in the conservative press that was unhappy with his new vision of the educated masses. He next presented the artists with an even grander project in 1923, at the SEP headquarters. It was here that Rivera created 135 frescoes that covered more than 5000 square feet. Among the themes that Rivera stressed were Mexicans hard at work, the natural glories of Mexico and the Revolution. Panels had such names as 'Life of Zapata', 'This is how the Proletariat Revolution will be', 'The Liberation of the rural worker' and 'The rural teacher'.

At one point, the press realised there was a poem by the radical Gutiérrez Cruz included on one mural. Under pressure, Vasconcelos asked Rivera to get rid of this and he complied. Nonetheless, numerous Communist symbols, such as the hammer and sickle, appear in the murals, revealing Rivera's political leanings.

Rivera alone at the National Preparatory School

When Vasconcelos resigned (see page 181), the artists' major sponsor and protector was gone. The new government demanded that the syndicate be disbanded and the publication of *El Machete* halted. It was either that or they would lose their jobs. Most refused the ultimatum and were fired. Rivera was probably saved from this fate because he had resigned from the Communist Party in 1925. He rejoined the Party the following year but was allowed to continue his work, until he finished the murals in 1928.

Work at Chapingo

While he was working on the SEP murals, Rivera also created frescoes at the National School of Agriculture at Chapingo. He worked there from 1924 until 1927 and painted what many art historians consider to be his finest work, 'The Liberated Earth and Natural Forces Controlled by Humanity', in the former chapel. One critic dubbed it the 'Sistine Chapel of the Twentieth Century'. Rivera focused on social justice through land reform and how people could harness nature to do better.

The National Palace murals

At the National Palace in 1929, Rivera provided the public with a massive pictorial history of Mexico from the pre-Columbian days until 1930, entitled the *'Epic of the Mexican People'*. The artist and historian Desmond Rochfort described his work in 1993 as 'the first of the murals to place the Revolution within some kind of historical perspective'. Mexicans could see how the main events of their nation's history developed. The murals were a clear indication of the importance Rivera gave the Revolution and the centrality of Marxism to achieving a better future.

A US-commissioned work

One other series of Rivera's early mural work bears mentioning. The US ambassador to Mexico, Dwight Morrow, commissioned Rivera to paint murals on the walls of the Cortés Palace in Cuernavaca, capital of Morelos, in 1929. He entitled this work 'The History of Morelos: Conquest and Revolution'. He covered the history of the state from the time of the Spanish conquistador Hernán Cortés' landing at Veracruz until Zapata's agrarian revolution (see pages 45–48). Rivera's fellow leftists felt that Rivera's accepting money from a representative of a capitalist country, as well as his failure to condemn Leon Trotsky, were anathema, and led to his being thrown out of the Communist Party in 1929. This self-imposed exile, essentially, meant that he could not finish the 'Epic of the Mexican People' until 1935.

What was significant about Rivera's time in the USA?

Rivera in the USA

When political troubles at home made it uncomfortable for the muralists, they often headed north of the border. Diego Rivera spent much of 1930–34 in the USA; Orozco found a temporary home in the USA from 1927 to 1934.

The MOMA retrospective

The works of Mexican artists became increasingly in demand in the USA. The Museum of Modern Art (MOMA) in New York City created a one-man retrospective around Rivera's from late 1930 to early 1931. Rivera was the second artist to be honored in this fashion (Matisse was the first and Picasso the third). People attended the show in large numbers. Rivera received great praise for the show and went on to create murals in San Francisco and Detroit, though not without criticism:

- Some US citizens criticized the choice of non-US citizens to do commissioned work when many US artists were unemployed because of the Great Depression.
- Others found much to criticize in Rivera's overt political message of the evils of capitalism and the wonderful future offered by Marxism.
- Still others, particularly in Detroit, called for the destruction of Rivera's murals for their supposed anti-Catholic message.

However, it was in New York City that the most furore was generated.

The Rockefeller controversy

The wealthy and powerful Rockefeller family hoped to adorn the entry hall to the newly built Rockefeller Center with modern art. Rivera was contracted to produce one of the three murals in 1933. When the Rockefellers saw Rivera's 'Man at the Crossroads', they were stunned by the central position given to the Communist leader Vladimir Lenin. They asked Rivera to remove this affront to US capitalism but Rivera refused. The offending fresco was covered up, then chipped from the wall and carted off to the garbage dump. Rivera was fired, but still earned $20,000 for his work, a huge sum during the Great Depression. This was a far cry from what he had received from the SEP a decade earlier, when he and others received the same salary as a stonemason.

The Mexican Renaissance

During the 1920s and 1930s, Rivera became Mexico's most well-known artist, admired (and reviled) both at home and abroad. The Revolution was a great inspiration to Rivera, and he remained committed to its ideals of social justice and the centrality of the Mexican Indian in the past and future of Mexico. His name became synonymous with the Mexican Renaissance.

As a committed Marxist, he also understood that the Mexican Revolution only marked the beginning of a transformed society and culture. Yet, at the same time, he did not seem to think that painting for the wealthy was a contradiction. He painted portraits of businessmen both at home and in the USA, even though this kind of 'easel art' ran counter to what the Syndicate of Technical Workers, Painters and Sculptors swore in their 1922 manifesto.

SOURCE N

Diego Rivera drawing the cartoon of 'Infant in the Bulb of a Plant' on the east wall of his Detroit Industry mural, 1932

What does Source N suggest about the scale of Rivera's mural? ?

Los Tres Grandes: David Alfaro Siqueiros

How did the Mexican Revolution impact Siqueiros?

Siqueiros, the committed Communist

David Alfaro Siqueiros (1896–1974) was a much more committed leftist than Rivera. He not only served as a soldier during the Revolution, but also tried to make his art revolutionary, both in content and technique. He was an early member of the Mexican Communist Party and remained a staunch supporter of the Soviet Union until his death. As an artist, he produced much less than the workhorse Rivera because he was often consumed by political activities, which caused him to go to prison and even leave Mexico several times.

Siqueiros was rebellious from an early age. In 1911, at the age of fifteen, he helped lead a six-month strike at his art school over poor instruction. Several years later, he joined the Revolution and served for four years. By the end he had become a captain. During the war, he co-founded the Congress of Soldier Artists, an early attempt at political organizing. In 1919, he went to Paris and broadened his artistic horizons as he learned of new trends in French ***avant-garde*** art.

KEY TERM

Avant-garde Experimental or radical.

SOURCE O

Excerpt from *Siqueiros: His Life and Works* by Philip Stein, International Publishers, New York, 1994, page vii. Stein was an artist and had worked with Siqueiros from 1948–58.

Siqueiros was a painter of socialist convictions who, in his leadership of the Mexican Muralist Movement, confronted the schools of abstract art rooted in capitalism. A force so strong and influential as that led by Siqueiros was dangerous and had to be halted, at least if the predominant culture had any say in the matter. Yet, in spite of a literary art criticism blackout, especially in the United States, the genius and technical ability that his works revealed could not be denied: taking the top honors at the Venice Biennale in 1950, and the creation of his final spectacular mural, The March of Humanity. *Of course, there was his politics; he was a dedicated Marxist-Leninist throughout his life. How could he dare to mix politics with 'art'? How could he, Mexico's greatest portrait painter, organize the miners' union, march on May Day, then lecture on aesthetic theory for a modern world? Siqueiros was a smoldering creator, one who placed himself at the vortex of events of the struggling masses that brought such turmoil to the world.*

? How, according to Source O, did Siqueiros combine his politics with his art?

SOURCE P

'Del porfirismo a la Revolución', 1952–54, fresco

? What do you think is the political meaning of the mural in Source P?

Siqueiros' art: influence, technique and message

How did Siqueiros reveal his politics through his art?

While in Paris, Siqueiros met Rivera and other leading artists. He journeyed to Italy with Rivera and was stunned by the murals of Renaissance artists like Masaccio, Giotto and Michelangelo. Like Rivera, Vasconcelos enticed him back to Mexico to contribute to creating art for the people. He was given space in the National Preparatory School and tried to organize an artists' collective to set up a common vision for the project.

SOURCE Q

Siqueiros quoted in *Siqueiros: His Life and Works* by Philip Stein, page 38.

There our first work was produced. Ignorant of muralism, ignorant of public art, problems artists of our time did not care to occupy themselves with, we began in the most stumbling manner that one can imagine. We distributed the walls of the National Preparatory School as one would divide a loaf of bread, everyone a slice … But this fixed method of distributing the work was not the only error we committed as ardent muralists. We had yet to form a concept of the differences between easel painting and the construction of murals. But the most extraordinary and fundamental problem of all concerned our theme. The problem of a new thematic concept was tremendous, new, and incalculable.

What evidence is there in Source Q of the difficulties the artists faced? ?

Siqueiros at the National Preparatory School

Siqueiros produced murals that were not necessarily political in nature, though the ones that aroused the greatest reaction certainly were. He created the grand mural 'The Myths and Burial of a Martyred Worker' in 1924. A detail in this mural was a worker's coffin, draped with a hammer and sickle. Students at the school were not at all pleased with this and tried to destroy his work as they had tried with Rivera's. During this period, Siqueiros helped create the union of artists, sculptors and technical workers with Rivera, and put great time and energy into the newspaper *El Machete*. He and Rivera both wrote for the paper and contributed artwork, as did other accomplished writers, photographers and engravers.

When Vasconcelos resigned (see page 181), Siqueiros turned to political activity and helped organize the silver miners in Jalisco state to strike for better wages and living conditions. He was elected head of a national trade union and travelled to the Soviet Union in 1928. The anti-Communist government placed him in an internal exile in Taxco from which he was forbidden to travel. In Taxco, Siqueiros turned back to art and produced many paintings that were eventually shown in Mexico City in 1932.

Siqueiros in the USA

In 1932, Siqueiros was thrown out of Mexico for being a dangerous subversive, and went to Los Angeles, California. Here, he created three murals, including 'América Tropical'. In this mural, a crucified figure of an Indian is displayed, and an eagle representing the USA sits atop his head. It was clear he was attacking US imperialism in the Americas. Shortly thereafter, the mural was whitewashed over (though it was recently restored).

Another of the murals, 'Street Meeting' (also known as 'Workers' Meeting'), stressed union organizing, interracial relationships and racial unity, topics that were not popular for the Los Angeles city elders. This was almost immediately covered over, although there is now hope that it too can be restored.

The messages in Siqueiros' murals did not go unnoticed by US authorities and his visa was not extended. Siqueiros next spent time in South America, before returning to the USA in 1936. He settled for some months in New York City, where he gave lectures and workshops to aspiring artists. Jackson Pollock was one of these students and incorporated what he learned in his own art.

Siqueiros' experimentalism

It was during his US exile and subsequent years in Argentina, Chile and Cuba that Siqueiros shifted to a truly different way of painting. He was finally able to realize his goals of not only utilizing the Mexican Revolution as an inspiration, but also breaking away from traditional fresco painting. He used a spray gun to apply pyroxylin paint, an industrial substance, onto walls. He also used the camera to help him plan his works instead of sketchpads. Siqueiros used projectors to cast figures on walls and promoted the notion that art should not be flat, as on a canvas, but should incorporate rounded surfaces and be more alive.

The Spanish Civil War and the Second World War

The political situation in Mexico changed with the election of the progressive Lázaro Cárdenas in 1934. Siqueiros returned home, but was drawn to the **Spanish Civil War**. In Spain, he served in one of the international brigades, supporting the **anti-fascist** government and attained the rank of **lieutenant-colonel**. He returned again to Mexico as the tides of war turned against the Spanish government and the fascists led by General Franco won. In 1939, he created 'Portrait of the Bourgeoisie' under the sponsorship of the National Electrical Workers' Union in Mexico City. The painting warned of the dangers of fascism and how workers were being turned into gold coins by an enormous machine. During the Second World War, much of Siqueiros' work focused on the struggle between the fascists and those supporting democracy.

KEY TERM

Spanish Civil War Civil war in Spain from 1936–39, pitting the elected Republican goverment against Conservative rebels.

Anti-fascist Against the totalitarian ideology of fascism.

Lieutenant-colonel A commissioned officer's rank, above that of a major and below a colonel.

Siqueiros and Trotsky

Siqueiros was fully committed to Stalin and even went so far as to participate in the unsuccessful attempt on Leon Trotsky's life in 1940 in a town near Mexico City. He and Communist workers machine-gunned Trotsky's home and came very close to killing the exiled Communist leader and his wife. Siqueiros went into hiding. By the time he was captured, tried and found not guilty several months later, Trotsky had been murdered by a Soviet agent.

A decade of creation

The 1950s was a busy decade for Siqueiros. As well as numerous easel paintings, he also created a number of memorable murals including 'Man, the Master and not the Slave of the Machine'; 'The People and the University, the University for the People'; and 'Revolution Against the Porfirian Dictatorship'. In the first of these murals, he used pyroxylin on aluminum. The second was a mural made of mosaics and the third was acrylic paint on plywood.

The Mexican Revolution certainly helped shape Siqueiros' outlook, but he continued to rail against the post-revolutionary governments' failures to enact the deep and far-reaching reforms he felt were needed. Siqueiros did not slow down as he aged. In 1959, at 63 years old, he supported railroad workers in a national strike and was accused of insulting the President. For that, he spent the next five years in prison. But he was irrepressible. From as soon as he got out in 1964, until 1971, he worked on 'The March of Humanity and Toward the Cosmos' in Mexico City. This enormous mural again upended traditional interpretations of art because, unlike murals produced 50 years earlier, the message of the piece was open to wide interpretations.

US and European reaction to Siqueiros

Commencing in the 1920s and continuing for decades, many US and European painters, photographers, writers and educators flocked to Mexico. They wanted to learn what exciting experiments were taking place there as a result of, and reaction to, the promises and failures of the Mexican Revolution. In 1934, the US painter Elsa Rogo, friends with both Rivera and Siqueiros, summed up her reaction to Siqueiros. Her words could certainly have described the muralist 30 years later.

SOURCE R

Excerpt from *Diego Alvaro Siqueiros* by Elsa Rogo, Parnassus, Vol. 6, No. 4, April 1934, page 5.

The story of David Alfaro Siqueiros is to some extent the history of the whole revolutionary movement in Mexico. He is identified with it as intimately and completely as the Mexican mural 'Renaissance' is bound up with it. Rebellion is in his blood; it is constantly being pumped by his heart not only through his veins and arteries but on to the very canvases in a passionate frenzy of insurgent emotion. Not satisfied with being merely a revolutionary in thought, he is likewise intent on the exploration of new media and technical procedures. For him there are no half measures – half a loaf is certainly not better than none, but worse. Rebellious not only in the content of his paintings, he chooses to be revolutionary in technique as well.

According to Source R, what made Siqueiros a revolutionary? ?

Who was Orozco and what role did the Revolution play in his art?

Los Tres Grandes: José Clemente Orozco

José Clemente Orozco (1883–1949) was born in the state of Jalisco in modest circumstances. He lost his left hand in an accident at school, and when his father died he turned to making satirical political cartoons and pictures depicting the seedier side of life in Mexico City to support himself. One of his art teachers, the influential Gerardo Murillo, who called himself Dr Atl, recognized Orozco's promise and encouraged his efforts. Atl impressed Orozco with his emphasis on the necessity of having pride in Mexican culture, instead of looking to Europe for artistic inspiration. When the Revolution broke out, Atl enlisted Orozco to help produce a decidedly political publication, *The Vanguard*.

Orozco, the independent thinker

Orozco saw the horrors of the civil war during the Revolution first hand, and his experiences shaped his outlook on politics and art. He could not stand the hypocrisy of the generals and politicians as they began making money for themselves during and after the Revolution. Unlike Rivera, he was unwilling to portray the conflict in black and white terms, pitting good versus evil. His autobiography explained how he viewed the Revolution.

? According to Source S, why was there no right and no wrong side during the Revolution?

SOURCE S

Excerpt from *José Clemente Orozco: An Autobiography*, Austin, Texas, 1962, page 54.

People grew used to killing, to the most pitiless egotism, to the glutting of the sensibilities, to naked bestiality. Little towns were stormed and subjected to every sort of excess. Trains back from the battlefield unloaded their cargoes in the station in Orizaba: the wounded; the tired, exhausted, sweating and tatterdemalion [dressed in ragged clothing]. In the world of politics it was the same, war without quarter, struggle for power and wealth. … Underneath it all, subterranean intrigues went on among the friends of today and the enemies of tomorrow, resolved, when the time came, upon mutual extermination.

Orozco at the National Preparatory School

Unable to find work, Orozco travelled to the USA in 1917. At the border, US customs officials examined his art and found them a threat to American morality because some portrayed sex workers. They destroyed 60 of his prints on the spot. Orozco made his way to California and worked as a house painter. He later found a job painting dolls' faces in a factory in New York City. On his return to Mexico in 1919, he managed to scratch a living producing art, and more importantly, becoming friends with a circle of artists who included Rivera, Siqueiros and Xavier Guerrero. He joined the Syndicate of Technical Workers, Painters and Sculptors and was invited to participate in the new project at the National Preparatory School in 1923. He was 40 years old when he worked on his first murals.

Reaction to Orozco's murals

One of Orozco's murals, 'The Reactionary Forces', was soon seriously damaged by students. The literary historian David Ellis wrote in 1998 that a surviving sketch 'shows vividly a grotesquely ugly woman in furs … kicking the point of one of her high heels into the head of a female beggar who is lying with a skeletal baby on the floor'. The students felt he was mocking them and their mothers. Another mural, 'Christ Destroys His Cross', signified that Christ realized that he had died in vain when he saw the conditions on earth. Students were incensed and wrecked the mural.

Orozco's views on Rivera

While Rivera said in 1925 that 'José Clemente Orozco, along with the popular engraver, José Guadalupe Posada, is the greatest artist, whose work expresses genuinely the character and spirit of the people of the City of Mexico', Orozco felt Rivera was a bit of a self-promoter who overshadowed other artists. During his US sojourn, he carried on a lively correspondence with Jean Charlot (see Source L on page 193). In one letter, he wrote that '… the idea that we are all his disciples is very well entrenched here [the USA]. To talk about "Indians", "revolution", "Mexican renaissance", "folk arts" … is to talk about Rivera'. He also called Rivera 'Diegoff Riveritch Romanoff', a dig at his fellow artist's pro-Soviet leanings.

Orozco and other muralists were fired from the National Preparatory project when Vasconcelos resigned (see page 181), but he returned in 1926 as the social and political climate changed. He completed eighteen large frescoes that included 'The Trench' and 'Cortés and Malinche'. Another noteworthy mural of his from this period was 'Omniscience'. However, Orozco was drawn to the USA to continue his career because he felt he had been underappreciated in his home country.

Orozco's impact on US art

Orozco went to the USA in 1927 and remained there until 1934. In those years, he created several murals that had a great impact on US art. He worked at three educational establishments; Pomona College in California, the New School for Social Research in New York and at Dartmouth College in New Hampshire. His 'Epic of American Civilization' at Dartmouth comprised 24 panels, 3200 square feet, and took him two years to complete. In this mural, he told the tale of the history of Mexico, from the migration of the Aztecs to the central valley, to an industrialized society.

Orozco in Guadalajara

Orozco was soon commissioned by the state government in Guadalajara for a series of murals on public buildings. From 1936 to 1939, he worked at the Hospicio Cabañas (a hospital complex), the university and the governor's palace. At the Hospicio, he created what many consider to be his one of his greatest masterpieces, 'Man of Fire', part of a survey of Mexican history. Orozco continued to work until he died of a heart attack in 1949.

Orozco and politics

Unlike some of his fellow muralists, Orozco was modest, solitary and apolitical. He believed, as he wrote in his autobiography, that 'No artist has, or ever has had, political convictions of any sort. Those who profess to have them are not artists.' This is not to suggest that he was unwilling to portray what he saw as the oppressors and the downtrodden. He was quite clear that the workers and peasants had suffered as a consequence of the Revolution and that others had unfairly prospered. At his core, he was a humanitarian and, because of the Revolution, sensitive to people's capacity to harm other people.

SOURCE T

Excerpt from *A History of Mexican Mural Painting* by Antonio Rodríguez, London, 1968, pages 191–2, quoted in *Art and Revolution in Latin America: 1910–1990* by David Craven, New Haven, 2002, page 47. Rodríguez compiled the first extensive examination of the Mexican Muralist Movement in the late 1960s. David Craven was a distinguished professor of Art History until his death in 2012.

He did not glorify revolution. He was sincere in saying that great social phenomena need no glorification … If Orozco did not extol the Revolution, he nevertheless fulfilled himself through it. How could we understand the Orozco of 'La trinchera', 'Los soldados', and 'Adiós' [three frescoes of Orozco] without the Revolution? Diego Rivera idealized it; Orozco showed its … tragedy.

? What, according to Source T, did the Mexican Revolution contribute to Orozco's art?

SOURCE U

Siqueiros, Orozco, Rivera

? In what ways would Source U, showing *Los Tres Grandes*, be helpful for a historian studying the Mexican Muralist Movement?

Other noteworthy artists

Who else did the Revolution inspire?

There were most definitely other great artists beside *Los Tres Grandes* who contributed to the flourishing of the arts in post-revolutionary Mexico. Among them were the artists Frida Kahlo, Jean Charlot, Rufino Tamayo, Alfredo Ramos Martinez, Roberto Montenegro, Dr Atl, Francsico Goitia, Antonio Ruíz; the print-maker Xavier Guerrero; the architect Juan O'Gorman; and the photographers Manuel Álvarez Bravo and Lola Álvarez Bravo. They all are worth further exploration.

Non-Mexican artists were also influenced by the creative impulses of Mexicans such as Ben Shahn, Tina Modotti, Edward Weston and Jackson Pollock. During the Great Depression, the US government also turned over public spaces to artists to use their creativity to boost the nation's spirits, driven in part by the success of Mexican muralists.

TOK

Orozco was the only one of the Big Three Mexican muralists to claim that his work was not political. Research images of his art online, and then state to what extent you agree with his assessment. (Arts, Social Sciences, Ethics, Reason, Imagination.)

Criticism of *Los Tres Grandes*

In Mexico, not all artists shared the political beliefs of the Big Three. They felt there was something disturbingly wrong for artists to be supported by the Mexican government, which had its own agenda, namely to promote a twisted and inaccurate view of the Revolution. It was not difficult to see the continued poverty in the rural areas and the corrupt politicians and former generals skimming money from state funds.

Octavio Paz, the Mexican Nobel laureate, summed up what he felt were the real reasons for Vasconcelos and others to allow the muralists public spaces when he wrote in his *Essays on Mexican Art* (1987) that 'The government allowed artists to paint on the walls of government buildings a pseudo-Marxist version of the history of Mexico, in black and white, because such painting gave it the look of being progressive-minded and revolutionary.'

Other muralists felt the sting of criticism when they did not keep in line with a 'correct' interpretation of Mexico's past.

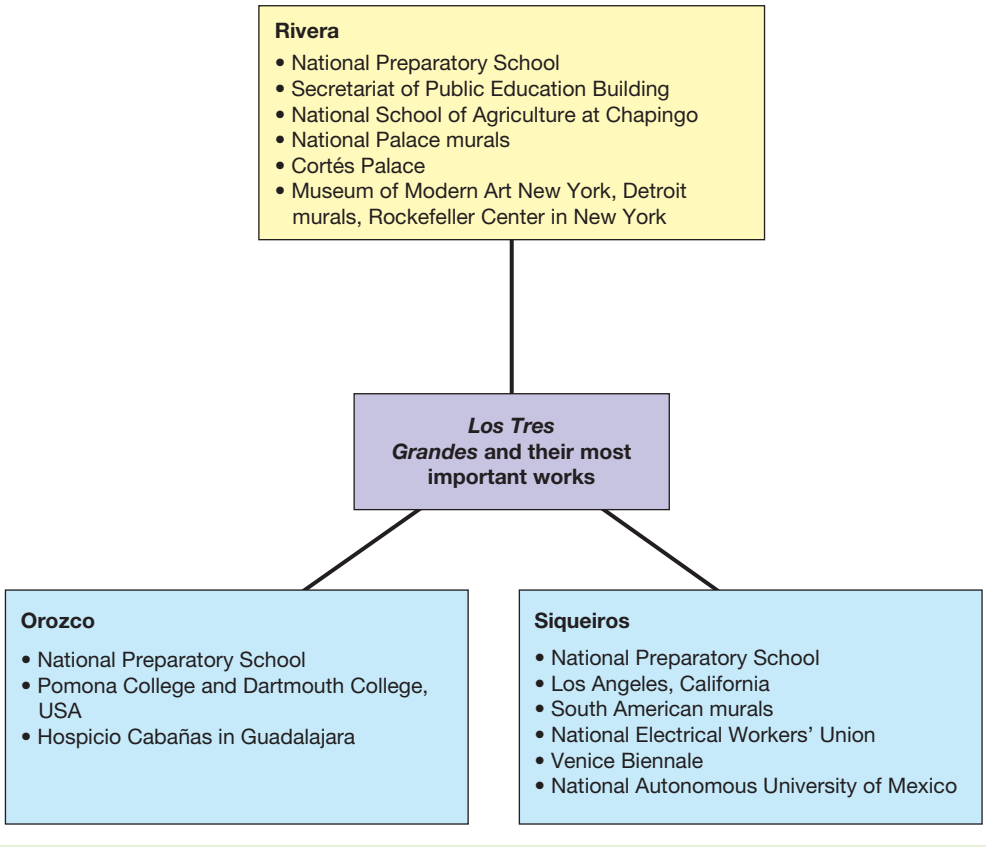
SOURCE V

Rufino Tamayo in a 27 December 1990 *New York Times* interview.

I had difficulties with the Muralists, to the point that they accused me of being a traitor to my country for not following their way of thinking. But my only commitment is to painting. That doesn't mean I don't have personal political positions. But those positions aren't reflected in my work. My work is painting.

Why, according to Source V, was Tamayo considered a traitor? ?

Mexico in the years following the Revolution became one of the world's artistic centers. A new wave of artists had inspired many around the globe, and their themes centering on native cultures, politics and novel techniques became recognized and admired (and sometimes feared). Similar experimentation in music also occurred as a direct result of the Revolution.



SUMMARY DIAGRAM

The creative outburst after the Revolution

4 The Revolution and Mexican music

Key question: How was the Revolution reflected in popular music?

New music styles also developed during and after the Revolution. Musicians and composers felt driven to perform music that reflected the new attention given to what some considered the real roots of the country, instead of mimicking European styles.

Significant composers during the Revolution

Which musical works grew out of the Revolution?

Indian music and politics

The composer Carlos Chávez (1899–1978) praised Indian music and used traditional rhythms in his work. His 'Sinfonía India' (1935) also incorporated non-European instruments. As the founder of the Orquestra Sinfónica de México, Chávez was in a prime position to promote indigenous musical traditions and encourage the study of folk music.

Silvestre Revueltas (1899–1940) was another important Mexican composer. He composed 'Sensemayá' in 1938, after returning from Spain where he had performed with a Mexican group supporting the government against Franco's fascists (see page 199). 'Sensemayá' was based on an Afro-Cuban poem, certainly not the normal fare in much of Latin America. The Chilean Nobel Prize recipient, Pablo Neruda, devoted an elegiac poem to Revueltas in his massive work *Canto General* (1950), an excerpt from which is below:

Canto General (1950)

When a man like Silvestre Revueltas
returns definitively to the earth,
there's a murmur, a wave of voice and
weeping that prepares and propagates his departure
The little roots tell the grains: 'Silvestre died',
and wheat ripples his name on the slopes
and then the bread knows.
Now all America's trees know,
and our arctic region's frozen flowers too …

Pablo Neruda, extract from *Canto General*, translated by Jack Schmitt (University of California Press, 1991).

Ballads and history

Popular music created and performed in the rural areas were often ***corridos*** or narrative ballads. The Revolution spawned many ballads that often sung the praises of the various heroes such as Pancho Villa and Emiliano Zapata, as well as women who participated in the conflict. *La cucaracha* was a well-known *corrido* and its many versions reflect how lyrics were altered to fit one's political allegiances. In the Cárdenas period, 1934–40, there were many ballads that sang the praises of land reform and the nationalization of the petroleum industry.

KEY TERM

Corridos Mexican ballads.

? What do you think the people were promised in Source W?

SOURCE W

***Corrido* by Mariano Zapata. Accessed at www.bibliotecas.tv/zapata/corridos/corr14.html and translated. This *corrido was* very popular among those who fought with Zapata.**

I'm a Zapatista from the State of Morelos,
because I have proclaimed the Plan de Ayala and San Luis;
if they don't carry out what they promised the people,
we will do it with our guns.
To warn that the people will not be tricked,
nor treated with vigorous cruelty,
if we are the sons, not the stepsons of the Homeland,
the heirs of peace and liberty.
Noble general, patriotic guerrilla,
who with great loyalty fought to defend his native land;
I hope that you will succeed thanks to the Supreme Being,
in order for there to be peace in the State of Morelos.

Corridos and the *Cristeros*

Corridos often used simple words to tell recent historical events, which helps explain their appeal to many. It was also one way of how news spread through the countryside. During the Cristero Revolt (see page 90), the Catholics also sang *corridos*. The *Corrido of General Gorostieta* is one example of an anti-government song.

? Why would Source X have appealed to *Cristeros*?

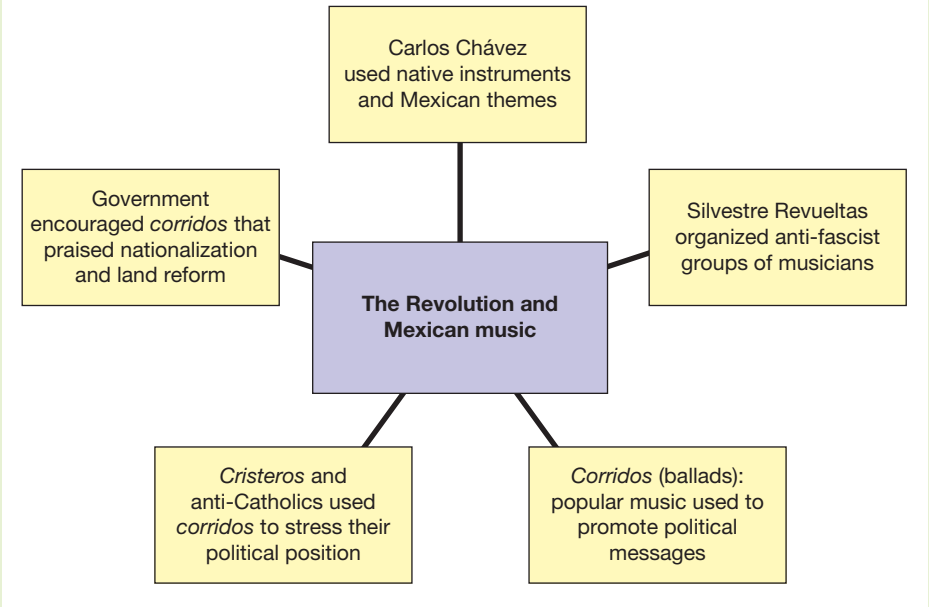
SOURCE X

Excerpt from the *Corrido del General Gorostieta*, 1929. Accessed at www.laits.utexas.edu/jaime/cwp5/crg/english/gorostieta/index.html.

The ballad of General Gorostieta
The real story, truly told.
Of a valiant man who scaled honor's heights
In defense of his holy religion.
In defense of his holy religion …
But when the religious struggle broke out
And the people shed their blood on the motherland
He unsheathed his victorious sword once again
And confronted the government's injustice.
And as leader of the rebel forces
Whose cry was 'Long live Christ the King!'
With his valiant and dedicated soldiers
Demanded a reform to the law.
In the prolonged and bloody struggle
An unholy war that gave no quarter.
And in spite of the lack of munitions
The rebellion triumphed in glory. …
But in a desire for peace
The Government and Church negotiated a truce.

And as soon as General Gorostieta learned of this
Quickly dissolved his legions.
Trying to surrender, he was attacked
By forces of the Federal Government.
And in the struggle, Gorostieta was killed
Causing grief throughout the land.
This tragedy shook the land high and low
With great suffering throughout the nation.
To know that Gorostieta should die so
In defense of his holy religion.

The use of music played with 'authentic' Mexican instruments, the popular and catchy *corrido* tunes and that the lyrics often had political undertones helped popularize the Revolution in the minds of many.



SUMMARY DIAGRAM

The Revolution and Mexican music

5 The Revolution and Mexican literature

Key question: What impact did the Revolution have on Mexico's literature?

The Revolution created a new type of literary genre known in Mexico as the 'Novel of the Revolution'. Approximately 100 authors wrote almost 300 novels that were inspired by the upheavals of the Revolution. The period of the Novel of the Revolution spanned from 1915 to 1947. Mariano Azuela's novel *The Underdogs* (*Los de abajo*), published in 1915, is considered by many to be the first and one of the best examples of this new type of Mexican fiction. For the first time, according to Gerald Martin, a professor of the history of Latin American literature, writing in 1998, 'the Revolution produced fiction which … saw history not as something in the distant past like the colonial of independence periods, but as both a reality and a concept which could at once mobilize and fix the perception of social, political and economic events'. The immediacy of the themes contributed to the impact of these short stories and novels, both in Mexico and internationally.

Who were the authors inspired by the Revolution?

Mexican fiction

The scholar Manuel Gutiérrez in his *The Novel of the Mexican Revolution* (2011) wrote that there were three generations of writers impacted by the Revolution:

- The first included those born during the *Porfiriato*; some of these authors participated in the bloody years of the Revolution.
- The second comprised, for the most part, adolescents during the fighting who witnessed but usually did not participate in the violence.
- The last generation was those who were too young to remember the upheavals.

Mariano Azuela and *The Underdogs*

Mariano Azuela (1873–1952) came from a modest family but was able to attend medical college and become a doctor. He was an early supporter of Madero and became disillusioned after Madero's assassination (see page 46). Nonetheless, Azuela put his skills to use and served as a field doctor with one of Pancho Villa's generals. In the evenings, he worked on his novel *The Underdogs*, using his own experiences to flavor his novel. He fled to El Paso, Texas in 1915 because of the Huerta dictatorship, and published his book in a serial format in a Spanish-language newspaper later that year. The book was not widely known in Mexico at the time, though when it was 'rediscovered' in 1924, Azuela became a celebrated author. He continued to write and work as a doctor among the underprivileged in Mexico City for the rest of his life.

The Underdogs

The storyline of *The Underdogs* follows the activities of the peasant Demetrio Macías as he fights against Huerta's federal forces during the Revolution. At one point, a disillusioned middle-class supporter, Solís, joins Macías and comments on where the Revolution might be heading.

SOURCE Y

Excerpt from *The Underdogs with Related Texts* by Mariano Azuela, translated with an introduction by Gustavo Pellón, Hackett, Indianapolis, 2006, pages 43–4.

'How beautiful the Revolution is even in its savagery!' declared Solís, moved. Then in a low and vaguely melancholic voice:

'What a shame that what is coming won't be the same. We have to wait a bit. Until there are no more combatants, until the only shots heard are those of the mobs given over to the delights of looting. Until shining diaphanously, like a drop of water, we can see the psychology of our race condensed in two words: steal, kill! … My friend, what a disappointment, if we who offered all our enthusiasm, our very lives to overthrow a miserable assassin, instead turn out to be the builders of an enormous pedestal so that a hundred or two hundred thousand monsters of the same species can raise themselves! … a nation of not ideals, a nation of tyrants! … All that blood spilled, and all in vain!'

According to Source Y, what might be the results of the Revolution? ?

Juan Rulfo

Azuela's early work contrasts greatly with one of the last writers of the period, Juan Rulfo (1917–1986). His short story 'They Gave Us the Land' successfully demonstrates the harshness of life for peasants in post-revolutionary Mexico. The story is about four peasants who fought in the Revolution who are given land by the government. Even though they protest that the land has no water and is therefore useless, the government official is proud to have distributed the land.

Agustín Yáñez

Agustín Yáñez (1904–1980) also wrote at the end of the Novel of the Revolution period. His psychological novel *The Edge of the Storm* was published in 1947. Like other writers, he wanted to help create a national consciousness among Mexicans – a nationalist literature that was not so beholden to European literary trends.

Vasconcelos and others

Other significant writers of the Novel of the Revolution period include José Vasconcelos, Rafael Muñoz, Martín Luis Guzmán and Nellie Campobello, the sole woman among the group. Guzman's work was particularly biting in its criticism of political corruption. He wrote *The Shadow of the Caudillo* in

1929. Readers had little difficulty seeing the combination of Obregón and Calles as the manipulative tyrant.

Later authors were certainly influenced by the Mexican Revolution. Carlos Fuentes wrote *The Death of Artemio Cruz* in 1962 and *The Old Gringo* in 1985. Both novels deal with changes wrought by the upheavals of the 1910s. Foreign writers, such as the British author Graham Greene, were intrigued by the Mexican Revolution and its aftermath. Greene wrote one of his masterpieces, *The Power and the Glory* (1940), after visiting Mexico. The book discusses the religious–State conflict in 1930s Mexico. The US journalist John Reed reported on the Mexican Revolution in its early years, before heading to Europe to cover the Russian Revolution. The Mexican Revolution's impact was felt throughout the world.

? What impact did Mexican literature have on non-Mexicans, according to Source Z?

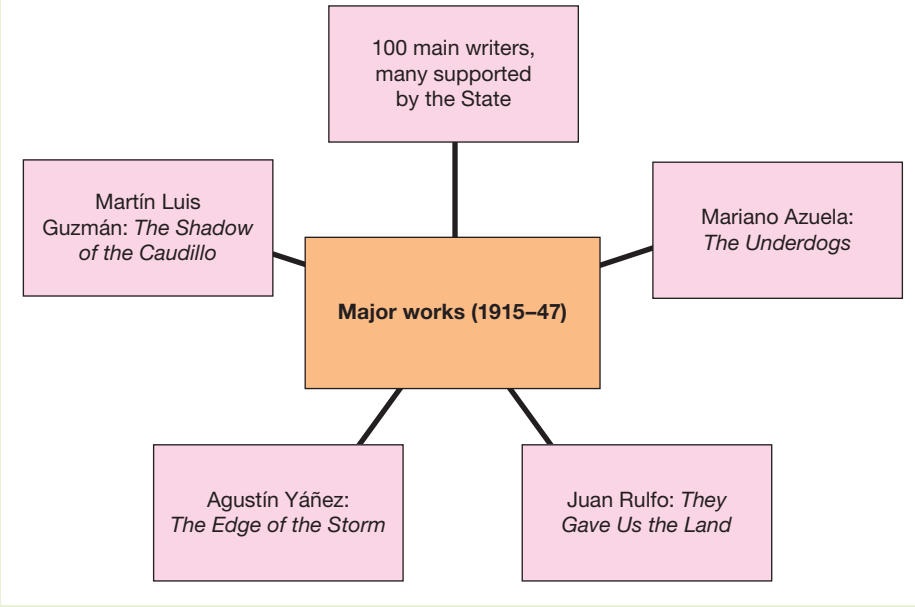
SOURCE Z

Excerpt from *Literature of Latin America* by Rafael Ocasio, Greenwood Press, Westport, Connecticut, 2004, page 51. Ocasio is a Latin Americanist and professor of Spanish.

The Mexican Revolution became an important subject in Mexican literature. It led to a sub-genre known as the literature of the Mexican Revolution. This production also had strong influence throughout Latin America. It brought attention to new literary trends and a renewed interest in sociocultural documentation of Latin American culture. The literature of the Mexican Revolution also documented the complex events that were taking place in Mexico. Perhaps for the first time, international readers met Mexican characters, in particular the peasants and native groups representative of an emerging Mexican national identity. They also had a close glimpse of events in the complicated movements of the Mexican Revolution.

An ambiguous outlook on the achievements of the Revolution

The Revolution brought a renaissance in literature, in much the same way as the Mexican Muralist Movement. Many authors penned dark stories that reflected the losses of their countrymen, as well as some of the dubious heroic actions of generals and politicians. The Mexican Secretariat of Public Education, led by José Manuel Puig Casauranc after Vasconcelos, enticed writers with paid work if they wrote about revolutionary themes, and many accepted his offer. Yet what distinguished some of the novelists from some of their fiery compatriots in the art world was that many of the novels portrayed the Revolution in ambiguous terms. Was the Revolution a glorious chapter in Mexican history or was it merely a means for people without ideals to seize power?



SUMMARY DIAGRAM

The Revolution and Mexican literature

Chapter summary

The impact of the Revolution on women, education, the arts, music and literature

The Mexican Revolution had an enormous effect on women and their roles in Mexican society.
The period from 1920 until 1940 also saw great experimentation in the arts, education, literature and music. The extent to which these changes were revolutionary or not is debatable. What is certain is that the Revolution did spark a flurry of activities in all these areas. The upheavals of the Mexican Revolution and the adoption of the 1917 Constitution articles required a response from post-revolutionary governments. The State tried to create stability, provide economic and social progress and promote its own narrative of the Mexican Revolution's accomplishments. To a certain extent this did take place, with the SEP directing many initiatives through education and art. Actual achievements, though, were mixed, because some efforts were not fully thought out and various sectors of Mexican society, such as the Catholic Church and conservatives, resisted change.

Examination advice

How to answer 'assess' questions

Questions that ask you to 'assess' want you to make judgements that you can support with evidence, reasons and explanations. It is important to demonstrate why your own assessment is better than another.

Example

Assess the impact of the Mexican Revolution on education.

1 For questions like this, think deeply about what exactly is being asked. What themes arose from the Revolution? Consider the following important aspects:

- *Nationalism*
- *A commitment to improving the living standards of Mexicans, and to rebuilding after a long and bloody conflict*
- *A significant break from the past*
- *The Constitution of 1917's promise to promote education for all*

You must make judgements about how effective the Mexican educational system was in addressing these issues.

2 You will want to approach questions using the command term 'assess' thematically. For this specific question, use the four themes above to help you organize your essay. Spend five minutes doing this before you begin to write your essay. Here is an example of what you might include:

- *Nationalism:*
  - *Under the SEP, idea of one Mexican nation emphasized*
  - *Heroes of the Revolution highlighted in textbooks*
  - *Promotion of Spanish as a unifying language*
  - *Direct education from national authority (SEP)*
- *Commitment to improving living standards:*
  - *Situation after the Revolution: up to 1 million dead*
  - *Illiteracy rates of 80%*
  - *Widespread disease and poverty*
  - *Introduction of health and technical training to adults*

- *significant break from the past:*
  - *Introduction of new ideas and schools (rural areas)*
  - *Cultural missions*
  - *Break Catholic Church's hold on education*
  - *'Socialist' education*
- *Constitution of 1917's promise:*
  - *Education would be free for all*
  - *State would control education, especially primary education*
  - *Changes to the Constitution*

3 Your introduction you should state your thesis, which might be something like 'The Mexican Revolution prompted a thorough rethinking of the sort of education that should be provided to its citizens.' An example of a good introductory paragraph for this question is given below.

The Mexican Revolution from 1910 to 1920 left in its wake major disruptions to the economy and society. Not least among these upheavals was the impact the Revolution had on the educational system in Mexico. For almost ten years, schooling had been interrupted for many children. There were also hundreds of thousands of other youngsters who had never been to school because there had never been any education available, particularly in rural areas. A series of committed reformers undertook to improve the educational levels through a thorough rethinking of the sort of education that the government should provide its citizens. It was hoped that by emphasizing nationalism, improving living conditions, offering a significant or revolutionary break from the past and following through on the promises made in the 1917 Constitution, Mexico could progress quickly. These changes were to be made through the Secretariat of Public Education (SEP), a new government agency created in 1921.

4 In the body of your essay, discuss one theme from your introduction and how it impacted Mexican education. One strategy would be to begin with the aims you think were the most important and end with the least significant. It is also very important that you explain why or why not a specific goal was met. Remember that your essay will be judged on the quality and quantity of supporting evidence. Be sure to defend and explain your examples.

5 Now try writing a complete answer to the question following the advice above.

Examination practice

Below are four IB exam-style questions for you to practice on this topic.

1 Compare and contrast how each of the Big Three muralists portrayed the Mexican Revolution.
(For guidance on how to answer 'compare and contrast' questions, see page 78.)

2 Assess the impact of the Mexican Revolution on the arts.

3 'Mexican educational policies were ill conceived and a failure.' To what extent to you agree with this assessment?
(For guidance on how to answer 'to what extent' questions, see page 137).

4 Assess the roles of Mexican women in the Revolution.

Timeline

1876	Porfirio Díaz forced President Lerdo de Tejada to resign
1877	Beginning of Porfirio Díaz's rule
1880	Díaz's handpicked successor, Manuel González, won the presidency
1888	Díaz elected president again and amended the constitution to allow re-election in future
1906	Miners' strike in Cananea
1907	Textile workers' strikes
1908	Creelman interview of Porfirio Díaz
1910	Election year when anti-Díaz forces coalesced against his re-election **October** Madero issued his *Plan de San Luis Potosí* Díaz won the presidential election and revolution broke out
1911	**May** Zapata's army defeated Díaz's army at Cuautla and Díaz resigned Díaz forced to resign and went into exile **November** Madero became president Zapata issued his *Plan de Ayala*
1912	US Congress passed a law that arms could only be sold to the constitutional government
1913	**February** Madero and Pino Suárez shot and killed Huerta took over the government **March** Carranza issued his *Plan de Guadalupe* US Ambassador to Mexico, Henry Lane Wilson, interfered in Madero's government USA refused to recognize Huerta's *de facto* government
1914	**April** US intervention in Tampico and Veracruz **May** ABC Powers Conference, Canada **October** Constitutional convention at Aguascalientes
1916	Pancho Villa attacked a New Mexico town **March** US intervention under Pershing failed to find Villa, until February 1917
1917	**January** Zimmermann note deciphered and published **February** Constitution of 1917 promulgated **May** Carranza became president
1918	Carranza Doctrine rejected the US Monroe Doctrine
1919	Zapata assassinated by order of Carranza CROM, Mexican labor union, founded
1920	Obregón elected president
1921	Secretariat of Public Education (SEP) founded Carranza murdered
1921–3	*El Maestro* published by SEP
1922	The Syndicate of Technical Workers, Painters and Sculptors founded
1923	Pancho Villa assassinated by order of Obregón **August** Bucareli Agreement signed
1923–4	De la Huerta revolt
1924	Calles elected president Siqueiros painted his murals *The Myths and Burial of a Martyred Worker* at the National Preparatory School
1925	Calles introduced laws which restricted the Catholic Church

1925–8	Moisés Sáenz greatly expanded network of rural schools
1926–9	Cristero Rebellion
1927	Dwight Morrow appointed US ambassador to Mexico
1928	**July** Obregón assassinated
1928–4	Calles' *Maximato*
1929	Calles created the National Revolutionary Party (PNR) Rivera began his *Epic of the Mexican People* mural
1931–4	The Marxist Narciso Bassols headed the SEP
1934	Cárdenas elected president
1935	Calles deported to USA
1936	CTM labor union formed
1936–9	Orozco's Guanajuato murals
1938	**March** President Cárdenas nationalized the petroleum industry PNR transformed into Party of the Mexican Revolution (PRM) **May** Cedillo Rebellion began and lasted until January 1939
1939	US Good Neighbor Policy instituted by President Roosevelt
1940	Trotsky murdered in Mexico City Ávila Camacho became president

Glossary

1857 Constitution Liberal constitution defending individual rights, especially through the judiciary, and supporting the separation of powers, but reducing the power of the executive.

1917 Constitution Mexican Constitution emanating from the Revolution, reinforcing land ownership, resource ownership, anticlericalism and labor rights.

Aesthetic culture A culture that has been purified of foreign elements, in this case cleansed of non-Hispanic elements.

Anarchism Political movement advocating an end of government institutions in favor of free associations of individuals.

Anarchy A state of chaos and disorder as a result of a lack of government institutions to control people.

Anticlerical Of a policy (anticlericalism) that verbally and sometimes physically attacks the established Church (in this case, the Roman Catholic Church), including its priests, churches, schools and properties.

Anti-fascist Against the totalitarian ideology of facism.

Artisans Handworkers who practice traditional crafts, such as woodworking, pottery, etc.

Authoritarian Form of government stressing authority at the expense of individual freedoms.

Avant-garde Experimental or radical.

Axis Powers The Alliance between Germany, Italy and Japan during the Second World War.

Banditry The practice of forming groups of armed outlaws and thieves to plunder and steal, especially in the countryside.

Bicameral A Congress made up of two houses, usually a Senate and a Chamber of Deputies or Representatives.

The 'Big Stick' Policy Also known as the Roosevelt Corollary to the Monroe Doctrine, this 1904 assertive policy justified US military intervention in Latin America and the Caribbean.

Bolshevist A follower of Bolshevism, a term used to describe how the Communist Bolsheviks seized power in Russia.

Bourgeoisie The middle class, with ideals of accumulation of capital at the expense of the working class.

Braceros Literally, those who work with the physical strength of their arms, in farm and cattle ranch work.

Broadside A strong written attack.

Bucareli Agreement Agreement between Mexican and US representatives that 'solved' the dispute over subsoil rights. Named after Bucareli Street where the negotiations took place.

Caciquismo Political practice promoted by Díaz, whereby local, mostly rural, leaders were co-opted to support his government and rewarded with economic and political privileges.

Callistas Supporters of Calles.

Camisas rojas 'Red shirts' – a Socialist paramilitary organization formed under the direction of Garrido Canabal.

Campesinos Mexican peasant farmers.

Carrancistas Another name for the Constitutionalist forces who followed the orders of Venustiano Carranza.

Cash crops Agricultural products grown at a large scale to sell for profit.

Caudillos Local strongmen or rural leaders who could command an armed force.

Central Powers During the First World War, the name given to the belligerents Germany, Austria-Hungary, Turkey and Bulgaria.

Charro Well-dressed rural Mexican man with tight-fitting trousers and jacket, silver ornaments and wide-brimmed hat. There was a code of honor and gallantry associated with this role.

Científicos Mexican intellectuals, technocrats and influential politicians during the Díaz regime.

Clientelism A political patronage system that relies on personal favors from a political leader and the loyalty of those granted the favors or positions.

Communism Political movement advocating the elimination of private property and state control of the economy, as well as the dictatorship of the proletariat (workers).

Company store A store selling dry goods and other necessities to workers who work for the company, mine or *hacienda*. Workers paid in tokens had to buy their provisions from here. Paying workers in tokens to be used only at the company store was a typical form of worker exploitation; the employers controlled the prices and could discount as much as they wanted from wages.

Conglomerate A series of small companies owned by a large corporation.

Constitutionalists Name coined by Venustiano Carranza for the army led by himself against Huerta, with the goal to re-establish Mexico under its present constitution.

The Constructive Phase The period in which the construction of state institutions began.

Consuls Government officials sent to foreign countries to attend to their country's businesses and to protect its citizens.

Conventionists Led by Pancho Villa and Emiliano Zapata, those who recognized the authority of the Convention of Aguascalientes (as opposed to the Constitutionalists).

Corridos Mexican ballads.

Coup A violent government takeover.

Cristeros Catholics who rose in rebellion against the Mexican government from 1926 to 1929.

Cromistas Supporters of the workers' union CROM.

Cultural assimilation A government policy that aimed to make an ethnic group (in this case, the Mexican Indians) forget the cultural and ethnic roots that distinguish them from the mainstream.

Cultural *caudillo* An overlord who controlled the cultural policy of the government.

De facto Term that refers to the actual government, which, in fact, exists, regardless of whether it is legitimate or not.

Debt peonage Farm or mine workers who are forced to work in one *hacienda* or mine in order to pay off acquired debts.

Dedazo A reference to the word for 'finger' in Spanish, *dedo*, that describes when a politician handpicks a successor.

Democracy A representative form of government that involves all of its citizens, without exclusions, who are able to rule through majority vote.

Dictatorship Form of government with all the power resting on one person or small group.

Dollar Diplomacy President Taft added this US foreign policy to the Big Stick Policy. It aimed to protect US business interests in foreign countries.

Duty-free Manufactured goods, usually foreign-made luxury consumer goods, sold without customs duties in order to encourage consumption.

Ejidatarios Peasants who held a share of the *ejido* or co-operative land.

Ejidos Land communally owned by Indian tribes. Colonial Spain and Mexican governments had acknowledged their rights to it until the mid-nineteenth century.

Executive, judiciary and legislative The branches of a democracy that run a republic, preferably in an equal balance of power of the three branches. The legislative creates laws and policies, the judiciary applies these and the executive enforces these.

Expropriate When the state takes away property from landowners, with or without compensation.

Expropriation Law of 1935 Law that gave the federal government the power to nationalize industries for the public good. Compensation was to be paid over a ten-year period.

Favored treatment A special status regarding trade. In this case, Carranza was most interested in the German provision of armaments.

Frescoes Artworks applied directly to wet plaster.

Geopolitical Geographic and economic importance of a country in the world political stage.

Good Neighbor Policy When Franklin D. Roosevelt became President in 1933, he announced that the USA would become a good neighbor to Latin American countries. This marked a departure from US military interventions.

Guerrilla Irregular form of warfare against the established military using ambush and sabotage techniques.

Hacendados Large landowners – the rural elite – who were able to increase their landholdings greatly during the Porfirian era and grow cash crops for export.

Haciendas Vast tracts of privately owned land that produced cash crops and employed many landless peasants.

Hagiographic Idolizing or excessively flattering.

Hegemony Predominant influence of one country over others in the region or continent.

Henequén Plant in the agave family grown for its string fiber and used in making rope and twine.

Indigenismo Cultural movement strongly promoted by the post-revolutionary governments in Mexico, to raise the Indian image as a cultural icon representing the Mexican nation.

Isolationism US foreign policy 1919–39 whereby the USA chose not to get involved in world wars.

El jefe máximo Supreme leader, also known as Plutarco Calles.

Jefes políticos District political chiefs or state strongmen who were loyal to Díaz.

Ladino A westernized, Spanish-speaking Mexican, usually a *mestizo*.

Leon Trotsky Leader in the Russian Revolution who fled the Soviet Union after Stalin became dictator. He was a proponent of international revolution.

Ley fuga A law used by dictators allowing police and military forces to shoot suspects in the act of escaping custody.

Lieutenant-colonel A commissioned officer's rank, above that of a major and below a colonel.

Mandate Authority to carry out a policy.

Maximato Period in Mexican history from 1928–34 in which Calles ruled from behind the scenes.

Memoranda The plural of 'memorandum'; a note written for diplomatic purposes.

Mestizo A person of European and Indian (Native American) ancestry.

Ministers plenipotentiary Early twentieth-century term for a diplomat just below the rank of Ambassador.

Muleteer A person who works guiding and transporting mules.

Muralist Movement A Mexican art movement after the Revolution. Artists often created large murals depicting events in Mexican history.

Nationalist Strong emphasis on patriotism that exalts the nation and its values above any other considerations.

Natural selection In order to survive as a species, organisms adapt to the environment by selectively reproducing traits that increase their strength.

Obregonistas Supporters of Obregón.

Oil installations Rigs, refineries, storage areas and port facilities for loading.

Pan o palo Spanish for 'bread or big stick', essentially 'the carrot and stick' way of coercing support.

Pariahs Outcasts.

Paternalistic A form of treating people similar to the way a parent treats a small child, making decisions for them and disciplining them to improve their behavior.

Pedagogy The method and practice of teaching.

Populist A politician who claims to support the people against the elite.

Porfiriato The period of the Porfirio Díaz regime between 1876 and 1910, also known as the Porfirian Era.

Positivism The views of French sociologist Auguste Comte, which stressed the power of science and technology in modern progress.

Prerogative Legal choice given to the president; in this case, according to the Mexican constitution.

Proletariat Term referring to the working class, mostly urban factory workers.

Pueblos Spanish name for Indian villages in rural Mexico that often held communal lands.

Pulque An alcoholic drink derived from the agave plant.

Quasi-fascist Partially fascist or leaning towards radical authoritarian nationalism.

Radicalization The process of becoming increasingly extreme in taking violent action.

Rancheros Large landowners who raised cattle and other animals, mostly for export, and profited from the Porfirian era.

Readers A book designed to give students practice in reading.

Republican A form of government ruled by its citizens through representatives. The representatives may or may not include all citizens, however.

Reservations Land set aside for Native Americans to restrict their movement.

Revisionist A new look at past events or historical periods from a fresh perspective, especially when new evidence has surfaced. This generally criticizes historiography up to that point.

Rurales The Mexican mounted rural guard, or police force, which was especially powerful during the Díaz regime.

Ruralistas Supporters of land reform.

Secretary of the interior Cabinet member in charge of government administration, as well as co-ordinating security forces, such as the *rurales*, to preserve the national government.

Sedition The act of encouraging resistance and rebellion against the legally established government.

Severance Legal termination of a work contract that requires the employer to give the released worker monetary compensation.

Sharecroppers Tenant farmers living on and farming a landowner's land. The landowner took part of the harvest and provided seeds and tools for the sharecropper doing the farm work.

Sinarquistas Supporters of the National Sinarquista Union.

Smelter A factory for melting mineral ore into metal.

Social mobility A society whereby people are free to move upward in social class; for example, from the lower classes to the middle class, through educational and work opportunities.

Socialism Political movement advocating communism as a political end, but conceding that before reaching it, there could be some private property and a partial control of the economy by the state.

Southern Cone A geographical and political name given to the southern-most countries of South America: Chile, Argentina, Uruguay and Paraguay.

Spanish Civil War Civil war in Spain from 1936–39, pitting the elected Republican government against conservative rebels.

Status quo The preservation of things as they are, without changes.

Subaltern Term coined by the Italian intellectual Antonio Gramsci referring to subordinate social groups. In the 1980s it was developed by historians in India studying post colonialism. It has by now become the study of marginalized and lower-class groups in general, like peasants and Indians in Mexico in the early twentieth century.

Tamaleras Women who made and sold Mexican fast food consisting of steamed cornmeal flour with spicy meat, wrapped in corn-husks.

Technocrats A group of technical experts, such as engineers, bankers and economists. In this case, they wanted to modernize Mexico.

Villistas The name given to people who joined the cause and army of Pancho Villa, or who supported him.

Yellow journalism Reporting events in periodical publications with a view to create sensationalism or expose dramatic events and ultimately attract readers and sell more newspapers or magazines.

Zapatistas Zapata and his followers, who believed in fighting a revolution primarily for radical agrarian reform, and especially for returning land to peasants.

Further reading

Héctor Aguilar Camín and Lorenzo Meyer, *In the Shadow of the Mexican Revolution: Contemporary Mexican History, 1910–1989,* University of Texas Press, 1993.
The authors synthesize twentieth-century Mexican history in this accessible text.

Michael Gonzales, *The Mexican Revolution, 1910–1940,* University of New Mexico, 2002.
Gonzales examines the Revolution as a social revolution, and explores each of Mexico's presidents.

Gilbert M. Joseph and Timothy J. Henderson, eds, *The Mexico Reader: History, Culture, Politics,* Duke, 2003.
A wonderful collection of essays and primary sources covering hundreds of years of Mexican history.

Enrique Krauze, *Biografía del poder* series, Fondo de Cultura Económica.
The Mexican historian provides biographies of Zapata, Díaz, Madero, Villa, Caranza, Obregón, Calles and Cárdenas. These Spanish-language, large-format books contain many photographs of the leaders of the Revolution.

Enrique Krauze, translated by Hank Heifetz, *Mexico Biography of Power: A History of Modern Mexico 1810–1996,* Harper Collins Publisher, 1992.
Good example of a Mexican historian's analysis of modern Mexico, with a long, detailed chapter on the Revolution.

Ramón Eduardo Ruíz, *The Great Rebellion: Mexico 1905–1924,* Norton, 1980.
Ruíz's thesis is that what took place in Mexico in the early 1900s was a sustained rebellion rather than a true revolution.

Mark Wasserman, *The Mexican Revolution: A Brief History with Documents* (Bedford Series in History and Culture), Bedford / St. Martin's Press, 2012.
Wasserman includes 39 interesting and varied documents in this short reader, covering the period from 1906 to 1923.

Chapter 1

Anita Brenner, *The Wind that Swept Mexico*, Harper and Brothers, New York, 1943.
A candid and overlooked rendering of the Revolution from Mexican-born Brenner, from her vantage point in the art world. Contains original photographs.

Agustín Víctor Casasola; Pablo Monasterio Ortiz; Pete Hamill, *Mexico: The Revolution and beyond: photographs by Augustín Victor Casasola, 1900–1940,* Aperture, New York, 2003.
Large compendium of Casasola's unique and contemporary photographs of the Revolution.

Paul H. Garner, *Porfirio Díaz: Profiles in Power*, Longman, 2001.
A revisionist account of Díaz as a modernizing factor in nineteenth-century Mexico.

Donald Hodges and Gandy Ross, *Mexico: The End of the Revolution*, Praeger, 2001.
The authors trace the Díaz dictatorship and developments in the Revolution to prove that its ideals of social justice were continually betrayed.

Alan Knight, 'The Mexican Revolution: Bourgeois? Nationalist? Or Just a "Great Rebellion"?', *Bulletin of Latin American Research 4*, 1985, pages 1–37.
An analysis on judging and characterizing the Mexican Revolution.

Zuzana M. Pick, *Constructing the image of the Mexican Revolution: Cinema and the archive*, University of Texas Press, Austin, 2010.
Pick analyzes twelve films depicting the Mexican Revolution as they portray Mexican national icons.

Chapter 2

Margarita de Orellana, *Filming Pancho: How Hollywood shaped the Mexican Revolution,* Verso, London, New York, 2009.
Uses contemporary footage to analyze Hollywood's portrayal of the folk hero / bandit Pancho Villa to US cinema-goers.

Michael C. Meyer, *Mexican Rebel: Pascual Orozco and the Mexican Revolution*, University of Nebraska Press, Lincoln, 1967.
An unusual examination of the first rebel of the Revolution; his rise and fall as a revolutionary leader.

Robert E. Quirk, *The Mexican Revolution: The Convention of Aguascalientes*, Literary Licensing, LLC, 2012.
Quirk adds a religious perspective and consideration of Catholicism to this look at the 1917 Constitution.

John Rutherford, *Mexican Society during the Revolution: A Literary Approach*, Oxford University Press, Oxford, 1971.
Rutherford analyzes literary sources that characterize the Revolution as chaotic and aimless.

Patience A. Schell, *Church and State Education in Revolutionary Mexico City*, University of Arizona Press, Tucson, 2003.
Contains primary, vocational, private and Catholic education sources between 1917 and 1926.

Stephanie J. Smith, *Gender and the Mexican Revolution*, University of North Carolina Press, Chapel Hill, North Carolina, 2009.
Smith concentrates on the Yucatán, where two socialist governors of the Revolution supposedly advanced women's rights.

Frank Tannenbaum, *The Mexican Agrarian Revolution*, Macmillan, New York, 1929.
A classic early revisionist history, influential in portraying the Revolution as a massive peasant nationalist revolution. Alan Knight terms this 'the old orthodoxy!'.

Chapter 3

Jürgen Buchenau, *Plutarco Elias Calles and the Mexican Revolution*, Rowman and Littlefield, 2006.

Jürgen Buchenau, *The Last Caudillo: Álvaro Obregón and the Mexican Revolution*, Wiley-Blackwell, 2011.
Bucheanau provides a comprehensive investigation of Calles and Obregón.

David C. Bailey, *Viva Cristo Rey!: The Cristero Rebellion and the Church–State Conflict in Mexico*, University of Texas, 2011.
A very good introduction to the Catholic Rebellion that lasted from 1926–29.

Chapter 4

Ben Fallaw, *Cárdenas Compromised: The Failure of Reform in Postrevolutionary Yucatán*, Duke University Press, 2001.
Fallow closely examines land reform in the Yucatán and concludes that it was a failure because of popular opposition, local political bosses and lack of funds.

Alan Knight, 'Cardenismo: Juggernaut or Jalopy', *Journal of Latin American Studies*, Vol. 26, No. 1, February 1994, Cambridge, pages 73–107.

Knight examines the extent to which the Cardenista regime was revolutionary, transformative and successful.

Chapter 5

Robert Lansing, *War Memoirs of Robert Lansing*, Secretary of State, New York, 1935, reprinted by Kessinger Publishing, LLC, 2007.
By US Secretary of State Lansing (1915–20) with invaluable experiences in US–Mexican and First World War diplomacy.

Daniel Nugent, Ed, *Rural Revolt in Mexico and the Domain of Subaltern Politics*, Duke University Press, 1998.
The chapters on US intervention provide an alternative viewpoint from the subaltern perspective of the structures of power, both in Mexico and the world.

Henry Lane Wilson, *Diplomatic Episodes in Mexico, Belgium and Chile*, Doubleday, Page & Company, New York, 1927.
The first chapters offer an extraordinary personal recounting of events in Mexico by US Ambassador Henry Lane Wilson.

Chapter 6

David Craven, *Art and Revolution in Latin America, 1910–1990*, Yale, 2002.
A good chapter on the arts and the Mexican Revolution from 1910–40.

Barbara Kingsolver, *The Lacuna*, Harper, 2009.
Kingsolver's gripping novel includes fascinating details of Diego Rivera, Frida Kahlo and Leon Trotsky. A great vacation read.

Enrique Krauze, *Redeemers: Ideas and Power in Latin America*, Harper, 2011.
Krauze examines twelve important individuals whose ideas changed Latin American history. There is a chapter devoted to José Vasconcelos, and chapters on other Mexicans such as Octavio Paz, Samuel Ruíz and Subcomandante Marcos. A good source for teachers.

Desmond Rochfort, *Mexican Muralists: Orozco, Rivera, Siqueiros*, Chronicle Books, 1998.
A lavishly illustrated history of *Los Tres Grandes*.

Mary Kay Vaughan, *The State, Education and Social Class in Mexico, 1880–1928*, Northern Illinois University Press, 1982.
Vaughan suggests that much of the educational initiatives after the Revolution were not that different from the preceding Porfirian system.

Mary Kay Vaughan, *Cultural Politics in Revolution: Teachers, Peasants, and Schools in Mexico, 1930–1940*, University of Arizona Press, 1997.
Vaughan analyses the success of Mexico's revolutionary educational policies in the 1930s.

Films

Cananea (Mexico), 1978.
Based on true events, this film follows William Greene, who strikes it rich and develops the most profitable copper mine in Mexico, where the mistreatment of workers leads to a miner's strike in 1906, setting into motion one of the bloodiest battles in Mexican history.
www.fulltv.tv/movies/cananea.html

Old Gringo (United States), 1989.
From the historical novel by Mexican author Carlos Fuentes, it is set during the Mexican Revolution, where a frustrated spinster, a retired journalist and a fiery young general are inexplicably drawn together as they face love, death and war.
Available at www.amazon.com

Que viva Mexico! (Soviet Union), 1931.
A film documentary of the history of Mexico by Soviet filmmaker Sergei Eisenstein, presented in four novellas.
Available at the Silent Films Archive
http://archive.org/details/QuevivaMexico

¡Vámonos con Pancho Villa! (*Let's go with Pancho Villa!*) (Mexico), 1936.
This classic of Mexican cinema follows the adventures of six young men who leave their rural homes to join Pancho Villa's army.
Available at www.amazon.com

For Greater Glory, 2012.
Dos Corazones Films. A very biased epic on the Cristero Rebellion. Good for a TOK exercise.

Orozco: Man of Fire, 2007.
Good documentary on the muralist. The website also has a study guide.
www.paradigmproductions.org/orozco/

Diego Rivera: Art and Revolution, 1999.
This twelve-minute documentary offers a brief survey of Rivera's life and work.
Available through http://ffh.films.com

The Storm That Swept Mexico, 2010.
Produced by Paradigm Productions and available through PBS. This documentary provides excellent footage of the Revolution and its legacy, as well as interviews. The accompanying PBS website includes additional materials for students and teachers.
www.pbs.org/itvs/storm-that-swept-mexico/

Podcasts

'Source - BBC Player/In Our Time The Mexican Revolution/bbc.co.uk - © [2011] BBC'
Melvyn Bragg and his guests historians Alan Knight, Paul Garner and Patience Schell discuss the Mexican Revolution of 1910, the popular uprising that lasted ten years and resulted in the overthrow of President Porfirio Díaz
Broadcast on BBC Radio 4, 9:00a.m, Thursday 20 January 2011
www.bbc.co.uk/programmes/b00xhz8d

Websites

http://clah.h-net.org/?page_id=1039
The Conference on Latin-American History provides a good portal for web sources on Mexico.

www.latinamericanstudies.org/mex-revolution.htm
Some good links can be found here, as well as an interesting collection of photographs from the Revolution.

http://casahistoria.net/mexicorevolution.htm
Casa Historia provides many good links on Mexico during the twentieth century.

www.moma.org/interactives/exhibitions/2011/rivera/intro.php
Good for exploring Diego Rivera's one-man show at the Museum of Modern Art in New York City in 1931.

www.bluffton.edu/~sullivanm/mexico/mexicocity/rivera/muralsintro.html
109 images of Rivera's murals at the Palacio Nacional de Mexico available here.

http://hoodmuseum.dartmouth.edu/collections/overview/americas/mesoamerica/murals/
José Clemente Orozco's Epic of American Civilization at Dartmouth College is detailed at this website. Images, films and discussions can also be found here.

http://ermundodemanue.blogspot.com.es/2011/12/jose-clemente-orozco-obras-murales.html
A good overview of Orozco's murals. The text is in Spanish.

www.abcgallery.com/S/siqueiros/siqueiros-5.html
95 images of David Alfaro Siquieros' murals can be seen here, arranged chronologically.

www.loc.gov/search/?q=mexican+revolution&sp=1&in=original-format%3Aphoto%2C+print%2C+drawing
Hundreds of photos of the Mexican Revolution available at the Library of Congress.

Internal assessment

The internal assessment is an historical investigation on a historical topic that is required of all IB History students. This book has many key and leading questions which may be adapted for use as a research question for your internal assessment. In addition to those, you may wish to consider questions such as these:

Chapter 1

1 How did Díaz use the trappings of republican government to legitimize his dictatorship?
2 How far did the Porfiriato's emphasis on progress and modernity reach Mexicans?
3 Why were the *rurales* feared and hated in Díaz's Mexico?

Chapter 2

1 Why did Madero's presidency fail?
2 To what extent can Zapata's *Plan de Ayala* be called the blueprint of the Mexican Revolution?
3 Why was the Constitution of 1917 so unique?

Chapter 3

1 Why were Chinese immigrants frequently the target of attacks in Mexico in the 1920s?
2 Why did the Cristero Revolt fail?
3 To what extent did the Bucareli Agreement fail to address the issue of foreign control of Mexico's petroleum resources?

Chapter 4

1 To what extent was the nationalization of Mexico's petroleum industry successful?
2 How did Franklin D. Roosevelt's Good Neighbor Policy affect US–Mexican relations?
3 To what extent was Mexico able to cope with the effects of the Great Depression?

Chapter 5

1 How did economic investments fuel foreign intervention?
2 To what extent did US mining and oil investments influence US intervention in Mexico?
3 How did the First World War affect German involvement in the Mexican Revolution?

Chapter 6

1 Why did the Rockefeller family hire Diego Rivera to create a mural for the new Rockefeller Center and then fire him?
2 To what extent was Socialist Education successful during Cárdenas' presidency (1934–40)?
3 What did Leon Trotsky accomplish during his years of exile in Mexico?

Presidents of Mexico

The following is a list of presidents of Mexico, from 1876 to 1946:

1876–1880	Porfirio Díaz
1880–1884	Manuel González
1884–1911	Porfirio Díaz
1911	Francisco León de la Barra
1911–1913	Francisco I. Madero
1913	Pedro Lascuráin Paredes
1913–1914	Victoriano Huerta
1914	Francisco S. Carvajal
1914–1920	Venustiano Carranza
1914–1915	Eulalio Gutiérrez
1915	Roque González Garza
1915	Francisco Lagos Cházaro
1920	Adolfo de la Huerta
1920–1924	Álvaro Obregón
1924–1928	Plutarco Elías Calles
1928–1930	Emilio Portes Gil
1930–1932	Pascual Ortiz Rubio
1932–1934	Abelardo L. Rodríguez
1934–1940	Lázaro Cárdenas
1940–1946	Manuel Ávila Camacho

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