

***What was Miguel Hidalgo's role in the struggle for independence from Spain?***

Mexico's independence struggle, however, did not begin in the colony's political and commercial hub. Instead, a parish priest, Miguel Hidalgo, in a small town 120 miles northwest of Mexico City, was the first to take up arms against Spanish rule.

Speaking from his church pulpit in 1810, Hidalgo called on his mostly Indian and *mestizo* congregation to regain their land and freedom from the Spanish. His rallying cry, known among Mexicans as "*el grito*," raised the banner of revolution. Hidalgo organized an army of twenty thousand soldiers, equipped mostly with machetes and shovels. Hidalgo's forces attacked Spanish officials and landlords, often executing prisoners on the spot and turning ownership of the land over to the peasants who farmed it. Within a year, however, Hidalgo himself was captured and executed.

***“Will you make the effort to recover from the hated Spaniards the lands stolen from your forefathers 300 years ago?”***

—Father Miguel Hidalgo

Another parish priest, Jose Maria Morelos, carried on Hidalgo's rebellion south of Mexico City. In 1813, he convened a popular assembly that declared Mexico's independence from Spain. The following year, Morelos unveiled a constitution for Mexico that drew heavily on the principles of the French Revolution. He too was executed by the Spanish.

***How did events in Europe affect events in Mexico?***

Events in Europe also turned against the rebels. In 1814, Spanish guerrillas forced the French out of Spain and King Fernando VII returned to his throne. Fernando sent reinforcements to Mexico to reassert Spanish rule. In South America, Jose de San Martin and Simon Bolivar successfully led independence forces against the Spanish, but in Mexico most

of the remaining rebel leaders were hunted down and shot.

Ultimately, political turmoil in Spain finalized Mexico's break with the mother country. In 1821, reform-minded Spanish generals forced King Fernando to accept a liberal constitution. Many within Mexico's *criollo* elite, as well as church leaders, feared that the reforms threatened to overturn the old social order. With the blessing of the Spanish authorities in Mexico, they joined forces under Agustin de Iturbide to develop an independence plan to preserve their privileges. In 1821, Spain's viceroy (the representative of the king) officially recognized Mexico's independence.

***What were the immediate results of Mexico's independence?***

On September 27, 1821, Iturbide's 16,000-man army was greeted by cheering crowds and martial bands as it marched into Mexico City. In reality, there was little to celebrate. Mining, agriculture, and industry had all suffered during the long war. As many as six hundred thousand people had been killed in the independence struggle, and Mexico remained deeply divided. Iturbide, who crowned himself Emperor Agustin I, was executed in 1824.

Independent Mexico's infancy proved chaotic. Fifty governments were formed in Mexico's first three decades of existence. Eleven of them were headed by Antonio Lopez de Santa Anna, the most powerful political figure of the era. Like other regional strongmen and large landowners, Santa Anna profited from the chaos. With a small army under his command in Veracruz, Santa Anna pulled the strings of power in Mexico City. At the same time, he and other wealthy Mexicans kept the central government weak and ineffective by refusing to pay taxes.

***What were the origins of the clash between Texas and Mexico?***

Mexico paid a high price for its instability. Both U.S. officials and North American settlers sensed that Mexico lacked the strength to hold

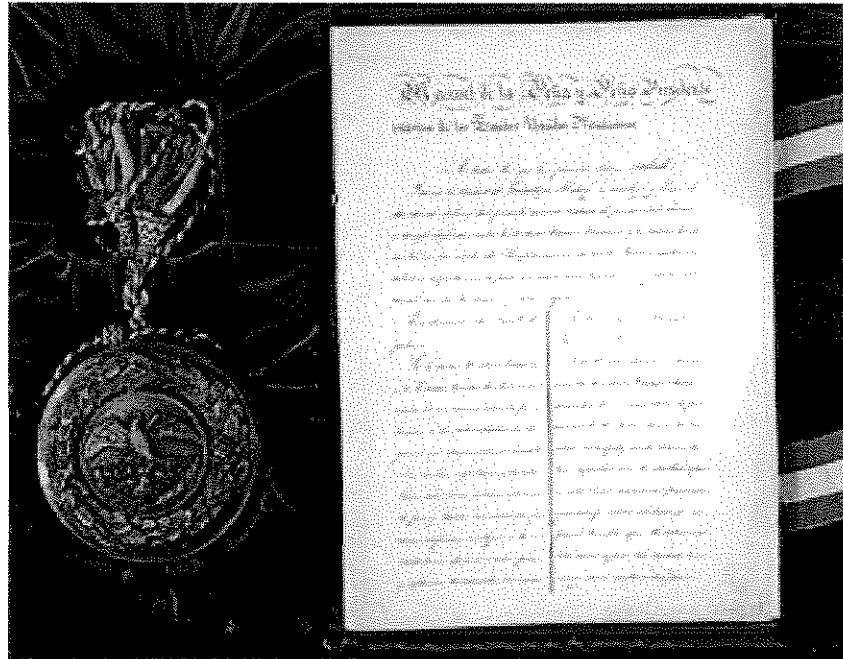
onto its sparsely populated territories north of the Rio Grande. (The land today which comprises the states of Arizona, California, New Mexico, and Texas was incorporated into New Spain in the 1700s.) As settlers streamed into Texas, they increasingly clashed with Mexican authorities over land rights, slavery, and tax issues.

In 1836, Santa Anna personally led a six thousand-man army into Texas to punish North American settlers who had overrun a Mexican garrison. In a thirteen-day battle in San Antonio, he overcame the resistance of two hundred North Americans defending a fortress known as the Alamo. Two months later, however, Santa Anna himself was captured by the North Americans. In exchange for his life, he agreed to recognize Texas' independence.

In fact, the confrontation between Mexico and the United States was far from over. Mexico's Congress rejected Santa Anna's agreement, while in Washington pressure mounted to grant Texas statehood. A full-scale war broke out in 1845 when the U.S. Congress admitted Texas into the union.

### ***What were results of the war between Mexico and the United States?***

The Mexican-American War (known among Mexicans as the "North American Intervention") exposed Mexico's shortcomings. Although outnumbered in most battles, the U.S. invaders achieved victory thanks largely to superior artillery and leadership. Mexican armies were pushed back on every front. Most humiliating was the relentless march of a ten thousand-man U.S. force from Veracruz to Mexico City, roughly following the route of Hernan Cortes. In 1847, the North Americans



The ceremonial copy of the Treaty of Guadalupe Hidalgo which officially brought an end to the Mexican-American War and added nearly two million square miles to the United States.

Photo courtesy of National Archives and Records Administration.

defeated a volunteer army assembled by Santa Anna. Six young Mexican cadets died in a last stand defending the magnificent palace at Chapultepec against the U.S. forces.

Even as Mexico City fell, several regional commanders launched a guerrilla campaign to wear down the North Americans. In the Yucatan peninsula, they equipped a largely Mayan Indian army to resist U.S. forces. Mexico's leaders, however, feared the disintegration of their country after the Mayans turned their weapons on local landowners. To restore Mexico's stability, the government signed the Treaty of Guadalupe-Hidalgo in 1848. In exchange for \$15 million, Mexico surrendered half its territory to the United States. The Mexican leadership then helped Yucatan landowners crush the Indian rebellion. In what is known as the "War of the Castes," nearly half the Mayan population was killed in two years of fighting.

### ***How did the war boost the fortunes of Mexico's Liberal Party?***

Defeat at the hands of the United States

shattered the confidence of Mexico's ruling class. Many questioned their country's cultural foundations, blaming Mexico's Spanish heritage and Catholicism for the loss to the largely Protestant, Anglo-Saxon society of the United States.

The outcome of the war boosted the fortunes of Mexico's Liberal Party. Mostly urban and middle class, the liberals believed that the United States could serve as a model for reforming Mexico. They faced strong opposition from conservatives, particularly large landowners and high-ranking officials in the church and the military. In the 1850s, the political struggle frequently spilled over into violence. The focal points were a radical new constitution and its forceful advocate, Benito Juarez.

At a time when Mexican politics were dominated almost entirely by *criollos* from prominent families, Juarez was an oddity. He was a Zapotec Indian, orphaned at a young age and brought to the city of Oaxaca as a servant. Juarez's natural intelligence earned him a spot in a local school and eventually a law degree. He was elected to Congress and became governor of Oaxaca after the Mexican-American War.

### ***What were the results of the civil war between liberals and conservatives?***

The constitution proclaimed in 1857 reflected the faith of Juarez and his fellow liberals in the rule of law. The constitution's liberal authors aimed to expand individual rights and limit the privileges of the Catholic Church. The political issues raised by the proposed reforms, however, were largely lost in a civil war between liberals and conservatives. To undermine his enemies and raise money for the liberal cause, Juarez in 1859 placed the property of the church under state control. In early 1861, he was able to enter Mexico City to assume the presidency.

Mexico's civil war again left the country vulnerable to foreign intervention. Britain, Spain, and the United States all took an interest in the conflict, but France proved the most

ambitious. In 1862, as civil war raged in the United States, France sought to conquer Mexico. The French suffered a stinging defeat at Puebla on May 5—a date Mexicans continue to celebrate today—but they soon reinforced their army. In 1863, they drove Juarez's government out of Mexico City and installed an Austrian prince, Ferdinand Maximilian, as emperor.

The French failed to establish their authority far beyond Mexico City. Guerrillas loyal to Juarez overran one French outpost after another north of the capital. The United States also lent support to the liberal cause after the end of the U.S. Civil War in 1865. By 1867, the French had withdrawn most of their troops, and the foundations of their Mexican empire crumbled. The last act occurred in Queretaro, where Juarez's forces captured Ferdinand Maximilian after a lengthy siege. The Austrian prince, who himself shared many of the liberals' convictions, was executed.

### ***How did Juarez try to modernize Mexico?***

Juarez's return to the presidency was marked by an energetic program to modernize Mexico. With the country's schools no longer under the control of the church, Juarez reorganized the educational system. He also sought to expand foreign trade by building a railroad from Mexico City to Veracruz.

Ironically, the roughly 6 million Indians who continued to live in their traditional communities—about one-half of Mexico's population at the time—were hit hard by Juarez's reforms. Juarez intended to nudge Mexico's Indian peasants out from under the protective wing of the church. He strove to cut their ties to the communal lands held by Indian villages and transform them into independent small farmers. In reality, the break-up of the communal lands left the Indians more vulnerable than ever. Large landowners and speculators robbed them of much of their land, often by force.

### ***What role did Porfirio Diaz play in Mexico's development?***

Juarez died of a heart attack in 1872, leaving a void in Mexican politics. The vacuum

was soon filled by another strong figure, Porfirio Diaz. Diaz, a *mestizo* from Juarez's home region of Oaxaca, had gained fame fighting against the French. After twice losing presidential elections to Juarez, Diaz seized power in 1876. He stepped down in 1880, reclaimed the presidency in 1884, and then held onto the office until 1910.

Diaz's motto was "little politics, much administration." There was no room for opposition during the dictatorship Mexicans call the "Porfiriato." Diaz, however, brought his country a level of stability it had not known since independence. He followed through on the program of economic modernization begun under Juarez. Twelve thousands miles of railroad were laid and new ports on the Atlantic and Pacific were built. For the first time, Mexico attracted large-scale foreign investment. Mining boomed, especially when an American team discovered oil along the Gulf of Mexico in 1901. New industries gained a foothold and agricultural exports rose.

Diaz's rule deepened the tremendous gulf between the rich and the poor in Mexico. By the turn of the century, three thousand families owned half the country's wealth. The estate of the Terraza clan in Chihuahua equaled the size of New Jersey. Theft of Indian land accelerated, pushing millions of peasants into hopeless debt. Moreover, foreigners played an increasingly large role in the Mexican economy. Of Mexico's 170 largest companies in 1910, 130 were controlled by foreigners (mostly North Americans). Many of Mexico's most productive mines and oil fields were in foreign hands. The growing presence of outsiders was an outgrowth of Diaz's policy of promoting investment by allowing foreigners to own the mineral rights to Mexican land. Foreigners had a substantial stake in Mexico's banks and railroads as well.

### ***Why did resentment of the Porfiriato grow in Mexico?***

Among those who did not reap the rewards of the Porfiriato, resentment built to explosive levels. In the cities, Mexico's growing middle class was increasingly taking up

the cause of democratic reform. Meanwhile, the poverty in the countryside was driving millions of peasants to the point of desperation.

Diaz provided the spark that brought about his downfall. In 1910, he withdrew his pledge not to run for re-election. Mexico's reformers responded by nominating Francisco Madero for the presidency. Diaz had rejected Madero as a running mate, but when the young author began drawing large, enthusiastic campaign crowds, Diaz ordered him to be arrested.

Madero was released after the election and soon fled to Texas. From a hotel room in San Antonio, he plotted an uprising against the Diaz regime. Madero's revolt, erupting exactly a century after Hidalgo's call to arms, collapsed within a few hours. Madero's commitment, however, inspired a new round of protests. In northern Mexico, Francisco "Pancho" Villa and Pascual Orozco raised a rebel army, attracting hundreds of government troops to their ranks. In the state of Morelos, much closer to Mexico City, Emiliano Zapata organized peasants and sugar industry workers into the Liberating Army of the South. Within weeks, Zapata's mostly Indian soldiers forced the thirty families who controlled Mexico's sugar belt to flee in panic.

Finally, Madero's supporters in Mexico City demanded Diaz's resignation. The old dictator ordered his troops to open fire on the demonstrators, but his advisers soon persuaded him to resign and leave the country. In June 1911, Madero entered Mexico City in triumph. He and his fellow reformers believed that their liberal revolution had succeeded. In reality, the revolution had only begun.

## **Land and Liberty**

Conflict between Madero and Zapata was inevitable. Madero, the son of a wealthy landowner, hoped to rekindle the liberal reforms of Benito Juarez. Zapata, a peasant of *mestizo* background, was determined to reclaim the land that had been stolen by large landowners. Madero initially persuaded Zapata to lay down his arms in exchange for a promise of land

reform. Zapata, however, would not give up the land that his forces had occupied. Madero soon called on the army to attack the rebels, and Zapata resumed the fight for revolution.

Madero also faced opposition from conservatives. Leading voices within the army, the bureaucracy, the church, the business community, and the U.S. embassy suspected his motives. They united behind General Victoriano Huerta, who had been responsible for containing Zapata.

***How did Huerta's actions temporarily unite the revolutionaries?***

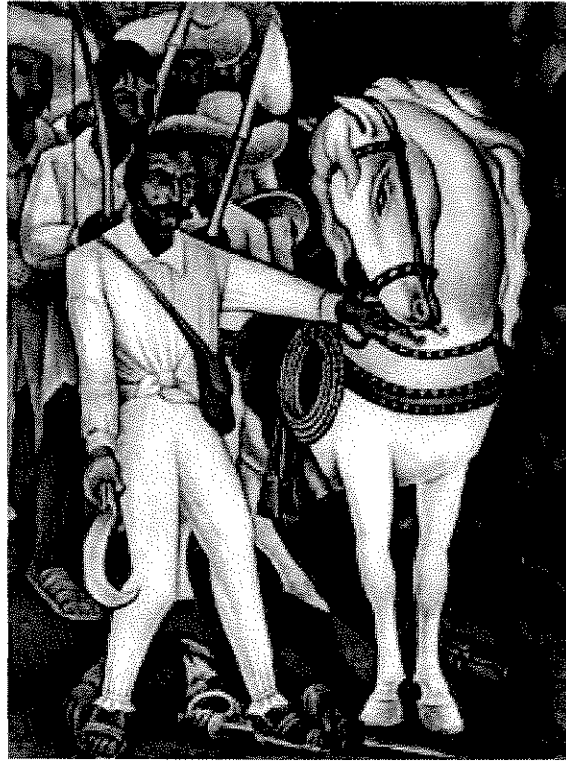
In February 1913, Huerta executed Madero and claimed the presidency. Huerta's ruthlessness brought the revolutionaries together, if only briefly. New armies in northern Mexico were formed and advanced quickly toward the capital.

In the United States, President Woodrow Wilson rejected Huerta with contempt and imposed an arms embargo on his regime. U.S. involvement, however, backfired, leading to a clash with Mexican troops in Veracruz and rallying support for Huerta in Mexico. Nevertheless, Huerta was forced to flee the country in July 1914.

Without a common enemy, the divisions among the revolutionary commanders re-emerged. A revolutionary convention in October 1914 brought the opposing viewpoints into the open, making it clear that land reform was the main point of contention. Zapata and Villa favored turning over the land of the haciendas to the peasants. Their plan, however, was rejected by Venustiano Carranza and his able general, Alvaro Obregon, the leaders of the revolution's most powerful military force.

***What impact did Villa's troops have on Mexico City?***

While the armies of Carranza and Obregon camped outside Mexico City, Villa and Zapata marched their troops into the capital. Zapata's men—mostly Indians clad in heavy white cloth and huge sombreros—were bewildered by the big city. Zapata soon withdrew them



Painting by Diego Rivera, called *Agrarian Leader Zapata*.

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to Morelos. In contrast, Villa's frontier troops from the north terrorized the capital with their pistols and heavy drinking. Villa cared little for developing a practical program to carry out the goals of revolution. Within a few weeks, he had turned most of Mexico City's liberal reformers against him and had plunged the capital into anarchy.

In January 1915, Carranza declared himself president. Villa had by then withdrawn his troops from Mexico City, allowing Obregon to occupy the capital. For the next five years, the rivalries among Carranza, Obregon, Villa, and Zapata were to result in the bloodiest fighting Mexico had seen since the Spanish conquest. Obregon held the military balance of power. He learned the lessons of the trench warfare that was taking place in Europe at the time, equipping his army with machine guns and barbed wire. In the spring of 1915, Obregon cut Villa's proud cavalry to pieces in a key battle at Celaya, northwest of Mexico City.

***How did Carranza try to undermine support for Zapata?***

Another one of Carranza's generals, Pablo Gonzalez, launched a campaign to defeat Zapata in 1916. For three years, his troops burned and pillaged Zapata's home state of Morelos in a brutal attempt to undercut the guerrilla leader's support. The peasants of Morelos, however, remained loyal to Zapata and continued to fight back against Gonzalez. Zapata was finally killed in 1919 when Gonzalez tricked him into an ambush.

Apart from the main military confrontations, Mexico was also plagued by lawless violence from 1911 to 1920. Small bands of armed men roamed the countryside, often killing and looting in the name of the revolution. At least 1 million Mexicans died before order was restored.

**Bringing Order to Chaos**

A first step toward stability took place in 1917, when a new constitution was proclaimed. The document reflected the long-standing desire for land reform, wider economic opportunity, and responsible government.

The constitution's authors—mostly teachers, lawyers, bureaucrats, engineers, and other members of the middle class—were determined to wrest power away from large landowners, foreign businessmen, and the church. They wanted to prevent another dictator from re-emerging, yet recognized that Mexico needed a strong central government. To address both concerns, the constitution's authors concentrated authority in the hands of the president, but prohibited re-election.

As expected, Carranza was elected president under the new constitution in 1917. Most Mexican politicians assumed that he would endorse Obregon as his successor in 1920. Carranza, however, nominated Mexico's ambassador to the United States, Ignacio Bonillas, to run for the presidency. Obregon rebelled, chasing a panicked Carranza from Mexico City. Carranza was assassinated on the way to Veracruz in May 1920.

***What was the result of Obregon's election to the presidency?***

With the election of Obregon in 1920, Mexico finally had a strongman capable of imposing order. Over the next four years, Obregon put down several rebellions, built a new consensus among the leading forces of the revolution, and patched up relations with the United States. He also turned over power to his successor, Plutarco Elias Calles, on friendly terms.

***How did Calles attempt to speed up modernization?***

Calles, who like Obregon had served as a revolutionary general under Carranza, sped up the program of modernization. He established Mexico's first income tax to raise money for education, health care, and economic development. He also took a harsh stance toward the Catholic Church. When Calles required in 1926 that priests be licensed by the government, a Catholic rebellion erupted. The rebels fought under the rallying cry "Long Live Christ the King!" Calles responded ruthlessly, ordering the army to massacre the rebels and hang priests. Churches were not allowed to re-open until 1929.

Calles amended the constitution to extend the presidential term to six years and permit his ally Obregon to again run for office in 1928. Obregon was elected, but a few days later was assassinated by a Catholic militant while celebrating his victory. Calles left the presidency at the end of his term, but he continued to exercise dictatorial control over Mexico until 1935 from his mansion in Cuernavaca.

***What was Calles' main instrument of power?***

Calles' main instrument of power was the National Revolutionary Party. Calles created the party in 1929 to unite the hundreds of political movements that had arisen during the revolution. All those associated with government, from cabinet ministers to state governors to low-level bureaucrats, were brought in as members. To seal the marriage between party and state, the National Revolutionary Party